

# FreeFlow™ Web Services

## Print Buyer Guide

Web Services



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# 1

## Introduction

### About FreeFlow Web Services

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

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

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

- Flexible ordering tools
- Pre-defined ordering workflows
- Online specification of jobs to be ordered
- Ordering variable information jobs
- Tracking status of ordered jobs
- Account management tools

### About this Guide

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

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

## Basic Concepts

### Jobs and Templates

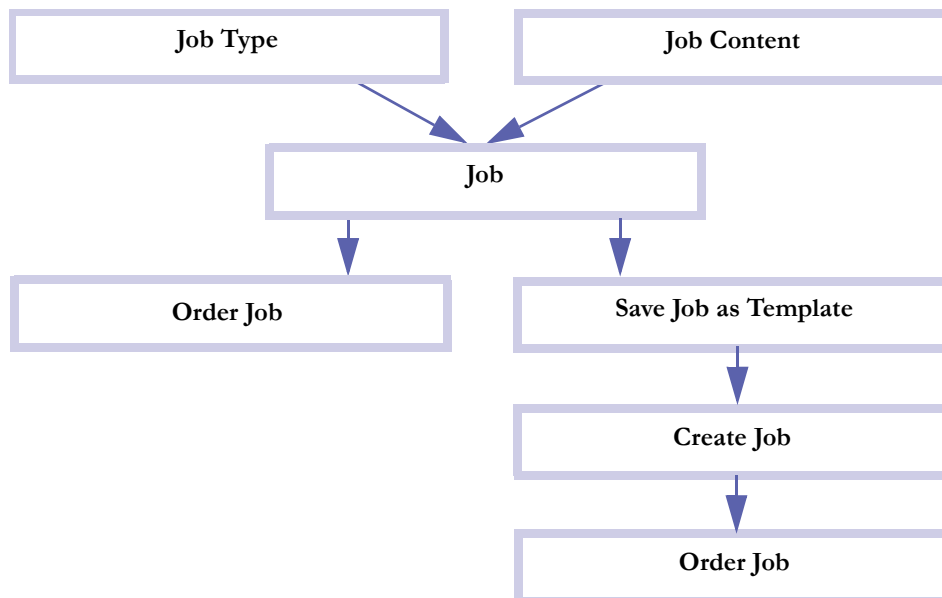
The basic terms and their definitions, as used in FreeFlow Web Services, are:

- **Job Type** - parameters describing a print job, such as a business card, flyer, letterhead, etc., that can be produced by the Print Service Provider.
- **Job Content** - a content file that builds a specific print job when combined with a typical Job Type.
- **Job** - a combination of a Job Type with a Job Content. Jobs can be created in the system for one-time use or can be saved as templates for repeated use.

There are three categories of jobs in the system:

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

Figure 1: Job Type - Job - Template relationships



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

- **Static** templates - contain constant job content. Static templates have permanent, unchanging job content. Each time a job based on the same static template is re-printed, the result looks the same. The **Book Assembly** templates are conceptually the same as Static templates.

See [Creating Static Templates](#) on page 39.

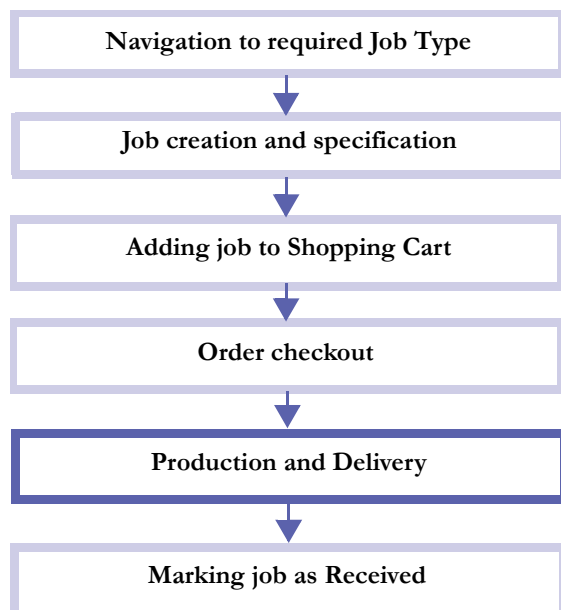
- **Variable Information (VI)** templates - contain variable fields and are used for creating Personalized or Variable Data jobs. Variable fields are created by using the Selective Upload feature, and variable field properties are modified by using Form Editor. See [Creating VI Fields](#) on page 41 and [Defining VI Fields using Form Editor](#) on page 48.

VI templates enable processing of single and multiple variable records. Personalized jobs contain single variable data record entered into the variable fields. Multiple personalized instances can be created, based on uploaded variable data. Each template instance is based on one variable data record and represents a personalized job. A collection of such instances can be saved as a template containing an archive of variable data. See [Ordering Variable Information Jobs](#) on page 13 for uploading variable data.

## Job Flow

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

**Figure 2: Job flow stages**



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

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

# Getting Started

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

- To log in to the Print Buyer side of the FreeFlow Web Services application, enter your user name and password, and click [Login](#).  
The system verifies your credentials and opens the Print Buyer interface, according to your user type.  
See [User Types and Privileges](#) on page 71 for setting user types.

It is possible to change the user interface language to any one of the enabled languages on the login screen. Each language is connected in the system to an appropriate measurement system. Choosing US English results in the use of the imperial system units of measurement, while choosing UK English or any other language results in the use of the metric system units.

## Main Interface Components

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

The Print Buyer interface is divided into four main pages:

**Order Jobs** - allows ordering jobs of any type. See [Ordering Workflows](#) on page 5.

**Track Jobs** - allows tracking the status of ordered jobs. See [Tracking Jobs](#) on page 29 for job states and tracking tools.

**Manage Templates** - allows management of all system assets (templates, catalogs, archives, images, inventory, etc.). See [Managing Templates](#) on page 35 and [Job Assets](#) on page 59.

**Manage Account** - allows account administration (account details, users, departments, etc.). See [Account Administration](#) on page 67.



Only Print Buyer users assigned the Administrator, Supervisor or Designer privileges can access and work with the [Manage Templates](#) and [Manage Account](#) pages.

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

**Shopping Cart** - shows the shopping cart with all the jobs that are already added to the cart and awaiting ordering. For working with the shopping cart, see [Shopping Cart and Order Checkout](#) on page 25.

**Software Downloads** - allows downloading of the applications and system features enabled by the Print Service Provider.

**Help** - provides the user with On-Line Help information and navigational tools.

**Logout** - allows the user to log out of the system.

# 2

## Ordering Jobs

### Ordering Workflows

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

The **Order Jobs** launch pad provides alternative starting points for ordering jobs:

- **Order from Our Catalog** - provides the Print Buyer user with several workflows for ordering Simple jobs. Jobs are ordered either from a Superstore catalog or from an HTML catalog. Superstore catalogs are designed and supplied to a Print Buyer by the Print Service Provider and have a customized look and feel. See [Ordering Jobs from Superstore Catalogs](#) on page 6. HTML catalogs can be also supplied by the Print Service Provider or created by an authorized Print Buyer user. See [Ordering Jobs from HTML Catalogs](#) on page 18. When you start ordering a job, the type of workflow initiated depends on the type of catalog and/or the template chosen for job creation.



Any Print Buyer user is enabled to order jobs from a catalog or folder specified in the user settings. See [User Starting Page](#) on page 70 for setting user access.

- **Print Documents from Your Computer** - provides the Print Buyer user with the workflows for ordering jobs based on content files stored on the user's computer.
- **Order a Book Assembly** - provides the Print Buyer user with the workflow for ordering composite jobs.



The **Order a Book Assembly** option appears when working with a Print Service Provider that offers the Book Assembly feature.



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

# Ordering Jobs from Superstore Catalogs

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

- 1 On the **Order Jobs** page, click the **Start Ordering** button under **Order from Our Catalog**.

The next page opens. The catalog defined in the user's settings is displayed by default.

If the products in catalog are divided into categories, the navigation panel on the left side of the screen displays the list of categories. The number of products in each category is indicated next to the category name.

If a **Shopping Cart** summary is displayed on the screen, the number of jobs in the cart and the total price for the jobs are shown. The list of jobs to be ordered later appears under the summary, in the **Items On Hold** pane. Customizable marketing messages and cross sales items can appear on the screen (optional).

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



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

- 3 Start the ordering workflow by clicking the **Add to Cart** button under the required job.  
OR  
Click the **Upload** button to start a workflow that includes creation and ordering of a new product based on the indicated job type.
- 4 Click the **Hold** button to add a product to the list of items to be ordered later. The product appears in the **Items On Hold** pane.

## Optional Wizard Steps

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

- Job Specification
- Variable Information
- Upload File
- File Report
- Preview
- Job Summary
- Job Details



## Job Specification

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

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

**Figure 3: Job Specification page**



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

See [Setting Template Properties](#) on page 39 for enabling changes to job properties on the **Job Specification** page of the ordering wizard.

## Variable Information

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

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

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

### Upload File

The ordering workflow includes the **Upload File** step when a job is created by uploading a design file to a selected job type.

Figure 4: Upload File page

The screenshot shows the 'Upload File' step of the ordering wizard. At the top, there are four tabs: 'Job Specification', 'Upload File' (which is active and highlighted), 'File Report', and 'Preview'. Below the tabs, there are two sub-tabs: 'Upload File' and 'Printing Options'. The 'Upload File' sub-tab is selected. The main content area contains a radio button labeled 'Click on the 'Browse' button and browse to the target file:' which is selected. Below this is a text input field and a 'Browse...' button. A note below the input field states: 'Note: The following file types are supported: PDF, JPEG, TIFF, GIF, PS, EPS, MS Word (DOC, DOCX), MS PowerPoint (PPT, PPS, PPTX, PPSX), MS Excel (XLS, XLT, XLW, XLC, XLSX, XLSB, XLTX), Adobe Illustrator (AI), Adobe Photoshop (PSD), Adobe InDesign (INDD)'. At the bottom, there is another radio button labeled 'Send Files Separately' which is not selected.

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

When the processing is completed, the ordering wizard proceeds to the **File Report** step.



If you prefer not to upload a file to the job at this stage but attach it later, select the **Send Files Separately** radio button and click **Continue**. The wizard proceeds to the next step without checking the job. See [Attaching Files to a Job](#) on page 11.

### File Report

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

Figure 5: File Report page

The screenshot shows the 'File Report' step of the ordering wizard. At the top, there are five tabs: 'Job Specification', 'Upload File', 'File Report' (which is active and highlighted), 'Preview', and 'Job Details'. Below the tabs, the main content area is titled 'File Report'. It contains a message: 'You may choose to ignore the problems for now and have them addressed by the Print Provider. Click on **Continue** to allow the Print Provider to solve these problems'. Below this message is a link: 'Click here to review these problems'. At the bottom, there is a checkbox labeled 'I want the Print Provider to resolve these problems' which is not checked.

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

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

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

**Figure 6: Preflight report view**



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

The general solution provided for each discovered problem (excluding font and low-resolution images) is to update the job type properties with the properties of the uploaded file. A number of additional solution options are provided for each problem in the **Solution** drop-down list. The **Special Instructions** field allows entering customer comments addressed to the Print Service Provider.

## Editing Page Size

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

- Update the job type properties according to the uploaded file.
- Leave the job type properties unchanged.
- Edit the crop and bleed of the created job.

## Ordering Jobs

- 1 To update the job type properties according to the uploaded file, set the appropriate option in the **Solution** drop-down box.



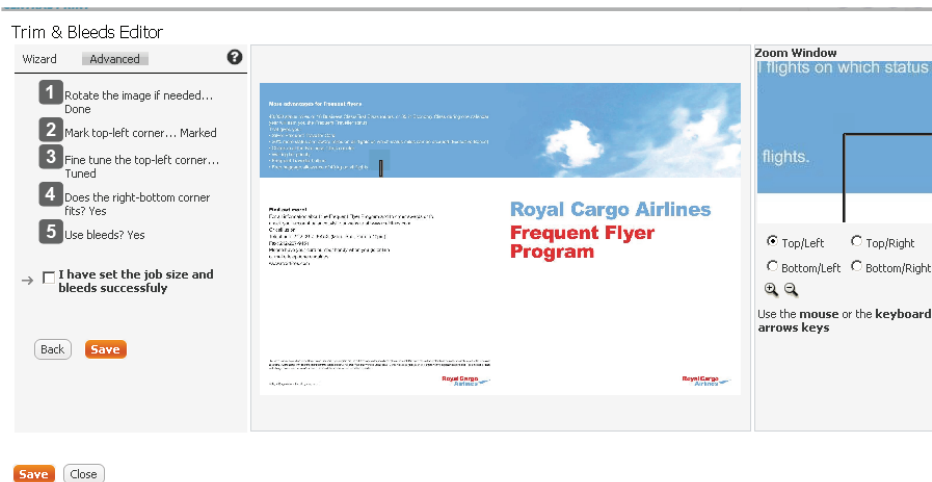
When the job type properties are updated according to the uploaded file, the price might become tentative.

- 2 To leave the page size as defined in the job type, set the appropriate option in the **Solution** drop-down box.
- 3 To edit the page size of the created job, click the **Edit Crop&Bleed** button that appears under the **Solution** drop-down box.

The **Trim & Bleeds Editor** wizard appears, allowing you to make the necessary corrections to the page size and to the proportions of the uploaded file.

- 4 Click **Start** to run the wizard.
- 5 Use the controls of the first wizard step to rotate the job pages, if necessary.
- 6 Click **Next**. The next step instructions appear.
- 7 Follow the instructions provided by the wizard until the **I have set the job size and bleeds successfully** check box appears on screen.

Figure 7: Editing wizard steps



- 8 If you are sure that your settings are correct, mark this check box and click **Save**.

The job preflight check is run again, and the file report is updated.

- 9 Review the updated report to ensure that the problem is solved.



If you don't mark the **I have set the job size and bleeds successfully** check box and click on the **Save** button, an additional check box appears. Mark this check box in order to ask the Print Service Provider to solve the page size problem.

## Preview

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

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

## Job Summary

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

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

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

## Attaching Files to a Job

- 1 Click the **Attachment** link. The **Attachments** dialog box opens.
- 2 Use the toolbar icons to rename, delete and download additional files to the job.
- 3 Click the **Upload Files** button to open the **Upload File** dialog box.
- 4 Navigate to the location where the required file is saved and upload it to the job, or upload multiple files to the Print Service Provider FTP site using the upload to FTP option.
- 5 Click **Continue**. The file(s) are added to the list of attachments in the **Attachments** dialog box.
- 6 Highlight any file in the list and click the **Mark for Production** button. The preflight check is run, and the file is sent to the Print Service Provider's production queue.

## Job Details

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

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

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

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

### Ordering Static Jobs

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

- 1 Select a job in the catalog by clicking the corresponding **Add to Cart** button.  
If the selected job is static, the **Preview** page opens, displaying the job preview. See [Preview](#) on page 11.
- 2 Click the **PDF Low resolution Proof** icon on the preview toolbar to verify the job design.



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

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



The Print Service Provider can enable additional information on the **Preview** page such as job details and job properties summary. See [Job Summary](#) on page 11 and [Job Details](#) on page 11.  
If changes are enabled by the Print Service Provider to the job properties, the **Job Specification** wizard page opens. See [Job Specification](#) on page 7.

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

OR

Click the **Add to Cart and Order** button.

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



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

- 6 To complete the ordering workflow, see [Shopping Cart and Order Checkout](#) on page 25.

## Ordering Variable Information Jobs

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

The following are three example workflows for ordering VI jobs.

## Ordering Personalized Jobs

- 1 Select a job in the catalog by clicking the corresponding [Add to Cart](#) button.

If the selected job includes variable fields enabling personalization, the **Variable Information** page opens, displaying the fields.

**Figure 8: Variable Fields**


The screenshot shows a web interface for ordering personalized jobs. At the top, there are three tabs: 'Variable Information' (selected), 'Job Specification', and 'Job Details'. Below the tabs is a form titled 'Contact Details'. The form contains several input fields with placeholder text 'e.g. John Smith':

- Full name: [Full name]
- Title: [Title]
- Company Name: [Company Name]
- \* Slogan/Message: [Slogan/Message]
- \* Address line 1: [Address 1]
- \* Address line 2: [Address 2]
- \* Address line 3: [Address 3]

The page can contain the job preview and job summary panes, which depends on the settings at the Print Service Provider side. See [Job Summary](#) on page 11 and [Preview](#) on page 11.

- 2 Enter information in the variable fields.



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

- 3 Click [Continue](#). The **Job Specification** page opens. See [Job Specification](#) on page 7.

- 4 Make necessary changes to the job properties enabled for modification, and click **Continue**.

The **Job Details** page opens. See [Job Details](#) on page 11.

- 5 Enter information in the empty fields, set the shipping date and change the job name, if necessary.
- 6 Click the **Add to Cart** wizard button. The job is created and added to the shopping cart. The catalog is displayed; this allows proceeding to the ordering of additional jobs. You can complete the ordering process at a later time.

OR

Click the **Add to Cart and Order** button.

The shopping cart appears, enabling you to get a quote for the jobs to be ordered and to complete the ordering process.

- 7 To complete the ordering workflow, see [Shopping Cart and Order Checkout](#) on page 25.

## Ordering Variable Data Jobs

### Uploading Variable Records

- 1 Select a job in the catalog by clicking the corresponding **Add to Cart** button.

If the selected product is based on a template that enables creation of multiple personalized instances, the controls of the **Variable Information** page allow the user to upload Variable Data records from an external database file.

**Figure 9: Uploading variable records**

**Variable Information** > Job Specification > Job Details

**Add Variable Data Records**

☒ Upload a Database File:  **Browse...**

☐ Select File Format:

File Type:

Encoding:

☒ Upload, Using a Custom Scheme:

Custom Scheme:

☐ Manually Create Records

Note: The following text file types are supported:  
Comma Delimited (\*.csv), Tab Delimited (\*.txt) and Semicolon Delimited (\*.txt).

- 2 Choose the **Upload a Database File** radio button and click **Browse** to navigate to a file to be uploaded. Select the file and click **Open**.
- 3 Choose the **Select File Format** radio button and select the type and encoding of the file to be uploaded.  
OR  
Choose the **Upload, Using a Custom Scheme** radio button and select a mapping scheme from the drop-down list.
- 4 Click **Continue**. The next wizard page opens.



## Mapping Variable Records

- 1 Select **First Row Contains Field Names**.
- 2 Map variable records of the uploaded file to the variable fields of the job by choosing the required options from the drop-down lists next to the field captions. Set the **Do not import from database** option in the fields that should not be personalized.
- 3 To open the **Scheme Management** dialog box and save the new mapping scheme, click the **Scheme** link.  
OR  
Choose an existing mapping scheme from the drop-down list.
- 4 Click **Continue**. The system processes the uploaded information and creates personalized instances.

## Editing Variable Records

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

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



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

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

### Ordering

The job is processed, and the **Job Details** wizard page opens. See [Job Details](#) on page 11.



Additional optional wizard steps can be included in the workflow, depending on settings made by the Print Service Provider.

- 1 Enter the job details in the empty fields and change the job name, if necessary.
- 2 Click the **Add to Cart** wizard button. The job is created and added to the shopping cart. The catalog appears; this allows proceeding to the ordering of additional jobs. You can complete the ordering process at a later time.

OR

Click the **Add to Cart and Order** button.

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

- 3 To complete the ordering workflow, see [Shopping Cart and Order Checkout](#) on page 25.

### Ordering from Variable Data Archive

- 1 Select a job in the catalog by clicking the corresponding **Add to Cart** button.

If the selected product contains an archive of Variable Data, the table of personalized instances appears.

**Figure 10: Variable Data archive**

**Variable Information** > Job Specification > Preview > Job Details

Use Template Archive

*This template contains a predefined Archive of variable information.  
Select only those records that you want to use in the Variable Data Job.*

<input checked="" type="checkbox"/>	Company Name	Slogan/Message	Full Name	Title	Address line 1	Address line 2	Address line 3	Mobile/ Other	Fax/Other	E-mail/ Ot
<input checked="" type="checkbox"/>	Real Deal	The best real estate deals	John Smith	CEO	425 W 59th str	New York, NY	10019	302-983-3721	(212) 5238331	john@reald
<input checked="" type="checkbox"/>	Real Deal	The best real estate deals	James Laure	VP Marketing	425 W 59th str	New York, NY	10019	302-425-8592	(212) 5238342	james@real
<input checked="" type="checkbox"/>	Real Deal	The best real estate deals	Browning Dan	Administrative Assistant	425 W 59th str	New York, NY	10019	310-980-4032	(212) 5238311	dan@realde
<input checked="" type="checkbox"/>	Real Deal	The best real estate deals	Tobin Deanna	District Manager Upstate New York	425 W 59th str	New York, NY	10019	302-346-8880	(212) 5238129	deanna@re
<input checked="" type="checkbox"/>	Real Deal	The best real estate deals	Corves Marilyn	District Manager Manhattan	425 W 59th str	New York, NY	10019	302-656-2320	(212) 5238122	marlyn@ree

Company Name  Total: 5

Each row in the **Use Template Archive** table represents one instance of the job. The rows are provided with selection check boxes. All instances are displayed in the table and marked to be ordered by default.

- 2 Find required records in the table using the search engine at the bottom of the screen: choose a field name from the drop-down list of variable fields and enter the record you are searching for.

The relevant row is highlighted in the table.

- 3 Clear the check boxes for instances that will be not ordered at this time.



You can add variable data records to the archive. Use the [Add Records](#) link to access the appropriate tool for editing Variable Data archive manually (see [Editing Variable Records](#) on page 15 for details).

- 4 Click [Continue](#). The **Preview** page opens. See [Preview](#) on page 11.

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



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

- 5 Close the **PDF Preview** dialog box and return to the **Preview** page of the wizard.
- 6 Mark the **I have reviewed the proof and accept it** check box under the preview panel, and click [Continue](#).

The **Summary** page opens. See [Job Summary](#) on page 11.

- 7 Change the number of copies to be ordered and click the [Update Price](#) button. A recalculated price is shown.

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

OR

Click the [Add to Cart and Order](#) button.

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

- 9 To complete the ordering workflow, see [Shopping Cart and Order Checkout](#) on page 25.

# Ordering Jobs from HTML Catalogs

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

## Main Workflow

- 1 On the **Order Jobs** page, click the **Start Ordering** button under **Order from Our Catalog**.  
The default catalog appears, as defined in the user settings. The catalog content is displayed to the right. Each product in the catalog is provided with a link used to start the ordering procedure.
- 2 Click the **Start Order** link under a product to be ordered.
- 3 On the next screen, verify the product details and price. The displayed default price is calculated for the default number of copies shown in the **Number of copies** field.
- 4 Change the number of copies to be ordered.

When you are ordering a VI job, the variable information fields appear among other job details.

- 5 From the predefined options of the drop-down menus, choose the information to be printed in the variable fields, or enter required information manually.
- 6 Click **Continue**.
- 7 On the next screen, verify the price components and total price, payment method and shipping address for the job you are ordering.
- 8 View all job pages. By default, the first job page is shown in the preview. Use the **Page Number** drop-down box above the job preview to navigate the pages.
- 9 Click the **PDF Preview** link to view the job soft proof.
- 10 Click **Place Your Order**. The order confirmation appears, displaying the job and order details.

The order is issued to the Print Service Provider.

## Additional Ordering Options

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

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

- Exporting HTML - exporting a catalog/template to an external HTML page that is saved and then placed on the Print Service Provider's Internet site or on the Print Buyer organization's Intranet site. Jobs can be ordered directly from the site.

- Sending MailToPrint - exporting a catalog/template to an external HTML page that is distributed to specific employees by email. The employees receive the HTML page attached to an email message that permits ordering from the attached page.

Users receiving the HTML page by email are specified in the MailToPrint settings. There are also approval settings that determine whether the jobs ordered from this specific page by a specified user are sent directly to production or to employers with higher privileges for approval. In the latter case, when an employee issues a job order, a request for approval is sent to the predefined addresses.

See [Setting MailToPrint Option](#) on page 46 for setting MailToPrint workflow and email addresses.

The ordering workflow for these two options is the same as described in the [Main Workflow](#) above.


## Ordering Inventory Jobs

Your Print Service Provider can enable specific jobs to be printed and stored in the Print Service Provider's facilities. When this option is enabled for a template, the jobs can be printed to inventory and ordered to inventory. Printing to inventory can be enabled for static jobs only. See [Inventory](#) on page 65 for managing inventory templates.

### Ordering to Inventory


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


- 1 Click the **Manage Templates** tab and then click the [Inventory](#) option in the left menu. The **Search** window opens.
- 2 Find a required inventory template by name using the search engine above the list of templates. Entering the complete name into the field locates the specific template. Entering a character string locates all templates with names beginning with the character string.
- 3 Use [Advanced Search](#) to narrow the search results by adding filtering criteria such as template number or other attribute.
- 4 Select the required template from the list of search results and click the [Print to Inventory](#) button under the template details.

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

- 5 Set the number of copies to be printed to inventory.
- 6 Complete the ordering procedure (see [Shopping Cart and Order Checkout](#) on page 25).

### Ordering from Inventory

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

- 1 Select an inventory template on the **Templates** page and note the maximum number of copies that can be ordered from inventory.
- 2 The **Add to Cart and Order** button appears. Click the button to add the job to the shopping cart. The shopping cart opens. The job is added to the shopping cart and indicated by the  icon.
- 3 Set the number of copies to be ordered from inventory.
- 4 Complete the ordering procedure (see [Shopping Cart and Order Checkout](#) on page 25).

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

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

- 1 On the **Order Jobs** page, click **Start Ordering** under **Print Documents from Your Computer**.  
The **Choose Job Type** screen appears, displaying the types of jobs that can be ordered.
- 2 Select a required job type and click the **Select** button.  
The ordering wizard starts.  
The wizard is comprised of different ordering steps, depending on the selected job type. See the corresponding example wizards in the [Ordering Jobs from Superstore Catalogs](#) section above.
- 3 Perform the necessary operations on each wizard page. See [Optional Wizard Steps](#) on page 6.
- 4 Click the **Add to Cart** wizard button. The job is created and added to the shopping cart. The **Order Jobs** page appears; this allows proceeding to the ordering of additional jobs. You can complete the ordering process at a later time.  
  
OR  
  
Click the **Add to Cart and Order** button.  
The shopping cart appears, enabling you to get quotes for the jobs to be ordered and to complete the ordering process.
- 5 To complete the ordering workflow, see [Shopping Cart and Order Checkout](#) on page 25.

## Ordering Book Assembly Jobs

Workflow for ordering Book Assembly jobs includes the following steps:

- Uploading Print Files
- Setting Binding Style
- Preflight Report
- Defining Job Components
- Ordering

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

- 1 On the **Order Jobs** page, click the **Start Ordering** button under **Order a Book Assembly**.



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

- 2 To proceed to the first wizard step, click the **Start Printing** button.

The **Upload Files** wizard page appears, with instructions for the user regarding the work procedure.

### Uploading Print Files

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

OR

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

The file names appear in the **Uploaded Files** pane.



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

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

### Setting Binding Style

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

### Preflight Report

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

- 1 Click the link to start the preflight check and display the file report.



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

The system checks color settings, fonts in use and images included in the files. The **File Upload Report** appears.

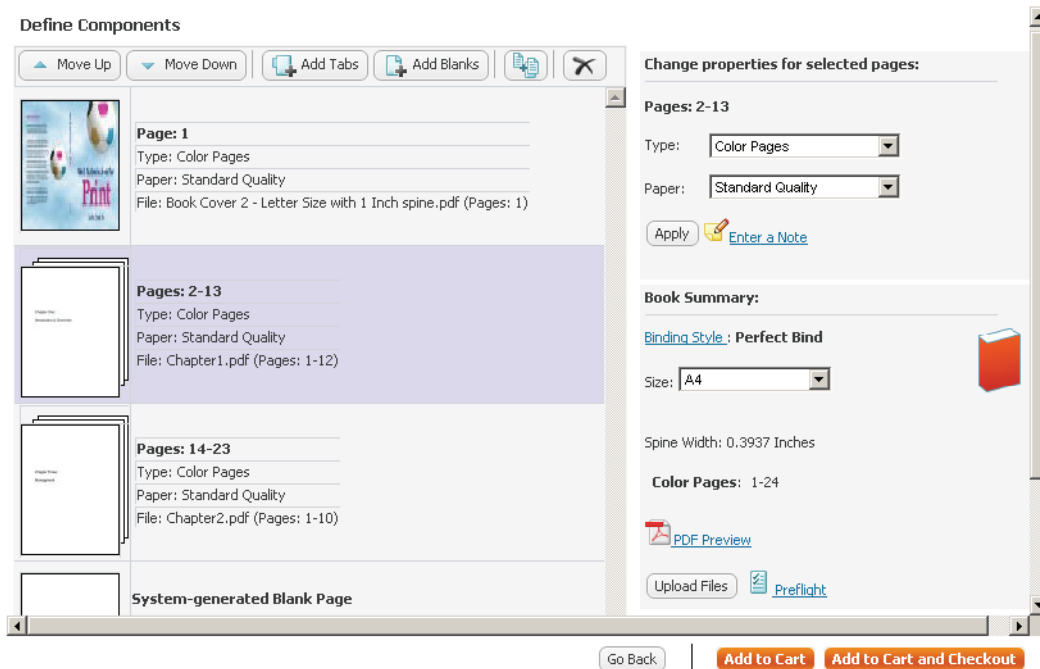
- 2 Click **Continue**. The wizard proceeds to the next step where job components can be defined.



## Defining Job Components

The **Define Components** window appears.

**Figure 11: Defining components of a Book Assembly job**



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



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

- 1 To add tabs to the book, click the **Add Tabs** button.  
The **Add Tabs** dialog box opens.
- 2 Choose the tab type and paper quality and enter text for each new tab. Enter the number of pages to be followed by the tab. Repeat until all tabs are defined, and click **OK**.  
The new tabs appear in the list of components.
- 3 To add blank pages to the book, click on the **Add Blanks** button.  
The **Add Blank Pages** dialog box opens.
- 4 Choose whether the new blank pages are color or B/W, and choose the paper quality. Enter the number of blank pages to be added. Enter the numbers of the pages to be followed by the blank pages, and click **OK**.  
The new blank pages appear in the list of components.
- 5 Change the order of components in the list using the **Move Up** and **Move Down** control buttons located at the top of the components list.

## Ordering Jobs

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- 6 To change the properties of a particular component, select the component in the list. The component properties appear on the right side of the window, in the **Change properties for selected pages** pane.



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

- 7 Make the necessary changes to the type and paper quality of the selected component and click **Apply**. The component details are changed in the list.
- 8 To define page exceptions, enter the page numbers in the **Select Pages** text box under the list of components, and click **Select**.  
  
The numbers of the selected pages appear in the pane, and the appropriate settings are enabled.
- 9 Make the necessary changes and click **Apply**.
- 10 Preview the book in low-resolution PDF format, and run the preflight check.

## Ordering

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

OR

Click the **Add to Cart and Order** button.

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

- 2 To complete the ordering workflow, see [Shopping Cart and Order Checkout](#) on page 25.









## Shopping Cart and Order Checkout

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

Figure 12: Shopping cart


**Shopping Cart**

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

JOB #		Thumbnails	Job Name	Quantity	Price (€)
217	 <a href="#">Save For Later</a> <a href="#">Delete</a>		<a href="#">New Job #217</a>	<input type="text" value="1"/>	
218	 <a href="#">Save For Later</a> <a href="#">Delete</a>		<a href="#">New Job #218</a>	<input type="text" value="1"/>	
220	 <a href="#">Save For Later</a> <a href="#">Delete</a>		<a href="#">High Blood pressure and its effects #220</a>	<input type="text" value="500"/>	
222	 <a href="#">Save For Later</a> <a href="#">Delete</a>		<a href="#">High Blood pressure and its effects #222</a>	<input type="text" value="500"/>	

Note: The displayed price does not include taxes and shipping

**Subtotal:** €0.00

(Get Quote before Ordering)  [Get Quote](#)



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

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

## Handling Jobs in Shopping Cart

- 1 Click the note icon next to a job number to enter or edit a note for this job.

The note can be viewed by the Print Service Provider and can serve as a communication channel for special instructions between the Print Buyer and the Print Service Provider.

- 2 For any job that is not to be ordered at this time:  
Click [Save for Later](#) to remove the job from the shopping cart and transfer it to **Saved Jobs** for future use.  
OR  
Click [Delete](#) to permanently delete the job from the shopping cart.
- 3 Click the job name link to return to the ordering wizard page, where the job properties, content and details can be modified, if required.

### Order Price Calculation

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

### Order Checkout

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

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

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

### Setting Shipping Parameters

- 1 To modify the displayed shipping address, click **Edit** on the **Choose a Shipping Address** screen.
- 2 To select another shipping address, click the **Show Address Book** link. See [Handling the Address Book](#) on page 77 for details.
- 3 To enter a new shipping address, click the **Enter a New Shipping Address** link.
- 4 To ship to more than one address, click the **Ship to Multiple Addresses** link.
- 5 After the appropriate address(es) have been added, click **Continue**.  
The **Choose Your Shipping Options** screen appears.
- 6 Set the shipping date using the calendar.
- 7 If a choice of shipping methods is available, select the required shipping method, and click **Continue**.

## Placing Order

- 1 On the **Place the Order** screen that appears, choose a payment method from the options enabled by the Print Service Provider.
- 2 Verify the order information, choose a cost center for each job in the order and complete the **Reference Code** fields for each job, if required.
- 3 Click the **Place Your Order** wizard button.

The **Order Confirmation** screen appears indicating that the order is placed and displaying the order details.

- 4 Click the **Continue Shopping** button to return to the **Order Jobs** screen.



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



# 3

## Tracking Jobs

### Job Queues and Statuses

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

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

- **Saved Jobs** - the jobs created and saved previously and ready for ordering. These jobs can be viewed by the Print Service Provider but are not ordered until the Print Buyer adds them to the shopping cart and orders them.
- **Shopping Cart** - the jobs placed in the shopping cart. See [Shopping Cart and Order Checkout](#) on page 25.
- **Approval** - the jobs ordered by users that are not assigned the approval privileges, and are waiting for approval by a Supervisor or Administrator. The **Approval** queue displays all of the jobs awaiting approval, and enables approval or rejection.
- **Printing** - the ordered jobs currently in the **Production** queue on the Print Service Provider side.
- **Shipping** - the ordered jobs the Print Service Provider has shipped.
- **Received** - the ordered jobs the Print Buyer has received from the Print Service Provider.

## Searching for a Job

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

Figure 13: Search window

Track Jobs - Search (13 Jobs)

Status: All Search: Shipped All - - - Search

Advanced search Column Selection

JOB #	Status	Job Type	Job Name	Creation Date
187	Ready for Printing		Diabetic Brochure #187	08-28-2008 01:36
191	Ready for Printing		Booklet on how to treat allergies #191	08-28-2008 05:43
197	8		Alternative Medicine BC #197	09-01-2008 01:03
198	8		Archive Business card #198	09-01-2008 01:03
199	8		Health 3 #199	09-01-2008 01:03
205	Ready for Printing		Booklet on how to treat allergies #205	09-01-2008 01:31
206	Ready for Printing		Diabetic Brochure #206	09-01-2008 01:32
211	Ready for Printing		Booklet on how to treat allergies #211	09-01-2008 02:29
213	Ready for Printing		Alternative Medicine BC #213	09-01-2008 02:31

PDF Preview Note Preflight

JOB #: 187, Order #: OGR4  
Job Name: Diabetic Brochure #187  
Quantity: 250, Pages: 1  
Job Type: Diabetic Brochure\_2

User: Tom Jones  
Order Date: 28-08-2008 01:37  
Shipping Date: 8/28/2008 11:36:00 AM  
Reference #: Attachments  
No Files are Attached

Edit Properties Re-order Job Save as Template Search Order



The same window can be accessed by clicking the **View Status** button under **Order Status** on the **Order Jobs** page.

## Main Features of the Search Window

The window is composed of the following elements:

- Search engine and the **Advanced Search** button - a search mechanism that offers a variety of methods to locate a specific job or a number of jobs characterized by common criteria. See [Search Options](#) on page 31 for details.
- Search results table - lists the jobs that have been discovered by the search. The table contains a number of attribute columns. Clicking on a column header sorts the list of jobs by attribute.

Use the **Column Selection** button to open the appropriate dialog box where you can set appearance of the search results table. The list of all available job attributes is displayed in this dialog box. When an attribute is selected, a column with this attribute name appears in the search results table, and the relevant information is displayed.

- **Excel Report** button - the user can export the search results into an Excel file. Clicking on this button accesses a dialog box, which allows the user to determine which attributes will appear in the Excel file. When an attribute is selected in the dialog box, a column with this attribute name appears in the Excel file.

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

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



## Search Options

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

**All** - displays jobs in all possible queues and statuses.

**All (excluding deleted)** - displays jobs in all possible queues and statuses, except for deleted jobs.

**Saved Jobs, Pending Approval, Ready for Printing, Shipped, Received, Artwork** - displays jobs in their respective queues.

**Rejected** - displays all jobs rejected by the Supervisor or Administrator in the **Approval** queue.

**Deleted** - displays all deleted jobs.

**Ready to Order, Ordered, Not ordered** - displays all jobs in the corresponding status.

Additional filtering criteria can be entered in the search boxes:

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

The following table lists and describes all optional filter settings:

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

- The text box next to the command box is used for entering letters or numbers that represent the search target.

- Advanced search enables the user to enter a specific status and attributes that narrow the scope of the search. The [Advanced Search](#) button accesses the appropriate dialog box, where several of these attributes can be combined.

## Job Details and Related Operations

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

- **PDF Preview** - allows the user to preview a selected job in PDF format.
- **Note** - accesses a dialog box, where a note for the Print Service Provider can be added or edited.
- **Preflight** - starts the preflight operation and displays the file report that includes colors, fonts and images information.
- **Variable Data** - appears only when a VI job is selected in the search results table. Clicking on this link accesses the **Edit Variable Data** dialog box, which allows the user to create variable records manually or to import the records from an external database file to the selected job. See [Ordering Variable Information Jobs](#) on page 13 for details.
- **Attachments** - allows the user to attach design files (fonts, images, etc.) to the job.
- **Optional activities buttons** - the operations enabled for a job depend on the status of the job. Accordingly, there are different combinations of operation buttons for different jobs selected in the search results table. See [Job Activities](#) on page 32 for details.

## Job Activities

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

- **Add to Cart** - transfers the selected job to the shopping cart for receiving a price quote and ordering. See [Shopping Cart and Order Checkout](#) on page 25 for working with the shopping cart.
- **Re-order** - sends a copy of the selected job to the shopping cart. Appears for jobs in the **Printing, Shipping and Received** queues.
- **Delete Job** - deletes the job from the system.
- **Duplicate Job** - creates a new job that is identical to the selected job. Appears for jobs in the **Saved Jobs** queue and adds duplicate jobs to the same queue.
- **Edit Properties** - accesses the **Edit Properties** dialog box, allowing the user to view and edit the job properties.
- **Move to Received** - transfers the selected job to the **Received** queue notifying the Print Service Provider that the job has been received. Appears for jobs in the **Shipping** queue.
- **Save as Template** - saves the selected job as a template for future use. Appears for jobs in the **Saved Jobs, Printing, Shipping and Received** queues.



The [Save As Template](#) button appears only for users with Manage Template privileges. See [User Types and Privileges](#) on page 71.

- **Variable Data** - appears when a VI job is selected in the **Saved Jobs** queue. Clicking this button accesses the **Edit Variable Data** dialog box, allowing the user to create variable records manually or to import the records from an external database file to the selected job. See [Ordering Variable Information Jobs](#) on page 13 for details.
- **Send Approval Email** - appears when a job is selected in the **Saved Jobs** queue. It is used for receiving feedback on a job from one or more reviewers before the job is ordered. The user enters the subject, comments and email addresses of approvers. The approval cycle is carried out by email and does not require the approvers to be system users. The recipients receive an email message, add comments and click [Accept](#) or [Reject](#).



Each time a recipient accepts or rejects a job, the initiator receives an Approval Status email indicating the recipient's action.

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



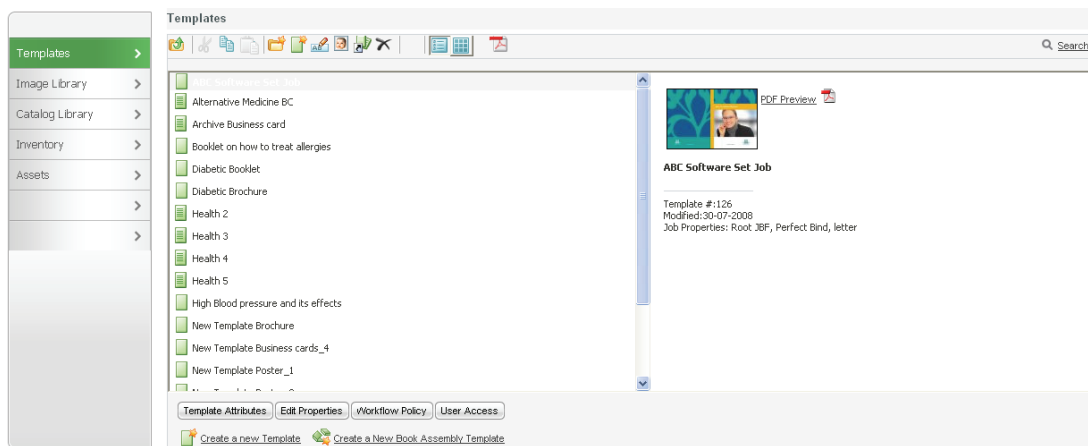
# 4

## Managing Templates

### Templates Repository

When the user clicks on the **Manage Templates** tab, the **Templates** window opens by default.

**Figure 14: Templates window**







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

The window toolbar provides the user with the tools to manage the templates and the repository. See [Controls and Operations](#) on page 36.

The [Search](#) link enables the user to find a specific template or group of templates. See [Searching for Templates](#) on page 37.

### Template Types

Template types are indicated by the following icons:

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

See [Basic Concepts](#) on page 2 for job - template relationships.

### Controls and Operations

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

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

- **Create New Template** - opens the **Choose Job Type** page and initiates the workflow for creating static and VI templates.



The same workflow is initiated when you click on [Create a New Template](#) at the bottom of the screen. See [Creating Static Templates](#) on page 39.

Clicking on [Create a New Book Assembly Template](#) initiates the workflow for creating composite templates. See [Creating Book Assembly Templates](#) on page 44.

- **Catalog Link** - opens the **Choose Catalog** dialog box, which enables locating a specific catalog in the catalog library and adding it to the templates repository.
- **View list** - displays a list of folders and templates in default view mode in one hierarchical level, and the appropriate information for the selected folder/template:
  - If a folder is selected, the folder's name and icon are displayed.
  - If a template is selected, the basic template information is displayed, such as name, job type, colors, page size and last modification date.
  - If the selected template is a VI template that contains an archive of variable records, the number of records is displayed.
- **View thumbnails** - enables viewing the template repository items as thumbnails. This view displays only the names and thumbnails.
- **PDF Preview** - enables displaying a PDF preview of the selected template.
- **Search link** - accesses the screen used to search for templates.

## Searching for Templates

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

- 1 Click on **Search** to open the search window.
- 2 Enter a complete or partial template name or template number in the search text box.  
  
The mechanism searches and displays all suitable templates in the repository. The more complete the template name, the more precise the search.
- 3 The **Search Results** table includes attribute columns. Click on a column header to sort the list of templates.
- 4 Click the **Advanced Search** button to open the **Advanced Template Search** dialog box.  
  
Advanced search enables the user to enter specific status and attributes, or combine several of these attributes, to narrow the scope of the search.
- 5 Click the **Column Selection** button to open the dialog box for selecting the attribute columns to be displayed on the screen. In this dialog box, the entire list of the template attributes is shown. Select the check boxes for the attributes that are to be displayed.
- 6 Click the **Excel Report** button to export the search results to an Excel file. The dialog box opens enabling you to select attributes that will appear in the Excel file. When an attribute is selected, the relevant information appears in the Excel file.
- 7 Select a template in the **Search Results** pane to view the template details. The details and the enabled activities are displayed in the lower section of the window (see the [Controls and Operations](#) section on page 36).
- 8 Click the **Folder View** button to return to the **Templates** window.

## Creating Templates

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

## Workflows and Wizards

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

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

### Simple Job Templates

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

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

See [Creating Static Templates](#) on page 39.

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

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

See [Creating VI Templates](#) on page 40.

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

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

### Composite Job Templates

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

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

See [Creating Book Assembly Templates](#) on page 44.

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

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



## Creating Static Templates

### Uploading Content to a Template

- 1 On the **Templates** screen, click [Create a new Template](#) to initiate the template creation wizard.



You can go back to the templates repository at any stage of template creation by clicking the [Back To Library](#) button or [Back to Template Library](#).

The **Choose Job Type** dialog box appears.

- 2 Select a required Job Type and click [Select](#). The template creation wizard opens.
- 3 On the **General Properties** wizard page, enter all necessary details and related notes.
- 4 Click [Change Thumbnail](#) to replace the template thumbnail by one uploaded from the dedicated library.
- 5 Click [Save and Continue](#) to proceed to the next step.
- 6 On the **Content** wizard page, navigate to the required content file and upload it.
- 7 Click [Save and Continue](#) to proceed to the next step.

### Setting Template Properties

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



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

- 2 Configure how the properties are organized on the **Job Specification** page of the ordering wizard, initiated when a job is ordered based on this template:
  - a Add a new tab to break the **Job Specification** page into several tabs when displaying intent in the ordering wizard:
    - i Click the [Add Tab](#) button.
    - ii Enter a new tab name and description in the dialog box that opens, and click [OK](#).

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

- b Use the [Move up](#) and [Move Down](#) buttons to organize the properties: select a property in the list and move it to the required position.

See [Job Specification](#) on page 7 for description of the ordering wizard page.

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

## Preflight Check of Uploaded File

- 1 Click **Save and Continue**. The preflight check of the uploaded content file is performed, and the **File Report** wizard page opens.
- 2 Use the [Click here to review these problems](#) link to open the report and handle the discovered problems.  
OR  
Click **Save and Continue** to save the template with the discovered problems.  
  
See [File Report](#) on page 8 for more information about the preflight report and related operations.

## Saving Templates as Static

- 1 Click **Save and Continue**.  
The template creation wizard proceeds to the **Variable Information** page.  
The preview of the uploaded file is displayed on this page. See [Preview](#) on page 11 for preview controls.
- 2 Set the template type to **Static** (no variable information). This is the default.
- 3 Click **Finish**.  
  
The created template is saved as a static template and added to the list on the **Templates** screen.  
The **Variable Information** page is not included in the workflow for ordering jobs based on this template.

## Creating VI Templates

- 1 On the **Templates** screen, click **Create a new Template**.  
The template creation wizard is initiated.
- 2 Perform all steps of the static template workflow from [Uploading Content to a Template](#) and up to [Preflight Check of Uploaded File](#).

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

- [Setting VI Workflow](#)
- [Creating VI Fields](#)
- [Defining Properties of VI Fields](#)
- [Arranging VI Fields](#)
- [Saving VI Template](#)

## Setting VI Workflow


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

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

- 1 From the drop-down menu, choose one of the two VI workflow options:
  - **Personalize (single record ordering)** - for ordering jobs with one variable data record.
  - **VDP (database upload/editing)** - for ordering jobs with multiple variable data records.

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

## Creating VI Fields

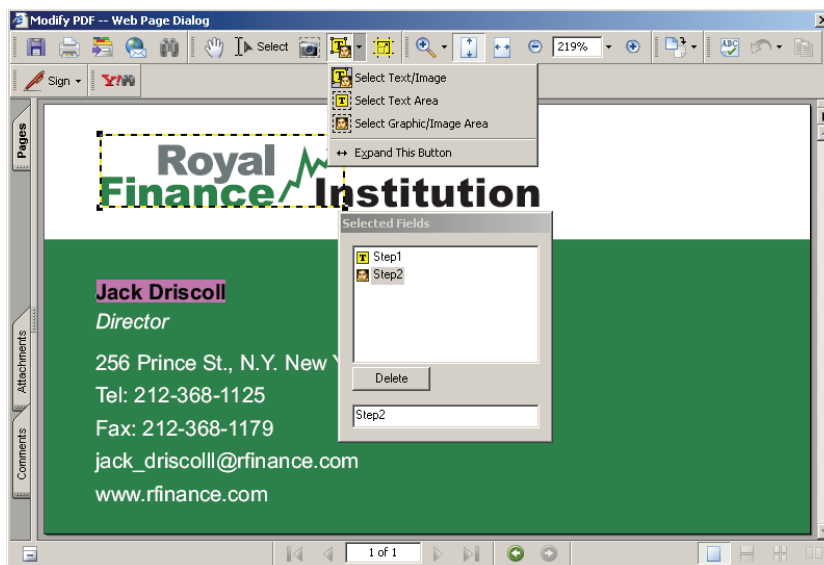
- 1 Click the **Selective Upload** button.  
The **Modify PDF** page appears, displaying the uploaded PDF file.
- 2 From the drop-down menu of the **Select Text/Image** button  on the toolbar:
  - Choose **Select Text Area** to enable selecting text fields.  
Drag the cursor over the text to select it.

OR

  - Choose **Select Graphic/Image Area** to enable selecting image fields.  
Select an image by dragging the selection frame around the object.

The **Selected Fields** dialog box appears.

**Figure 15: Selective Upload tools**



Selected fields appear in the dialog box and represent the created variable fields.

- 3 Rename the created fields by selecting items in the list and by typing new names in the text box at the bottom of the dialog box.

The variable fields are created. VI jobs can be ordered based on this template, and personal information can be entered manually or uploaded to the prepared fields.

- 4 Using the navigation buttons under the preview, move to another template page and repeat Step 2 and Step 3, if required.
- 5 Click **OK**. The PDF preview closes, and the user is returned to the **Variable Information** page of the template creation wizard.



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

## Defining Properties of VI Fields

- 1 Click the **Form Editor** button.

The **Form Editor** dialog box opens. The created fields are listed in the left **Field Name** pane.

**Figure 16: Form Editor dialog box (example for a variable image field)**

- 2 Set the properties of the created variable fields:
  - a Select a field in the **Field Name** list.  
The relevant properties appear to the right, in the settings pane.
  - b Set the field properties.
- 3 Click **Advanced Options** to define rules for the selected field.  
See [Defining VI Fields using Form Editor](#) on page 48 for a description of VI field types, properties and rules.
- 4 Click **OK** to close the **Form Editor** dialog box and return to the **Variable Information** page of the template creation wizard.
- 5 Click **Save and Continue**.

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

## Arranging VI Fields

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

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

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

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

## Saving VI Template

- 1 Click **Finish**. The template is created and saved.

The new template appears in the repository, in the **Templates** window.

### Creating Book Assembly Templates

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

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

### Template Activities

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

- **Edit Properties** - appears for all template types. Runs the same wizard used to create the selected template. See [Setting Template Properties](#) on page 37 for editing procedures.
- **Workflow Policy** - appears for all template types. Opens a dialog box to allow users with Manage Template privileges to set additional requirements in the job ordering workflow. See [Setting Workflow Policy](#) on page 45.
- **User Access** - appears for any template selected in the repository. Opens a dialog box to assign access rights for both User Groups and Users. See [Managing Users](#) on page 69.
- **Manage Archive** - appears only for Variable Information templates. Accesses the screen that allows the user to import variable records from an external database file, to export variable records to an external database file, and to remove or edit the variable records included in the template. See the corresponding information in the [Ordering Variable Information Jobs](#) section on page 13.
- **MailToPrint** - appears when a static or VI template is selected. Opens a dialog box that allows setting the MailToPrint properties and the email address to which to send selected template information as an HTML page. Jobs can then be ordered by the user directly from the sent HTML page. See [Setting MailToPrint Option](#) on page 46 for setting MailToPrint option.



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

## Setting Workflow Policy

- 1 On the **Templates** screen, select a template in the list and click **Workflow Policy** to configure additional settings in the ordering workflow. These settings take effect when a job is ordered based on this template.

The **Workflow Policy** dialog box allows setting mandatory actions in the job ordering workflow, adding input fields and setting some variable fields to require approval.

- 2 To set mandatory actions related to the soft proof, mark the **Require Preview** check box.

When this check box is marked, the user ordering from this template is required to review the soft proof of the job prior to ordering.

The following options are enabled:

- **JPG Preview** and **PDF Preview** radio buttons - the preview is displayed in the selected format.
- **The user must accept preview in order to continue** - when selected, the check box **I have examined the Job Preview and approve it for printing** appears on the preview page of the ordering wizard. To add the job to the cart or add the job to the cart and order, this check box must be selected.

- 3 Select the **Force Reference Code** check box to make the reference code field mandatory when a job is ordered based on this template.
- 4 Under **Additional Input Fields**, mark the required **Job Name**, **Reference Code**, and **Cost Center** check boxes to set these fields to appear in the job ordering workflow and require completion before continuing with the procedure.
- 5 Under **Approval Policy**, mark the **Apply Supervisor Approval By-pass Fields** check box. An additional pane opens in the dialog box.



This additional section appears only when you edit a VI template.

- 6 Specify the variable fields in the template that require Supervisor approval:
  - a Mark the **Modification** check box to set the field to require approval when the field text is modified.
  - b Mark the **Overflow/Empty** check box to set the field as one that requires approval when the text is longer than the text box or the field is left empty.
- 7 Click **OK** to save changes to the workflow defined in the template.

### Setting MailToPrint Option

User that receives a MailToPrint email message can order jobs using a sent HTML page. The MailToPrint settings define the user addresses and a number of requirements for a job ordered from the email.

See [Additional Ordering Options](#) on page 18 for MailToPrint feature explanation.



The MailToPrint ordering option can be set for any static or VI template residing in the repository.

Uploading of Variable Data records from an external database file is not enabled for VI templates designated as MailToPrint templates.

- 1 On the **Templates** screen, select a template in the list and click **MailToPrint** to set the ordering policy for jobs ordered based on this template and from this email.



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

The **Send MailToPrint Properties** dialog box appears allowing you to define the ordering policy:

- 2 Select **The Job must be approved by a supervisor...** to hold the order in the shopping cart until it is approved by the Supervisor.
- 3 Select **An order is created after...** to create an order automatically without Supervisor approval. The next settings are enabled.
- 4 Choose the number of days from order to shipping from the **Days to Deliver** drop-down list.
- 5 Mark the **Show Price Before Processing the Order** check box to view the price before the job is submitted to the Print Service Provider. If this check box is clear, jobs are ordered without price verification.
- 6 Mark the **Show the Reference Code Input Field** check box to display the reference code text box during ordering. If this check box is clear, the field does not appear.
- 7 Mark the **Ask for User Login** check box to allow only users with a user name and password to order jobs from this template. If this check box is clear, any user that has access to the MailToPrint email can order the jobs.
- 8 Mark the **Allow File Attachments** check box to allow attaching additional files to the ordered job.
- 9 From the **This email message can be used** drop down list, choose the number of times the same email can be used for ordering jobs, or set **No Limit**.
- 10 From the **Max number of copies allowed per order** drop-down list, choose the maximum number of job copies that can be ordered from this template.

The **Email Options** pane allows specifying the MailToPrint message information and addresses:

- 11 In the **Message Subject** field, enter the text to appear in the email message subject line.



- 12 In the **Recipient Email** field, enter the email addresses to receive the message. Use a comma or semicolon to separate addresses. Use the **Address Book** link for convenient entry of frequently used email addresses from the address book.
- 13 Select the default user name from **Default Login Profile**. When no login is required, all jobs ordered using the email appear with the default user's credentials.
- 14 Set the default code in the **Default Reference Code** field.
- 15 In the **Personalized Message Header** field, enter the text to appear in the email message header.

The control buttons allow exporting the selected template to an external HTML page used for job ordering:

- 16 Click the **Export HTML** button to export the selected template information to an external HTML page and save it for future use. The page can then be uploaded to the Print Service Provider's Internet site or to the Print Buyer organization's Intranet site, and used for ordering jobs.
- 17 Click the **Send MailToPrint** button. The template information is sent to the email addresses specified in the **Send MailToPrint Properties** dialog box, as described above.

# Defining VI Fields using Form Editor

Use the Form Editor to specify:

- Text alignment and boundaries properties.
- Font properties.
- Properties that govern the behavior of fields during ordering.
- Properties that control the display of fields in the printed job.

## Defining the Basic Field Properties

- 1 If the **Form Editor** dialog box does not open automatically, click the **Form Editor** button on the **Define Fields** tab of the **Variable Information** page. The **Form Editor** opens, along with the **Layout Preview** dialog box.
- 2 For each field adjust the settings as necessary. Refer to the detailed tasks below.
- 3 If necessary, access the **Advance Options** area. Refer to the detailed tasks below.
- 4 Click **OK**; the **Form Editor** is closed and the **Define Fields** tab is displayed again.

## Text Fields

Form Editor feature enables to define text fields' input rules and behavior, alignment and boundaries, and font properties.

## Defining Input Restrictions on Fields

You can define several input restrictions on fields:

- No restrictions.
- A field is mandatory.
- A field is mandatory and its value must differ from the default value.
- A field's value must be changed or be left empty.

To mark a field as mandatory:

- 1 Select the field.
- 2 Select **Input Field text cannot be Blank** in the **Field Input** list.

To mark a field as mandatory and different from the default:

- 1 Select the field.
- 2 Select **Input Field text must be changed and cannot be Blank** in the **Field Input** list.

To mark a field as must be changed or left empty:

- 1 Select the field.
- 2 Select **Input Field text must be changed or empty** in the **Field Input** list.

## Defining Non-Editable Fields

Non-editable fields are used for captions. The caption has to be made variable in order to be able to move it on the template according to values of other fields, but requires no input from the user during ordering.

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

## Defining Non-Printable Fields

Non-printable fields are used for data collection.

- 1 Select the field.
- 2 Select the **Do not print this field** check box.

## Defining User Moveable Fields

User moveable fields can be interactively moved by the Print Buyer during ordering.

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

## Defining Pinned Fields

Pinned fields are useful in cases when a template contains some fields that are to be updated manually for a certain job, and other fields that will be uploaded from a database. You need to mark the manually updated fields as Pinned, the application will enable the Print Buyer to type the values of Pinned fields and will then enable to upload a variable database to the other fields.

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

## Defining the Target Audience of a Field

The target audience of a field enables to make a field visible or invisible according to the user type viewing the variable data form.

- 1 Select the field.
- 2 Select the appropriate option in the **View By** list.

## Defining Field Format

Field format rules warn the user when the data entered is not formatted correctly, and in some cases corrects the typed data. The formats are:

- Special formats for phone numbers and zip codes.
- Special formats for emails.

- ALL UPPER CASE, all lower case, Sentence case or Initial Caps.
- Limit the acceptable characters.
- Other, custom, formats.



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

- 1 Select the field.
- 2 Select the required format from the **Field Format** list.  
OR  
Click [Field Format](#) link for more options.

### Defining Drop-down Menu Fields

Drop-down lists are used to simplify the user's interaction with the application, to improve accuracy of data input and to reduce costly mistakes. There are two types of drop-down lists – simple and complex.



It is important to remember that while the drop-down lists have many benefits, changing them (adding, editing or removing values) requires editing the template. Therefore, it is preferable not to create drop-down lists for fields which values might need to be changed by users.

Simple drop-down lists are used to limit the number of options for a specific variable field, and at the same time to facilitate fast and accurate entry of data when creating the print job.

Complex drop-down lists are used in cases when the values of several fields are interdependent. In such a case you can create a drop-down list on one field (the leading field), and connect each value in drop-down list to a set of values in other fields. I.e. a change in one field will cause a pre-defined change in other fields as well. A common example of such a case would be a company with offices in several locations. When ordering a business card or letterhead, an employee has only to select a location, and then the appropriate address, city, fax, etc. will be filled in automatically.

### Defining a Simple Drop-down Menu

- 1 Select the field.
- 2 Select **Dropdown Menu** in the **Field Type** list; to the right of the **Field Type** appear a drop-down icon and two new buttons: [Add List](#) and [List Management](#).
- 3 Click [Add List](#); the **Add List** dialog box appears.
- 4 Enter several values, use comma as a separator between the values.
- 5 Click **OK** to save the list and close the window.

## Defining a Complex Drop-down Menu

To simplify this task it will be presented through an example. For the sake of the example we will assume that you have a leading field called Office Name and two fields connected to it: Office Address and Office Fax.



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

- 1 Select the field.
- 2 Select **Dropdown Menu** in the **Field Type** list; to the right of the **Field Type** appear a drop-down icon and two new buttons: **Add List** and **List Management**.
- 3 Click **List Management**; the **List Management** dialog box appears.
- 4 Click **Add Table**; the **New Table** dialog box opens.
- 5 Type the table name (**Office**) and click **OK**.
- 6 Create the primary column:
  - a Select the name of the leading field (**Office Name**) in the list.



You will be creating several columns of values, each column connected to one field. Generally, you can create the columns in any sequence you wish, and then define which of these columns is the primary (leading) field. It is, however, more convenient to start with the leading field and then add the fields depending on it.

- b Type the first value in the empty text field (**New York**).
  - c Click **Add Row**; another row is added to this column.
  - d Type another value (**London**), continue adding rows and values as necessary.
  - e Select the radio button above the **Office Name** column to indicate that this is the **Primary Column** (leading field).
- 7 Create connected fields:
  - a Click **Add Column**; another column is added to the table. The new column has the same number of rows as the primary column.
  - b Select the name of a field to be changed based on the value of the primary column in the list (**Office Address** in our example), and type the values for this field for each of the values in the primary column.
  - c Add a column for another connected field (**Office Fax**).
- 8 Click **OK** to save the table and close the window.



Look at the field names: the leading field has a drop-down list icon. All the connected fields are marked with a lock icon and have the same color rectangle marking that they belong to the same drop-down list group. Had the form contained more than one drop-down list field, each group would have been marked by a different color.


### Defining Composite Fields

Composite fields are used when you have a paragraph that is not variable with variable strings inside it. The length of variable strings affects the flow of text in the paragraph.

A good example would be a direct mail campaign for a supermarket, promoting a specific product in the supermarket according to the preferences of the recipient:

“In our *fruit* department you will find fresh *pineapples* every day!”

The sentence in this example is the “composite” field, while the name of the department and the product are its children fields. Most of the standard field properties can be applied to the children fields.

- 1 Select the field.
- 2 Select **Composite** from the **Field Type** list; the **Composite** properties are displayed.
- 3 Select the children fields:
  - a Select the word or words you want to become one field and click the word selection icon ; the selected string is highlighted and a field is added to the list under the composite field.
  - b Repeat for additional strings.
- 4 Click **Save**.

### Image Fields

Form Editor feature enables to define image fields’ input rules, behavior, alignment and boundaries.

#### Defining Input Restrictions on Fields

You can define several input restrictions on image fields:

- No restrictions.
- A field is mandatory (an image must be selected).
- A field is mandatory and its value must differ from the default value (default image must be changed and an image must be selected).
- A field’s value must be changed (default image must be changed).

To mark a field as mandatory:

- 1 Select the field.
- 2 Select **An Image Must Be Selected** in the **Field Input** list.

To mark a field as mandatory and different from the default:

- 1 Select the field.
- 2 Select **Default Image Must Be Changed and an Image Must Be Selected** in the **Field Input** list.

To mark a field as must be changed:

- 1 Select the field.
- 2 Select **Default Image Must Be Changed** in the **Field Input** list.

## Defining Non-Editable Fields

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

## Defining Non-Printable Fields

Non-printable fields are used for data collection.

- 1 Select the field.
- 2 Select the **Do not print this field** check box.

## Defining User Moveable Fields

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

## Defining Pinned Fields

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

## Defining the Target Audience of a Field

- 1 Select the field.
- 2 Select the appropriate option in the **View By** list.

## Controlling the Image Upload Policy

You can define several image upload options:

- Do not allow image upload – will force the user to select an image from the available selection.
- Allow upload to the job folder – the user will be able to upload the image, but it will be available only for this job.

- Allow upload to the personal folder – the user will be able to upload the image to a personal folder, hence only he will be able to use this image while ordering in the future.
- Allow upload to the selected folder – the user will be able to upload the image to a predefined folder in the public library.
- Use access to the public image library – the user will be able to upload the image to any folder in the public image library.

To define the policy:

- 1 Select the field.
- 2 Select the required **Image Upload** option.

### Controlling the Image Selection GUI

You can control whether the images for selection will be displayed during ordering as a drop-down list or as a slider control.

- 1 Select the field.
- 2 Select the required **Image Selection GUI** option.

### Enabling the Image Editor

When image editing is enabled, the user after uploading an image can crop, scale or rotate it as needed using the interactive Image Editor tool.

- 1 Select the field.
- 2 Select the **Use Image Editor** check box.

## Advanced Options

In many cases of generic designs for personalization, specific values used in the job can affect the design. The advanced options of Form Editor are designed to deal with these situations. See example of advanced properties in the table below.

Name	Title	Tel	Mobile	Email
Janice Jones	President	444-555123	422-555345	janice@global.com
John Smith	Vice President	444-555125	422-555348	john@global.com
James Cook	Supervisor	444-555321		
Carol Donaldson	Project Manager	444-555327		carol@global.com

In this example each one of the employees for whom a business card should be printed, requires different data fields. One doesn't have a mobile phone, another doesn't have a mobile or email.



The options for dealing with this type of situation are:

- Create one design and leave gaps in it. This option is not valid in professional quality print jobs.
- Create several different designs. This is a valid and common solution but it requires maintaining different design versions and requires an extra decision by the user as to when to use each design.

The advanced options of Form Editor address this issue by defining flexible rules that deal with these changes ad-hoc:

- Position links handle the vertical and horizontal position of fields relative to position of other fields. This can be related to the size of a fields or to absence of data in a field.
- Suffix enables you to specify a constant suffix in a field, so that the ordering user has to type only the changing information, a situation that is common to emails. This reduces unnecessary typing of data and thus possible errors.
- Group Centering is used to balance “white space” resulting from such changes as vertically or horizontally modified position links, changes in the number of lines in a multiline field, or horizontal centering of fields with varying length.
- Empty Fields is used to remove labels and captions for fields that have been left blank.
- Identical Input Fields is used to specify several fields that use the same data, so that the ordering user has to enter the data only once and all the connected fields are populated automatically. This reduces unnecessary typing of data and thus possible errors.
- Style Selection is used for instances where a field's style (font, font size, and font color) might require adjustment.

## Defining Advanced Options

- 1 Click **Advanced Options**; the **Advanced Options** dialog box opens with the **Positions Links** tab selected.
- 2 Click **OK** when you finish modifying the advanced options.

## Defining Position Links

- 1 Select the field you would like to re-position (for example, City) and click **Add**; the field is added into the **Moved Field** text box and a **Leading Field** drop-down list appears.
- 2 Select the empty field (for example, Address 2) in the **Leading Field** and select the **Vertical Link** check box.  
This ensures that the vertical location of the field being repositioned (City) will be affected by the vertical position (or the absence) of the other field (Address 2).
- 3 Leave the relative positioning radio button at its default selection.
- 4 A text message at the bottom of the window indicates the nature of the change (for example, “In case ‘Address 2’ is empty ‘City’ will be placed in ‘Address 2’ position”).
- 5 Repeat the process for each field that needs repositioning.
- 6 Click **Apply**.

### Defining a Suffix

- 1 In the **Advanced Options** window, click the **Suffix** tab.
- 2 Select the field where the suffix does not change (for example, Agent email) and click **Add**. The field is added to the **Fields with Suffix** area.
- 3 Fill in the suffix (for example, **@royalcargo.com**) in the **Field Suffix** field.
- 4 Click **Apply**.

### Defining Advanced Group Centering

- 1 In the **Advanced Options** window, click the **Group Centering** tab.
- 2 Create a block of fields to act as a group by clicking **New Group** and entering a name for the group of fields (for example, Customer).
- 3 Indicate whether horizontal or vertical centering should be performed for the group.
- 4 For each field that will be in the group, select the field and click **Add**.
- 5 Click **Apply**.

The application calculates the enclosing rectangle for the fields in the group and the vertical or horizontal center of the rectangle. When a job is ordered, the application checks the existing fields in the order, recalculates the enclosing rectangle and aligns the new vertical or horizontal center to the original point. It then positions the text accordingly.

### Handling Empty Fields

- 1 In the **Advanced Options** window, click the **Empty Fields** tab.
- 2 For each field whose label should be removed if the field is empty, select the field and click **Add**. The field is added to the **Empty Fields Definitions** area.
- 3 When done, click **Apply**.

### Handling Identical Input Fields

- 1 In the **Advanced Options** window, click the **Identical Input Fields** tab.
- 2 Click **New Group** and enter a name for the field (for example, Customer Name).
- 3 For each field sharing identical information with another field, select the field and click **Add**.
- 4 When done, click on **Apply**.

## Defining Advanced Style Selection

- 1** In the **Advanced Options** window, click the **Style Selection** tab.
- 2** To adjust a style item for a group of fields, click **Add Group**.  
The **Add Group** dialog box appears.
  - a** Specify the **Group Name** (for example, Customer).
  - b** Select the type of item (Font, Font Size, or Color) in the **Group Type** drop down box, and click **OK** in the **Add Group** dialog box.
  - c** Add fields to the group by selecting each field and clicking **Add**.
  - d** Select the allowable style item values (for example, select the allowable fonts if you selected Font from the drop down list) for the fields in the group.
  - e** Repeat this for each group and style combination.



# 5

## Job Assets

### Catalog Library

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

On the **Manage Templates** page, click **Catalog Library** in the left menu to enter the library.

A list of available catalogs is displayed in the central pane of the screen. When a catalog is selected in the list, the catalog content is displayed to the right. When an HTML type catalog is selected, the template's thumbnails and details are displayed. See the [Ordering Jobs from HTML Catalogs](#) section on page 18 for a description of the ordering workflow for HTML catalogs. When a Superstore type catalog is selected, the template categories are displayed. See the [Ordering Jobs from Superstore Catalogs](#) section on page 6 for a description of the ordering workflows for Superstore catalogs.



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

### Managing Catalogs

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

#### Creating a New HTML Catalog

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

#### Adding Templates to HTML Catalogs

- 1 Use the **Add Templates** button to open the **Choose Template** dialog box, which enables adding templates to a selected catalog.

Any template enabled for the user account can be located using this dialog box. The toolbar buttons enable performing the following navigation and management operations: renaming and deleting templates, creating new folders and moving one level up to navigate to a required template.

- 2 Select a required template in the list or in a folder.

- 3 Click the **Select** button to add the selected template to the created catalog.
- 4 Click **Close** to return to the **Catalog Library**.

## Exporting Catalog Content

- 1 Select a catalog in the library.
- 2 Use the **Send MailToPrint** button to set the ordering policy for jobs ordered from this catalog via email, and email addresses of the users to receive the catalog HTML page.  
OR  
Use the **Export HTML** button to export the catalog to an external HTML page that can be uploaded to the Print Service Provider Internet site or to the Print Buyer organization Intranet site, and used for ordering jobs.

## Template Display Setup

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

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

## Catalog Properties Setup

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

The setting procedure includes:

- **Setting Display Parameters**
- **Setting Workflow Parameters**

- [Setting Variable Information Fields](#)
- [Setting Order Parameters](#)
- [Setting Delivery Parameters](#)
- [Setting Price Preview](#)
- [Setting Email Options](#)
- [Finishing the Setup Procedure](#)

## Setting Display Parameters

In the **Display Parameters** section, specify the display parameters for all templates included in the catalog:

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

## Setting Workflow Parameters

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

- 1 In the [This Catalog Can Be Used](#) drop-down box, select the number of times this catalog template can be used for ordering jobs.
- 2 Select [The job requires supervisor approval...](#) to send a supervisor approval email prior to placing the order.  
In the [Approvers](#) field, enter the email addresses of people to receive the approval query. Use a comma or semicolon to separate addresses. Use the [Address Book](#) link for convenient entry of email addresses.  
  
OR  
  
Select [An order is created after the user approves the job](#) to enable creating an order automatically upon user approval.
- 3 Mark the [Ask for User Login](#) check box to allow only users with a user name and password to order jobs from the catalog.
- 4 Clear the check box to allow any user that has access to the MailToPrint email (see email settings below) to order jobs from the catalog.
- 5 Select the user profile from the [Default Login Profile](#) drop-down list. If no login is required, all jobs ordered using the email defined below appear with the credentials of this user.

### Setting Variable Information Fields

In the **Variable Information** section, set the default values of the variable field properties taken from:

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

### Setting Order Parameters

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

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

### Setting Delivery Parameters

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

- 1 Select **Allow Shipping Date Modification** to enable changing the shipping date. Clear the check box to disable this option.
- 2 Select **Default time from Order to Shipping** to enable setting the number of days from the time the order is approved until the job is shipped.
- 3 Select **Allow Shipping Address Modification** to enable changing the shipping address. Clear the check box to disable this option.
- 4 When the above option is enabled, the following two options are provided:
  - Select **Always approve Shipping Address** to require that the users always verify and approve the shipping address.
  - Select **Disable Address Book Access** to deny user access to the system address book (recommended for B2C applications).



## Setting Price Preview

In the **Quote and Preview** section, enable price preview before jobs are submitted for print:

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

OR

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

## Setting Email Options

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

- 1 In the **Email Subject** field, enter the text to appear in the subject line of email messages to which the catalog HTML page will be attached.
- 2 In the **Recipient Email** field, enter the email addresses of employees to receive the catalog HTML page. Use a comma or semicolon to separate addresses.

Use the **Address Book** link for convenient entry of email addresses.

## Finishing the Setup Procedure

- 1 Click **OK** to save changes made to the catalog properties, close the **Catalog Properties** dialog box and return to the catalog library.

OR

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

# Image Library

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

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

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

## Managing the Image Library

- 1 Use the toolbar buttons above the list of library folders to manage the list of folders: to create a new folder, to rename or delete an existing folder.
- 2 Use the toolbar buttons above the list of image files in a selected folder to manage the files and change the list display mode:

There are buttons supporting standard file management operations such as cutting, copying, pasting, renaming and deleting files in the list. In addition, you can toggle the file view mode using the [View list](#) and [View thumbnails](#) buttons. You can also download any image file in the library to any available location using the [Download image\(s\)](#) button.

- 3 Use the [Upload Images](#) button to add images to the library.

## Uploading Images to the Library

To upload images to the library:

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



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

## Inventory

Jobs ordered from inventory templates can be printed and stored in the Print Service Provider storage facilities, instead of being immediately shipped to the delivery destination. Using the Inventory feature, the Print Buyer can order larger numbers of job copies than are currently needed, store them at the Print Service Provider facility and receive the jobs immediately, when the need arises. See the [Ordering Inventory Jobs](#) section on page 19 for ordering jobs from inventory and printing jobs to inventory.

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

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

## Managing Inventory Templates

- 1 On the **Manage Templates** page, click **Inventory** in the side menu. The **Inventory - Search** screen opens.
- 2 Use the search engine to locate specific inventory templates or groups of templates.

The search results are shown on the screen in the **Search Results** table, which displays template details in various information columns.

- 3 Click the **Advanced Search** button to add filtering criteria to get more precise search results. In the **Advanced Inventory Search** dialog box, enter the available details and click **Search**. The search results are displayed.
- 4 Click the **Column Selection** button to open a dialog box that enables the user to configure which columns appear in the **Search Results** table. All available template attributes are listed in the dialog box. When an attribute is selected, the corresponding column appears in the table.
- 5 Click the **Excel Report** button to export inventory template information to an external Excel file.
- 6 Select a template in the **Search Results** table. The template details are displayed under the table. The template thumbnail displays the front page and orientation. The template can be previewed in low-resolution PDF format, and the template properties can be viewed and modified.
- 7 Click the **Edit Properties** button to view and modify the template properties. See [Template Activities](#) on page 44 for details.
- 8 Click the **Workflow Policy** button to view and modify the workflow, define mandatory actions and add input fields. See [Setting Workflow Policy](#) on page 45 for details.
- 9 Click the **MailToPrint** button to export the template information to an external HTML page. The page can be saved for future use or sent to a specific user by email, allowing the user to order the jobs directly. See [Setting MailToPrint Option](#) on page 46 for details.

# Variable Data Files

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

## Managing the Library

- 1 On the **Manage Templates** page, click **Assets** in the side menu.

The **Asset Management** screen opens. The list of all database files stored in the system is displayed.

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

- 2 Click **New** to open the **Upload Asset** dialog, which enables browsing and uploading new databases.
- 3 Click **Edit** to open the same dialog and enable uploading databases to replace existing ones.
- 4 Click **Delete** to delete a database file selected in the list.

## Database Features

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

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

# 6

## Account Administration

### Introduction

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

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

- **Account** - defines a general Print Buyer contact and address, and sets the default starting page for the account users logging on to the Print Buyer software application. See [General Account Settings](#) on page 68.
- **Users** - defines and manages account users and sets an individual starting page for each user logging on to the Print Buyer software application. See [Setting Account Users](#) on page 69.
- **User Groups** - creates user groups and assigns users to groups. See [Setting User Groups](#) on page 73.
- **Departments** - defines and manages departments in the Print Buyer organization. See [Setting Departments](#) on page 74.
- **Cost Centers** - defines and manages cost centers in the Print Buyer organization. See [Setting Cost Centers](#) on page 74.
- **Address Book** - handles the Print Buyer address book. See [Handling the Address Book](#) on page 77.
- **Email** - sets notifications to be sent by email when specific events take place at the Print Service Provider side. See [Setting Email Notifications](#) on page 76.

# General Account Settings

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

When you click on the **Manage Account** tab, the **Account** option is selected by default.

## General Contact Information

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

## Default Starting Page

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

## General Shipping and Billing Addresses

The **Shipping and Billing** page displays the shipping and billing addresses of the Print Buyer organization. The links access the address book, where new addresses can be entered or existing addresses can be chosen. For more information, see [Handling the Address Book](#) on page 77.

## Setting Account Users

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

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

## Managing Users

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



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

## Creating a New User

To create a new user:

- 1 Click the **Add** button under the list of users.  
The new user is created and appears in the list under the default name “New User”.  
The default user settings are displayed in the right pane.
- 2 In the **Contact Information** pane, replace the default name by editing the **FirstName** and **LastName** fields and enter all necessary user information.
- 3 Enter the user identification information in the **Login Name** and **Password** fields.
- 4 Choose an option from the **User Type** drop-down list to define which usage privileges are assigned to the user. See [User Types and Privileges](#) on page 71.

When you choose **User**, **Designer** or **Custom** user type, the **Approval Email Settings** link appears.

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



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

- 6 Click the **Assign** link to assign a cost center to the user.  
The **Cost Center Assignment** dialog box opens. All defined account cost centers are listed in the **Customer's Cost Centers** pane. See [Setting Cost Centers](#) on page 74 to create a list of cost centers.
  - a Select a cost center and click **Add**. The cost center is moved to the **User Assigned Cost Centers** pane and assigned to the user.
  - b Click **Add All** to assign to the user the account cost centers that are in the list at the moment.
  - c Select the **All Cost Centers** check box above the assignment area if you want also the all cost centers added in the future to be automatically assigned to the user.
  - d Use **Remove** and **Remove All** buttons to cancel assignments.
  - e Click **Close** to save assignments and return to the **Users** window.
- 7 From the **Department** drop-down list, choose the user's department. See [Setting Departments](#) on page 74 for creating a list of departments.
- 8 Enter information in the **IP Filter** field.
- 9 Click the **Edit Address** link under contact information fields to modify the user details and address. The user information is modified in the address book.
- 10 Save the settings or click **Revert** to discard the changes.

## User List Tools

The toolbar buttons enable the following operations:

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

The list of users is searchable:

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

## User Starting Page

- 1 From the **Order Jobs Page** drop-down list, choose the view of the starting page, displayed when this user logs on to the system:
  - To use the general account settings, choose **Use Customer Default**.  
See [Default Starting Page](#) on page 68 for default settings.
  - Choose the **Launch Pad** option to set the initial **Order Jobs** page to be viewed as a launch pad that provides different starting points for the job ordering.OR



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

- 2 If the initial **Order Jobs** page was set to template view, choose from the following options:
    - To use the general account settings, choose **Use Customer Default**.  
See [Default Starting Page](#) on page 68 for default settings.
    - Choose **Root Folder** to view the entire repository of templates.
    - Choose **Specific Folder** to view templates residing in a specific folder.  
When this option is selected, the **Folder** link appears, enabling selection of a folder to be viewed.
    - Choose **Catalog** to view a catalog on the initial **Order Jobs** page.  
The **User Catalog** drop-down box appears.
    - To use the general account settings, choose **Use Customer Default**.  
See [Default Starting Page](#) on page 68 for default settings.
- OR
- Choose another option to view another catalog on the starting page when the user logs on to the system.

## Shipping and Billing

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

- 1 Clear the check boxes above the addresses.
- 2 Use the address links to access the address book.  
For address book information see [Handling the Address Book](#) on page 77.
- 3 Select the user in the address book and click **Select**. The address on the screen is changed.
- 4 Save the settings or click **Revert** to discard the changes.

## User Types and Privileges

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

The default user types defined in the system are:

- **Admin** - Has full user privileges, including account administration. An administrator can design jobs, send jobs to the shopping cart and place orders. In addition, an Administrator is responsible for setting user privileges.
- **Supervisor** - Has privileges similar to those of an administrator but without access to account administration. The Supervisor can design jobs, send jobs to the shopping cart and place orders.
- **Designer** - Is responsible for designing jobs and creating templates.
- **Super User** - Creates jobs through the use of templates and can order jobs.
- **User** - Creates jobs through the use of templates but cannot directly order jobs.

## Account Administration

- **Guest** - New or occasional user. Can only create jobs based on templates supplied by the Print Service Provider for this purpose.
- **Custom** - By default, creates jobs through the use of templates but cannot order jobs.



The **Custom** option allows creating an additional user type with custom privileges.

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

Privilege	Assigned to						
	Administrator	Supervisor	Designer	Super User	User	Guest	Custom
Account administration	✓						
Manage template library	✓	✓	✓				
View jobs of other account users	✓	✓	✓				
Place an order/Get quote	✓	✓		✓			
Upload job content	✓	✓	✓				
Edit job properties	✓	✓	✓				
Use Form Editor	✓	✓	✓				
Use variable data	✓	✓	✓	✓	✓		✓
Use variable data archive	✓	✓	✓	✓	✓		✓
Send MailToPrint	✓	✓	✓				
Download plug-ins	✓	✓	✓				
View address book	✓	✓	✓	✓	✓	✓	✓
Edit contact details	✓	✓	✓	✓	✓	✓	✓



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

## Setting User Groups

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



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

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

## Creating a New Group

To create a new user group:

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

## Deleting a Group

To delete a group from the list in the **User Groups** pane:

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

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

## Setting Departments

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

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

- 1 To add a new department to the list, enter a name for the new department and click **Add**.

The new department appears in the list. When a department is added to the list, its name is added to the **Department** drop-down box on the user creation pane. See [Creating a New User](#) on page 69 for assigning users to departments. The number of users assigned to the department appears in the department row.

- 2 To rename a department, select it in the list and change the name that appears in the **Department Name** field. Click **Update**. The department is renamed.
- 3 To delete a department from the list, select it and click **Delete**. The users that were assigned to the department are not affected by the deletion.
- 4 Use the **Import** link to import a list of departments from an external file.
- 5 Use the **Export** link to export the list of defined departments to an external file.

## Setting Cost Centers

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

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

### Creating a New Cost Center

- 1 Click **Add** under the list of cost centers.  
The **Add Cost Center** dialog box opens.
- 2 Enter a name and a code number for the new cost center, and click **OK**.  
The new cost center appears in the list and is selected. The settings pane for the created cost center appears to the right. The cost center ID generated by the system is displayed.
- 3 Enter information in the detail fields.
- 4 Mark the **Enable Budget** check box to enable budget settings.  
The **Set Budget** button appears.
- 5 Click the button to open the **Set Cost Center Budget** dialog box.
- 6 Enter the total amount of money allocated to the specific cost center and click **OK**.  
The amount appears in the **Total** field.

- 7 Enter the budget name and minimum budget for the cost center.  
When the minimum is reached, the budget administrator receives a warning notice. See [Modifying a Cost Center Budget](#) below.
- 8 Enter the email address of the administrator to receive an automatically forwarded warning notification that the cost center budget has been exceeded.
- 9 Click **Update** to save the cost center settings.

## Modifying a Cost Center Budget

- 1 Select a cost center in the list.  
The previously set details and budget are displayed to the right.  
  
The total amount allocated to the cost center is displayed in the **Total** field. The remaining amount of budgeted money is displayed in the **Remaining Budget** field. The system-calculated amount of budgeted money already used by the selected cost center appears in the **Used Budget** field.
- 1 Mark the **Enable Budget** check box to enable changes to the cost center budget.  
The **Set Budget** button appears.
- 2 Click the button to open the **Set Cost Center Budget** dialog box.
- 3 Enter the total amount of money allocated to the cost center and click **OK**.  
The amounts displayed in the **Total** and **Remaining Budget** fields are reset.
- 4 Click **Update** to save changes made to the budget of the selected cost center.

# Setting Email Notifications

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

Sending notifications can be triggered by the following events:

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

To set the email notifications:

- 1 Go to **Manage Account** and select the **Email** option in the left menu.

The **Email** window opens, displaying the list of events. The **Use System Default Email Settings** check box is marked by default, and events in the list are selected according to the default settings.

- 2 Clear the check box to enable changes to the settings.
- 3 Mark a check box for an event and click the **Contacts** link in the event row.

A dialog box opens, which allows setting the email addresses of the sender and recipients.



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

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

## Handling the Address Book

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

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

## Managing Contacts

### Contact Display

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

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

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

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

### Searching for a Contact

To find a contact in the address book:

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

### Creating a New Contact

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



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

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

### Toolbar Activities

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

**Rename Address** - renames a contact selected in the list.

**Duplicate Address** - duplicates a contact selected in the list.

**Import Addresses** - imports contacts from an external database file.

**Export Addresses** - creates and exports the list of contacts to an external database file.

**Delete Address** - deletes a contact selected in the list.



# A

## Print Driver Configuration

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

Print Driver is supplied by the Print Service Provider and can be downloaded by using the **Software Downloads** control in the upper part of the screen. See [Main Interface Components](#) on page 4.

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

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



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

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

# Installing Print Driver

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

- [Prerequisites \(Windows Vista Only\)](#)
- [Installation on Macintosh, Windows 2000, 2003, XP, and Vista](#)

## Prerequisites (Windows Vista Only)

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

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

- 1 Click **Start > Control Panel**.
- 2 Type UAC into the **Search** input field; the **UAC** window appears.
- 3 Click the **Turn User Account (UAC) on or off** link; the corresponding dialog box appears.
- 4 Clear the **Use User Account Control (UAC) to help protect your computer** check box, and click **OK**.
- 5 Restart the computer to apply the changes.
- 6 Carry out the Print Driver installation.



Following the installation procedure, you can enable the UAC feature by selecting the **Use User Account Control (UAC) to help protect your computer** check box in the **Turn on User Account Control** dialog box.

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

To install the Print Driver:

- 1 Log in to FreeFlow Web Services and click **Software Downloads**; the **Software Downloads** dialog box appears.
- 2 Click the **Print Driver** link; the **Print Driver** dialog box appears.
- 3 Click **Continue**; the **Software License Agreement** dialog box appears.
- 4 Select the **I accept** check box and click **Continue**.

The Print Driver downloading dialog box is opened, and the **File Download** dialog box appears after several seconds.

- 5 Click **Run**.



If the **File Download** dialog box does not appear, right-click on the **Print Driver** link; the installer appears. Follow the installer instructions.

- If you are installing the Print Driver on a Macintosh computer, refer to the [Macintosh](#) section below.
- If you are installing the print driver under a Windows operating system, refer to the [Windows](#) section below.

### Macintosh

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

### Windows

- 1 Click **Next**; the **Customer Information** window appears.
- 2 Type the user name and organization name, respectively, and select one of the **Install this application** radio buttons.
- 3 Click **Next**; the **Setup Type** window appears.
- 4 Select a setup type and click **Next**; the **Ready to Install the Program** window appears.
- 5 Click **Install**; the Print Driver installation begins.
- 6 Click **Finish** to complete the process.

# Ordering Jobs through the Print Driver

To order a job through the Print Driver:

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

# Glossary

<b>Catalog</b>	A collection of templates containing job designs from which the Print Buyer can order ready-to-print jobs or create and order new jobs.
<b>Intent</b>	A set of properties of a print job.
<b>Job</b>	The entire material to be printed.
<b>Job Type</b>	An entity that is described by a set of basic job properties. Users create new jobs by uploading design files to a Job Type.
<b>Job Ticket</b>	A document that specifies the production and finishing materials and schedules as well as the delivery and pricing details.
<b>Output Device</b>	Any machine that produces printed material.
<b>PDF (Portable Document Format)</b>	A computer file format for publishing and distributing electronic documents (text, image, or multimedia) with the same layout, formatting, and font attributes as in the original; is widely used in commercial printing and on the Web.
<b>Personalized job</b>	A VI job that utilizes the ability to incorporate personal data with the job content and represents one personalized job instance. See Variable Data jobs for contrast.
<b>Print Buyer</b>	Any individual or organization that purchases printed material produced by a printing facility.
<b>Print Buyer Side</b>	FreeFlow Web Services is a system that provides an open line for communication between the Print Service Provider and the Print Buyer. The Print Buyer side refers to the FreeFlow Web Services interface that is viewed by the Print Buyer.
<b>Print Driver</b>	A feature that enables the users in the Print Buyer organization to print jobs directly from their DTP applications, utilizing the standard Print command.
<b>Print Service Provider</b>	Individual or organization that produces printed material.
<b>Process Colors</b>	The four basic colors of ink used in color printing (Cyan, Magenta, Yellow and Black).
<b>Run (length of run)</b>	The total number of job copies ordered.
<b>Selective Upload</b>	A feature that allows the Print Buyer to create variable fields in a PDF file of any static job. This functionality is used in creation of VI templates.
<b>Spot Colors</b>	Special, pre-mixed colors that are used in addition to process colors, or in conjunction with Black.

<b>Surcharge</b>	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 or Express time printing).
<b>Template</b>	A job file which has been saved in order to serve as the basis for the structure and general layout of future jobs.
<b>User</b>	Any individual in the Print Service Provider and Print Buyer organization who is working with the FreeFlow Web Services system.
<b>Variable Data job</b>	A VI job that utilizes the ability to incorporate multiple variable instances with the job content.
<b>Variable Information job</b>	A job incorporating variable fields with personal data or variable data.

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