Administration guide

PRISMAdirect

Configuration

océ

A CANON COMPANY

Canon

Production Systems - Cutsheet

Copyright

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US

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Software version

This documentation describes the functionality of PRISMAdirect v1.3.0.

Contents

Chapter 1
Login

[Login]

Introduction

Depending on the application configuration, it may be necessary to identify yourself. You have to enter your user name and password.

Procedure

1. Enter your user name.
2. Enter your password.
3. Select [Remember my user name and password.] to log on next time, without entering your user name and password.
   You have to accept cookies from this application to support this option.
4. Click [Log in].
   For easy access, you are advised to add this page to your personal bookmarks.

Chapter 2
Start using the application

Add, edit or delete

Introduction

Action icons become available when you hover the mouse pointer over the concerning item.

Action	Description
New	Click the plus icon to add an item, e.g. a user or cost center. The icon appears when you hover the mouse pointer over the item.
Edit	Click the pencil icon to edit an item, e.g. a user or cost center. The icon appears when you hover the mouse pointer over the item.
Delete	Click the delete icon to delete an item, e.g. a user or cost center. The icon appears when you hover the mouse pointer over the item.

Chapter 3

Procedures

Introduction

This chapter contains complete procedures to configure PRISMAdirect. The following chapters describe the configuration for each separate dialog.

Configure the payment workflow

Introduction

The payment providers offer a payment service for your users. When you select one or more payment providers, each user can pay for their orders directly. You have to configure the payment workflow in three locations in workspace [Configuration]:

1. [System] - [Connectivity]
   Enable payment for the system. Then, you can select which payment providers are available for the system.
   Configure the authentication to the SQL server instance. The system creates a payment report per payment provider on the SQL server when the authentication is correct.
   The payment report is stored in the accounting database on the SQL server. You do not have to enable the accounting functionality to create and access the payment report. The accounting functionality and the payment report can be enabled independently.
2. [System] - [Web submission]
   You have to configure the payment providers for each web server once the payment service is enabled.
3. [Web shop]
   You have to enable the payment service for each web shop where you want to offer the payment service.

This topic describes the complete payment workflow.

Procedure

1. **Enable payment for the system**
   1. Click [System] - [Connectivity] - [Payment providers].
   2. Enable option [Use payment providers] to enable payment for the system.
   3. Select which payment providers will be available for the system.
   4. Configure the credentials for the SQL server to create a payment report and store it on the SQL server. You can create a payment report per payment provider.
      You can also configure the credentials for the SQL server in [Accounting and reporting]. Click [Accounting and reporting] - [Accounting] - [Accounting workflow]. When you change the settings in [Accounting and reporting], the settings will also change in this dialog and vice versa.
      1. Define the [Computer name \ instance name:].
         With this option, you define where the accounting database is stored. For example: SQL_server_name\SQL_server_instance_name.
      2. You have to define how the [Order processing] connects to the accounting database.

Setting	Description
[Windows authentication]	The current Windows user information is used for the authentication. The user is not prompted for a user name and password.
[SQL authentication]	The user must type a user name and password for the SQL server.

NOTE
The payment report can be collected when the user has system administration rights on the accounting database.

      3. Click the [Test connection] button.
         Click this button to test the connection to the defined server.
   5. Click [Save].
2. **Configure payment providers**

1. Click [System] - [Web submission] - <web server> - [Payment providers].
   You can configure the [Payment providers] for each web server.
2. Option [Use payment providers]
   - Enabled:
     The users can pay for their orders directly. You can enable one or more payment providers. For example: PayPal.
   - Disabled:
     The users cannot pay for their orders directly.
     You can disable the payment providers in this dialog when your Web server has no Internet access. For example, your company uses a local area network. The user does not receive an "unable to connect" message from the payment provider.
3. Configure each payment provider.
   For example, you can define the setting [API username], et cetera when you use the PayPal API. PayPal delivers these settings to you when you create a merchant account in PayPal.
4. Click [Save].

3. Enable payment per web shop

1. Click [Web shop] - <web shop> - [Pricing] - [Payment].
2. Enable the [Enable payment] option. Customers have to pay their orders before they can submit their orders via the web shop.
   You can customise this setting for one or more user groups. See: [User management] - [User groups] - [User group settings]. The custom setting overrules the web shop setting for the user group. The custom setting is used in all web shops for the concerning user group.
3. Click [Save].

Configure the file hosting providers

Introduction

The file hosting providers provide an Internet hosting service specifically designed to host user files. When you enable file hosting providers, the users can add files from the hosting service - the "cloud" - to their job. Both the print room operator and the customers are users that can use the file hosting providers.

This topic describes the entire workflow for the file hosting providers.

Make sure that the JDD service user has Internet access. See [Advanced infrastructure] in [System].

Procedure

1. You have to enable the file hosting providers for the application.
   Click [System] - [Connectivity] - [File hosting providers].
2. Enable the [Use file hosting providers] option in the [Global settings] section.
   - Enabled
     The user can select files from file hosting providers. You can select which file hosting providers are available for the user. For example: Dropbox.
   - Disabled
     The user cannot select files from file hosting providers.
3. You have to enable the file hosting providers for [Order processing] and the web servers. In other words, enable the selected file hosting providers for both the print room operator and the customers.
   You can customise this setting for one or more user groups. See: [User management] - [User groups] - [User group settings]. The custom setting overrules the web shop setting for the user group. The custom setting is used in all web shops for the corresponding user group.
   - Enabled
     1. [Cache settings]:
        You can store the data of the file hosting providers within a cache. If requested data is contained in the cache, the request can be served by simply reading the cache, which is comparatively faster. Otherwise, the data has to be fetched from its original storage location, which is comparatively slower.
        You must define the [cache size] and the [cache folder].

        NOTE
        The JDD service user must have the permission "Full Control" over the cache folder.
     2. Section [File hosting providers]
        You can configure the file hosting providers. For example, you can define the [Consumer Key] and the [Consumer Secret] when you use the Dropbox API.

     The user can select files from file hosting providers.
   - Disabled
     The user cannot select files from file hosting providers.
4. Click [Save].

Configure the shipping workflow

Introduction

You can offer a shipping service to your customers. When you select one or more shipping providers, each customer can request shipment of an order via the web shop. You have to configure the shipping workflow in three locations in workspace [Configuration]:

1. [System] - [Connectivity]
   Configure the default shipping settings for the system. You can configure some of these settings differently for the web shops. For example, you have three web shops. You have enabled shipping on system level. Now, you can enable or disable shipping for each web shop.
2. [System] - [Web submission]
   You can enable and configure one or more shipping providers for each web server once shipping is enabled for the system.
3. [Web shop]
   You have to enable the shipping service for each web shop where you want to offer shipping. You have to select one or more shipping formulas for each web shop.

This topic describes the complete shipping workflow.

Procedure

1. **Configure the general shipping settings**
   1. You have to enable the shipment providers for the system.
      Click [System] - [Connectivity] - [Shipping] - [General settings].
   2. Option [Use shipping providers]:
      - Enabled
        The customer can request shipment of an order. You can select which shipment providers are available for the customer. For example: FedEx.
      - Disabled
        The customer cannot request shipment of an order.
   3. Select which shipment providers are available for the customer. For example: FedEx.
   4. You can type a message to the customer for each provider.
      Click a language to type a default message to the customer in that language. The available languages are displayed just above the text field. The available languages are equal to the active languages for the system. See: [System] - [Active languages for system].
      Most providers offer a link that customers can click to track their package. If a provider does not offer such a link, then you can type the web site of the shipment provider in the message. For example: Go to shipmentprovider.com to track your order.
   5. Click [Save].
2. **Configure the default shipping label**
   1. Click [System] - [Connectivity] - [Shipping] - [Default label].
   2. You can use variables from the order ticket to create the shipment label. This allows you to use dynamic information in the label. You can use variables from the list of [Order items] and/or the [Pickup address]. Drag and drop the variable into the label at the desired position. A variable is indicated by '%' symbols. You can also type fixed text in the label.
   3. Define the font settings for the label.
   4. Enable the [Print logo in label] option to print the logo in the job ticket.
      1. Click button [Browse] to select an image.
         The allowed image file types are: .bmp, .jpg, .gif, .png.
         Click [Clear] to remove a selected image.
      2. Select the position for the logo from the drop-down list.
      3. [Scale logo to page size]

You can scale the logo to the page size. Enable the [Keep ratio] option to use the same relation between width and height for the logo as for the page size. You have to define the width [%] for the image.
5. Click button [Preview] to preview the shipment label.
6. Click [Save].

3. **Type the default pickup address**
   1. Click [System] - [Connectivity] - [Origin address].
   2. Type all address information in the concerning text fields.
      The values in the text fields will not be validated in this dialog. The values will be validated when the operator requests a shipment in the [Order processing] workspace. The selected shipment provider returns an error message if any of the values are incorrect. For example, the zip code is incorrect or the provider is not active in the specified country.
   3. Click [Save].
4. **Configure shipping providers**
   1. Click [System] - [Web submission] - <web server> - [Shipping providers].
      You can configure the [Shipping providers] for each web server.
   2. Option [Use shipping providers]
      - Enabled:
        The users can request shipment of their orders. You can enable one or more shipping providers. For example: FedEx.
      - Disabled:
        The users cannot request shipment of their orders.
   3. Enable the shipping providers that you want to make available to the print room. For example: FedEx.
      The customer can only select whether or not to ship an order. The operator can select which shipping provider will ship the order.
   4. Configure the shipping providers.
      For example, you can define the setting User key, et cetera when you use the FedEx API. Each shipping provider delivers the required settings to you when you create an account.
   5. Click [Save].
5. **Configure shipping per web shop**
   1. Click [Web shop] - <web shop> - [Pricing] - [Shipping].
   2. Enable the [Enable shipping] option.
      The customer can request shipment of an order via the web shop.
      You can customise this setting for one or more user groups. See: [User management] - [User groups] - [User group settings]. The custom setting overrules the web shop setting for the user group. The custom setting is used in all web shops for the corresponding user group.
   3. Click [Add].
      You can configure one or more delivery times and assign shipping formulas to the each delivery time.
      1. Configure the maximum time to deliver an order. The shorter the delivery time, the higher the postage.
         You can type a value in the text field. Or you can click the arrow buttons to increase or decrease the value.
      2. Assign a shipping formula to the delivery time. Select a formula from the drop-down list.
      3. Do this for each delivery time.
   4. Click [Save].
      The customer can choose one of the configured delivery times in the web shop.
6. **Type the pickup address of the web shop**
   1. Click [Web shop] - <web shop> - [Contact information] - [Origin address].
   2. [Use default origin address]
      - Enabled
        The web shop uses the default pickup address. See: [System] - [Connectivity] - [Shipping] - [Origin address].

- Disabled
  You can type the pickup address for your web shop.

3. Type all address information in the concerning text fields.
   The values in the text fields will not be validated in this dialog. The values will be validated when the operator requests a shipment in the [Order processing] workspace. The selected shipment provider returns an error message if any of the values are incorrect. For example, the zip code is incorrect or the provider is not active in the specified country.
4. Click [Save].

7. **Shipping formulas**
   You have to create the shipping formulas based on agreements with each shipping provider.
   1. Click [Price and formula editor] - [Formulas] - [Shipping formulas for orders].

Configure the tax services workflow

Introduction

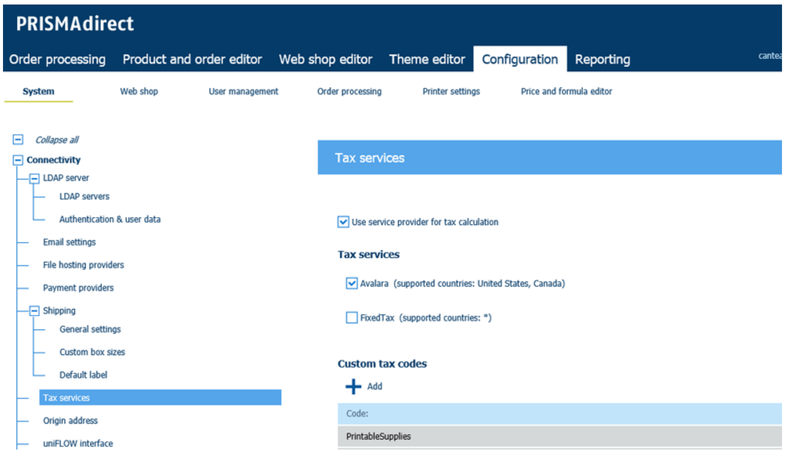
The tax service calculates the sales taxes for the orders. You have to configure the tax services workflow in the following locations in workspace [Configuration]:

1. [System] - [Connectivity]
   Configure which tax services are available for the system.
2. [System] - [Web submission]
   You have to configure the tax services for each web server once tax services are enabled for the system.
3. [Web shop]
   - [Origin address]
     The tax service requires the pickup address of the print room and the delivery address of the customer.
   - [Price estimation]
     The order price must be calculated first before the sales tax can be calculated.
   - [Tax calculation]
     You can select one tax service per web shop.

This topic describes the complete tax services workflow.

Procedure

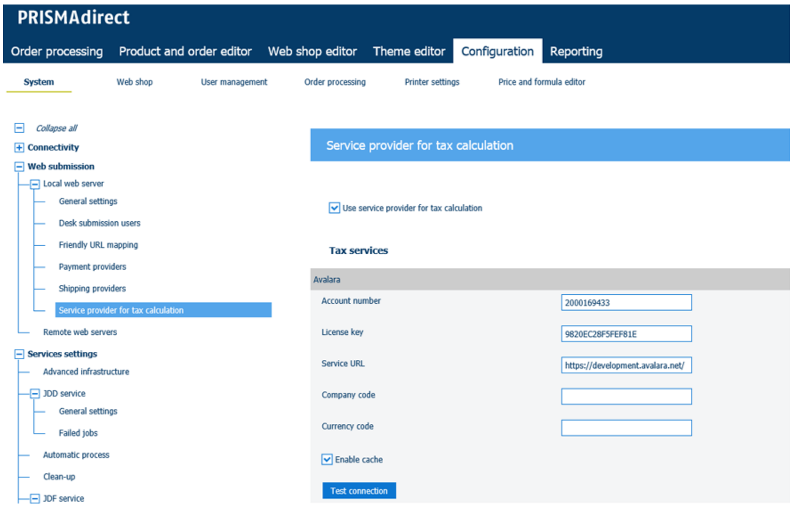
1. **Enable tax services for the system**
   1. Click [System] - [Connectivity] - [Tax services].
   2. Enable option Use tax services to enable sales tax calculation for the system.[Use service provider for tax calculation]
   3. Select which tax services will be available for the system.
   4. Click [Save].



2. **Configure the tax services**
   1. Click [System] - [Web submission] - <web server> - [Service provider for tax calculation].
      You can configure the [Tax services] for each web server.
   2. Option [Use service provider for tax calculation]
      - Enabled:
        The tax service calculates the sales taxes for the orders.
      - Disabled:
        The system cannot calculate the sales taxes.

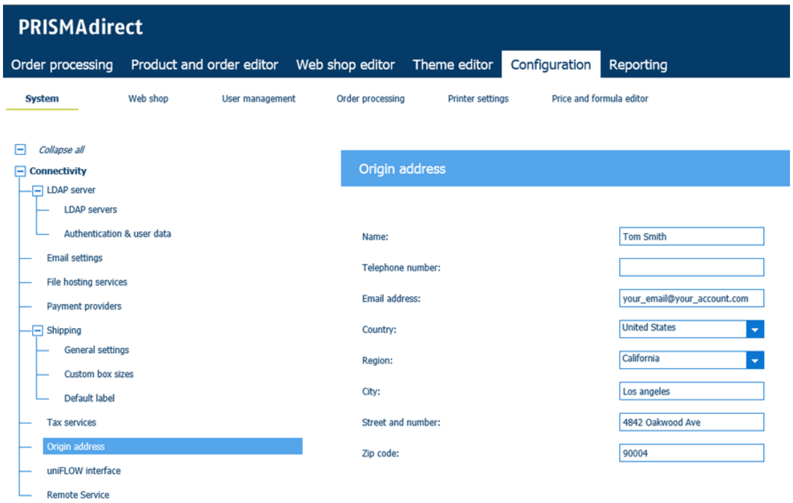
You can disable the tax services in this dialogue when your Web server has no Internet access. For example, your company uses a local area network. The user does not receive an "unable to connect" message.

3. Configure each tax service.
   For example, you can define the setting Account number, et cetera when you use the Avalara API. Avalara delivers these settings to you when you create a merchant account.
4. Click [Save].



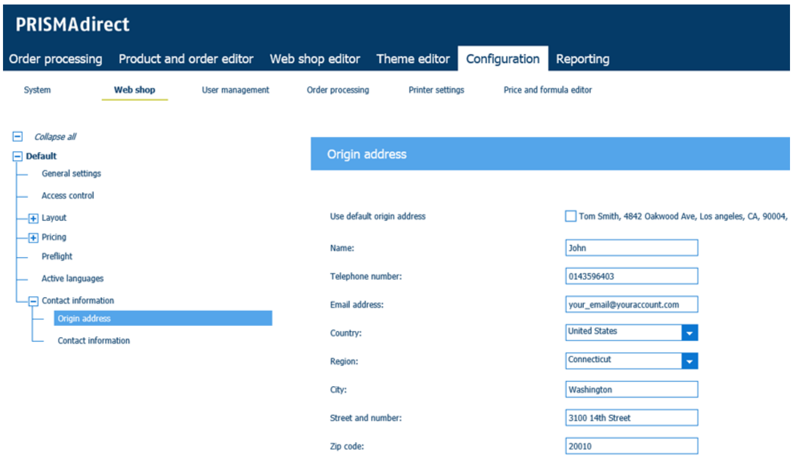
3. Type the default pickup address

1. Click [System] - [Connectivity] - [Origin address].
2. Type all address information in the concerning text fields.
3. Click [Save].

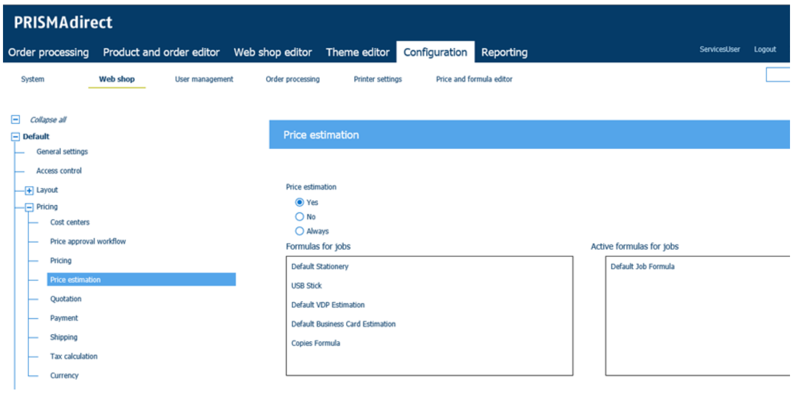


4. Configure the tax calculation for each web shop

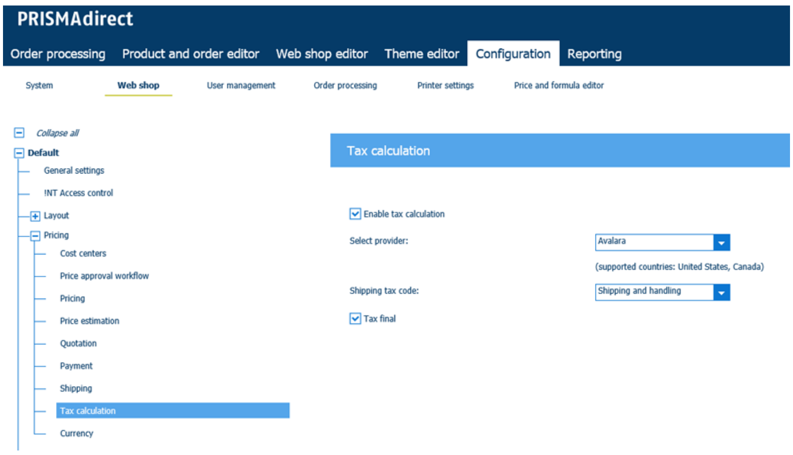
1. Click [Web shop] - <web shop> - [Contact information] - [Origin address].
   You have to configure the pickup address of the web shop if you want to use the tax service.



2. Click [Web shop] - <web shop> - [Pricing] - [Price estimation].
   You have to enable price estimation if you want to use the tax service.



3. Click [Web shop] - <web shop> - [Pricing] - [Tax calculation].
4. Enable the [Enable tax calculation] option.
5. Select a tax service from the drop-down list.
   The tax service calculates the sales taxes for the orders.



6. Click [Save].

Configure the self-registration workflow

Introduction

You have to configure self-registration for each web shop. The scenario to enable self-registration is:

1. For each web shop:
   - Configure if users are allowed to create an account for Web Submission via self-registration.
   - Configure if each account is activated automatically or manually.
2. For accounts that must be activated manually:
   You can activate or deactivate any self-registered user accounts.

This topic describes the complete self-registration workflow.

Procedure

1. **Allow self-registration per web shop**
   1. Click [Web shop] - <web shop> - [Access] - [General settings].
   2. [Allow self-registration]
      Customers can create their own accounts when you enable this option. The link [Create an account] appears in the login screen of the Web Submission.
   3. [Use CAPTCHA]
      Customers have to type the displayed alphanumerical characters while creating an account.
   4. [The system administrator must activate all new self-registered user accounts.]
      - True
        The system administrator receives an email when a user has created a new account via self-registration. The system administrator must activate each account manually.
        Type the email address for the system administrator.
      - False
        All new user accounts are activated automatically.
        Once an account is activated, you can manage the concerning user in workspace [User management]. You can add the user to a user group, assign a cost center, etc.
   5. Click [Save].
2. **Activate self-registered users**
   1. Click [User management] - [Users] - [Self-registered users].
   2. Select which new accounts you want to activate.
   3. Click [Save].
      The application sends an email to each user whose account is activated.
      Once an account is activated, you can manage the corresponding user in workspace [User management]. You can add the user to a user group, assign a cost center, etc.

Configure the languages

Introduction

You can select which languages must be active for the system. Then, you can configure which languages are available for the customers. You have to configure this for each web shop. You have to configure the languages in the following locations in workspace [Configuration]:

1. [System]
   Select the active languages for the system.
   A language link will become available in the components of the system, e.g. the [Order processing]. The user can change the display language via the language link.
2. [Web shop]
   Configure which of the system languages are available per web shop.
3. [Web shop]
   Allow customers to change the language of the web shop.
4. [Web shop]
   Select the language of the logon page of the web shop.

This topic describes how you can select the active languages for the system and the web shops.

Procedure

1. **Select the active languages for the system**
   1. Click [System] - [Active languages for system]
   2. Enable all languages that you want to offer to your users.
      By default, the installation language is enabled.
   3. Click [Save].
2. **Allow customers to change the language of the web shop**
   1. [Allow the customer to change the language]
      Enable this option to allow a user to change the language of the Web Submission.
      If this option is disabled, Web submission is displayed in the installation language and the user is not able to change the language.
   2. Click [Save].
3. **Select the language of the logon page of the web shop**
   1. Click [Web shop] - <web shop> - [Layout] - [Layout].
   2. [Language]
      Select the language of the Web Submission logon page.
   3. Click [Save].
4. **Select the active languages for the web shop**
   1. Click [Web shop] - <web shop> - [Active languages].
   2. Select the default language of the web shop from the drop-down list.
   3. Enable all languages that you want to offer to your customers.
   4. Click [Save].

Configure the preflight workflow

Introduction

A preflight operation is a quality check of your document. You can configure the application to automatically preflight a PDF file when:
- The operator generates a proof PDF in the order processing console.
- The customer adds a file to an order in the web shop.

The preflight operation checks if any rules are violated in the PDF file(s). You can configure most of the rules. You can configure some rules to detect and fix a violation. Other rules can only be configured to detect a violation. These violations can only be solved manually in the concerning PDF file by the customer or the operator. The operation generates a preflight report and an annotated file. The preflight report shows a summary of the problems that have been found and fixed.

You have to configure the preflight settings in the following locations in workspace [Configuration]:
1. [Order processing]
   You have to configure the preflight rules for the [Order processing] workspace.
2. [Web shop]
   You can configure the preflight settings for each web shop. These settings will also be used when you create an order for this web shop in the [Order processing].
3. [System]
   You can configure the number of preflight processes that can run in parallel.
4. You can attach the preflight report to emails to your customer. To configure the email templates, go to: [Order processing] - [Workflow configuration] - [Email templates].

This topic describes how you can configure the preflight settings for each web shop.

Procedure

1. **Configure the preflight rules for the workspace [Configuration]**
   1. Click [Order processing] - [Preflight].
   2. Click the following rules to configure the rules.
      You can configure some rules to detect and fix a violation. Other rules can only be configured to detect a violation. These violations can only be solved in the concerning PDF file by the customer or the operator.
      - [PDF actions and scripting rule:]
      - [Content too close to border rule:]
      - [Embedded fonts rule:]
      - [Hairline rule:]
      - [Image compression is too high rule:]
      - [Image resolution is too high rule:]
      - [Image resolution is too low rule:]

      You can only enable or disable the following rules. The preflight operation cannot fix these violations. These violations can only be solved manually in the concerning PDF file by the customer or the operator.
      - [Restricted permissions rule:]
      - [Transparency rule:]
      - [Overprint rule:]
   3. Enable or disable each rule in the [Enabled] column.
   4. Define the [Severity] of each rule.
      - [Warning]
        A violation of the rule is detected. You can ignore the warning.

- [Error]
  A violation of the rule is detected. The violation of the rule must be fixed.
5. You can define a timeout. The value is the timeout value in minutes.
   When the timeout value is exceeded, the preflight operation is canceled.
6. [Enable automatic preflight]
   When you enable this option, the application preflights each PDF file that the customer adds to an order in the web shop. When the customer adds a non-PDF file, then the file must be converted to PDF first before the preflight operation can start.
   When you disable this option, the submitted files of the customer cannot be preflighted in the web shop. The files can only be preflighted when the operator generates a proof PDF in the order processing console.
   You can customize this setting for one or more user groups. See: [User management] - [User groups] - [User group settings]. The custom settings overrule the web shop settings for the user group. The custom settings are used in all web shops for the concerning user group.
7. Click [Save].

2. Configure the preflight rules for each web shop

1. Click [Web shop] - <web shop> - [Preflight].
2. Click the following rules to configure the rules.
   You can configure some rules to detect and fix a violation. Other rules can only be configured to detect a violation. These violations can only be solved in the concerning PDF file by the customer or the operator.
   - [PDF actions and scripting rule:]
   - [Content too close to border rule:]
   - [Embedded fonts rule:]
   - [Hairline rule:]
   - [Image compression is too high rule:]
   - [Image resolution is too high rule:]
   - [Image resolution is too low rule:]

   You can only enable or disable the following rules. The preflight operation cannot fix these violations. These violations can only be solved manually in the concerning PDF file by the customer or the operator.
   - [Restricted permissions rule:]
   - [Transparency rule:]
   - [Overprint rule:]
3. Enable or disable each rule in the [Enabled] column.
4. Define the [Severity] of each rule.
   - [Warning]
     A violation of the rule is detected. You can ignore the warning.
   - [Error]
     A violation of the rule is detected. The violation of the rule must be fixed.
5. You can define a timeout. The value is the timeout value in minutes.
   When the timeout value is exceeded, the preflight operation is canceled.
6. [Enable automatic preflight]
   When you enable this option, the application preflights each PDF file that the customer adds to an order in the web shop. When the customer adds a non-PDF file, then the file must be converted to PDF first before the preflight operation can start.
   When you disable this option, the submitted files of the customer cannot be preflighted in the web shop. The files can only be preflighted when the operator generates a proof PDF in the order processing console.
   You can customize this setting for one or more user groups. See: [User management] - [User groups] - [User group settings]. The custom settings overrule the web shop settings for the user group. The custom settings are used in all web shops for the concerning user group.
7. Click [Save].

3. **Configure the number of preflight processes that can run in parallel**
    1. Click [System] - [Services] - [Services settings] - [Automatic process].
    2. Set the number of preflight processes.
       It is recommended that you define the same number of preflight processes as you have web shops for which option [Enable automatic preflight] is enabled.
       The number of processes can impact the performance of the application.
    3. Click [Save].

Configure the email workflow

Introduction

You have to configure the email settings in three locations in workspace [Configuration]:

1. [System]
   You have to configure the email settings and the SMTP server of the print room.
2. [Order processing]
   - You can allow the operator to attach additional files to the default email messages to the customer.
   - You can create default email messages.

This topic describes the complete email workflow.

Procedure

1. **Configure the SMTP server of the print room and the email settings**
   1. Click [System] - [Connectivity] - [Email settings].
   2. Type the email address of the print room.
      When you type a different email address for a web shop, then this email address is overwritten.
   3. Type the name that will be used in the 'From' field of the email message. For example: 'Print room'.
   4. Type any Cc addresses.
   5. The operator can add or remove email addresses from the 'Cc' field when you enable option [Allow the operator to add Cc addresses].
   6. [SMTP server:]
      1. Type the address and the port number of your email server.
         Ask your IT department for details. Only SMTP mail servers are supported. The range for the port number is: 0 to 64000.
      2. Click the [Test connection] button to test the connection to the [SMTP server:].
      3. [SMTP server authentication:]
         Some SMTP servers require that the sender is authenticated before the server sends e-mail on its behalf. The sender is authenticated using the credentials of the currently logged on user. If this option is set to false, then email is sent to the server anonymously. The value for this option depends on how the client has configured the SMTP server.

Setting	Description
[Anonymous]	Select this value if no authentication is required for your SMTP server.
[Custom authentication]	Type a valid PRISMAdirect user and its password. You can use the [Test connection] button to check the entered cre-dentials.

   7. [Send emails from server]
      Choose whether the e-mails are sent directly from the [Order processing] or from the server. This can be important because of virus scanners, strict policy and firewall rules in place on the different PCs.
   8. Click [Save].
2. Create default email messages for all stages of the order workflow.
   1. Click [Order processing] - [Workflow configuration] - [Email templates].
   2. Select the email template that you want to configure.

3. You can change the subject of the email message.
   You can change the default email message for each available language. The languages are enabled in [Active languages for system] in the [System] component.
   Click [Revert to default] to use the default email message again. Your changes will be discarded.
4. Your email message can contain variables from the job ticket. This allows you to send a dynamic message, containing job-specific information. You can use variables from the list of order items and/or the product items. You can use the product items only in text field [Job information (per job):]. Drag and drop the variable into the message at the desired position. A variable is enclosed by '%' symbols.
   You can include a hyperlink to the order in your email. Drag and drop [Hyperlink to order] into the message. When the customer clicks the hyperlink, a web page opens that contains the concerning order.
5. You can configure which files are automatically attached to the email message.
   - Select option [Attach the document] to attach the final PDF document to the email message.
   - Select the [Attach the job ticket] option to attach the job ticket to the email message.
   - Select the [Attach the preflight report] option to attach the preflight report to the email message.

   NOTE
   The operator can attach additional files to an email message when the [Allow operator to attach files when sending email.] option is enabled. See [Other settings] in the [Workflow configuration] dialog.
6. Click [Save].
7. Repeat these steps for all email templates.

3. Allow the operator to attach additional files to the default email messages.

1. [Allow operator to attach files when sending email.]
   You can define the email templates in section [Email templates]. In that section, you can define which files will be attached to the emails by default. When you enable this option, you can allow the operator to attach additional files to the email messages to the customer.
2. Click [Save].

Configure the VDP workflow

Introduction

The VDP functionality is available in the PRISMA Core. The PRISMA Core is installed on the server. Therefore, all actions and validations concerning the VDP functionality are executed on the server. Jobs are created via the Web Submission and the Order processing. These applications must have access to the server when they are installed on separate computers. The Order processing and the Web server connect to the server via the port for the Print Prepare Manager service.

You have to configure the VDP functionality in two locations in workspace [Configuration]:
1. [Print Prepare Manager service]in [System]
   The Order processing and the Web server connect to the server via the port for the Print Prepare Manager service. These applications must have access to the server to use the VDP functionality.
2. [VDP settings]in [System]
   Define the maximum number of pages of a variable data document shown in the [Preview] or [Proof PDF].

Procedure

1. **Define the port for the Print Prepare Manager service.**
   1. Click [System] - [Services] - [Services settings] - [Print Prepare Manager service].
   2. Define the port for the Print Prepare Manager service.
      The port for the Print Prepare Manager service must be accessible from the Order processing and the Web server.
   3. Click [Save].
2. **Configure the preview of a variable data document.**
   1. Click [Order processing] - [General settings] - [General settings].
   2. Define the maximum number of pages of a variable data document shown in the [Preview] or [Proof PDF]. The maximum value for this option is 2000 pages.
      A high number of pages can decrease the performance of the application.
   3. Click [Save].

Configure the budget management workflow

Introduction

You can manage the budgets for users and user groups. You have to create one or more cost centers for each web shop. You have to assign a budget to each cost center. Then, you can assign one or more users and user groups to each cost center. For the assigned users the order prices are deducted from the budget. You can set a maximum price for an order for each user or user group. In this case, an approver has to accept or reject the order when the price exceeds the maximum price.

You have to configure the cost centers in two locations in workspace [Configuration]:
1. [Web shop]
   You have to create one or more cost centers for each web shop.
2. [User management]
   You can assign one or more users and user groups to each cost center.

You have to configure the price approval workflow in two locations in workspace [Configuration]:
1. [Web shop]
   You can define the default price approval settings for each web shop.
2. [User management]
   You can define custom price approval settings for users and user groups. The custom settings overwrite the default price settings for each web shop.

Alternatively, you can setup an interface between the PRISMAdirect server and the uniFLOW server. The uniFLOW server then manages the cost centers and the price approval workflow. See *Setup the uniFLOW interface* on page 59

NOTE
The cost centers and the price approval workflow are part of the budget management workflow. When the payment workflow is enabled, then the budget management workflow is disabled.

You can assign one or more cost centers to a user group for each web shop.

Procedure

1. **Create one or more cost centers for each web shop.**
   1. Click [Web shop] - <web shop> - [Pricing] - [Cost centers].
      You have to configure the cost centers for each web shop.
   2. Click the plus icon to add a cost center. An empty cost center is created.
      Click the pencil icon to edit the cost center. The cost center is expanded.
   3. Edit the caption. The caption is the displayed name of the cost center.
      You can use the characters: 'a - z', 'A - Z', '0 - 9', '_' . Spaces are allowed for the caption.
   4. Type a description for the cost center.
   5. Define the email address of the approver for this cost center. When you add more than one email address, you must use a semicolon to separate the addresses.
      The approver receives an email when the spent budget exceeds the specified threshold.
   6. Define the available budget for the cost center.
   7. [Send warning at threshold [%]:]
      Define a percentage of the available budget. The approver receives an email when the spent budget exceeds the specified threshold. The approver can increase or decrease the available budget, or reset the spent budget.
      The email message is predefined but it can be changed. It can be changed from the [Workflow configuration], in the section [Email templates].

   8. [Use cost center one level down:]
      For example, you can create a top level cost center which contains the total budget. Then you create a cost center per department. The cost center for each department uses part of the total budget. When you enable this option for the top level cost center, then users can only select one of the departmental cost centers.
   9. Select the default cost center.
      When multiple cost centres are assigned to a user, the default cost center is selected for that user in the web shop. Customers can always select another cost centers in the web shop.
   10. Click [Save].

2. **Define the default price approval settings for each web shop.**
   1. Click [Web shop] - <web shop> - [Pricing] - [Price approval workflow].
      You have to configure the default price approval settings for each web shop.
   2. Click [New level].
      Define a maximum price for the current level. You can type a value in the spinbox for the budget.
   3. Define the email address of the approver for the current level. When you add more than one email address, you must use a semicolon to separate the addresses.
      The approver receives an email when the order price exceeds the maximum price for the current level. The approver of the current level must approve or reject the order. If the price exceeds the maximum price of the next level, an approver of that level must also approve or reject the order.

      NOTE
      The approver for level 1 can forward the approval form to the approver for level 2.

   4. Click button [New level] to define a maximum price for the new level. The maximum price of the new level must be higher than the maximum price of the previous level.
   5. [Allow an approver to accept on behalf of higher level approvers.]
      When you enable this option, each approver can always accept or reject an order, regardless of the price.
   6. [Motivation to approve price]
      Click a language to type a default motivation to approve the price in that language. The available languages are displayed just above the text field. The customer can edit the motivation when the order price exceeds the maximum price for level 1.
   7. Click [Save].
3. **Assign one or more users to each cost center.**
   1. Click [User management] - [Users] - [Cost centers] - <web shop>.
      You have to configure the cost centers for each web shop.
   2. Select a user.
      The available cost centres for the user appear.
   3. Click the checkbox to assign a cost center to the user. The checkbox appears when you hover the mouse pointer over a cost center.
      You can assign multiple cost centres to the user. The cost centers are added to the [Assigned cost centers].
      - Click the view icon to view the configuration of the cost center. The icon appears when you hover the mouse pointer over a cost center.
   4. Deselect the cost centers that you want to remove for the user in section [Available cost centers].
      Or you can click the delete icon in section [Assigned cost centers]. The icon appears when you hover the mouse pointer over a cost center.
   5. Click [Save].
4. **You can define custom price approval settings for users. The custom settings overwrite the default price settings for each web shop.**

   1. Click [User management] - [Users] - [Price approval workflow] - <web shop>.
      You have to configure the price approval settings for each web shop.
   2. Select a user.
      The price approval settings for the user appear.
   3. Click [New level].
      Define a maximum price for the current level. You can type a value in the spinbox for the budget.
   4. Define the email address of the approver for the current level. When you add more than one email address, you must use a semicolon to separate the addresses.
      The approver receives an email when the order price exceeds the maximum price for the current level. The approver of the current level must approve or reject the order. If the price exceeds the maximum price of the next level, an approver of that level must also approve or reject the order.

      NOTE
      The approver for level 1 can forward the approval form to the approver for level 2.

   5. Click button [New level] to define a maximum price for the new level. The maximum price of the new level must be higher than the maximum price of the previous level.
   6. [Allow an approver to accept on behalf of higher level approvers.]
      When you enable this option, each approver can always accept or reject an order, regardless of the price.
   7. Click [Save].
5. **Assign one or more user groups to each cost center.**
   1. Click [User management] - [User groups] - [Cost centers] - <web shop>.
      You have to configure the cost centers for each web shop.
   2. Select a user group.
      The available cost centers for the user group appear.
   3. Click the checkbox to assign a cost center to the user group. The checkbox appears when you hover the mouse pointer over a cost center.
      You can assign multiple cost centers to the user group. The cost centers are added to the [Assigned cost centers].
      - Click the view icon to view the configuration of the cost center. The icon appears when you hover the mouse pointer over a cost center.
   4. Deselect the cost centers that you want to remove for the user group in section [Available cost centers].
      Or you can click the delete icon in section [Assigned cost centers]. The icon appears when you hover the mouse pointer over a cost center.
   5. Click [Save].
6. **You can define custom price approval settings for user groups. The custom settings overwrite the default price settings for each web shop.**
   1. Click [User management] - [User groups] - [Price approval workflow] - <web shop>.
      You have to configure the price approval settings for each web shop.
   2. Select a user group.
      The price approval settings for the user group appear.
   3. Click [New level].
      Define a maximum price for the current level. You can type a value in the spinbox for the budget.
   4. Define the email address of the approver for the current level. When you add more than one email address, you must use a semicolon to separate the addresses.
      The approver receives an email when the order price exceeds the maximum price for the current level. The approver of the current level must approve or reject the order. If the price exceeds the maximum price of the next level, an approver of that level must also approve or reject the order.

NOTE
The approver for level 1 can forward the approval form to the approver for level 2.

5. Click button [New level] to define a maximum price for the new level. The maximum price of the new level must be higher than the maximum price of the previous level.
6. [Allow an approver to accept on behalf of higher level approvers.]
   When you enable this option, each approver can always accept or reject an order, regardless of the price.
7. Click [Save].

Configure the prices for media, printing, and finishing

Introduction

You have to configure the prices in the following locations in workspace [Configuration]:

1. [Price and formula editor]
   You have to configure the prices for the system.
   You have to configure the prices for media, printing and finishing options. You can configure the prices for choice items that you want to use in formulas. You have to configure the prices for stationery products. When you have configured the prices, you can create formulas for jobs and for orders.
2. [Web shop]
   When the prices are configured for the system, you can configure the prices for each web shop. The prices for a web shop overrule the settings for the system.

All items for media, printing and finishing are defined in and retrieved from the [Product and order editor]. This is also true for the choice items.

Procedure

1. **Configure the prices for the system.**
   1. Click [Price and formula editor] - [Pricing].
   2. Click [Prices for media].
   3. Define values for all options in the dialog. You can type a value in the text field. Or you can click the arrow buttons to increase or decrease the value.
   4. Click [Save].
   5. Do the same for:
      - [Prices for printing]
      - [Prices for finishing]
2. **You can configure the prices for each web shop. The prices for a web shop overrule the settings for the system.**
   1. Check that the default prices are configured.
      Click [Price and formula editor] - [Pricing].
   2. Configure if the default prices must be increased or decreased for each web shop.
      Click [Web shop] - <web shop> - [Pricing] - [Pricing].
   3. Define percentages for all options in the dialogue. You can type a percentage in the text field. Or you can click the arrow buttons to increase or decrease the percentage. Define if the percentage must be added or subtracted for each option.
   4. Click [Save].

Configure the default price estimation settings

Introduction

You can define the default price estimation settings for the web shop.

You can define the price settings for and assign formulas to:

- Product
  Select a product in the [Product and order editor] workspace. You can define the [Price estimation] and [Quotation] settings for each product. The product settings overrule the user group and the web shop settings.
- User groups
  You can customize the [Price estimation] and [Quotation] settings for each user group. The custom settings overrule the web shop settings for the user group. The custom settings are used in all web shops for the corresponding user group.
- Each web shop
  You can define the [Price estimation] and [Quotation] settings for each web shop.

The jobs created with a product will use the following price settings and formulas:

1. If a formula is assigned to the product, then this formula is used.
2. Otherwise, the formula and price settings assigned to the user group are used.
3. If no formulas are assigned to the product or user group, then the formulas and price settings assigned to the web shop are used.

Procedure

1. **Define the [Price estimation] and [Quotation] settings for each product.**
   Select a product in the [Product and order editor] workspace. You can define the [Price estimation] and [Quotation] settings for each product. The product settings overrule the user group and the web shop settings.
2. **You can customize the [Price estimation] and [Quotation] settings for each user group.**
   You can customize the [Price estimation] and [Quotation] settings for each user group. The custom settings overrule the web shop settings for the user group. The custom settings are used in all web shops for the concerning user group. See *Add or edit a user group* on page 136.
3. **Define the [Price estimation] and [Quotation] settings for each web shop.**
   1. Click [Web shop] - <web shop> - [Pricing] - [Price estimation].
   2. [Price estimation]
      - [Yes]
        The [Price estimation] option is available in Web Submission. A user is always presented with an estimation of the job cost.
      - [No]
        The [Price estimation] option is not available in Web Submission. A user is never presented with an estimation of the job cost.
      - [Always]
        A user is always presented with an estimation of the job cost. The user cannot submit the job until the cost of the job is estimated.
   3. [Select formulas]
      Drag and drop the available formulas to the active formulas. Do this for both the jobs and the orders.
   4. Click [Save].

Configure the default quotation settings

Introduction

You can define the default quotation settings for the web shop. The operator calculates and sends the quotation to the customer. A license is required to use the quotation functionality.

You can define the price settings for and assign formulas to:
- Product
  Select a product in the [Product and order editor] workspace. You can define the [Price estimation] and [Quotation] settings for each product. The product settings overrule the user group and the web shop settings.
- User groups
  You can customize the [Price estimation] and [Quotation] settings for each user group. The custom settings overrule the web shop settings for the user group. The custom settings are used in all web shops for the corresponding user group.
- Each web shop
  You can define the [Price estimation] and [Quotation] settings for each web shop.

The jobs created with a product will use the following price settings and formulas:
1. If a formula is assigned to the product, then this formula is used.
2. Otherwise, the formula and price settings assigned to the user group are used.
3. If no formulas are assigned to the product or user group, then the formulas and price settings assigned to the web shop are used.

Procedure

1. **Define the [Price estimation] and [Quotation] settings for each product.**
   Select a product in the [Product and order editor] workspace. You can define the [Price estimation] and [Quotation] settings for each product. The product settings overrule the user group and the web shop settings.
2. **You can customize the [Price estimation] and [Quotation] settings for each user group.**
   You can customize the [Price estimation] and [Quotation] settings for each user group. The custom settings overrule the web shop settings for the user group. The custom settings are used in all web shops for the corresponding user group. See *Add or edit a user group* on page 136.
3. **Define the [Price estimation] and [Quotation] settings for each web shop.**
   1. Click [Web shop] - <web shop> - [Pricing] - [Quotation].
   2. [Quotation]
      - [Yes]
        The [Quotation] option is available in Web Submission. A user can request a quotation.
      - [No]
        The [Quotation] option is not available in Web Submission. A user cannot request a quotation.
      - [Always]
        A user is always presented with a quotation. The user cannot disable the request to calculate a quotation.
   3. [Price can be accepted on behalf of the customer:]
      Enable this option to allow the operator to accept the quotation on behalf of the customer. Disable this option to force the customer to accept or reject the quotation.
   4. [An order can be printed only after the price is calculated.]
      Enable this option to force the operator to always calculate the quotation. The quotation must be calculated for a correct budget control.
   5. [Formula for job:]
      You have to select a formula to calculate the quotations of the jobs.

6. [Formula for order:]
   You have to select a formula to calculate the quotations of the orders.
7. Click [Save].

Chapter 4
System

Connectivity

LDAP server

Add an LDAP server

Introduction

You can use LDAP servers for authentication and to retrieve user data.

Procedure

1. Click [System] - [Connectivity] - [LDAP server] - [LDAP servers].
2. Click [Add] or [Edit] to open the [Edit LDAP server settings] dialog.
   When you add a new LDAP server you have to configure the LDAP server settings.
3. You can configure the LDAP server(s) in this dialogue.

Setting	Description
[Domain name for LDAP server:]	You can define a custom name for the LDAP server. The custom name must be unique. NOTE An LDAP server can be used for Windows authentication of users.
[Credentials policy:]	The credentials policy defines which credentials are used by the JDF Framework service to connect to the LDAP server. You can select one of the following credential policies: • [Use the credentials of the currently logged on user] These are the credentials that are stored in the global settings of the LDAP server. These credentials are used for each connected LDAP server. These credentials are not defined in the application by the user. [Use the credentials of the currently logged on user] is the default value for the drop-down list. This value can always be used for each LDAP server. • [Use the credentials which are stored on the LDAP server] These are the credentials that you define in [LDAP server user name:] and [LDAP user password:]. • [Use the credentials of the Windows user who runs the JDF Framework service] You can select this credential policy only for Secure-based authentication types. This credential policy supports Integrated Windows Authentication (IWA) only. These credentials are defined by the user during the installation of the application. The Windows user can be DocWorker, a local user, or a selected domain user. You can identify the Windows user who runs the JDF Framework in the Services dialogue of Microsoft Windows: .\JdfFramework: local user .\DocWorker: DocWorker Secure authentication type

Setting	Description
[LDAP server user name:]	You must supply a user name and password to retrieve information from the LDAP server. This option becomes available when you select value [Use the credentials which are stored on the LDAP server] in option [Credentials policy:].
[LDAP user password:]	You must supply a user name and password to retrieve information from the LDAP server. This option becomes available when you select value [Use the credentials which are stored on the LDAP server] in option [Credentials policy:].
[Server address:]	You must define the address of the LDAP server. If you define only the address of the LDAP server, the users are searched through the entire LDAP server. You can also define the server address and the search root. When you define the server address and the search root, the search for users starts at the defined root on the server. For example: LDAP://sro.company.net:389/DC=sro,DC=company,DC=net, where: • sro.company.net The address of the domain controller. • 389 The port which is used to connect to the LDAP server. The default port number for a non-secure connection is 389. The default port number for a secure connection is 636. • DC=sro,DC=company,DC=net The path to search for users in the active directory tree on the LDAP server.
[Server type:]	Select a server type. The server types which start with “Native…” are preferred. The other server types are available for backwards compatibility.
[Use secure connection (SSL)]	Select this option if you want to create a secure connection to the LDAP server. You must update the port number in option [Server address:] when you want to use a secure connection. The default port number for a non-secure connection is 389. The default port number for a secure connection is 636. To be able to select this option, the LDAP server has to support this.
[User filter:]	A default user filter is created automatically when the LDAP server is used for authentication or to retrieve user data. Only users that pass the filter can be imported from the LDAP server. You can edit the filter. The minimum filter is the LDAP attribute for user name, for example: (sAMAccountName=%u). The user filter must contain "%u" as placeholder for the user name. The minimum filter will always work, but it is not time efficient. The filter must be updated when the [LDAP attribute for user name:] is changed.

Setting	Description
[LDAP attribute for user name:]	You can define the LDAP attribute that contains the user name. The default LDAP attribute is used for the user name if this field is left empty. The default LDAP attribute depends on the server type.
[User group filter:]	A default user group filter is created automatically when the LDAP server is used for authentication or to retrieve user data. Only user groups that pass the filter can be imported from the LDAP server. You can edit the filter. The minimum filter is the LDAP attribute for group name, for example: (cn=%g). The user group filter must contain "%g" as placeholder for the user group name. The minimum filter will always work, but it is not time efficient. The filter must be updated when the [LDAP attribute for group name:] is changed.
[LDAP attribute for group name:]	You can define the LDAP attribute that contains the group name. The default LDAP attribute is used for the group name if this field is left empty. The default LDAP attribute depends on the server type.

4. [Authentication used to connect to LDAP server:]
   You can define the type of authentication which the application uses to connect to the LDAP server. See *Authentication types* on page 45
5. [Authentication used to connect user to the LDAP server:]
   You can define the type of authentication which the application uses to authenticate a user on the LDAP server. See *Authentication types* on page 45
6. Allow automatic creation of users:
   Every user who logs on to the application with an [LDAP server user name:] and an [LDAP user password:] is created automatically.
   The [User type] of an automatically created user becomes:
   - [Windows user] if the user is authenticated via Windows authentication.
   - [LDAP user] if the user is authenticated via custom authentication.

   An automatically created user belongs to the group of [Customers].
   The users in the [Customers] group can access the [Web Submission].
7. Type an LDAP attribute for each enabled profile attribute.
   You can map information that is available within the LDAP server to the [Profile settings] of the customers. When the LDAP server is used to retrieve user data, the profile attributes receive the value of the mapped LDAP attribute. The [Profile settings] of the customers then automatically receive the data from the LDAP server.
   - If the LDAP attribute contains a value, the associated profile attribute is filled in. The customer cannot change the profile attribute.
   - If the LDAP attribute does not contain a value, the associated profile attribute is left empty. The customer must define the value of the profile attribute.
   - If you deselect a profile attribute, the user can change the value of the profile attribute.

   The LDAP attributes may not be present in all the LDAP servers or might not contain relevant information.
8. You can map LDAP attributes to job ticket items. When the LDAP server is used to retrieve user data, the job ticket items receive the value of the mapped LDAP attribute.
   1. Click [Add].
   2. Select a job ticket item from the drop-down list.
   3. Type the LDAP attribute that contains the information that you want to use for the job ticket item.
   4. Do this for all job ticket items that you want to map to LDAP attributes.

9. Click [Save].

Authentication types

Introduction

You can define the type of authentication which the application uses to connect to the LDAP server. And you can define the type of authentication which the application uses to authenticate a user on the LDAP server. Authentication types can be combined with an optimization, e.g. NoneAndServerBind. This authentication type can be combined with the ServerBind optimization.

- The authentication types are described in the table "Authentication types".
- The optimizations for the authentication types are described in the table "Authentication optimizations".

NOTE
In LDAP "authentication" is called "bind".

Authentication types

Authentication type	Description
None	None means a simple bind to the server using plain text credentials. A simple bind is the only binding mechanism defined in the LDAP specification itself. None has a high compatibility across LDAP server vendors. WARNING: this authentication is NOT SECURE because plain text credentials are used. Possible usage: All server types, but this authentication type is not recommended.
NoneAndServerBind	This is the None authentication type combined with the ServerBind optimisation. WARNING: this authentication is NOT SECURE because plain text credentials are used. Possible usage: ActiveDirectory, but this authentication type is not recommended.
NoneAndFastServerBind	This is the None authentication type combined with ServerBind and FastBind optimizations. WARNING: this authentication is NOT SECURE because plain text credentials are used. Possible usage: ActiveDirectory, but this authentication type is not recommended.
Anonymous	Anonymous means that no authentication is done. Most LDAP servers do not allow anonymous access by default, or give a very restrictive access to the server. Possible usage: All server types, but this authentication type is not recommended.
AnonymousAndServerBind	This is the Anonymous authentication type combined with the ServerBind optimisation. Possible usage: ActiveDirectory, but this authentication type is not recommended.

Authentication type	Description
AnonymousAndFastServerBind	This is the Anonymous authentication type combined with ServerBind and FastBind optimizations. Possible usage: ActiveDirectory, but this authentication type is not recommended.
Secure	Secure is the Windows authentication method, which relies on the Windows Security Support Provider Interface (SSPI). The SSPI usually selects the Windows Negotiate protocol with Kerberos or NTLM authentication. Secure supports both explicit credentials and Integrated Windows Authentication (IWA). WARNING: ActiveDirectoryFastDelegationSecureBinding is preferred for better security over Secure. Possible usage: ActiveDirectory, NativeADS, NativeLDAP with a Windows-based LDAP Server.
FastSecureBinding	This is the Secure authentication type combined with the FastBind optimisation. WARNING: ActiveDirectoryFastDelegationSecureBinding is preferred for better security over FastSecureBinding. Possible usage: ActiveDirectory, NativeADS.
SecureSocketLayer	SecureSocketLayer means that a TLS/SSL communication channel is used to encrypt all the network traffic. The encryption includes the bind and exchange of credentials. This is the recommended setting for most LDAP servers, when security must be guaranteed without using the Windows authentication and security mechanisms. However, the setup is complex because SecureSocketLayer requires that the server has a valid server certificate installed. And the client must trust the Certificate Authority (CA) which issued the server certificate. The analysis of SecureSocketLayer problems can be complex: • For ADSI-based connectors: Any SecureSocketLayer-related problems are reported in the Windows System Event log. If the server certificate is invalid, the SecureSocketLayer connection will fail. • For non-ADSI-based connectors: Any SecureSocketLayer-related problems are reported in the dialogue that appears after you click button [Test connection]. If the server certificate is invalid, a warning is reported but the SecureSocketLayer connection will succeed. Possible usage: SunDirectoryServer, NativeLDAP, NativeADS. This authentication type is recommended.

Authentication type	Description
FastSecureSocketLayer	This is the SecureSocketLayer authentication type combined with the FastBind optimisation for ADSI-based connectors, or FastConcurrentBinding optimisation for non-ADSI connectors. Possible usage: SunDirectoryServer, NativeLDAP, NativeADS. This authentication type is recommended.
ActiveDirectoryFastSecureBinding	This is the Secure authentication type combined with the Sealing, Signing and FastBind optimization. The users are authenticated against ActiveDirectory servers. Possible usage: ActiveDirectory, NativeADS.
ActiveDirectoryFastDelegationSecureBinding	This is the Secure authentication type combined with the Sealing, Signing, Delegation, and FastBind optimization. The users are authenticated against ActiveDirectory servers. Possible usage: ActiveDirectory, NativeADS. This authentication type is recommended for ActiveDirectory.
Basic	Basic means a simple bind to the server using plain text credentials. This authentication type is very similar to None. WARNING: this authentication is NOT SECURE because plain text credentials are used. Possible usage: All server types, but this authentication type is not recommended.
BasicWithFastConcurrentBinding	This is the Basic authentication type combined with the FastConcurrentBinding optimisation. WARNING: this authentication is NOT SECURE because plain text credentials are used. Possible usage: All server types, but this authentication type is not recommended.
BasicWithFastConcurrentBindingAndSSL	This is the Basic authentication type combined with the FastConcurrentBinding optimization and a SecureSocketLayer communication channel. Possible usage: NativeLDAP. This authentication type is recommended.
Negotiate	This is the Windows Negotiate authentication, which means the same as Secure authentication. Negotiate results in Kerberos or NTML authentication. Possible usage: ADAM and NativeLDAP connectors against a Windows-based LDAP server.
Kerberos	The Kerberos authentication is almost the same as Secure authentication. Kerberos results in Kerberos authentication. WARNING: Negotiate is preferred over Kerberos. Possible usage: ADAM and NativeLDAP connectors against a Windows-based LDAP server.

Authentication type	Description
NTML	The NTML authentication is almost the same as Secure authentication. NTML results in NTML authentication. WARNING: Negotiate is preferred over NTML. Possible usage: ADAM and NativeLDAP connectors against a Windows-based LDAP server.
Digest	This is the Windows Digest Access authentication. Possible usage: ADAM and NativeLDAP connectors against a Windows-based LDAP server.

Authentication optimizations

- The authentication types are described in the table "Authentication types".
- The optimizations for the authentication types are described in the table "Authentication optimizations".

Authentication optimizations	Description
ServerBind	With optimization ServerBind, only the server which is specified in the connection URL is addressed. It is usually safe to use ServerBind for most LDAP servers and for ActiveDirectory when the specific domain controller is addressed. Failover servers for ActiveDirectory are not addressed.
FastBind	With FastBind optimization, the objectClass attribute on the server is not used. This increases the performance. Optimization FastBind is only valid for ADSI-based connectors, such as ActiveDirectory or NativeADS.
FastConcurrentBinding	With optimization FastConcurrentBinding no security token is created. This increases the performance when only user authentication is needed. Optimization FastConcurrentBinding is only valid for non-ADSI based connectors, such as ADAM, NativeLDAP, SunDirectoryServer.
SecureSocketLayer	With option SecureSocketLayer, a TLS/SSL communication channel is created to encrypt all network traffic.
Sealing	Optimization Sealing activates additional encryption capabilities of SSPI.
Signing	Optimization Signing activates additional data integrity checking capabilities of SSPI.
Delegation	Optimization Delegation activates the ability of using the Windows security context across domains.

Test the connection

Introduction

The connection status of each LDAP server is displayed in column [Status].

- Green dot:
  The connection to the LDAP server is established.
- Orange dot:
  The connection to the LDAP server is not checked or the connection is being checked.
  After a reboot of the system, the dots are orange. Click [Test connection] to update the state of each LDAP server.
- Red dot:
  The connection to the LDAP server cannot be established. Check the settings of the LDAP server.

Procedure

1. Click [System] - [Connectivity] - [LDAP server] - [LDAP servers].
2. Click [Test connection] to test the connection to the selected LDAP server. The connection status of each LDAP server is displayed in column [Status].
   The following checks are done :
   - Connect + bind to the server using the 4 settings you have specified;
   - Read of RootDSE;
   - Probe for a user entry to enumerate user attributes;
   - Probe for a group entry to enumerate group attributes.

Authentication & retrieve user data

Introduction

The [Authentication & user data] dialog displays the LDAP servers which are available to the application. The application searches for LDAP servers in the local network and domain during the start up of the application.

The LDAP servers can be added to two different lists:
- [Servers used for authentication:]
  The first LDAP server in the list is used for the authentication of a user. If the user cannot be authenticated by the first server, then the second server is used, etc.
  User data can be collected from each server in this list.
- [Servers used to retrieve user data:]
  The servers in this list are only used to retrieve user data that is available on an LDAP server. The retrieved user data is filled in automatically in the mapped profile attributes and the mapped job ticket items.

Procedure

1. Click [System] - [Connectivity] - [LDAP server] - [Authentication & user data].
2. You can drag and drop the available LDAP servers into field [Servers used for authentication:] or field [Servers used to retrieve user data:].
3. You can drag and drop the servers to set the correct order of the LDAP servers.
4. Click [Save].

Refresh the LDAP information

Click [Refresh] to refresh the generic info about the LDAP, users and groups part of that LDAP.

PRISMAdirect stores some information about each LDAP locally. The information regards generic info about the LDAP, users and groups part of that LDAP. In order for it to be in sync with the real information, a service synchronizes this information automatically once a day, at midnight. If you want to synchronize this information manually, you have to use the [Refresh] functionality which starts an update of the information stored for all the LDAP servers.

1. Click [System] - [Connectivity] - [LDAP server] - [LDAP servers].
   The connection status of each LDAP server is displayed in column [Status].
   - Green dot:
     The connection to the LDAP server is established.
   - Orange dot:
     The connection to the LDAP server is not checked or the connection is being checked.

     NOTE
     After a reboot of the system, the dots are orange. Click [Test connection] to update the state of each LDAP server.
   - Red dot:
     The connection to the LDAP server cannot be established. Check the settings of the LDAP server.

Configure the email settings

Introduction

You have to configure the email settings and the SMTP server of the print room.

You have to configure the email settings in three locations in workspace [Configuration]:
1. [System]
   You have to configure the email settings and the SMTP server of the print room.
2. [Order processing]
   - You can allow the operator to attach additional files to the default email messages to the customer. See *Configure the other settings* on page 155
   - You can create default email messages. See *Configure the email templates* on page 157

1. Click [System] - [Connectivity] - [Email settings].
2. Type the email address of the print room.
   When you type a different email address for a web shop, then this email address is overwritten.
3. Type the name that will be used in the 'From' field of the email message. For example: 'Print room'.
4. Type any Cc addresses.
5. The operator can add or remove email addresses from the 'Cc' field when you enable option [Allow the operator to add Cc addresses].
6. [SMTP server:]
   1. Type the address and the port number of your email server.
      Ask your IT department for details. Only SMTP mail servers are supported. The range for the port number is: 0 to 64000.
   2. Click the [Test connection] button to test the connection to the [SMTP server:].
   3. [SMTP server authentication:]
      Some SMTP servers require that the sender is authenticated before the server sends e-mail on its behalf. The sender is authenticated using the credentials of the currently logged on user. If this option is set to false, then email is sent to the server anonymously. The value for this option depends on how the client has configured the SMTP server.

Setting	Description
[Anonymous]	Select this value if no authentication is required for your SMTP server.
[Custom authentication]	Type a valid PRISMAdirect user and its password. You can use the [Test connection] button to check the entered credentials.

7. [Send emails from server]
   Choose whether the e-mails are sent directly from the [Order processing] or from the server. This can be important because of virus scanners, strict policy and firewall rules in place on the different PCs.
8. Click [Save].

Configure the file hosting providers

Introduction

The file hosting providers provide an Internet hosting service specifically designed to host user files. When you enable file hosting providers, the users can add files from the hosting service - the "cloud" - to their job. Both the print room operator and the customers are users that can use the file hosting providers.

This topic describes the entire workflow for the file hosting providers.

Make sure that the JDD service user has Internet access. See [Advanced infrastructure] in [System].

Procedure

1. You have to enable the file hosting providers for the application.
   Click [System] - [Connectivity] - [File hosting providers].
2. Enable the [Use file hosting providers] option in the [Global settings] section.
   - Enabled
     The user can select files from file hosting providers. You can select which file hosting providers are available for the user. For example: Dropbox.
   - Disabled
     The user cannot select files from file hosting providers.
3. You have to enable the file hosting providers for [Order processing] and the web servers. In other words, enable the selected file hosting providers for both the print room operator and the customers.
   You can customise this setting for one or more user groups. See: [User management] - [User groups] - [User group settings]. The custom setting overrules the web shop setting for the user group. The custom setting is used in all web shops for the corresponding user group.
   - Enabled
     1. [Cache settings]:
        You can store the data of the file hosting providers within a cache. If requested data is contained in the cache, the request can be served by simply reading the cache, which is comparatively faster. Otherwise, the data has to be fetched from its original storage location, which is comparatively slower.
        You must define the [cache size] and the [cache folder].

        NOTE
        The JDD service user must have the permission "Full Control" over the cache folder.

     2. Section [File hosting providers]
        You can configure the file hosting providers. For example, you can define the [Consumer Key] and the [Consumer Secret] when you use the Dropbox API.

     The user can select files from file hosting providers.
   - Disabled
     The user cannot select files from file hosting providers.
4. Click [Save].

Enable payment for the system

Introduction

The payment providers offer a payment service for your users. When you select one or more payment providers, each user can pay for their orders directly. You have to configure the payment workflow in three locations in workspace [Configuration]:

1. [System] - [Connectivity]
   Enable payment for the system. Then, you can select which payment providers are available for the system.
   Configure the authentication to the SQL server instance. The system creates a payment report per payment provider on the SQL server when the authentication is correct.
   The payment report is stored in the accounting database on the SQL server. You do not have to enable the accounting functionality to create and access the payment report. The accounting functionality and the payment report can be enabled independently.
2. [System] - [Web submission]
   You have to configure the payment providers for each web server once the payment service is enabled. See *Configure payment providers* on page 65.
3. [Web shop]
   You have to enable the payment service for each web shop where you want to offer the payment service. See *Enable payment* on page 117.

This topic describes how you can enable payment for the system. You can also create a payment report and store it on the SQL server.

Procedure

1. Click [System] - [Connectivity] - [Payment providers].
2. Enable option [Use payment providers] to enable payment for the system.
3. Select which payment providers will be available for the system.
4. Configure the credentials for the SQL server to create a payment report and store it on the SQL server. You can create a payment report per payment provider.
   You can also configure the credentials for the SQL server in [Accounting and reporting]. Click [Accounting and reporting] - [Accounting] - [Accounting workflow]. When you change the settings in [Accounting and reporting], the settings will also change in this dialog and vice versa.
   1. Define the [Computer name \ instance name:].
      With this option, you define where the accounting database is stored. For example: SQL_server_name\SQL_server_instance_name.
   2. You have to define how the [Order processing] connects to the accounting database.

Setting	Description
[Windows authentication]	The current Windows user information is used for the authentication. The user is not prompted for a user name and password.
[SQL authentication]	The user must type a user name and password for the SQL server.

   NOTE
   The payment report can be collected when the user has system administration rights on the accounting database.

   3. Click the [Test connection] button.
      Click this button to test the connection to the defined server.
5. Click [Save].

Type the default pickup address

Introduction

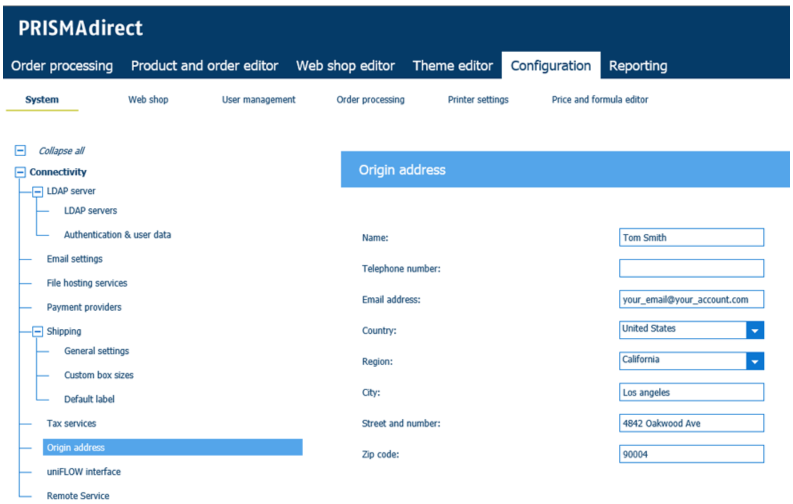
This topic describes how you can define the default pickup address. Usually, this is the address of your print shop. The shipment provider collects the packages at this address. The tax service requires the pickup address of the print room and the delivery address of the customer. You can define a unique pickup address for each web shop. See: [Web shop] - <web shop> - [Origin address].

You can offer a shipping service to your customers. When you select one or more shipping providers, each customer can request shipment of an order via the web shop. You have to configure the shipping workflow in three locations in workspace [Configuration]:

1. [System] - [Connectivity]
   Configure the default shipping settings for the system. You can configure some of these settings differently for the web shops. For example, you have three web shops. You have enabled shipping on system level. Now, you can enable or disable shipping for each web shop.
   See: *Configure the general shipping settings* on page 56 and *Configure the default shipping label* on page 57.
2. [System] - [Web submission]
   You can enable and configure one or more shipping providers for each web server once shipping is enabled for the system. See: *Configure shipping providers* on page 66.
3. [Web shop]
   You have to enable the shipping service for each web shop where you want to offer shipping. You have to select one or more shipping formulas for each web shop. See *Configure shipping* on page 118

Procedure

1. Click [System] - [Connectivity] - [Origin address].
2. Type all address information in the concerning text fields.
   The values in the text fields will not be validated in this dialog. The values will be validated when the operator requests a shipment in the [Order processing] workspace. The selected shipment provider returns an error message if any of the values are incorrect. For example, the zip code is incorrect or the provider is not active in the specified country.
3. Click [Save].



Shipping

Configure the general shipping settings

Introduction

You can offer a shipping service to your customers. When you select one or more shipping providers, each customer can request shipment of an order via the web shop. You have to configure the shipping workflow in three locations in workspace [Configuration]:

1. [System] - [Connectivity]
   Configure the default shipping settings for the system. You can configure some of these settings differently for the web shops. For example, you have three web shops. You have enabled shipping on system level. Now, you can enable or disable shipping for each web shop.
   See: *Configure the default shipping label* on page 57 and *Type the default pickup address* on page 55.
2. [System] - [Web submission]
   You can enable and configure one or more shipping providers for each web server once shipping is enabled for the system. See: *Configure shipping providers* on page 66.
3. [Web shop]
   You have to enable the shipping service for each web shop where you want to offer shipping. You have to select one or more shipping formulas for each web shop. See *Configure shipping* on page 118 and *Type the pickup address* on page 125.

This topic describes how you can enable one or more shipping providers for the system.

Procedure

1. You have to enable the shipment providers for the system.
   Click [System] - [Connectivity] - [Shipping] - [General settings].
2. Option [Use shipping providers]:
   - Enabled
     The customer can request shipment of an order. You can select which shipment providers are available for the customer. For example: FedEx.
   - Disabled
     The customer cannot request shipment of an order.
3. Select which shipment providers are available for the customer. For example: FedEx.
4. You can type a message to the customer for each provider.
   Click a language to type a default message to the customer in that language. The available languages are displayed just above the text field. The available languages are equal to the active languages for the system. See: [System] - [Active languages for system].
   Most providers offer a link that customers can click to track their package. If a provider does not offer such a link, then you can type the web site of the shipment provider in the message. For example: Go to shipmentprovider.com to track your order.
5. Click [Save].

Configure the default shipping label

Introduction

You can offer a shipping service to your customers. When you select one or more shipping providers, each customer can request shipment of an order via the web shop. You have to configure the shipping workflow in three locations in workspace [Configuration]:

1. [System] - [Connectivity]
   Configure the default shipping settings for the system. You can configure some of these settings differently for the web shops. For example, you have three web shops. You have enabled shipping on system level. Now, you can enable or disable shipping for each web shop.
   See: *Configure the general shipping settings* on page 56 and *Type the default pickup address* on page 55.
2. [System] - [Web submission]
   You can enable and configure one or more shipping providers for each web server once shipping is enabled for the system. See: *Configure shipping providers* on page 66.
3. [Web shop]
   You have to enable the shipping service for each web shop where you want to offer shipping. You have to select one or more shipping formulas for each web shop. See *Configure shipping* on page 118 and *Type the pickup address* on page 125.

The application delivers the pickup address, the delivery address, etc to the shipping provider when the operator clicks [Dispatch] in the [Order processing] workspace. The shipping provider returns a shipping label containing the addresses, barcode, etc. The operator can print the shipping label and paste it to the package.

This topic describes how you can configure the default shipping label for those shipping providers that do not return a shipping label. The label only contains the information that you configure in this dialogue.

Procedure

1. Click [System] - [Connectivity] - [Shipping] - [Default label].
2. You can use variables from the order ticket to create the shipment label. This allows you to use dynamic information in the label. You can use variables from the list of [Order items] and/or the [Pickup address]. Drag and drop the variable into the label at the desired position. A variable is indicated by '%' symbols. You can also type fixed text in the label.
3. Define the font settings for the label.
4. Enable the [Print logo in label] option to print the logo in the job ticket.
   1. Click button [Browse] to select an image.
      The allowed image file types are: .bmp, .jpg, .gif, .png.
      Click [Clear] to remove a selected image.
   2. Select the position for the logo from the drop-down list.
   3. [Scale logo to page size]
      You can scale the logo to the page size. Enable the [Keep ratio] option to use the same relation between width and height for the logo as for the page size. You have to define the width [%] for the image.
5. Click button [Preview] to preview the shipment label.
6. Click [Save].

Enable tax services for the system

Introduction

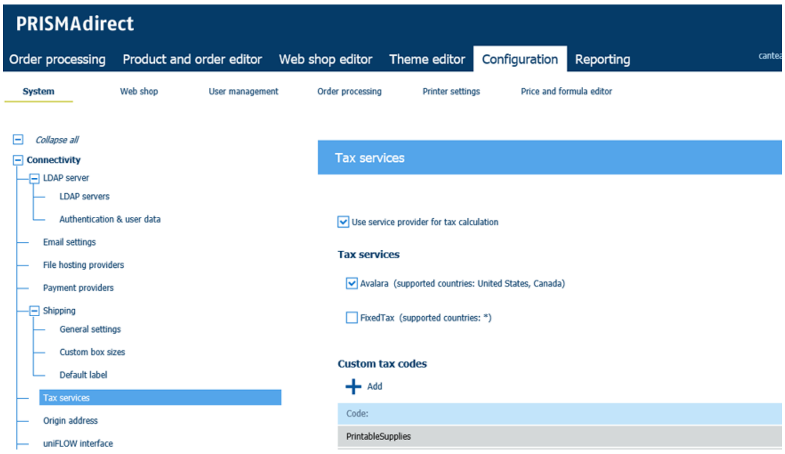
The tax service calculates the sales taxes for the orders. You have to configure the tax services workflow in the following locations in workspace [Configuration]:

1. [System] - [Connectivity]
   Configure which tax services are available for the system. See *Enable tax services for the system* on page 58 and *Type the default pickup address* on page 55.
2. [System] - [Web submission]
   You have to configure the tax services for each web server once tax services are enabled for the system. See *Configure the tax services* on page 67
3. [Web shop]
   - [Origin address]
     The tax service requires the pickup address of the print room and the delivery address of the customer. See *Type the pickup address* on page 125
   - [Price estimation]
     The order price must be calculated first before the sales tax can be calculated. See *Configure the default price estimation settings* on page 115
   - [Tax calculation]
     You can select one tax service per web shop. See *Configure tax calculation* on page 119.

This topic describes how you can enable the tax services for the system.

Procedure

1. Click [System] - [Connectivity] - [Tax services].
2. Enable option Use tax services to enable sales tax calculation for the system.[Use service provider for tax calculation]
3. Select which tax services will be available for the system.
4. Click [Save].



Setup the uniFLOW interface

Introduction

You can setup an interface between the PRISMAdirect server and the uniFLOW server. The uniFLOW server then manages:

- User management
- Authentication
  The users and user groups managed on the uniFLOW server must receive an appropriate [Role] for PRISMAdirect. The role determines the login rights of each user and user group in PRISMAdirect. You can manage the users and user groups in workspace [User management].
- Budget management
  The price approval workflow and the cost centres are managed by the uniFLOW server.
- Accounting
  The accounting information is stored on the PRISMAdirect server. The uniFLOW server can request the accounting information using the Read Leonardo Accounting Info task.

Procedure

1. Click [System] - [Connectivity] - [uniFLOW interface].
2. [Enable uniFLOW interface]
   You have to pair a unique URL of the PRISMAdirect server with the service URL of the uniFLOW server.
3. [PRISMAdirect interface settings]
   You can accept the default endpoint and port. If required, you can type a custom endpoint and/or port. The port must be unique. Test the connection to check that the URL is correct and unique.
   - [Use secure connections (HTTPS)]
     The URL of the PRISMAdirect server changes from HTTP into HTTPS.
   - [Do not validate the uniFLOW certificate.]
     The secure connection requires a certificate. The certificate is stored on the uniFLOW server. You can choose to not validate the uniFLOW certificate, for example when the uniFLOW server contains a self-signed certificate.
4. [uniFLOW interface settings]
   Type the service URL. This URL is defined on the uniFLOW server. Test the connection to check that the URL is correct and unique.
5. Click [Pair].
   The application creates the interface between the PRISMAdirect server and the uniFLOW server. When you change any of the settings in this dialog, you need to create the interface again.
   Click [Unpair] to disconnect the interface manually.
6. Click [Save].
7. Set the trace level for the uniFLOW interface:
   - [Debug]
     The [Debug] trace level provides the most detailed log information.
   - [Error]
     The errors are logged.
   - [Info]
     The errors and information messages are logged

   NOTE
   The [Debug] trace level can impact the performance of the application.

Configure the Remote Service

Introduction

Automatic license update

Updated licenses can be automatically downloaded and installed on the product from PRISMAdirect 1.2.0 onwards. An updated license is downloaded and installed automatically when:
- The customer extends the maintenance period.
- The customer has bought optional features.

Customers with a valid maintenance contract are entitled to software maintenance releases. From PRISMAdirect 1.2.0 onwards, the installer verifies whether a customer is allowed to install an update of the product. The customer is notified by a message at each refresh of the web page when:
- The maintenance period date expires within 1 month. The customer can also verify the maintenance expiration date in the About box.
- The license expires within 1 month. The customer can also verify the expiration date in the About box.
  The customer is notified at the login screen when the license has expired.

A newly downloaded license is:
- Announced to the user when there are changes at feature level.
- Automatically installed on the local Floating License Server.
  For a remote Floating License Server, the customer has to either:
  - Define a shared folder with the required rights.
  - Copy the license file manually.
- Used within one minute after the installation of the license.

Remote assistance

Remote assistance is another component of the Remote Service. Remote assistance enables our organization to connect and support our customers remotely. Implementation is based on TeamViewer. The customer has to allow a remote desktop connection for the help desk employee.

Before you begin

A valid license file must be installed in your local or remote Floating License Server

Procedure

1. Click [System] - [Connectivity] - [Remote Service].
2. Enable the [Enabled] option.
   There is no connection to the remote service back office when this option is disabled.
3. Type the [Service organization ID:] and [Verification code:].
   The ID and verification code identify your service organization. These settings are used to find your PRISMAdirect installation on the remote service website in the service organization.
   The serial number is automatically retrieved from the license.
4. Define the proxy server settings.
   You have to define the proxy server settings when you need special permissions for TeamViewer in your network.
   - [Automatically detect settings]
     The application detects the settings of your proxy server are automatically.
   - [Use proxy server]

You can define the settings of the proxy server manually. Use this setting when you want to use a dedicated proxy server.
- [Proxy URL:]
  The hostname and port. For example: proxy.example.com:8080

[Proxy server authentication]
Proxy servers that require authentication either require a username and password to access the Internet or authenticate users by using their current domain credentials.
1. [Proxy domain:]
   The domain where the proxy server resides.
2. [Proxy user name:] and [Proxy password:]
   The logon credentials for the proxy server.

5. Enable option [Remote desktop connection] for remote assistance.
   Remote assistance by our organization is based on TeamViewer. The help desk employee can request to allow a remote desktop connection for remote assistance.
6. Specify the license path:
   - Local Floating License Server
     No action required. The new license will be installed automatically in the license folder "DroppedLicense".
     You have to refresh the web page when the license is installed.
   - Remote Floating License Server
     - Define a shared folder with the required rights:
       1. Share the license folder "DroppedLicense" on your remote Floating License Server. The [Remote service credentials:] user must have to following rights to the shared folder: Modify, Read, Write.
       2. [Remote service credentials:]
          The read-only text box displays the current remote service user. This user runs the Print ORS Service which offers the remote assistance functionality. Click [Test connection] to test if the defined user has Internet access.
          You can change the user:
          1. Click the [Change] button.
          2. Select the domain and user name. Type the password. Letters in passwords must be typed using the correct case. The user must have Internet access.
          3. Click the [OK] button.
             The remote service user is changed.
          4. Click [Test connection] to test if the defined user has Internet access.
     - If you don't want to create a shared folder, you can copy the license file manually.
       1. The license file cannot be updated automatically because you haven't created a shared folder. Therefore, an error message appears informing you that the license cannot be updated on the license server.
       2. Click [System] - [Remote Service].
       3. Scroll to the bottom of the dialog to section [Failed to update license on:].
          This section appears when a license cannot be updated automatically.
       4. Click the save icon to save the license file on your computer.
       5. Copy the license file from your computer to the folder "DroppedLicense" on the remote Floating License Server.
7. Click [Save].
8. Verify whether the [Remote Service] connection has been established. A status icon is available in the top of the dialog:
   - Green light
     The connection to the remote service back office is established.
   - Orange light
     The connection to the remote service back office has failed.

Web submission

Configure the general settings

1. Click [System] - [Web submission] - <web server> - [General settings].
2. [Put the web site into maintenance mode]
   Enable this option to put the web server into maintenance. Customers cannot access the web shop anymore.
   Type the corresponding server name or IP address. When your server is part of a network, you have to use the UNC path to the server. For example: \\<servername.domain.topdomain>\.
3. Click [Save].

Define the desk submission users

Introduction

You can add or remove Desk Submission users. A Desk Submission user can create jobs on behalf of other users in the [Web Submission].

Procedure

1. Click [System] - [Web submission] - <web server> - [Desk submission users].
2. Select [Local users] or an LDAP server.
   The local users, or the users on the LDAP servers, become available in the [Users] drop-down list.
3. Select a user.
4. Click the [Add] button.
   The user has Desk Submission rights.

Create friendly URLs

Introduction

You can create a user-friendly URL for each web shop to improve the usability and accessibility of your web shops for your customers.

This dialog contains the default web shop and each web shop that is created in the [Web shop editor].

Procedure

1. Click [System] - [Web submission] - <web server> - [Desk submission users].
2. Select a web shop.
3. Type a user-friendly URL for the web shop.
4. Click [Save].

Configure payment providers

Introduction

The payment providers offer a payment service for your users. When you select one or more payment providers, each user can pay for their orders directly. You have to configure the payment workflow in three locations in workspace [Configuration]:

1. [System] - [Connectivity]
   Enable payment for the system. Then, you can select which payment providers are available for the system.
   Configure the authentication to the SQL server instance. The system creates a payment report per payment provider on the SQL server when the authentication is correct. See *Enable payment for the system* on page 54.
   The payment report is stored in the accounting database on the SQL server. You do not have to enable the accounting functionality to create and access the payment report. The accounting functionality and the payment report can be enabled independently.
2. [System] - [Web submission]
   You have to configure the payment providers for each web server once the payment service is enabled.
3. [Web shop]
   You have to enable the payment service for each web shop where you want to offer the payment service. See *Enable payment* on page 117.

This topic describes how you can select one or more payment providers once the payment service is enabled for one or more web shops.

Procedure

1. Click [System] - [Web submission] - <web server> - [Payment providers].
   You can configure the [Payment providers] for each web server.
2. Option [Use payment providers]
   - Enabled:
     The users can pay for their orders directly. You can enable one or more payment providers. For example: PayPal.
   - Disabled:
     The users cannot pay for their orders directly.
     You can disable the payment providers in this dialog when your Web server has no Internet access. For example, your company uses a local area network. The user does not receive an "unable to connect" message from the payment provider.
3. Configure each payment provider.
   For example, you can define the setting [API username], et cetera when you use the PayPal API. PayPal delivers these settings to you when you create a merchant account in PayPal.
4. Click [Save].

Configure shipping providers

Introduction

You can offer a shipping service to your customers. When you select one or more shipping providers, each customer can request shipment of an order via the web shop. You have to configure the shipping workflow in three locations in workspace [Configuration]:

1. [System] - [Connectivity]
   Configure the default shipping settings for the system. You can configure some of these settings differently for the web shops. For example, you have three web shops. You have enabled shipping on system level. Now, you can enable or disable shipping for each web shop.
   See: *Configure the general shipping settings* on page 56, *Configure the default shipping label* on page 57 and *Type the default pickup address* on page 55.
2. [System] - [Web submission]
   You can enable and configure one or more shipping providers for each web server once shipping is enabled for the system.
3. [Web shop]
   You have to enable the shipping service for each web shop where you want to offer shipping. You have to select one or more shipping formulas for each web shop. See *Configure shipping* on page 118 and *Type the pickup address* on page 125.

This topic describes how you can enable and configure one or more shipping providers once the shipping service is enabled for the system.

Procedure

1. Click [System] - [Web submission] - <web server> - [Shipping providers].
   You can configure the [Shipping providers] for each web server.
2. Option [Use shipping providers]
   - Enabled:
     The users can request shipment of their orders. You can enable one or more shipping providers. For example: FedEx.
   - Disabled:
     The users cannot request shipment of their orders.
3. Enable the shipping providers that you want to make available to the print room. For example: FedEx.
   The customer can only select whether or not to ship an order. The operator can select which shipping provider will ship the order.
4. Configure the shipping providers.
   For example, you can define the setting User key, et cetera when you use the FedEx API. Each shipping provider delivers the required settings to you when you create an account.
5. Click [Save].

Configure the tax services

Introduction

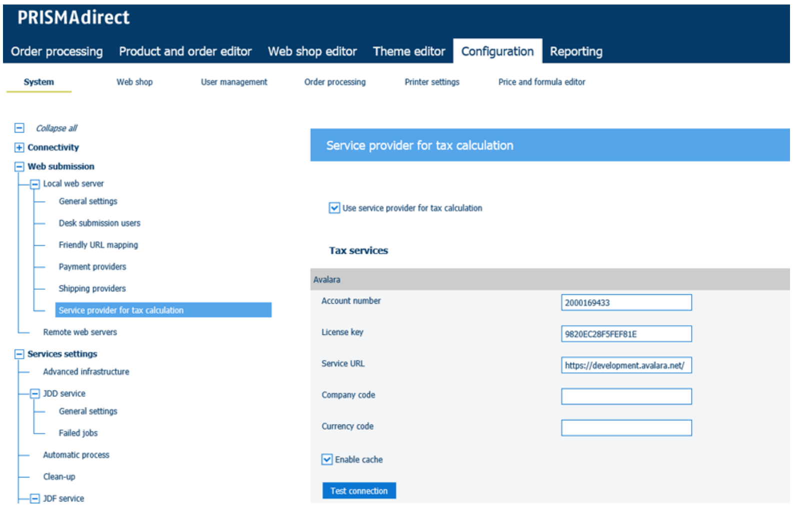
The tax service calculates the sales taxes for the orders. You have to configure the tax services workflow in the following locations in workspace [Configuration]:

1. [System] - [Connectivity]
   Configure which tax services are available for the system. See *Enable tax services for the system* on page 58
2. [System] - [Web submission]
   You have to configure the tax services for each web server once tax services are enabled for the system. See *Configure the tax services* on page 67
3. [Web shop]
   - [Origin address]
     The tax service requires the pickup address of the print room and the delivery address of the customer. See *Type the pickup address* on page 125
   - [Price estimation]
     The order price must be calculated first before the sales tax can be calculated. See *Configure the default price estimation settings* on page 115
   - [Tax calculation]
     You can select one tax service per web shop. See *Configure tax calculation* on page 119.

Procedure

1. Click [System] - [Web submission] - <web server> - [Service provider for tax calculation].
   You can configure the [Tax services] for each web server.
2. Option [Use service provider for tax calculation]
   - Enabled:
     The tax service calculates the sales taxes for the orders.
   - Disabled:
     The system cannot calculate the sales taxes.
     You can disable the tax services in this dialogue when your Web server has no Internet access. For example, your company uses a local area network. The user does not receive an "unable to connect" message.
3. Configure each tax service.
   For example, you can define the setting Account number, et cetera when you use the Avalara API. Avalara delivers these settings to you when you create a merchant account.

4. Click [Save].


PRISMAdirect
Order processing
Product and order editor
Web shop editor
Theme editor
Configuration
Reporting
System
Web shop
User management
Order processing
Printer settings
Price and formula editor
Collapse all
Connectivity
Web submission
Local web server
General settings
Desk submission users
Friendly URL mapping
Payment providers
Shipping providers
Service provider for tax calculation
Remote web servers
Services settings
Advanced infrastructure
JDD service
General settings
Failed jobs
Automatic process
Clean-up
JDF service
Service provider for tax calculation
Use service provider for tax calculation
Tax services
Avalara
Account number
2000169433
License key
9820EC28F5FEF81E
Service URL
https://development.avalara.net/
Company code
Currency code
Enable cache
Test connection

Services

Advanced infrastructure settings

Introduction

- [Logon credentials for installed components]
  Consider a distributed system. Several components of the application authenticate themselves to the [Server only] with this account. These components must use these logon credentials. You must define these logon credentials for each component when you install the component.
- [JDD service]
  It is recommended that you change the user only when:
  1. The user has a local system account.
     And
  2. You want to use the file hosting providers and/or the payment providers. The user must have Internet access.

  A number of services will be restarted when the user is changed. Jobs that are being submitted by customers will become corrupt. The following services will be restarted:
  - The Message Queuing service
  - The Print Job Data Dispatcher service

Procedure

1. Click [System] - [Services] - [Advanced infrastructure].
2. [Logon credentials for installed components]
   - Define a username and password.

   This user must belong to the [Services] group.
   The application restarts when you change the username or password.
3. [JDD service user:]
   The read-only text box displays the current JDD service user. Click [Test connection] to test if the defined user has Internet access.
   You can change the user:
   1. Click the [Change] button.
   2. Select the domain and user name. Type the password. Letters in passwords must be typed using the correct case.
      The user must have Internet access if you want to use the file hosting providers and/or the payment providers.
   3. Click the [OK] button.
      The JDD service user is changed.
   4. Click [Test connection] to test if the defined user has Internet access.
4. Click [Save].

Services settings

JDD service

Manage the JDD service settings

Introduction

The Job Data Dispatcher (JDD) service is used by the [Web Submission] to submit jobs to the [Server].

Procedure

1. Click [System] - [Services] - [Services settings] - [JDD service] - [General settings].
2. Select a template to configure the JDD service.
   You can select one of the following templates:
   - [Few submitters, small files]
   - [Few submitters, large files]
   - [Average number of submitters, medium files]
   - [Many submitters, small files]
   - [Many submitters, large files]

   Each template defines custom values which depend on the expected size and number of jobs submitted from the [Web Submission].
3. [Custom settings]
   Do not configure the custom settings yourself. Change these settings only after consulting the help desk when you have performance issues.
4. [VDP preview generation timeout [s]:]
   The application does not display the VDP preview when the generation of the preview is not completed within the defined timeout.
   Do not configure this setting yourself. Change this setting only after consulting the help desk.
5. [Print timeout [s]:]
   The print operation is cancelled when the printer does not start printing before the timeout expires.
   Do not configure this setting yourself. Change this setting only after consulting the help desk.
6. [Redistill timeout [s]:]
   The redistill operation is cancelled when the merged PDF file cannot be redistilled before the timeout expires. The operator can try to redistill the file again.
   Do not configure this setting yourself. Change this setting only after consulting the help desk.
7. Set the trace level for the JDD service:
   - [Debug]
     The [Debug] trace level provides the most detailed log information.
   - [Error]
     The errors are logged.
   - [Info]
     The errors and information messages are logged

   NOTE
   The [Debug] trace level can impact the performance of the application.
8. Click [Save].

Resubmit a failed job

Introduction

A failed job is a job which is not successfully received on the server. You can handle only one failed job at a time. The failed jobs are displayed in a list.

You have to resubmit each failed job:
1. If the server receives the job, the job is removed from the list.
2. If the server does not receive the job, the job must be deleted manually.

Procedure

1. Click [System] - [Services] - [Services settings] - [JDD service] - [Failed jobs].
2. Select a failed job.
   You can select only one job at a time.
3. Click button [Resubmit]
   The job is submitted. If the server receives the job, the job is removed from the list.
4. Click the [Refresh] button to update the list of failed jobs.
   The list of failed jobs is not updated automatically.

Delete a failed job

Procedure

1. Select a failed job.
   You can select only one job at a time.
2. Click the [Delete] button.
   The selected job is deleted.
3. Click the [Refresh] button to update the list of failed jobs.
   The list of failed jobs is not updated automatically.

Automatic process settings

Introduction

The automatic conversion service converts non-PDF files to PDF. The service uploads both the original files and the converted files. This application contains default conversion applications.

NOTE
A license is required to use the automatic conversion functionality.

The automatic merge service merges two or more PDF files into one PDF file. For example, two or more PDF files are automatically merged when you view a job with multiple PDF files.

The preflight operation checks if any rules are violated in the PDF file(s). You have to configure the preflight settings in the following locations in workspace [Configuration]:

1. [Order processing]
   You have to configure the preflight rules for the [Order processing] workspace. See *Configure the preflight rules* on page 150.
2. [Web shop]
   You can configure the preflight settings for each web shop. These settings will also be used when you create an order for this web shop in the [Order processing]. See *Configure the preflight rules* on page 121.
3. [System]
   You can configure the number of preflight processes that can run in parallel.
4. You can attach the preflight report to emails to your customer. To configure the email templates, go to: [Order processing] - [Workflow configuration] - [Email templates].

Procedure

1. Click [System] - [Services] - [Services settings] - [Automatic process].
2. Define if you want to use the automatic conversion service.
   - Enable the [Enable automatic conversion] option:
     Automatic conversion is enabled.
     When a customer submits a non-PDF file in [Web Submission] the file is automatically converted to a PDF file. The [Order processing] receives a job which contains the PDF file(s).
   - Disable the [Enable automatic conversion] option:
     Automatic conversion is disabled.
     When a customer submits a non-PDF file in [Web Submission], the [Order processing] receives a job which contains the original non-PDF file.
     The operator must convert the file before the job can be printed.
3. Select a conversion application from the drop-down list.
   When you select the HotfolderConverter, you must define the folders for the converter.
   - [Detect folders of the conversion application]
     The application uses the default folders for the conversion application.
   - [Input folder]: The converter receives the files for conversion via this input folder.
   - [Output folder]: The converter places the converted files in this output folder.
   - [Error folder]: The converter places the files that cannot be converted automatically in this error folder.

   NOTE
   The selected conversion application must be installed on the web server.
4. Select a merge application from the drop-down list.
   The automatic merge service merges two or more PDF files into one PDF file. For example, two or more PDF files are automatically merged when you view a job with multiple PDF files.
   Select a merge application from the drop-down list:

- PDFNetMerge
  PDFNetMerge is the preferred merge application.
- AcrobatMerge

  NOTE
  Acrobat Professional must be installed on the [Web server] when you want to use AcrobatMerge.

5. Set the number of preflight processes.
   It is recommended that you define the same number of preflight processes as you have web shops for which option [Enable automatic preflight] is enabled.
   The number of processes can impact the performance of the application.
6. Set the trace level for the automatic process settings:
   - [Debug]
     The [Debug] trace level provides the most detailed log information.
   - [Error]
     The errors are logged.
   - [Info]
     The errors and information messages are logged

   NOTE
   The [Debug] trace level can impact the performance of the application.
7. Click [Save].

Configure the clean-up settings

Introduction

The application creates temporary files. The temporary files left behind by the application accumulate over time and can take up a lot of disk space. These temporary files can be cleaned-up by the Print Cleanup Service.

Procedure

1. Click [System] - [Services] - [Services settings] - [Clean-up].
2. Define the [Number of hours between two clean-up operations:].

   NOTE
   If the "Number of hours between two clean-up operation" is 0, then the clean-up service cleans up one more time and only then it's deactivated.

3. Define if you want to delete finalised orders automatically.
   - Enable the [Delete finalized orders automatically after [days]:] option
     The application deletes any finalised orders automatically after the defined number of days.
   - Disable the [Delete finalized orders automatically after [days]:] option
     The operator has to delete finalized orders manually.
4. Set the trace level for the clean-up settings:
   - [Debug]
     The [Debug] trace level provides the most detailed log information.
   - [Error]
     The errors are logged.
   - [Info]
     The errors and information messages are logged

   NOTE
   The [Debug] trace level can impact the performance of the application.

5. Click [Save].

JDF service

Manage the general settings for the JDF service

Introduction

The Job Definition Format (JDF) is a technical standard being developed by the CIP4 organization. The purpose of the standard is to facilitate interaction between different systems in a printing or print-related workflow. PRISMAdirect offers an interface based on the JDF standard which allows communication with external JDF-enabled software components.

The CIP4 JDF specification is a very extensive standard covering all areas in the life cycle of a print job, from preflight to image rendering to finishing and packaging. Océ has developed a proprietary standard for the JDF ticket which is a subset of the CIP4 description.

PRISMAdirect defines a proprietary job ticket with a set of ticket settings that can be configured and extended by the user. The user must be able to submit a job to PRISMAdirect via JMF messages by providing a JDF ticket and the required data files. A mapping file is used to construct a valid PRISMAdirect ticket with the values taken from the JDF ticket.

Procedure

1. Click [System] - [Services] - [Services settings] - [JDF service] - [General settings].
2. [Use secure connections (HTTPS)]
   Enable this option if you want to use only a secure HTTPS connection to submit orders via JDF.
3. Use the [Pause JDF service] check box to pause or restart the JDF service.
   You receive a notification when the JDF service is restarted.
4. Set the trace level for the JDF service:
   - [Debug]
     The [Debug] trace level provides the most detailed log information.
   - [Error]
     The errors are logged.
   - [Info]
     The errors and information messages are logged

     NOTE
     The [Debug] trace level can impact the performance of the application.
5. Click [Save].

Add or edit JDF endpoints

Introduction

In this dialogue you can setup the JDF endpoints.

JDF endpoints can be used to transfer jobs to PRISMAdirect and receive status information back from PRISMAdirect.

The connection status of each JDF endpoint is displayed in column [Status].
- Green dot:
  The connection to the JDF endpoint is established.
- Orange dot:
  The connection to the JDF endpoint is not checked or the connection is being checked.
  After a reboot of the system, the dots are orange. Click [Test connection] to update the state of each JDF endpoint.

- Red dot:
  The connection to the JDF endpoint cannot be established. Check the settings of the JDF endpoint.

Procedure

1. Click [System] - [Services] - [Services settings] - [JDF service] - [JDF endpoints].
2. Click [Add JDF endpoint].
   Select a [JDF endpoint] and click [Edit] to edit an existing [JDF endpoint].
3. Define the [JDF endpoint] data.
   1. Type a name for the JDF endpoint.
   2. The URL used to access this [JDF endpoint] is automatically generated and cannot be changed.
   3. [Additional configuration for DSF]
      Enable this option when you want to use Digital StoreFront.
      1. You can type a value in the spinbox for the DSF port.
         The DSF URL is generated automatically and cannot be changed.
   4. [Web shop]
      Select for which web shop you want to create the JDF endpoint.
   5. [Choose your product]
      The JDF endpoint uses the selected product to create jobs. The selected product is only used when the JDF ticket does not specify a product.
4. Select the desired [Authentication] method and define the required data.

Setting	Description
[Windows authentication]	The Windows user is actually the user that runs the “Print JDF Service”. You can lookup the user of “Print JDF Service” in the Services dialog of Microsoft Windows. This user must be an LDAP user and the LDAP server must exist in PRISMAdirect for the authentication of the endpoint to be successful. The user is not prompted for a user name and password.
[Custom authentication]	Type a valid PRISMAdirect user and its password. You can use the [Test connection] button to check the entered credentials.

5. [Use custom mapping files]
   If you want to use your own [Mapping files] you have to define the [Mapping files] section.

Setting	Description
[Default mapping file for job status] [Default mapping file for JDF ticket]	You can download the default mapping files and use these files to create a custom mapping. See the two links in the top-right of the dialog.
[Upload]	Browse to the mapping files that you want to use.
[JDF ticket:]	This file is used to map JDF to PRISMAdirect ticket items. A mapping file is used to construct a valid PRISMAdirect ticket with the values taken from the JDF ticket.
[Job status:]	This file is used to map the job status in PRISMAdirect to JDF.

NOTE
The [Mapping files] are used every time the [JDF endpoint] is used. Do not move, delete or rename these files.

6. Click [Save].
   You receive a notification that the JDF service is restarted.

Location of the default mapping files

1. Click [System] - [Services] - [Services settings] - [JDF service] - [JDF endpoints].
2. Click the following links to download the mapping files:
   - [Default mapping file for job status]
     This file is used to map the job status in PRISMAdirect to JDF.
   - [Default mapping file for JDF ticket]
     This file is used to map JDF to PRISMAdirect ticket items. A mapping file is used to construct a valid PRISMAdirect ticket with the values taken from the JDF ticket.

NOTE
The mapping files are used every time the [JDF endpoint] is used.

Print Prepare Manager service settings

Introduction

The VDP functionality is available in the PRISMA Core. The PRISMA Core is installed on the server. Therefore, all actions and validations concerning the VDP functionality are executed on the server. Jobs are created via the Web Submission and the Order processing. These applications must have access to the server when they are installed on separate computers. The Order processing and the Web server connect to the server via the port for the Print Prepare Manager service.

You have to configure the VDP functionality in two locations in workspace [Configuration]:
1. [Print Prepare Manager service]in [System]
   The Order processing and the Web server connect to the server via the port for the Print Prepare Manager service. These applications must have access to the server to use the VDP functionality.
2. [VDP settings]in [System]
   Define the maximum number of pages of a variable data document shown in the [Preview] or [Proof PDF].

Procedure

1. Click [System] - [Services] - [Services settings] - [Print Prepare Manager service].
2. Define the port for the Print Prepare Manager service.
   The port for the Print Prepare Manager service must be accessible from the Order processing and the Web server.
3. Set the trace level for the Print Prepare Manager service:
   - [Debug]
     The [Debug] trace level provides the most detailed log information.
   - [Error]
     The errors are logged.
   - [Info]
     The errors and information messages are logged

   NOTE
   The [Debug] trace level can impact the performance of the application.

Print Licence Monitoring service settings

Introduction

The Print Licence Monitoring service checks regularly if a new or updated license is available in the [Floating Licence Server].

Procedure

1. Click [System] - [Services] - [Services settings] - [Print Licence Monitoring service].
2. Define the port for the Print Licence Monitoring service. The server and the [Floating Licence Server] must have access to the port.
3. Set the trace level for the Print Licence Monitoring service:
   - [Debug]
     The [Debug] trace level provides the most detailed log information.
   - [Error]
     The errors are logged.
   - [Info]
     The errors and information messages are logged

   NOTE
   The [Debug] trace level can impact the performance of the application.

Import service

Pause the import service

Introduction

You can pause the automatic import of jobs from the configured import folders.

Disable option [Pause import service] to start the automatic import service again.

Procedure

1. Click [System] - [Services] - [Services settings] - [Import service] - [General settings].
2. Enable the [Pause import service] option.
   The import service is paused. Jobs are not imported anymore.
3. Click [Save].

Define the trace level

Introduction

You can define the trace level for the import service.

Procedure

1. Click [System] - [Services] - [Services settings] - [Import service] - [General settings].
2. Define the trace level:
   - [Debug]
     The [Debug] trace level provides the most detailed log information.
   - [Error]
     The errors are logged.
   - [Info]
     The errors and information messages are logged

   NOTE
   The [Debug] trace level can impact the performance of the application.
3. Click [Save].

Add an import folder

Introduction

The operator can manually import orders into the [Order processing], but it is also possible to automatically import orders.

You can automatically import PDF files into the [Order processing] via import folders.

Procedure

1. Click [System] - [Services] - [Services settings] - [Import service] - [Import folders].
2. Click [New import folder].
3. Define the [Import folder path].
   Click button [Browse] to select or create an import folder.

4. Select the [Import job type].

Setting	Description
[Normal orders]	This import folder accepts all orders of PRISMAdirect. Normal orders will be imported using the product with which they were created. If this product does not exist anymore, they will be imported using the current Default Generic Product.
[Legacy job]	The orders will be imported using the current Default Generic Product.
[JDF ticket orders]	• [Choose your product] Click the drop-down list to select a product. The orders will be imported using the selected product. • [JDF ticket] This import folder must contain a JDF ticket. This file is used to map JDF to PRISMAdirect ticket items. A mapping file is used to construct a valid PRISMAdirect ticket with the values taken from the JDF ticket. Click [Upload] to copy a JDF ticket into this import folder. If this folder does not contain a JDF ticket, an empty JDF ticket is used for the orders.
[PDF only job with default order ticket]	This import folder accepts only PDF files. • [Choose your product] Click the drop-down list to select a product. The orders will be imported using the selected product. • [Order ticket] Define a custom order ticket for this particular import folder.
[Always accept orders and jobs]	This import folder accepts only PDF files. • [Choose your product] Click the drop-down list to select a product. The orders will be imported using the selected product. • [Order ticket] Define a custom order ticket for this particular import folder. The imported orders are placed in the [Accepted] state.
[Scanned job]	This import folder accepts only scanned files. The operator must create a job which contains a [Paper original]. The scanned file must contain the job number. Then the scanned file is automatically attached to the job. The default job ticket is used for these jobs.

5. Select the [Web shop]
   The orders are imported for the selected web shop.
6. Enable or disable option [Preserve job state].
   - When this option is enabled for legacy jobs:
     If the job state of the legacy job was [Ready], the job state of the imported job is set to [Ready]. Else, the job state of the imported job is set to [New]

     NOTE
     For jobs that were created with PRISMAaccess, the job state cannot be preserved and the state of the job will always be [New]

   - When this option is enabled for normal jobs:

The job state of the imported job is equal to the job state of the exported job. All the allowed job operations and restrictions imposed by the job state apply on the imported job.
- When this option is disabled for normal jobs:
The job state of the imported job is set to [New]

7. Click [Save].
The import folder is configured and added to the list of import folders.

Export service

Pause the export service

Introduction

You can pause the automatic export of jobs from the configured export folders.

Disable the [Pause export service] option to start the automatic export service again.

Procedure

1. Click [System] - [Services] - [Services settings] - [Export service] - [General settings].
2. Enable the [Pause export service] option.
   The export service is paused. Jobs are not exported anymore.
3. Click [Save].

Define the trace level

Introduction

You can define the trace level for the export service.

Procedure

1. Click [System] - [Services] - [Services settings] - [Export service] - [General settings].
2. Define the trace level:
   - [Debug]
     The [Debug] trace level provides the most detailed log information.
   - [Error]
     The errors are logged.
   - [Info]
     The errors and information messages are logged

   NOTE
   The [Debug] trace level can impact the performance of the application.
3. Click [Save].

Add an export folder

Introduction

The operator can manually export orders from the [Order processing], but it is also possible to automatically export orders. You can automatically export orders from the [Order processing] via export folders. You must create an export query. If the query is valid for an order, then that order is exported.

By default, all available files of a job are exported.

Procedure

1. Click [System] - [Services] - [Services settings] - [Export service] - [Export folders].
2. Click the [New export folder] button.

3. Define the [Export folder path].
   Click the [Browse] button to select or create an export folder.
4. Define the export query.
   If the query is valid for an order, then that order is exported. The export query is an SQL query which is uses order items. You have to define a query per export folder.
   Define a query on page 84
5. Enable or disable option [Export original files and job ticket only].
   If you enable this option, only the original file and the job ticket are exported.
   The following files are not exported:
   - The JDF ticket
   - The conversion file, if available
   - The redistill file, if available
   - The merged document, if available
6. Enable or disable option [Delete order after export].
   When you enable this option, all exported orders are removed from the [Order processing].
7. Click [Save].
   The export folder is configured and added to the list of export folders.

Define a query

Procedure

1. Drag and drop the order items and operators in the query field.
   To create an SQL query, you can use:
   - The available order items
   - The available operators
   - The additional operators: ', ", +, -, /, %

   The following rules apply:
   - Numbers are integers. A decimal separator is not allowed.
   - String values are enclosed in quotation marks.
   - Dates are enclosed in quotation marks. A date must be a valid date according to the regional settings of the computer.
   - Enumeration values are enclosed in quotation marks.
   - Boolean values are enclosed in quotation marks.

   Examples:

Type	Valid value	Invalid value
Number	53	34.5
String	'Hello'	Hello
Dates	'1/1/10'	1/1/10
Enumeration	'Enum_value'	Enum_value
Boolean	'True'	True

2. Example of a valid SQL query:
   [Date] >= '1/1/10'

Security

Configure the connection to the server and web server

Introduction

Jobs are created via the Web Submission and the Order processing. You can configure if you want to use a secure connection to the server and the web server.

Procedure

1. Click [System] - [Security] - [Connection].
2. [Use secure connections (HTTPS)]
   Use this option to specify if you want to use the secure HTTPS connection for Web Submission.
   If you enable this option you have to create a self-signed certificate, see dialog [Certificates]. A certificate guarantees a secure (HTTPS) connection to the Web Submission server.
3. [Use only HTTP connections to the server]
   Enable this option if you want to use HTTP only connections to the server. For example, the firewall is allowed to open only one HTTP port.
   Disable this option if you want to use HTTPS and TCP connections to the server. You must open the TCP port on the server.

Select the authentication type

Introduction

PRISMAdirect offers single sign on. Therefore, [Windows authentication] is integrated with Active Directory.

Procedure

1. Click [System] - [Security] - [Authentication mode].
2. Select the authentication type.
   The installed services and the [Configuration] always use [Custom authentication].

Create self-signed certificates

Introduction

You can create your own self-signed Certificate and use it for the secure transactions between the customers and the Web server.

Additional information

The Secure Socket Layer (SSL) protocol was created to ensure secure transactions between Web servers and Web browsers.

Data sent via an SSL connection is protected by encryption, a mechanism that prevents eavesdropping and tampering with any transmitted data. SSL provides that private data sent to a Web site, such as passwords, are kept confidential. Web server 'Certificates' are required to initialize an SSL session.

End users know that they have an SSL session with a website when their browser displays the little gold padlock and the address bar starts with 'https' rather than 'http'.

When connecting to the Web Submission website over SSL, the user's Web browser decides whether or not to trust the Web Submission website's SSL Certificate based on which Certification Authority has issued the actual SSL Certificate. To determine this, the browser looks at its list of trusted issuing authorities - represented by a collection of Trusted Root CA Certificates added into the browser by the browser vendor (such as Microsoft or Netscape).

Most SSL certificates are issued by CAs who own and use their own Trusted Root CA Certificates. These Trusted Root CA Certificates have already been added to all popular browsers, and are already trusted. These SSL certificates are known as 'single root' SSL certificates.

When you select option [Use secure connections (HTTPS)] in the [Connection] and assign a Certificate to the Web Submission Web site, end users will receive a 'Security Alert'. This shows the user more information about the Certificate that is used. The user can also view the Certificate details. When the user clicks 'Yes' the Certificate will be used and the secure connection will be established.

Procedure

1. Click [System] - [Security] - [Certificates].
2. Click the [Add] button.
3. Define all [Certificate items].
4. Define the [Number of years that the certificate is valid:] option.
5. Click the [OK] button.
   The created Certificate will be added to the 'Installed Certificates' list.
   Self-signed certificates are automatically imported on the web server.

Remove certificate

Introduction

You can only remove self-signed Certificates here.

Procedure

1. Click the delete icon to delete a certificate. The icon appears when you hover the mouse pointer over the certificate.
   A dialog will appear that asks you to confirm.

2. Click 'OK' to remove the selected Certificate.

NOTE
You can only remove self-signed Certificates here.

Backup and restore

Introduction

It is recommended that you create a backup after each installation and patch installation. The backup files are password-protected zip files. The backup files are created in the temporary data folder. See *Define the path for the temporary folder* on page 99

Backup and restore of the configurations and the order data

- The databases and configuration files will be backed up and restored in their entirety on a machine.
- You can only do a backup and restore on the same machine with the same PRISMAdirect version.
- After each restore, all services will be restarted and the PRISMAdirect website will be restarted. Therefore, users will have to log in again.

Export and import of the settings

You can import and export the configuration of PRISMAdirect. Then, you can use the exported settings to configure another installation of PRISMAdirect. The import and export file are not machine related.

When you export the settings, all settings will be exported. When you import the settings, you can select all settings or a subset of the exported settings.

In addition, PRISMAdirect offers a number of preproduced configuration files. You can use these files for fast configuration of PRISMAdirect as well.

Procedure

1. Click [System] - [Backup and restore].
2. You can backup the [Configurations] and the [Order data]. Click the [Backup] button.
   The backup files are stored in the [Downloads] folder. The backup files contain machine dependent settings. You can only restore a backup file when:
   - The computer name is the same.
   - The installation paths are the same.
   - The application version is the same as the application version that created the backup file.
3. You can export the [Settings] of the application. Click the [Export] button.
   The exported file is stored in the [Downloads] folder. The exported file does not contain any machine dependant settings. Therefore, you can import this file on all machines.

Restore

Procedure

1. You can restore the [Configurations] and the [Order data]. Click the [Restore] button.
   The backup files contain machine dependent settings. You can only restore a backup file when:
   - The computer name is the same.
   - The installation paths are the same.
   - The application version is the same as the application version that created the backup file.
2. You can import the [Settings] of the application. Click the [Import] button. Select which settings you want to import.
   The import file does not contain any machine dependant settings. Therefore, you can import this file on all machines.

3. Browse to the folder where the backup files are located.
4. Click [Open]. You have to select which [Settings] you want to restore.
   The backup file is being uploaded to the server and its content is being restored.

Accounting and reporting

Accounting

Enable accounting

Introduction

You can collect accounting information. The accounting information is saved in an SQL database. To collect accounting information, an order ticket must contain the following ticket fields with these exact names:
1. Account
2. Company
3. Copies
4. FinalCost
5. NrOfSourcePages
6. Plexity
7. PrintInColor
8. ReadyDate
9. UserId

These ticket fields are available in several views in the [Product and order editor]

The system administrator can edit the captions of these items in the [Product and order editor].

NOTE
The accounting information cannot be collected if the ticket definition contains an item with a name longer than 128 characters.

The ticket is allowed to contain other ticket fields.

The operator must be able to assign values to the ticket fields which are used for accounting. Define in the [Product and order editor] that these ticket fields can be edited by the operator.

Procedure

1. Click [System] - [Accounting and reporting] - [Accounting] - [Accounting workflow].
2. Enable the [Enable accounting] option.
   A license is required to use the accounting functionality.
3. Configure the credentials for the SQL server.
   You can also configure the credentials for the SQL server in [System]. Click [System] - [Connectivity] - [Payment providers]. When you change the settings in [System], the settings will also change in this dialog and vice versa.
   1. Define the [Computer name \ instance name:].
      With this option, you define where the accounting database is stored. For example: SQL_server_name\SQL_server_instance_name.
   2. You have to define how the [Order processing] connects to the accounting database.

Setting	Description
[Windows authentication]	The current Windows user information is used for the authentication. The user is not prompted for a user name and password.
[SQL authentication]	Type a user name and password for the SQL server.

Accounting information can be collected when the user has system administration rights on the accounting database.

3. Click the [Test connection] button.
   Click this button to test the connection to the defined server.

4. Click [Save].

Configure the invoice settings

Introduction

In this dialog, you can define the company information for the invoice. The [Order processing] uses the collected accounting information to generate the invoice.

Procedure

1. Click [System] - [Accounting and reporting] - [Accounting] - [Invoice].
2. Click button [Browse] to select an image.
   The allowed image file types are: .bmp, .jpg, .gif, .png.
3. Type the company name.
4. Type the company address.
5. Define the [Tax rate(%):] that must be used for the invoice.
6. Click [Save].

Reporting

Email the accounting reports automatically

Introduction

Accounting reports can be sent automatically by email, if:

- Option [Email accounting reports automatically] is enabled,
- The scheduled task is configured, and
- One or more accounting reports are selected in dialog [Accounting reports].

In this dialog, you can configure the required email settings and the settings for the scheduled task. You have to select which reports you want to attach to the email in dialog [Accounting reports].

You can manage the accounting reports in workspace [Reporting].

Procedure

1. Click [System] - [Accounting and reporting] - [Reporting] - [Email accounting reports automatically].
2. Enable the [Email accounting reports automatically] option.
3. Define the email address.
   When you add more than one email address, you must use a semicolon to separate the addresses.
4. Select the [File format for report:].
   The reports are converted into the selected format. The converted reports are attached to the email.
5. Define the [Reporting period [months]:].
   The accounting reports for the defined reporting period are emailed.
6. Click [New trigger] to define when the reports will be emailed.
7. Define when you want the task to start.
   You can define that the task is executed once, or you can set a recurrence pattern. Define the start date and enable or disable the task.
8. Type the username and password for the user. This user runs the task.
   The [AutomaticReportsEmailSender] task is created in the task scheduler. The task is executed with the provided credentials.
   The task generates the selected reports before emailing the reports. The reports generated via the scheduled task are saved on the server in the "Asset" folder. You can select the reports in dialog [Accounting reports].
9. Click [Save].
10. You have to select which reports you want to attach to the email in dialog [Accounting reports].

Select the accounting reports

Introduction

Accounting reports can be sent automatically by email, if:
- Option [Email accounting reports automatically] is enabled,
- The scheduled task is configured, and
- One or more accounting reports are selected in dialog [Accounting reports].

In this dialog, you have to select which reports you want to attach to the email. You have to configure the required email settings and the task settings in dialog [Email accounting reports automatically].

You can manage the accounting reports in workspace [Reporting].

Procedure

1. Click [System] - [Accounting and reporting] - [Reporting] - [Accounting reports].
2. Select which reports you want to attach to the email. You can select one or more reports.
   The report filenames (*.rpt) are displayed in this dialog. However, the report titles are displayed in workspace [Reporting]. It is recommended that the filename and the title of a report are similar when you create a new report.
3. Click the report to configure the report settings.
   1. [Attach the report]
      The report is attached as a file to the email.
   2. [Add hyperlink to report to the email]
      A link is added to the email. Click the link to open the report on the server.
   3. [Overwrite existing report]
      You can keep all versions of this report, or you can overwrite any existing reports on the server.
   4. [Delete existing report automatically]
      Enable this option to automatically delete the report on the server when a new report is generated. You can type a value in the spinbox for the number of days.
4. Click [Save].

Configure the reports folder

Introduction

You can manage the accounting reports in workspace [Reporting]. In this dialog, you can configure the location to store the reports that are generated in workspace [Reporting].

The task [AutomaticReportsEmailSender] generates the selected reports before emailing the reports. You can create the task in dialog [Email accounting reports automatically]. You can select the reports in dialog [Accounting reports]. The reports generated via the scheduled task are saved on the server in the "Asset" folder.

Procedure

1. Click [System] - [Accounting and reporting] - [Reporting] - [Reports folder].
2. Type the path to the reports folder.
   You have to create the reports folder on the server.

Select the active languages for the system

Introduction

You can select which languages must be active for the system. Then, you can configure which languages are available for the customers. You have to configure this for each web shop. You have to configure the languages in the following locations in workspace [Configuration]:

1. [System]
   Select the active languages for the system.
   A language link will become available in the components of the system, e.g. the [Order processing]. The user can change the display language via the language link.
2. [Web shop]
   Configure which of the system languages are available per web shop. See: *Select the active languages for the web shop* on page 123
3. [Web shop]
   Allow customers to change the language of the web shop. See: *Configure the access settings* on page 103
4. [Web shop]
   Select the language of the logon page of the web shop. See: *Configure the layout* on page 105

This topic describes how you can select the active languages for the system.

Procedure

1. Click [System] - [Active languages for system]
2. Enable all languages that you want to offer to your users.
   By default, the installation language is enabled.
3. Click [Save].

Manage the corrupted orders and jobs

Introduction

This topic describes how you can manage a corrupted job.

Procedure

1. Click [System] - [Corrupted orders and jobs].
- [Corrupted orders]
- [Corrupted jobs]

2. Select a job from the list of corrupted jobs. Manage the corrupted job:

Action	Description
[Save]	1. Click the [Save] button. 2. Browse to a location. Click the [Save] button. The corrupted job and the job ticket are saved. The saved job and job ticket can be sent to the help desk to analyze why the job became corrupted.
[Delete]	1. Click the [Delete] button. The corrupted job is deleted from the server.
[Refresh]	1. Click button [Refresh] to update the list of corrupted jobs. The list of corrupted jobs is not updated automatically.

Define the path for the temporary folder

Introduction

You have to define the temporary folder path. This folder is used to create the temporary backup file.

Procedure

1. Click [System] - [Temporary folder].
2. You can type or copy/paste the folder path in the text field.
3. Click [Save].

Define the license server settings

Procedure

1. Click [System] - [License].
2. Define the [License server name:].
   Define the name or IP address of the license server.
   You can define the license server name in Fully Qualified Domain Name (FQDN). For example, <servername>.company.nl.
3. Define the [Port:].
   Define which port of the license server is used.
4. Click the [Test connection] button.
   Click this button to test the connection to the defined server.
5. Click [Save].

Chapter 5
Web shop

Introduction

The [Web shop] component contains all available web shops. The name of the default web shop is [Default]. This web shop is always available. Each web shop that is created in the [Web shop editor] is added with its own name to [Web shop]. You have to configure each web shop separately.

Access

Configure the access settings

Configure the general settings

1. Click [Web shop] - <web shop> - [Access] - [General settings].
2. [Enable anonymous access]
   When you enable anonymous access to a web shop, you allow anonymous customers to browse the web shop. Anonymous customers cannot order from the web shop.
   Customers have to log in to the web shop to order products.
3. [Remember the user name and password]
   The option [Remember the user name and password] becomes available in the logon screen for the customer. When the customer enables this option, the customer can log on next time without entering username and password.
   The customer must enable cookies in the browser to support this option.
4. Click [Save].

Allow self-registration

You have to configure self-registration for each web shop. The scenario to enable self-registration is:

1. For each web shop:
   - Configure if users are allowed to create an account for Web Submission via self-registration.
   - Configure if each account is activated automatically or manually.
2. For accounts that must be activated manually:
   You can activate or deactivate any self-registered user accounts. See: *Activate self-registered users* on page 131

This topic describes how you can allow customers to create an account via self-registration. You can also configure if each account is activated automatically or manually.

1. Click [Web shop] - <web shop> - [Access] - [General settings].
2. [Allow self-registration]
   Customers can create their own accounts when you enable this option. The link [Create an account] appears in the login screen of the Web Submission.
3. [Use CAPTCHA]
   Customers have to type the displayed alphanumerical characters while creating an account.
4. [The system administrator must activate all new self-registered user accounts.]
   - True
     The system administrator receives an email when a user has created a new account via self-registration. The system administrator must activate each account manually.
     Type the email address for the system administrator.
   - False
     All new user accounts are activated automatically.
     Once an account is activated, you can manage the concerning user in workspace [User management]. You can add the user to a user group, assign a cost center, etc.
5. Click [Save].

Configure the permissions for customers

You can select which languages must be active for the system. Then, you can configure which languages are available for the customers. You have to configure this for each web shop. You have to configure the languages in the following locations in workspace [Configuration]:

1. [System]
   Select the active languages for the system. See: *Select the active languages for the system* on page 97
   A language link will become available in the components of the system, e.g. the [Order processing]. The user can change the display language via the language link.
2. [Web shop]
   Configure which of the system languages are available per web shop. See: *Select the active languages for the web shop* on page 123
3. [Web shop]
   Allow customers to change the language of the web shop.
4. [Web shop]
   Select the language of the logon page of the web shop. See: *Configure the layout* on page 105

This topic describes how you can allow customers to change the language of the web shop.

1. Click [Web shop] - <web shop> - [Access] - [General settings].
2. [Allow users to change their password]
   Enable this option to allow users of [Web Submission] to change their password.
   You can customize this setting for one or more user groups. See: [User management] - [User groups] - [User group settings]. The custom settings overrule the web shop settings for the user group. The custom settings are used in all web shops for the concerning user group.
3. [Allow the customer to change the language]
   Enable this option to allow a user to change the language of the Web Submission.
   If this option is disabled, Web submission is displayed in the installation language and the user is not able to change the language.
4. Click [Save].

Layout

Configure the layout

Introduction

You can select which languages must be active for the system. Then, you can configure which languages are available for the customers. You have to configure this for each web shop. You have to configure the languages in the following locations in workspace [Configuration]:

1. [System]
   Select the active languages for the system. See: *Select the active languages for the system* on page 97
   A language link will become available in the components of the system, e.g. the [Order processing]. The user can change the display language via the language link.
2. [Web shop]
   Configure which of the system languages are available per web shop. See: *Select the active languages for the web shop* on page 123
3. [Web shop]
   Allow customers to change the language of the web shop. See: *Configure the access settings* on page 103
4. [Web shop]
   Select the language of the logon page of the web shop.

This topic describes how you can configure the layout of the web shop. You have to configure each web shop. You can select the language of the logon page, the theme, etc.

Configure the layout settings

1. Click [Web shop] - <web shop> - [Layout] - [Layout].
2. [Language]
   Select the language of the Web Submission logon page.
3. [Theme:]
   Assign a theme to the web shop.
   You can create and edit the themes in workspace [Theme editor].
4. [Login instructions:]
   You can type in the user instructions that will be displayed on the Web Submission logon page. These login instructions are visible in Web Submission when the user logs on via custom authentication.
   The login instructions will not be translated when you select a different language for the logon page.
5. [Enable 'Download' page]
   You can publish documents for the customer in the web shop.
   1. Create folder "DownloadPage" in the temporary folder on the server. For the location of the temporary folder, see *Define the path for the temporary folder* on page 99.
      For example: C:\Windows\Temp\PRISMAdirect\DownloadPage
   2. Copy the files that you want to publish in the web shop in this folder.
   3. Enable the [Enable 'Download' page] option.
      The [Downloads] link becomes available in the web shop.

   The files are available for the customer when the customer clicks [Information] - [Downloads].
6. Click [Save].

Order history settings

1. Click [Web shop] - <web shop> - [Order history settings].
2. [Show order history]
   When you enable this option, a list becomes available in the [Order processing]. This list contains the canceled and finalized orders.
3. [Number of visible orders:]
   You can define how many canceled and finalized orders are available in the order history list.

Web shop view

Configure the custom columns for orders and jobs

Introduction

You can configure which order information is displayed for each order and job in the Web Submission. You can make the most important information of the orders available to the customers in one view.

For example, you can enable item [Number of jobs inside] to display how many jobs an order contains. For each order, the number of jobs is displayed as: {0} jobs inside.

You can customize this setting for one or more user groups. See: [User management] - [User groups] - [User group settings]. The custom settings overrule the web shop settings for the user group. The custom settings are used in all web shops for the corresponding user group.

Procedure

1. Click [Web shop] - <web shop> - [Layout] - [Web shop view] - [Custom columns for job / order].
2. Select:
   - [Custom columns for job] to configure the displayed information for jobs in the Web Submission.
   - [Custom columns for order] to configure the displayed information for orders in the Web Submission.
3. You can drag and drop available items to the active items.
   It is recommended that you enable not more than 12 items.
4. Drag each active item to set the order of the items.
   The item in the top becomes the leftmost displayed item. The item at the bottom becomes the rightmost displayed item.
5. Click [Save].

Create a filter

Introduction

You can create filters to determine which orders are visible for a user. You can create and configure the filters in the following locations in workspace [Configuration]:

1. [Web shop]
   The filter determines which orders are visible for a user of [Web Submission].
2. [Order processing]
   The filters determine which orders are visible for an operator of [Order processing]. See *Create a filter* on page 149.

Click the column header 'Name' to apply ascending sorting or descending sorting.

Click the column header '*' to sort on items that are used in the filter.

This topic describes how you can create and configure a filter for orders in the [Web Submission].

Procedure

1. Click [Web shop] - <web shop> - [Layout] - [Web shop view] - [Filter].

2. Select an item that you want to add to the filter and enable the [Use in filter] option.
An item is marked with a funnel icon when the item is added to the filter.

3. Configure the values for the item.

4. If required, you can add more than one item to the filter.
By default, the 'AND' operator is used when you add more than one item to the filter. When you enable the [Allow the OR operator in the filter] option, the 'OR' operator is used when you add more than one item to the filter.

5. Click [Save].

Configure the submission settings

Introduction

The settings in this dialog are related to file submission.

1. Click [Web shop] - <web shop> - [Layout] - [Submission].
2. [Allowed file types]
   - [*]
     All document types are accepted.
   - You can type the supported types of digital documents (for example PDF, DOC, PS, ...). Use a comma to separate the custom document types.

   You can customize this setting for one or more user groups. See: [User management] - [User groups] - [User group settings]. The custom settings overrule the web shop settings for the user group. The custom settings are used in all web shops for the corresponding user group.
3. [Overview of warnings]
   When you enable this option, the button [Check for warnings] becomes available for the user in the Web Submission. The user can click the button to check the order for warnings. The operation checks for any conflicts between the PDF file and the values of the visual ticket items. For example, you assigned a media type to the PDF file, but another media type is assigned to the visual ticket item [Media]. This results in a warning. The [Overview of warnings] dialog displays any detected warnings. It is recommended that the user solves any warning(s) before the user submits the order. Therefore, it is recommended that you enable the [Enable overview of warnings] option. See the help file of the [Product and order editor] for more information concerning visual ticket items.
4. [Copyright administration]
   Enable this option to make the customer responsible that submitted files are not copyright protected. A submitted document may have copyrights and this cannot be automatically checked by the software. The customer explicitly needs to sign off for copyrights to free the print room of copyrights infringements before the jobs can be sent to the print room. The customer can only submit a job when option [Copyright administration] is enabled.
   You can customize this setting for one or more user groups. See: [User management] - [User groups] - [User group settings]. The custom settings overrule the web shop settings for the user group. The custom settings are used in all web shops for the corresponding user group.
5. [Copyright administration message:]
   A default message is displayed to the customer or operator when:
   1. The [Copyright administration] option is enabled in this dialogue.
   2. The customer or operator tries to submit an order, but he or she has not enabled the [Copyright administration] option in the order ticket.

   Click a language to type a default message to the customer or operator in that language. The available languages are displayed just above the text field.
6. Click [Save].

Pricing

Manage the cost centers

Introduction

You can manage the budgets for users and user groups. You have to create one or more cost centers for each web shop. You have to assign a budget to each cost center. Then, you can assign one or more users and user groups to each cost center. For the assigned users the order prices are deducted from the budget. You can set a maximum price for an order for each user or user group. In this case, an approver has to accept or reject the order when the price exceeds the maximum price.

You have to configure the cost centers in two locations in workspace [Configuration]:
1. [Web shop]
   You have to create one or more cost centers for each web shop.
2. [User management]
   You can assign one or more users and user groups to each cost center. See *Assign a cost centre to a user* on page 133 and *Assign a cost center to a user group* on page 141.

You have to configure the price approval workflow in two locations in workspace [Configuration]:
1. [Web shop]
   You can define the default price approval settings for each web shop. See *Manage the default price approval settings* on page 112
2. [User management]
   You can define custom price approval settings for users and user groups. The custom settings overwrite the default price settings for each web shop. See *Manage the price approval settings for a user* on page 134 and *Manage the price approval settings for a user group* on page 142

Alternatively, you can setup an interface between the PRISMAdirect server and the uniFLOW server. The uniFLOW server then manages the cost centers and the price approval workflow. See *Setup the uniFLOW interface* on page 59

NOTE
The cost centers and the price approval workflow are part of the budget management workflow. When the payment workflow is enabled, then the budget management workflow is disabled.

This topic describes how you can create one or more cost centers for each web shop.

Procedure

1. Click [Web shop] - <web shop> - [Pricing] - [Cost centers].
   You have to configure the cost centers for each web shop.
2. Click the plus icon to add a cost center. An empty cost center is created.
   Click the pencil icon to edit the cost center. The cost center is expanded.
3. Edit the caption. The caption is the displayed name of the cost center.
   You can use the characters: 'a - z', 'A - Z', '0 - 9', '_' . Spaces are allowed for the caption.
4. Type a description for the cost center.
5. Define the email address of the approver for this cost center. When you add more than one email address, you must use a semicolon to separate the addresses.
   The approver receives an email when the spent budget exceeds the specified threshold.
6. Define the available budget for the cost center.

7. [Send warning at threshold [%]:]
Define a percentage of the available budget. The approver receives an email when the spent budget exceeds the specified threshold. The approver can increase or decrease the available budget, or reset the spent budget.
The email message is predefined but it can be changed. It can be changed from the [Workflow configuration], in the section [Email templates].
8. [Use cost center one level down:]
For example, you can create a top level cost center which contains the total budget. Then you create a cost center per department. The cost center for each department uses part of the total budget. When you enable this option for the top level cost center, then users can only select one of the departmental cost centers.
9. Select the default cost center.
When multiple cost centers are assigned to a user, the default cost center is selected for that user in the web shop. Customers can always select another cost centers in the web shop.
10. Click [Save].

Reset the spent budget

Introduction

Each cost center contains the available budget and the spent budget. You can reset the spent budget per cost centre manually.

Procedure

1. Click the pencil icon to edit the cost center. The icon appears when you hover the mouse pointer over a cost center.
2. Click the [Reset spent budget] button.
The spent budget of the cost center is reset to zero.

Manage the default price approval settings

Introduction

You can manage the budgets for users and user groups. You have to create one or more cost centers for each web shop. You have to assign a budget to each cost center. Then, you can assign one or more users and user groups to each cost center. For the assigned users the order prices are deducted from the budget. You can set a maximum price for an order for each user or user group. In this case, an approver has to accept or reject the order when the price exceeds the maximum price.

You have to configure the cost centers in two locations in workspace [Configuration]:

1. [Web shop]
   You have to create one or more cost centers for each web shop. See *Manage the cost centers* on page 110
2. [User management]
   You can assign one or more users and user groups to each cost center. See *Assign a cost centre to a user* on page 133 and *Assign a cost center to a user group* on page 141.

You have to configure the price approval workflow in two locations in workspace [Configuration]:

1. [Web shop]
   You can define the default price approval settings for each web shop.
2. [User management]
   You can define custom price approval settings for users and user groups. The custom settings overwrite the default price settings for each web shop. See *Manage the price approval settings for a user* on page 134 and *Manage the price approval settings for a user group* on page 142

Alternatively, you can setup an interface between the PRISMAdirect server and the uniFLOW server. The uniFLOW server then manages the cost centers and the price approval workflow. See *Setup the uniFLOW interface* on page 59

NOTE
The cost centers and the price approval workflow are part of the budget management workflow. When the payment workflow is enabled, then the budget management workflow is disabled.

This topic describes how you can define the default price approval settings for each web shop.

Procedure

1. Click [Web shop] - <web shop> - [Pricing] - [Price approval workflow].
   You have to configure the default price approval settings for each web shop.
2. Click [New level].
   Define a maximum price for the current level. You can type a value in the spinbox for the budget.
3. Define the email address of the approver for the current level. When you add more than one email address, you must use a semicolon to separate the addresses.
   The approver receives an email when the order price exceeds the maximum price for the current level. The approver of the current level must approve or reject the order. If the price exceeds the maximum price of the next level, an approver of that level must also approve or reject the order.

   NOTE
   The approver for level 1 can forward the approval form to the approver for level 2.

4. Click button [New level] to define a maximum price for the new level. The maximum price of the new level must be higher than the maximum price of the previous level.

5. [Allow an approver to accept on behalf of higher level approvers.]
   When you enable this option, each approver can always accept or reject an order, regardless of the price.
6. [Motivation to approve price]
   Click a language to type a default motivation to approve the price in that language. The available languages are displayed just above the text field. The customer can edit the motivation when the order price exceeds the maximum price for level 1.
7. Click [Save].

Configure the prices

Introduction

You have to configure the prices in the following locations in workspace [Configuration]:

1. [Price and formula editor]
   You have to configure the prices for the system. See *Configure the prices* on page 177.
   You have to configure the prices for media, printing and finishing options. You can configure the prices for choice items that you want to use in formulas. You have to configure the prices for stationery products. When you have configured the prices, you can create formulas for jobs and for orders.
2. [Web shop]
   When the prices are configured for the system, you can configure the prices for each web shop. The prices for a web shop overrule the settings for the system.

All items for media, printing and finishing are defined in and retrieved from the [Product and order editor]. This is also true for the choice items.

This topic describes how you can configure the prices for each web shop.

Configure the prices for media, printing and finishing items

1. Check that the default prices are configured.
   Click [Price and formula editor] - [Pricing].
2. Configure if the default prices must be increased or decreased for each web shop.
   Click [Web shop] - <web shop> - [Pricing] - [Pricing].
3. Define percentages for all options in the dialogue. You can type a percentage in the text field. Or you can click the arrow buttons to increase or decrease the percentage. Define if the percentage must be added or subtracted for each option.
4. Click [Save].

Configure the default price estimation settings

Introduction

In this dialogue, you can define the default price estimation settings for the web shop.

You can define the price settings for and assign formulas to:
- Product
  Select a product in the [Product and order editor] workspace. You can define the [Price estimation] and [Quotation] settings for each product. The product settings overrule the user group and the web shop settings.
- User groups
  You can customize the [Price estimation] and [Quotation] settings for each user group. The custom settings overrule the web shop settings for the user group. The custom settings are used in all web shops for the corresponding user group. See *Add or edit a user group* on page 136.
- Each web shop
  You can define the [Price estimation] and [Quotation] settings for each web shop.

The jobs created with a product will use the following price settings and formulas:
1. If a formula is assigned to the product, then this formula is used.
2. Otherwise, the formula and price settings assigned to the user group are used.
3. If no formulas are assigned to the product or user group, then the formulas and price settings assigned to the web shop are used.

1. Click [Web shop] - <web shop> - [Pricing] - [Price estimation].
2. [Price estimation]
   - [Yes]
     The [Price estimation] option is available in Web Submission. A user is always presented with an estimation of the job cost.
   - [No]
     The [Price estimation] option is not available in Web Submission. A user is never presented with an estimation of the job cost.
   - [Always]
     A user is always presented with an estimation of the job cost. The user cannot submit the job until the cost of the job is estimated.
3. [Select formulas]
   Drag and drop the available formulas to the active formulas. Do this for both the jobs and the orders.
4. Click [Save].

Configure the default quotation settings

Introduction

In this dialog, you can define the default quotation settings for the web shop. The operator calculates and sends the quotation to the customer. A license is required to use the quotation functionality.

You can define the price settings for and assign formulas to:
- Product
  Select a product in the [Product and order editor] workspace. You can define the [Price estimation] and [Quotation] settings for each product. The product settings overrule the user group and the web shop settings.
- User groups
  You can customize the [Price estimation] and [Quotation] settings for each user group. The custom settings overrule the web shop settings for the user group. The custom settings are used in all web shops for the corresponding user group. See *Add or edit a user group* on page 136.
- Each web shop
  You can define the [Price estimation] and [Quotation] settings for each web shop.

The jobs created with a product will use the following price settings and formulas:
1. If a formula is assigned to the product, then this formula is used.
2. Otherwise, the formula and price settings assigned to the user group are used.
3. If no formulas are assigned to the product or user group, then the formulas and price settings assigned to the web shop are used.

1. Click [Web shop] - <web shop> - [Pricing] - [Quotation].
2. [Quotation]
   - [Yes]
     The [Quotation] option is available in Web Submission. A user can request a quotation.
   - [No]
     The [Quotation] option is not available in Web Submission. A user cannot request a quotation.
   - [Always]
     A user is always presented with a quotation. The user cannot disable the request to calculate a quotation.
3. [Price can be accepted on behalf of the customer:]
   Enable this option to allow the operator to accept the quotation on behalf of the customer. Disable this option to force the customer to accept or reject the quotation.
4. [An order can be printed only after the price is calculated.]
   Enable this option to force the operator to always calculate the quotation. The quotation must be calculated for a correct budget control.
5. [Formula for job:]
   You have to select a formula to calculate the quotations of the jobs.
6. [Formula for order:]
   You have to select a formula to calculate the quotations of the orders.
7. Click [Save].

Enable payment

Introduction

The payment providers offer a payment service for your users. When you select one or more payment providers, each user can pay for their orders directly. You have to configure the payment workflow in three locations in workspace [Configuration]:

1. [System] - [Connectivity]
   Enable payment for the system. Then, you can select which payment providers are available for the system.
   Configure the authentication to the SQL server instance. The system creates a payment report per payment provider on the SQL server when the authentication is correct. See *Enable payment for the system* on page 54.
   The payment report is stored in the accounting database on the SQL server. You do not have to enable the accounting functionality to create and access the payment report. The accounting functionality and the payment report can be enabled independently.
2. [System] - [Web submission]
   You have to configure the payment providers for each web server once the payment service is enabled. See *Configure payment providers* on page 65.
3. [Web shop]
   You have to enable the payment service for each web shop where you want to offer the payment service.

You can enable payment for the selected web shop. Now, payment becomes mandatory for all customers of the web shop.

Payment

1. Click [Web shop] - <web shop> - [Pricing] - [Payment].
2. Enable the [Enable payment] option. Customers have to pay their orders before they can submit their orders via the web shop.
   You can customize this setting for one or more user groups. See: [User management] - [User groups] - [User group settings]. The custom setting overrules the web shop setting for the user group. The custom setting is used in all web shops for the corresponding user group.
3. Click [Save].

Configure shipping

Introduction

You can offer a shipping service to your customers. When you select one or more shipping providers, each customer can request shipment of an order via the web shop. You have to configure the shipping workflow in three locations in workspace [Configuration]:

1. [System] - [Connectivity]
   Configure the default shipping settings for the system. You can configure some of these settings differently for the web shops. For example, you have three web shops. You have enabled shipping on system level. Now, you can enable or disable shipping for each web shop.
   See: *Configure the general shipping settings* on page 56, *Configure the default shipping label* on page 57 and *Type the default pickup address* on page 55.
2. [System] - [Web submission]
   You can enable and configure one or more shipping providers for each web server once shipping is enabled for the system. See: *Configure shipping providers* on page 66.
3. [Web shop]
   You have to enable the shipping service for each web shop where you want to offer shipping. You have to select one or more shipping formulas for each web shop. Also see *Type the pickup address* on page 125.

This topic describes how you can enable and configure one or more shipping providers once the shipping service is enabled for the system.

Procedure

1. Click [Web shop] - <web shop> - [Pricing] - [Shipping].
2. Enable the [Enable shipping] option.
   The customer can request shipment of an order via the web shop.
   You can customize this setting for one or more user groups. See: [User management] - [User groups] - [User group settings]. The custom setting overrules the web shop setting for the user group. The custom setting is used in all web shops for the corresponding user group.
3. Click [Add].
   You can configure one or more delivery times and assign shipping formulas to the each delivery time.
   1. Configure the maximum time to deliver an order. The shorter the delivery time, the higher the postage.
      You can type a value in the text field. Or you can click the arrow buttons to increase or decrease the value.
   2. Assign a shipping formula to the delivery time. Select a formula from the drop-down list.
   3. Do this for each delivery time.
4. Click [Save].
   The customer can choose one of the configured delivery times in the web shop.

Configure tax calculation

Introduction

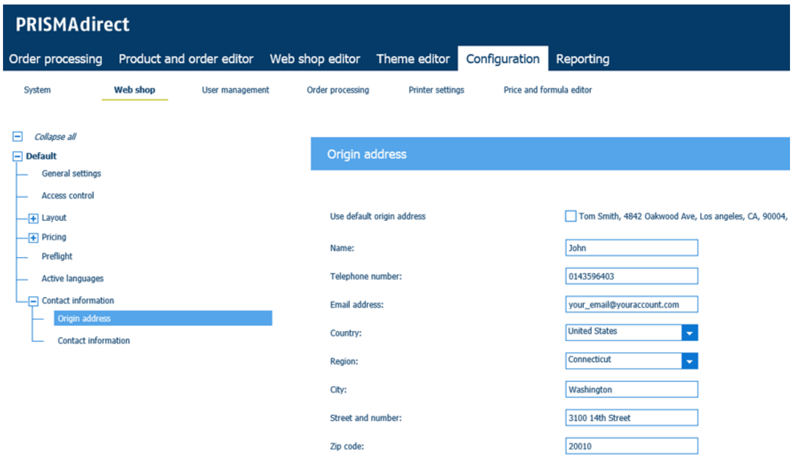
The tax service calculates the sales taxes for the orders. You have to configure the tax services workflow in the following locations in workspace [Configuration]:

1. [System] - [Connectivity]
   Configure which tax services are available for the system. See *Enable tax services for the system* on page 58
2. [System] - [Web submission]
   You have to configure the tax services for each web server once tax services are enabled for the system. See *Configure the tax services* on page 67
3. [Web shop]
   - [Origin address]
     The tax service requires the pickup address of the print room and the delivery address of the customer. See *Type the pickup address* on page 125
   - [Price estimation]
     The order price must be calculated first before the sales tax can be calculated. See *Configure the default price estimation settings* on page 115
   - [Tax calculation]
     You can select one tax service per web shop. See *Configure tax calculation* on page 119.

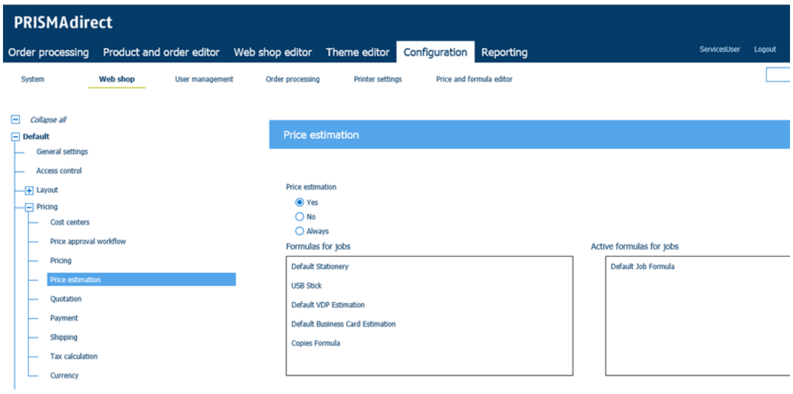
This topic describes how you can configure tax calculation for the selected web shop.

Procedure

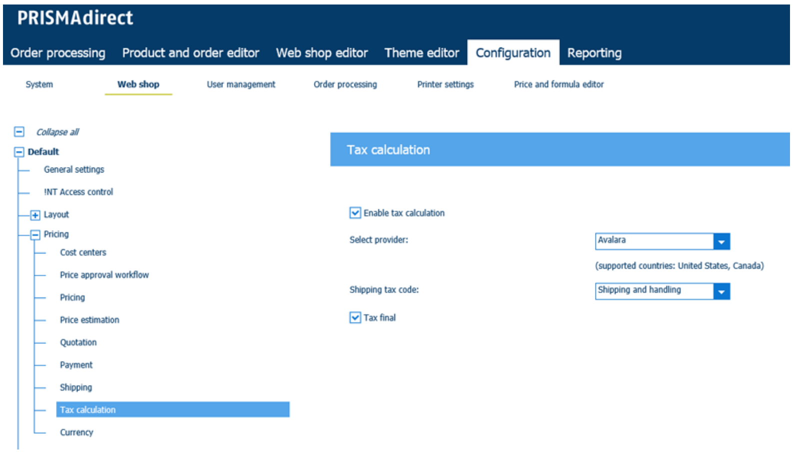
1. Click [Web shop] - <web shop> - [Contact information] - [Origin address].
You have to configure the pickup address of the web shop if you want to use the tax service.



2. Click [Web shop] - <web shop> - [Pricing] - [Price estimation].
You have to enable price estimation if you want to use the tax service.



3. Click [Web shop] - <web shop> - [Pricing] - [Tax calculation].
4. Enable the [Enable tax calculation] option.
5. Select a tax service from the drop-down list.
   The tax service calculates the sales taxes for the orders.



6. Click [Save].

Configure the preflight rules

Introduction

A preflight operation is a quality check of your document. You can configure the application to automatically preflight a PDF file when:
- The operator generates a proof PDF in the order processing console.
- The customer adds a file to an order in the web shop.

The preflight operation checks if any rules are violated in the PDF file(s). You can configure most of the rules. You can configure some rules to detect and fix a violation. Other rules can only be configured to detect a violation. These violations can only be solved manually in the concerning PDF file by the customer or the operator. The operation generates a preflight report and an annotated file. The preflight report shows a summary of the problems that have been found and fixed.

You have to configure the preflight settings in the following locations in workspace [Configuration]:
1. [Order processing]
   You have to configure the preflight rules for the [Order processing] workspace. See *Configure the preflight rules* on page 150.
2. [Web shop]
   You can configure the preflight settings for each web shop. These settings will also be used when you create an order for this web shop in the [Order processing].
3. [System]
   You can configure the number of preflight processes that can run in parallel. See *Automatic process settings* on page 72.
4. You can attach the preflight report to emails to your customer. To configure the email templates, go to: [Order processing] - [Workflow configuration] - [Email templates].

This topic describes how you can configure the preflight settings for each web shop.

Procedure

1. Click [Web shop] - <web shop> - [Preflight].
2. Click the following rules to configure the rules.
   You can configure some rules to detect and fix a violation. Other rules can only be configured to detect a violation. These violations can only be solved in the concerning PDF file by the customer or the operator.
   - [PDF actions and scripting rule:]
   - [Content too close to border rule:]
   - [Embedded fonts rule:]
   - [Hairline rule:]
   - [Image compression is too high rule:]
   - [Image resolution is too high rule:]
   - [Image resolution is too low rule:]

   You can only enable or disable the following rules. The preflight operation cannot fix these violations. These violations can only be solved manually in the concerning PDF file by the customer or the operator.
   - [Restricted permissions rule:]
   - [Transparency rule:]
   - [Overprint rule:]
3. Enable or disable each rule in the [Enabled] column.
4. Define the [Severity] of each rule.
   - [Warning]

A violation of the rule is detected. You can ignore the warning.
- [Error]
  A violation of the rule is detected. The violation of the rule must be fixed.

5. You can define a timeout. The value is the timeout value in minutes.
   When the timeout value is exceeded, the preflight operation is canceled.
6. [Enable automatic preflight]
   When you enable this option, the application preflights each PDF file that the customer adds to an order in the web shop. When the customer adds a non-PDF file, then the file must be converted to PDF first before the preflight operation can start.
   When you disable this option, the submitted files of the customer cannot be preflighted in the web shop. The files can only be preflighted when the operator generates a proof PDF in the order processing console.
   You can customize this setting for one or more user groups. See: [User management] - [User groups] - [User group settings]. The custom settings overrule the web shop settings for the user group. The custom settings are used in all web shops for the concerning user group.
7. Click [Save].

Select the active languages for the web shop

Introduction

You can select which languages must be active for the system. Then, you can configure which languages are available for the customers. You have to configure this for each web shop. You have to configure the languages in the following locations in workspace [Configuration]:

1. [System]
   Select the active languages for the system. See: *Select the active languages for the system* on page 97
   A language link will become available in the components of the system, e.g. the [Order processing]. The user can change the display language via the language link.
2. [Web shop]
   Configure which of the system languages are available per web shop.
3. [Web shop]
   Allow customers to change the language of the web shop. See: *Configure the access settings* on page 103
4. [Web shop]
   Select the language of the logon page of the web shop. See: *Configure the layout* on page 105

This topic describes how you can configure which of the system languages are available per web shop.

1. Click [Web shop] - <web shop> - [Active languages].
2. Select the default language of the web shop from the drop-down list.
3. Enable all languages that you want to offer to your customers.
4. Click [Save].

Contact information

Type the contact information settings

Introduction

The [Contact information] are used in the [About] link in [Web Submission]. Customers can contact the person with questions, etc.

1. Click [Web shop] - <web shop> - [Contact information] - [Contact information].
2. Configure:

Setting	Description
[Name]	The name of the contact person
[Telephone number]	The telephone number of the contact person.
[Location]	The location where the contact person can be found.
[Email address]	The email address of the contact person.

3. Click [Save].

Type the pickup address

Introduction

You can offer a shipping service to your customers. When you select one or more shipping providers, each customer can request shipment of an order via the web shop. You have to configure the shipping workflow in three locations in workspace [Configuration]:

1. [System] - [Connectivity]
   Configure the default shipping settings for the system. You can configure some of these settings differently for the web shops. For example, you have three web shops. You have enabled shipping on system level. Now, you can enable or disable shipping for each web shop.
   See: *Configure the general shipping settings* on page 56, *Configure the default shipping label* on page 57 and *Type the default pickup address* on page 55.
2. [System] - [Web submission]
   You can enable and configure one or more shipping providers for each web server once shipping is enabled for the system. See: *Configure shipping providers* on page 66.
3. [Web shop]
   You have to enable the shipping service for each web shop where you want to offer shipping. You have to select one or more shipping formulas for each web shop. See *Configure shipping* on page 118.

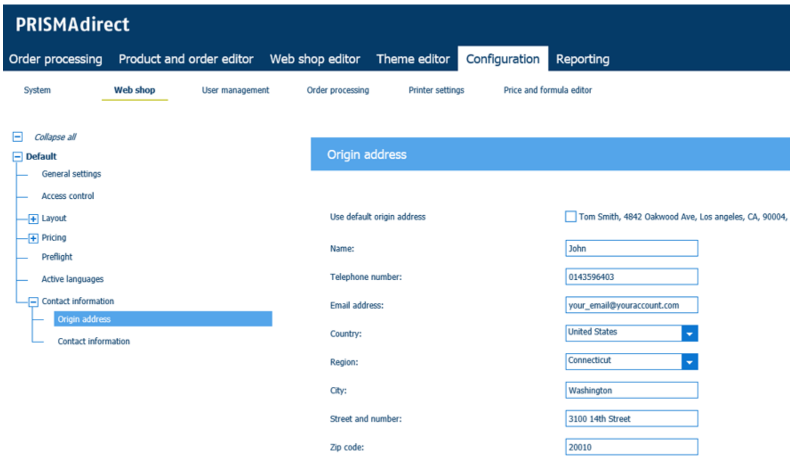
This topic describes how you can define the pickup address for your web shop. Usually, this is the address of your print shop. The shipment provider collects the packages at this address.

You can also use the default pickup address. See: [System] - [Connectivity] - [Origin address].

Procedure

1. Click [Web shop] - <web shop> - [Contact information] - [Origin address].
2. [Use default origin address]
   - Enabled
     The web shop uses the default pickup address. See: [System] - [Connectivity] - [Origin address].
   - Disabled
     You can type the pickup address for your web shop.
3. Type all address information in the concerning text fields.
   The values in the text fields will not be validated in this dialog. The values will be validated when the operator requests a shipment in the [Order processing] workspace. The selected shipment provider returns an error message if any of the values are incorrect. For example, the zip code is incorrect or the provider is not active in the specified country.

4. Click [Save].


PRISMAdirect
Order processing
Product and order editor
Web shop editor
Theme editor
Configuration
Reporting
System
Web shop
User management
Order processing
Printer settings
Price and formula editor
Collapse all
Default
General settings
Access control
Layout
Pricing
Preflight
Active languages
Contact information
Origin address
Contact information
Origin address
Use default origin address
Tom Smith, 4842 Oakwood Ave, Los angeles, CA, 90004,
Name:
John
Telephone number:
0143596403
Email address:
your_email@youraccount.com
Country:
United States
Region:
Connecticut
City:
Washington
Street and number:
3100 14th Street
Zip code:
20010

Chapter 6
User management

Users

Add or edit a user

Introduction

Dialog [User settings] displays all available users. The application automatically fills in the values in column [User type]. These values depend on the creation of the users. Every user who logs on to the application with an LDAP username and password is created automatically. The [User type] becomes:

- [Windows user] for an automatically created user that is authenticated via Windows authentication.
- [LDAP user] for an automatically created user that is authenticated via custom authentication.
- [Web user] for users created in this dialog.
- [Web user] for self-registered users with an active account. See *Activate self-registered users* on page 131.

Procedure

1. Click [User management] - [Users] - [User settings].
2. Click the plus icon to add a user. A new user is created.
   Click the pencil icon to edit the user.
3. Define the user name. The user name must be unique.

   NOTE
   The following characters are not allowed in a username: @";:<>|?/*[],=+
   The [User name] cannot be changed when you edit the user.

4. Define the [Role] of the user.
   - [Services]
     The users in the [Services] group have the highest rights. These users can access:
       [Order processing]. Both the [Order view] and the [Job view].
       [Product and order editor]
       [Web shop editor]
       [Theme editor]
       [Configuration]
       [Reporting]
       [Web Submission]
   - [Order managers]
     The users in the [Order managers] group can access:
       [Order processing]. Both the [Order view] and the [Job view].
       [Product and order editor]
   - [Operators]
     The users in the [Operators] group can access the [Job view] of the [Order processing].
   - [Customers]
     The users in the [Customers] group can access the [Web Submission].
5. Define the [Password] for this user. You can also change the existing password of a user.
   The password must be different from the user name. Use the following rules to define a strong password:
   - The password must have at least 8 characters.
   - The password must use both upper case and lower case characters.
   - The password must contain at least one number.
   - The password must be different from the user name.

Confirm the password.
Click [Reset password] to change the existing password of a user.

6. You can add a user to one or more user groups.
   When a user is added to multiple user groups:
   - You have to select a default user group for the user. The budget of the default user group is used for this user.
   - You have assigned a role to each user group. Each role has associated rights. The rights for the user groups are merged for the user.
7. [Custom filter settings]
   Enable this option to allow only the use of custom filters for this user in the [Order processing].
   You can create the custom filters in the [Manage filters] dialog of [Order processing].
   When you enable this option, the default filters in the [Order processing] are disabled for this user.
8. Click [Save].

Edit the profile settings

Introduction

You can map the [Profile settings] of the customer to job ticket items. When the customer submits a job, the job ticket items automatically receives the data from the [Profile settings].

- If the profile attribute contains a value, the associated job ticket item is filled in automatically. The customer cannot change the job ticket item.
- If the profile attribute does not contain a value, the associated job ticket item is left empty. The customer must define the value of the job ticket item.
- If you deselect a profile attribute, the Web Submission user must define the value of the job ticket item.

The available profile attributes are fixed and cannot be changed. You can select other job ticket items to map to the profile attributes.

[User profile]

1. Click [User management] - [Users] - [User profile].
2. Enable the profile settings that you want to use.
3. Click the drop-down list to select a job ticket item for a profile attribute.
   Do this for all profile attributes.
4. Click [Save].

Activate self-registered users

Introduction

You can activate or deactivate any self-registered user accounts. The scenario to enable self-registration is:

1. For each web shop:
   - Configure if users are allowed to create an account for Web Submission via self-registration.
   - Configure if each account is activated automatically or manually.

   See: *Configure the access settings* on page 103
2. For accounts that must be activated manually:
   You can activate or deactivate any self-registered user accounts.

This topic describes how you can activate new self-registered user accounts.

Procedure

1. Click [User management] - [Users] - [Self-registered users].
2. Select which new accounts you want to activate.
3. Click [Save].
   The application sends an email to each user whose account is activated.
   Once an account is activated, you can manage the concerning user in workspace [User management]. You can add the user to a user group, assign a cost center, etc.

Import users from an LDAP server or uniFLOW server

Introduction

You can import users from an LDAP server or uniFLOW server. You cannot add a [User role] to an imported user. When you add the user to a user group, the user receives the role of the user group. You also can only change the default group of an imported user amongst the groups it belongs to in the LDAP server. Also, you cannot change its password.

Procedure

1. Click [User management] - [Users] - [Import from LDAP server].
2. Click the [Import] button.
3. Select a server from the drop-down list.
4. Select which user(s) you want to import.

   NOTE
   To be able to import groups or users from a server, the test connection should be successful.

5. Click the [Import] button.

Assign a cost centre to a user

Introduction

You can manage the budgets for users and user groups. You have to create one or more cost centers for each web shop. You have to assign a budget to each cost center. Then, you can assign one or more users and user groups to each cost center. For the assigned users the order prices are deducted from the budget. You can set a maximum price for an order for each user or user group. In this case, an approver has to accept or reject the order when the price exceeds the maximum price.

You have to configure the cost centers in two locations in workspace [Configuration]:

1. [Web shop]
   You have to create one or more cost centers for each web shop. See *Manage the cost centers* on page 110
2. [User management]
   You can assign one or more users and user groups to each cost center.

You have to configure the price approval workflow in two locations in workspace [Configuration]:

1. [Web shop]
   You can define the default price approval settings for each web shop. See *Manage the default price approval settings* on page 112
2. [User management]
   You can define custom price approval settings for users and user groups. The custom settings overwrite the default price settings for each web shop. See *Manage the price approval settings for a user* on page 134 and *Manage the price approval settings for a user group* on page 142

Alternatively, you can setup an interface between the PRISMAdirect server and the uniFLOW server. The uniFLOW server then manages the cost centers and the price approval workflow. See *Setup the uniFLOW interface* on page 59

NOTE
The cost centers and the price approval workflow are part of the budget management workflow. When the payment workflow is enabled, then the budget management workflow is disabled.

This topic describes how you can assign one or more users to each cost center.

Procedure

1. Click [User management] - [Users] - [Cost centers] - <web shop>.
   You have to configure the cost centers for each web shop.
2. Select a user.
   The available cost centres for the user appear.
3. Click the checkbox to assign a cost center to the user. The checkbox appears when you hover the mouse pointer over a cost center.
   You can assign multiple cost centres to the user. The cost centers are added to the [Assigned cost centers].
   - Click the view icon to view the configuration of the cost center. The icon appears when you hover the mouse pointer over a cost center.
4. Deselect the cost centers that you want to remove for the user in section [Available cost centers]. Or you can click the delete icon in section [Assigned cost centers]. The icon appears when you hover the mouse pointer over a cost center.
5. Click [Save].

Manage the price approval settings for a user

Introduction

You can manage the budgets for users and user groups. You have to create one or more cost centers for each web shop. You have to assign a budget to each cost center. Then, you can assign one or more users and user groups to each cost center. For the assigned users the order prices are deducted from the budget. You can set a maximum price for an order for each user or user group. In this case, an approver has to accept or reject the order when the price exceeds the maximum price.

You have to configure the cost centers in two locations in workspace [Configuration]:
1. [Web shop]
   You have to create one or more cost centers for each web shop. See *Manage the cost centers* on page 110
2. [User management]
   You can assign one or more users and user groups to each cost center. See *Assign a cost centre to a user* on page 133 and *Assign a cost center to a user group* on page 141.

You have to configure the price approval workflow in two locations in workspace [Configuration]:
1. [Web shop]
   You can define the default price approval settings for each web shop. See *Manage the default price approval settings* on page 112
2. [User management]
   You can define custom price approval settings for users and user groups. The custom settings overwrite the default price settings for each web shop.

Alternatively, you can setup an interface between the PRISMAdirect server and the uniFLOW server. The uniFLOW server then manages the cost centers and the price approval workflow. See *Setup the uniFLOW interface* on page 59

NOTE
The cost centers and the price approval workflow are part of the budget management workflow. When the payment workflow is enabled, then the budget management workflow is disabled.

This topic describes how you can define custom price approval settings for users. The custom settings overwrite the default price settings for each web shop.

Procedure

1. Click [User management] - [Users] - [Price approval workflow] - <web shop>.
   You have to configure the price approval settings for each web shop.
2. Select a user.
   The price approval settings for the user appear.
3. Click [New level].
   Define a maximum price for the current level. You can type a value in the spinbox for the budget.
4. Define the email address of the approver for the current level. When you add more than one email address, you must use a semicolon to separate the addresses.
   The approver receives an email when the order price exceeds the maximum price for the current level. The approver of the current level must approve or reject the order. If the price exceeds the maximum price of the next level, an approver of that level must also approve or reject the order.

   NOTE
   The approver for level 1 can forward the approval form to the approver for level 2.
5. Click button [New level] to define a maximum price for the new level. The maximum price of the new level must be higher than the maximum price of the previous level.

6. [Allow an approver to accept on behalf of higher level approvers.]
   When you enable this option, each approver can always accept or reject an order, regardless of the price.
7. Click [Save].

User groups

Add or edit a user group

Introduction

You have to configure each web shop separately in workspace [Web shop]. In this dialog, you can customize a number of web shops settings for each user group. The custom settings overrule the web shop settings for this user group. The custom settings are used in all web shops for this user group.

Procedure

1. Click [User management] - [User groups] - [User group settings].
2. Click the plus icon to add a user group. A new user group is created.
   Click the pencil icon to edit the user group.
3. Define the user group name. The name must be unique.

   NOTE
   The following characters are not allowed in a user group name: @";:<>|?/*[],=+
   The [User group name] cannot be changed when you edit the user group.

4. Define the [Role] of the users in the group.
   - [Services]
     The users in the [Services] group have the highest rights. These users can access:
       [Order processing]. Both the [Order view] and the [Job view].
       [Product and order editor]
       [Web shop editor]
       [Theme editor]
       [Configuration]
       [Reporting]
       [Web Submission]
   - [Order managers]
     The users in the [Order managers] group can access:
       [Order processing]. Both the [Order view] and the [Job view].
       [Product and order editor]
   - [Operators]
     The users in the [Operators] group can access the [Job view] of the [Order processing].
   - [Customers]
     The users in the [Customers] group can access the [Web Submission].
5. [Allowed file types]
   - [Web shop]
     Use the settings for [Allowed file types] as defined in dialog [Submission] in [Web shop].
   - [Custom]
     Use custom settings for [Allowed file types] for this user group. The custom settings overrule the web shop settings for this user group. The custom settings are used in all web shops for this user group.
6. [Price estimation]
   - [Web shop]
     Use the settings for [Price estimation] as defined in dialog [Price estimation] in [Web shop].
   - [Custom]

Use custom settings for [Price estimation] for this user group. The custom settings overrule the web shop settings for this user group. The custom settings are used in all web shops for this user group.

NOTE
In the [Product and order editor], the system administrator can select a price estimation formula for each product. The formulas in the product overrule the formulas assigned to the user group in this dialog.

7. [Quotation]
   - [Web shop]
     Use the settings for [Quotation] as defined in dialog [Quotation] in [Web shop].
   - [Custom]
     Use custom settings for [Quotation] for this user group. The custom settings overrule the web shop settings for this user group. The custom settings are used in all web shops for this user group.

     NOTE
     In the [Product and order editor], the system administrator can select a quotation formula for each product. The formulas in the product overrule the formulas assigned to the user group in this dialog.
8. [Copyright administration]
   - [Web shop]
     Use the settings for [Copyright administration] as defined in dialog [Submission] in [Web shop].
   - [Custom]
     Use custom settings for [Copyright administration] for this user group. The custom settings overrule the web shop settings for this user group. The custom settings are used in all web shops for this user group.
9. [Allow the customer to change the language]
   - [Web shop]
     Use the settings for [Allow the customer to change the language] as defined in dialog [Permissions for customers] in [Web shop].
   - [Custom]
     Use custom settings for [Allow the customer to change the language] for this user group. The custom settings overrule the web shop settings for this user group. The custom settings are used in all web shops for this user group.
10. [Custom columns]
   - [Web shop]
     Use the settings for [Custom columns] as defined in dialog [Custom columns] for jobs and orders in [Web shop].
   - [Custom]
     Use custom settings for [Custom columns] for this user group. The custom settings overrule the web shop settings for this user group. The custom settings are used in all web shops for this user group.
11. [Enable 'Download' page]
   - [Web shop]
     Use the settings for [Enable 'Download' page] as defined in dialog [Layout] in [Web shop].
   - [Custom]
     Use custom settings for [Enable 'Download' page] for this user group. The custom settings overrule the web shop settings for this user group. The custom settings are used in all web shops for this user group.
12. [File hosting service]
   - [Global settings]

Use the settings for [File hosting service] as defined in dialog [File hosting providers] in [System].
- [Custom]
Use custom settings for [File hosting service] for this user group. The custom settings overrule the [Order processing] and web server settings for this user group. The custom settings are used in all web shops for this user group.

13. [Enable payment]
    - [Web shop]
    Use the settings for [Enable payment] as defined in dialog [Payment] in [Web shop].
    - [Custom]
    Use custom settings for [Enable payment] for this user group. The custom settings overrule the web shop settings for this user group. The custom settings are used in all web shops for this user group.
14. [Enable shipping]
    - [Web shop]
    Use the settings for [Enable shipping] as defined in dialog [Shipping] in [Web shop].
    - [Custom]
    Use custom settings for [Enable shipping] for this user group. The custom settings overrule the web shop settings for this user group. The custom settings are used in all web shops for this user group.
15. [Enable automatic preflight]
    - [Web shop]
    Use the settings for [Enable automatic preflight] as defined in dialog [Preflight settings] in [Web shop].
    - [Custom]
    Use custom settings for [Enable automatic preflight] for this user group. The custom settings overrule the web shop settings for this user group. The custom settings are used in all web shops for this user group.
16. Click [Save].

Import a user group

Introduction

You can import user groups from a file.

Procedure

1. Click [User management] - [User groups] - [User group settings].
2. Click the [Import] button.
3. Browse to the file.

   NOTE
   The file type can be csv or xml.

4. Click [Open].
   The user group is imported.

Import user groups from an LDAP server or uniFLOW server

Introduction

You can import user groups from an LDAP server or a uniFLOW server.

The users and user groups managed on the LDAP server or uniFLOW server must receive an appropriate [Role] for PRISMAdirect. The role determines the login rights of each user and user group in PRISMAdirect. You can manage the users and user groups in workspace [User management].

Procedure

1. Click [User management] - [User groups] - [Import from LDAP server].
2. Click the [Import] button.
3. Select a server from the drop-down list.
4. Select which user group(s) you want to import.

   NOTE
   To be able to import groups or users from a server, the test connection should be successful.

5. Define the [Role] of the user.
   - [Services]
     The users in the [Services] group have the highest rights. These users can access:
     [Order processing]. Both the [Order view] and the [Job view].
     [Product and order editor]
     [Web shop editor]
     [Theme editor]
     [Configuration]
     [Reporting]
     [Web Submission]
   - [Order managers]
     The users in the [Order managers] group can access:
     [Order processing]. Both the [Order view] and the [Job view].
     [Product and order editor]
   - [Operators]
     The users in the [Operators] group can access the [Job view] of the [Order processing].

- [Customers]
  The users in the [Customers] group can access the [Web Submission].

6. Click the [Import] button.

Assign a cost center to a user group

Introduction

You can manage the budgets for users and user groups. You have to create one or more cost centers for each web shop. You have to assign a budget to each cost center. Then, you can assign one or more users and user groups to each cost center. For the assigned users the order prices are deducted from the budget. You can set a maximum price for an order for each user or user group. In this case, an approver has to accept or reject the order when the price exceeds the maximum price.

You have to configure the cost centers in two locations in workspace [Configuration]:

1. [Web shop]
   You have to create one or more cost centers for each web shop. See *Manage the cost centers* on page 110
2. [User management]
   You can assign one or more users and user groups to each cost center.

You have to configure the price approval workflow in two locations in workspace [Configuration]:

1. [Web shop]
   You can define the default price approval settings for each web shop. See *Manage the default price approval settings* on page 112
2. [User management]
   You can define custom price approval settings for users and user groups. The custom settings overwrite the default price settings for each web shop. See *Manage the price approval settings for a user* on page 134 and *Manage the price approval settings for a user group* on page 142

Alternatively, you can setup an interface between the PRISMAdirect server and the uniFLOW server. The uniFLOW server then manages the cost centers and the price approval workflow. See *Setup the uniFLOW interface* on page 59

NOTE
The cost centers and the price approval workflow are part of the budget management workflow. When the payment workflow is enabled, then the budget management workflow is disabled.

This topic describes how you can assign one or more user groups to each cost center.

Procedure

1. Click [User management] - [User groups] - [Cost centers] - <web shop>.
   You have to configure the cost centers for each web shop.
2. Select a user group.
   The available cost centers for the user group appear.
3. Click the checkbox to assign a cost center to the user group. The checkbox appears when you hover the mouse pointer over a cost center.
   You can assign multiple cost centers to the user group. The cost centers are added to the [Assigned cost centers].
   - Click the view icon to view the configuration of the cost center. The icon appears when you hover the mouse pointer over a cost center.
4. Deselect the cost centers that you want to remove for the user group in section [Available cost centers].
   Or you can click the delete icon in section [Assigned cost centers]. The icon appears when you hover the mouse pointer over a cost center.
5. Click [Save].

Manage the price approval settings for a user group

Introduction

You can manage the budgets for users and user groups. You have to create one or more cost centers for each web shop. You have to assign a budget to each cost center. Then, you can assign one or more users and user groups to each cost center. For the assigned users the order prices are deducted from the budget. You can set a maximum price for an order for each user or user group. In this case, an approver has to accept or reject the order when the price exceeds the maximum price.

You have to configure the cost centers in two locations in workspace [Configuration]:

1. [Web shop]
   You have to create one or more cost centers for each web shop. See *Manage the cost centers* on page 110
2. [User management]
   You can assign one or more users and user groups to each cost center. See *Assign a cost centre to a user* on page 133 and *Assign a cost center to a user group* on page 141.

You have to configure the price approval workflow in two locations in workspace [Configuration]:

1. [Web shop]
   You can define the default price approval settings for each web shop. See *Manage the default price approval settings* on page 112
2. [User management]
   You can define custom price approval settings for users and user groups. The custom settings overwrite the default price settings for each web shop.

Alternatively, you can setup an interface between the PRISMAdirect server and the uniFLOW server. The uniFLOW server then manages the cost centers and the price approval workflow. See *Setup the uniFLOW interface* on page 59

NOTE
The cost centers and the price approval workflow are part of the budget management workflow. When the payment workflow is enabled, then the budget management workflow is disabled.
This topic describes how you can define custom price approval settings for user groups. The custom settings overwrite the default price settings for each web shop.

Procedure

1. Click [User management] - [User groups] - [Price approval workflow] - <web shop>.
   You have to configure the price approval settings for each web shop.
2. Select a user group.
   The price approval settings for the user group appear.
3. Click [New level].
   Define a maximum price for the current level. You can type a value in the spinbox for the budget.
4. Define the email address of the approver for the current level. When you add more than one email address, you must use a semicolon to separate the addresses.
   The approver receives an email when the order price exceeds the maximum price for the current level. The approver of the current level must approve or reject the order. If the price exceeds the maximum price of the next level, an approver of that level must also approve or reject the order.

   NOTE
   The approver for level 1 can forward the approval form to the approver for level 2.

5. Click button [New level] to define a maximum price for the new level. The maximum price of the new level must be higher than the maximum price of the previous level.

6. [Allow an approver to accept on behalf of higher level approvers.]
   When you enable this option, each approver can always accept or reject an order, regardless of the price.
7. Click [Save].

Manage the user roles

Introduction

The user roles determine the login rights of each user and user group in PRISMAdirect. You can create and manage the custom user roles. You can assign the custom user role to a user or user group. When you delete this role, the role [Customers] is automatically assigned to the user or user group.

You cannot edit or delete the default user roles:
- [Services]
- [Order managers]
- [Operators]
- [Customers]

Procedure

1. Click [User management] - [User roles].
2. Click [New role].
   You can also click the copy icon to copy an existing role. The icon appears when you hover the mouse pointer over the existing role.
3. Type the name for the user role.
   By default, all rights are enable for the new role.
4. Manage the rights for the role.
   You have to disable [Order view] first, before you can disable [Job view].
5. You can assign the user role to a user or user group. See *Add or edit a user* on page 128 and *Add or edit a user group* on page 136

Chapter 7
Order processing

General settings

Configure the general settings

Configure the general settings

Configure the general settings for the operator and the order manager of the [Order processing] workspace.

1. Click [Order processing] - [General settings] - [General settings].
2. You can configure the following settings:

Setting	Description
[Allow the operator to change the files of jobs]	Enable this option to allow the operator to change the files of jobs in the job details of the selected job. When this option is enabled, the operator can: • [Digital file], [Paper original] and [Other digital file]. • A product can contain a fixed document. The operator can remove the fixed document and can add other files to the job. • A product can contain a fixed VDP document. The operator can remove the fixed VDP document and can add other files to the job. • Delete a file. • Replace a file. • Edit a non-PDF file. The customers submit files to the [Order processing]. The customers must be confident that the files are printed exactly as these were submitted. When you enable this option, there is no guarantee that the submitted files will remain unchanged before the job is printed.
[Allow the order manager to change the orders]	Enable this option to allow the order manager to change the submitted orders. The order manager can add or remove jobs from the orders, add or remove files from the jobs, etc. The order manager should change an order only after a request from the customer.
[Always add the OrderID to the email subject]	Enable this option to add the OrderID to the subject of each email which is sent from the application. To be able to identify the job in the email client, the OrderID must be added to the subject. NOTE This option must be enabled when Microsoft Outlook is installed. The operator can create jobs and accept jobs in Microsoft Outlook.
[Overview of warnings]	When you enable this option, the operator can open the overview of warnings in the [Order processing]. The order is checked for warnings before the order is submitted. The [Overview of warnings] dialog displays any detected warnings. It is recommended that the operator solves any warning(s) before the operator submits the order. Therefore, it is recommended that you enable the [Enable overview of warnings] option.

Setting	Description
[Allow the order manager to assign jobs from imported orders to operators]	Imported orders can contain multiple jobs. Enable this option to allow the order manager to the jobs to different operators.
[Get notifications when a new order is received]	The operator and the order manager get notifications when a new order is received. The notifications are • A ringing sound, and • The browser tab displays the number of new orders.
[Current job number]	This option contains the job number of the last job. You can define any job number with a maximum value of 999999999. The next submitted job has job number: [Current job number] + 1. NOTE Multiple jobs with the same job number can appear in the job list, when you change the [Current job number].
[Current order number:]	This option contains the number of the last order. You can define any number with a maximum value of 999999999. The next submitted order has order number: [Current order number:] + 1. NOTE Multiple orders with the same order number can appear in the order list, when you change the [Current order number:].

3. Click [Save].

Trace level

Set the trace level for the [Order processing] workspace:
- [Debug]
  The [Debug] trace level provides the most detailed log information.
- [Error]
  The errors are logged.
- [Info]
  The errors and information messages are logged

NOTE
The [Debug] trace level can impact the performance of the application.

Configure the VDP settings

You can offer the VDP functionality to your customers. You have to configure the VDP functionality in two locations in workspace [Configuration]:
1. [Print Prepare Manager service]in [System]
   The Order processing and the Web server connect to the server via the port for the Print Prepare Manager service. These applications must have access to the server to use the VDP functionality.
2. [VDP settings]in [System]
   Define the maximum number of pages of a variable data document shown in the [Preview] or [Proof PDF].

Procedure

1. Click [Order processing] - [General settings] - [General settings].
2. Define the maximum number of pages of a variable data document shown in the [Preview] or [Proof PDF]. The maximum value for this option is 2000 pages.
   A high number of pages can decrease the performance of the application.
3. Click [Save].

Manage filters

Create a filter

Introduction

You can create filters to determine which orders are visible for an operator. You can create and configure the filters in the following locations in workspace [Configuration]:

1. [Web shop]
   The filter determines which orders are visible for a user of [Web Submission]. See *Create a filter* on page 108.
2. [Order processing]
   The filters determine which orders are visible for an operator of [Order processing].

Click the column header 'Name' to apply ascending sorting or descending sorting.

Click the column header '*' to sort on items that are used in the filter.

This topic describes how you can create and configure one or more filters for orders in the [Order processing].

Procedure

1. Click [Order processing] - [Manage filters] - [Filters for orders / jobs]
2. Click the plus icon to add a filter.
3. Assign the filter to one or more operators. You can manage the operators in [Order processing] - [Workflow configuration] - [General settings] - [Assign to].
4. Type a name and description for the filter. The name must be unique.
5. Select an item that you want to add to the filter and enable the [Use in filter] option.
   An item is marked with a funnel icon when the item is added to the filter.
6. Configure the values for the item.
7. If required, you can add more than one item to the filter.
   By default, the 'AND' operator is used when you add more than one item to the filter. When you enable the [Allow the OR operator in the filter] option, the 'OR' operator is used when you add more than one item to the filter.
8. Click [Save].

Configure the preflight rules

Introduction

A preflight operation is a quality check of your document. You can configure the application to automatically preflight a PDF file when:
- The operator generates a proof PDF in the order processing console.
- The customer adds a file to an order in the web shop.

The preflight operation checks if any rules are violated in the PDF file(s). You can configure most of the rules. You can configure some rules to detect and fix a violation. Other rules can only be configured to detect a violation. These violations can only be solved manually in the concerning PDF file by the customer or the operator. The operation generates a preflight report and an annotated file. The preflight report shows a summary of the problems that have been found and fixed.

You have to configure the preflight settings in the following locations in workspace [Configuration]:
1. [Order processing]
   You have to configure the preflight rules for the [Order processing] workspace
2. [Web shop]
   You can configure the preflight settings for each web shop. These settings will also be used when you create an order for this web shop in the [Order processing]. See *Configure the preflight rules* on page 121.
3. [System]
   You can configure the number of preflight processes that can run in parallel. See *Automatic process settings* on page 72.
4. You can attach the preflight report to emails to your customer. To configure the email templates, go to: [Order processing] - [Workflow configuration] - [Email templates].

This topic describes how you can configure the preflight settings for the workspace [Configuration].

Procedure

1. Click [Order processing] - [Preflight].
2. Click the following rules to configure the rules.
   You can configure some rules to detect and fix a violation. Other rules can only be configured to detect a violation. These violations can only be solved in the corresponding PDF file by the customer or the operator.
   - [PDF actions and scripting rule:]
   - [Content too close to border rule:]
   - [Embedded fonts rule:]
   - [Hairline rule:]
   - [Image compression is too high rule:]
   - [Image resolution is too high rule:]
   - [Image resolution is too low rule:]

   You can only enable or disable the following rules. The preflight operation cannot fix these violations. These violations can only be solved manually in the concerning PDF file by the customer or the operator.
   - [Restricted permissions rule:]
   - [Transparency rule:]
   - [Overprint rule:]
3. Enable or disable each rule in the [Enabled] column.

4. Define the [Severity] of each rule.
   - [Warning]
     A violation of the rule is detected. You can ignore the warning.
   - [Error]
     A violation of the rule is detected. The violation of the rule must be fixed.
5. You can define a timeout. The value is the timeout value in minutes.
   When the timeout value is exceeded, the preflight operation is canceled.
6. [Enable automatic preflight]
   When you enable this option, the application preflights each PDF file that the customer adds to an order in the web shop. When the customer adds a non-PDF file, then the file must be converted to PDF first before the preflight operation can start.
   When you disable this option, the submitted files of the customer cannot be preflighted in the web shop. The files can only be preflighted when the operator generates a proof PDF in the order processing console.
   You can customize this setting for one or more user groups. See: [User management] - [User groups] - [User group settings]. The custom settings overrule the web shop settings for the user group. The custom settings are used in all web shops for the concerning user group.
7. Click [Save].

Workflow configuration

General settings

Manage the operators

Introduction

In this dialog, you can create and manage the operators. You can assign jobs to an operator in workspace [Order processing]. In this way, you can divide the work between several operators.

You cannot delete an operator when jobs are assigned to this operator.

Procedure

1. Click [Order processing] - [Workflow configuration] - [General settings] - [Assign to].
2. Click the plus icon to add an operator.
   Click the pencil icon to edit the operator.
3. Edit the name of the operator.
   You can use the characters: 'a - z', 'A - Z', '0 - 9', '_' . Spaces are allowed.
4. Click [Save].

Manage the categories

Introduction

You can assign jobs to predefined categories and to custom categories in workspace [Order processing].

The predefined categories are:
- [New jobs]
- [Ready jobs]
- [Finalized jobs]

You cannot edit or delete the predefined categories.

You can define your own custom categories. You cannot delete a custom category when jobs are assigned to this category.

Procedure

1. Click [Order processing] - [Workflow configuration] - [General settings] - [Categories].
2. Click the plus icon to add a category.
   Click the pencil icon to edit the category.
3. Edit the name of the category.
   You can use the characters: 'a - z', 'A - Z', '0 - 9', '_' . Spaces are allowed.
4. Click [Save].

Configure the workflow

Introduction

You can configure which actions must be performed by the application when the state of an order changes. This procedure describes all actions that are possible at an order state change. Not all actions are available for all state changes.

Procedure

1. Click [Order processing] - [Workflow configuration] - [General settings].
2. Select any of the order states.
3. Print job ticket when...
   Enable this option when you want to print the ticket when the order changes into the concerning state.
4. You can select several options for sending an email:
   - [Always]
     The email message for the concerning order state change is always send to the customer.
   - [When requested by customer]
     The email message for the concerning order state change is only sent to the customer when the customer has requested this.
   - [Send an email to the customer]
     The email message for the concerning order state change is always send to the customer.
   - [Send an email to the operators]
     The email message for the concerning order state change is always send to the operators. You can define multiple email addresses. Use a semicolon to separate the email addresses.
5. [Allow to edit the email message before sending]
   The default email message is opened. You can change the email message before you send it to the customer.
6. [Send email to Cc addresses]
   Enable option [Send email to Cc addresses] to add a carbon copy address to the email sent. You can define multiple email addresses. Use a semicolon to separate the email addresses.
7. [Move to category]
   Define to which category you want to move the order when the order state changes into the concerning state.
8. [Assign to]
   Define to which operator you want to assign the order when the order state changes into the concerning state.
9. Click [Save].

Configure the other settings

Introduction

You have to configure the email settings in three locations in workspace [Configuration]:

1. [System]
   You have to configure the email settings and the SMTP server of the print room. See *Configure the email settings* on page 52
2. [Order processing]
   - You can allow the operator to attach additional files to the default email messages to the customer.
   - You can create default email messages. See *Configure the email templates* on page 157

Procedure

1. Click [Order processing] - [Workflow configuration] - [General settings] - [Other settings].
2. [Print both the job ticket and the job.]
   The job ticket is inserted as a banner page before the job.
3. [Allow operator to attach files when sending email.]
   You can define the email templates in section [Email templates]. In that section, you can define which files will be attached to the emails by default. When you enable this option, you can allow the operator to attach additional files to the email messages to the customer.
4. [Enable automatic document preparation]
   You can use the automation templates of PRISMAprepare for automatic document preparation.
   1. Get the automation templates
      PRISMAprepare must be installed on a local system. You have to install the PRISMAdirect Web Bootstrap on the same local system. You can download the bootstrap from the PRISMAdirect server, see [Configuration] - [Downloads].
      When you change the automation templates in the local installation of PRISMAprepare, the bootstrap will push the changes to the server of PRISMAdirect.
   2. Use the automation templates
      Enable the [Enable automatic document preparation] option. The automation templates become available in the products in the [Product and order editor] workspace. You can activate the automation templates in each product in view [Print room].
      For each product, the active automation templates will be applied to the jobs as soon as the jobs arrive on the server. The jobs receive the layout as defined by the templates.
      When this option is disabled, the products cannot use the automation templates.
5. Click [Save].

User settings

Configure the reminders

Introduction

You can configure reminders about jobs that are nearly due. You can have up to 5 reminders with different colors. The [Job number] column receives the selected color of the concerning reminder. It is recommended that you add the column [Delivery date] to the [Job view] of the workspace [Order processing]. In this way, the operator can see the creation date of the job and the requested delivery date in one view.

Procedure

1. Select [Set a reminder] if you want to be reminded about jobs that are nearly due.
2. Click [New reminder].
3. You can select how far ahead of the due date the reminder of the job is displayed:
   - [Days]
     The number of days before the due date.
   - [Hours]
     The number of hours before the due date.
   - [Minutes]
     The number of minutes before the due date.
4. You can select the colour for the job to signal the concerning reminder.
5. Click [Save].

Email templates

Configure the email templates

Introduction

The application allows you to automatically send default email messages to the customer. For example, you can create default email messages for all stages of the order workflow.

You have to configure the email settings in three locations in workspace [Configuration]:

1. [System]
   You have to configure the email settings and the SMTP server of the print room. See *Configure the email settings* on page 52
2. [Order processing]
   - You can allow the operator to attach additional files to the default email messages to the customer. See *Configure the other settings* on page 155
   - You can create default email messages.

Procedure

1. Click [Order processing] - [Workflow configuration] - [Email templates].
2. Select the email template that you want to configure.
3. You can change the subject of the email message.
   You can change the default email message for each available language. The languages are enabled in [Active languages for system] in the [System] component.
   Click [Revert to default] to use the default email message again. Your changes will be discarded.
4. Your email message can contain variables from the job ticket. This allows you to send a dynamic message, containing job-specific information. You can use variables from the list of order items and/or the product items. You can use the product items only in text field [Job information (per job):]. Drag and drop the variable into the message at the desired position. A variable is enclosed by '%' symbols.
   You can include a hyperlink to the order in your email. Drag and drop [Hyperlink to order] into the message. When the customer clicks the hyperlink, a web page opens that contains the concerning order.
5. You can configure which files are automatically attached to the email message.
   - Select option [Attach the document] to attach the final PDF document to the email message.
   - Select the [Attach the job ticket] option to attach the job ticket to the email message.
   - Select the [Attach the preflight report] option to attach the preflight report to the email message.

   NOTE
   The operator can attach additional files to an email message when the [Allow operator to attach files when sending email.] option is enabled. See [Other settings] in the [Workflow configuration] dialog.
6. Click [Save].
7. Repeat these steps for all email templates.

Ticket mappings

Use job ticket settings in printer driver

Introduction

You can use the values in the job ticket directly in the corresponding settings in the printer driver. All the printers installed on your machine that support the [UPP mappings] will be available in the section [UPP mappings]. The Unified Print Path (UPP) printers use the same technology as PRISMAprepare to print page programmed documents.

The job ticket items that you can use are defined in the [Product and order editor]. You can use job ticket items of type: [Choice], [Yes/No], [Text] and [Number].

You can use the values of the job ticket in:
- [All printers]
  The values of the job ticket are used in all printer drivers.
  At least one printer that supports [UPP mappings] must be installed to see items in the [Printer parameters].
- To specific printers
  The values of the job ticket are used in a specific printer driver. The values of the job ticket are only used when you print to that printer.
  You can use the values of the job ticket differently in different printer drivers.

You can use the job ticket settings for [All printers]. You can use the same job ticket settings for one or more specific printers. The job ticket settings for a specific printer driver overwrite the use of these settings for all printers.

Procedure

1. Click [Order processing] - [Ticket mappings] - [UPP mappings].
2. Select if you want to use the job ticket settings in:
   - [All printers]
   - A specific printer
     You must select a printer.

   NOTE
   At least one printer must be installed.
3. Select a [Job ticket item].
   The possible values for this [Job ticket item] and the [Printer parameters] are displayed.
4. Select one of the values and select the corresponding printer parameter.
5. Repeat above steps for each job ticket item that you want to use in the printer driver.
   For example:
   You can use a job ticket item like 'Document type' with value 'Internal report' for multiple printer settings in the printer driver. You can use this job ticket key 'Internal report' for the printer driver settings 'Duplex = On' and 'Staple = Off'. When a user specifies the 'Document' type as 'Internal report,' the document will be printed duplex and with a staple.
6. Click [Save].

Use job tickets settings in document

Introduction

You can use the values of the job ticket items in document attributes. The document attributes are used when you page program the document.

The job ticket items that you can use are defined in the [Product and order editor]. You can use job ticket items of type: [Choice], [Yes/No], [Text] and [Number].

NOTE
Job ticket item [Copies] is only visible when the document is printed.

NOTE
You can use the job ticket settings only if the document is not already page programmed.

Procedure

1. Click [Order processing] - [Ticket mappings] - [Job ticket items in document].
2. Select a [Job ticket item].
   The possible values for this [Job ticket item] and the [Document attributes] are displayed.
3. Select one of the values and select the corresponding document attribute.
   You can map one job ticket item per document attribute.
4. Repeat above steps for each job ticket item that you want to use in the document attributes.
5. Click [Save].

Configure the printed ticket

Procedure

1. Click [Order processing] - [Print options for ticket].
2. Define the font settings for the ticket.
   - [Ticket title settings]
     Define how the title of the job ticket must be printed.
   - [Group item settings]
     Define how the group items of the job ticket must be printed.
   - [Item settings]
     Define how the job ticket items must be printed.
3. For each job ticket category, you can define the font with option [Font name:].
4. For each job ticket category, you can define the [Font size:].
5. For each job ticket category, you can define the [Font style:]
   - [Bold]
   - [Italic]
   - [Underline]
   - [Strikethrough]
6. Enable the [Print logo in ticket] option to print the logo in the job ticket.
   1. Click button [Browse] to select an image.
      The allowed image file types are: .bmp, .jpg, .gif, .png.
      Click [Clear] to remove a selected image.
   2. Select the position for the logo from the drop-down list.
   3. [Scale logo to page size]
      You can scale the logo to the page size. Enable the [Keep ratio] option to use the same relation between width and height for the logo as for the page size. You have to define the width [%] for the image.
7. Click [Save].

Chapter 8

Printer settings

Manage the printers for the application

[Printer discovery tool]

Introduction

You can use the printer discovery tool to easily add printers to PRISMAdirect.

With this printer discover tool, you can detect printers on your network and get the configuration of the printers by standard SNMP protocol. The SNMP protocol must be enabled on the printers. When SNMP is not enabled, you can still add printers manually.

Click the [Discover] button to launch the [Printer discovery tool].

[Printer discovery method]

You can discover printers on the network either by broadcast, by scanning a range of IP addresses or by defining a subnet mask. By default, the range of IP addresses and the subnet mask are retrieved from the local IP address and the local Windows subnet mask.

Discovery method	Description
[Broadcast to local network]	Use this discovery method when printers are connected to the local network. SNMP enabled printers that recognise this type of broadcast will respond. NOTE Not all SNMP enabled printers respond to the broadcast.
[Scan range]	Use this discovery method when printers are connected to another subnet of the network than the local network. NOTE When you have multiple network cards in your system you should use the scan range discovery method. Scan a range of IP addresses for SNMP enabled printers from the lowest to the highest IP address.
[Scan subnet]	Use this discovery method when you network is divided into sub networks. Scan the defined subnet for SNMP enabled printers. The system uses the subnet mask to determine the scan range. You can change the subnet mask.

Click [Search] to start the discovery of printers.

Or you can define the additional settings for [Advanced...] first.

[Advanced discovery]

Click the[Advanced...] button to define SNMP parameters. These parameters are used during the scan process. Some of them are also used to configure the discovered printers.

Scan process properties

Setting	Explanation
[Retries:]	Define how many times the tool tries to contact a printer.
[Timeout (ms):]	Define the response timeout of a printer in ms.

You can select which SNMP version is supported by the printer:
- SNMP V1
- SNMP V3

You can define the following settings when you select SNMP V1:

Settings SNMP V1

Setting	Description
[Read community:]	The read community name is used to identify the group of devices that support printer monitoring. Default value 'public'.

You can define the following settings when you select SNMP V3:

Settings SNMP V3

Setting	Description
[Security user name:]	Define a user name for the authentication service.
[Context:]	'Context' refers to the collection of management information accessible by the SNMP entity. This setting is optional.
[Authentication protocol:]	Select the authentication protocol that is used by the printer. • None • MD5 • SHA
[Authentication password:]	The 'Authentication password' is the password required for the authentication service.
[Confirm password:]	Confirm the authentication password.
[Privacy protocol:]	Select the encryption algorithm that is used by the printer. • None • DES • AES
[Privacy password:]	The 'Privacy password' is the password required for the privacy (encryption) service. This setting is optional.
[Confirm password:]	Confirm the privacy password.

Search result window

Once the discovery starts, using the selected scan method and its parameters, progression status information shows the current number of scanned IP addresses and the current number of printers found. The result of the scan process is updated progressively and displays the following information:

Column header	Explanation
[IP address]	The printer IP address.

Column header	Explanation
[Printer name]	The printer name. The Windows printer name if the printer is already defined in the local Windows system, otherwise the model name is used as the printer name.
[Printer model]	The printer model.
[Status]	The printer configuration status. The following status can be shown: • [New] The printer is not yet available on the local system. • [Not configured] The printer is available on the local system but the printer is not yet configured for PRISMAdirect. • [Configured] The printer is available on the local system and the printer is configured for PRISMAdirect. • [Not responding] The printer is available on the local system and the printer can be configured for PRISMAdirect. However, the printer is not responding. • [Invalid configuration] The printer is available on the local system. However, the printer is configured for another printer model or another controller version. • [Invalid printer] The printer is defined on the local system with the same printer address. However, the printer does not match the discovered printer model or the discovered controller version.

Column header	Explanation
[Action]	The following actions are available depending on the configuration status of the printer: • [Add] The configuration status of the printer is [New]. Click [Add] to add the printer to the local system and/or configure the printer for PRISMAdirect. If the driver is required but not yet installed, the action button also launches the printer driver installation wizard before adding the printer to the local system. For printers for which no driver is needed, the action button opens a dialog that allows you to add the printer to PRISMAdirect. No printer is added to the local system. The finishers are automatically retrieved from the printer. • [Edit] The configuration status of the printer is [Configured]. Click [Edit] to edit the configuration of the printer. • [Configure] The configuration status of the printer is [Not configured] or [Invalid configuration]. Click [Configure] to configure the printer for PRISMAdirect. The available finishers are automatically retrieved from the printer. • [Remove] The configuration status of the printer is [Not responding] or [Invalid printer]. Click [Remove] to remove the printer from the local system and from the PRISMAdirect configuration.

Add a printer manually

Click the [Add additional printer] button to add a printer manually. For example, SNMP is not enabled on a printer. Therefore, the printer discovery tool cannot find the printer. See: *Add a printer manually* on page 166.

Add a printer manually

Introduction

You can add a printer manually. For example, SNMP is not enabled on a printer. Therefore, the printer discovery tool cannot find the printer.

Add a new printer

1. Click [Printer settings] and click the plus icon next to [Printers].
2. Select the printer model and controller version of your printer.
3. You can change the printer name.
4. Enter the IP address of the printer.
5. Click OK.

Edit the printer settings

Manage the general settings

Introduction

The general settings define the properties and the availability of each printer. Click [Printer settings] - [Printers] and select an available printer.

Printer image

You can change the printer image: *Select a printer image* on page 168.

Preferences

- [Available for printing]
  Enable this option to make the printer available in the application.
- [Enable the driver settings button in the print dialog]
  The printer driver can offer options that are not available in the [Print] dialogue. For example, the printer driver of a color printer can offer color settings which are not supported by PRISMAdirect.
  Enable this option to add the driver settings button to the [Print] dialogue. You can find this button next to the printer driver in the [Print] dialog.
  If the [Print] dialogue offers all driver settings, then the driver settings button is not added to the [Print] dialogue.

  NOTE
  The printer output can be ruined if the printer driver dialogue contains settings that conflict with page program settings. Options like [Same-up], [Booklet], page programming in the driver and 'Number of copies' are potentially dangerous. Rasterize and finishing settings are usually save.

- [Enable accounting]
  When this option is enabled, the tab [Accounting] becomes available in the [Print] dialogue.
- [Maximum number of sheets per job for variable data documents]
  You can cut a print job into a number of smaller jobs. For example, a print job consists of 1000 variable data documents. Each variable data document contains two pages which are printed on one sheet. You set this option to 10. Now, 100 print jobs are sent to the printer.

  NOTE
  This option is available for variable data documents.

PDL Settings

- [Far East fonts:]
  Select this option if you want to include Far East fonts.
- [PostScript level:]
  Select the PostScript level of the printer. Available options are [Level 2] or [Level 3].
- [Emit fonts:]
  - Select option [All fonts] to add all used fonts to the print file. This will lead to a larger print file.
  - Select option [Embedded fonts] to add only the embedded fonts to the print file. For fonts that are not embedded, the printer will check if the font is installed on the printer. If not, the font will be replaced by a font that is installed on the printer.

[Web sites for the printer:]

You can add one or more URLs to the text field. The URLs become available in the context menu of the printer in the [Order processing].

Right-click a printer in the [Order processing] to open the context menu of the printer. You can select the website(s) in the context menu.

NOTE
This option is available in PRISMAdirect only.

[Select a printer image]

Introduction

Select a printer image from the pre-defined list of images or upload your own image.

1. Click the printer image.
2. Browse to the image that you want to use as printer image.
3. Click OK.

You can also upload your own image for the printer.

1. Click the printer image.
2. Click [Upload].
3. Browse to the image that you want to use as printer image.
   Images of type GIF, JPG, and PNG are supported.
4. Click [Open].

Manage the printer configuration

Introduction

Define the queue settings for the selected printer. The queue settings are printer dependent. Click [Printer settings] - [Printers] and select an available printer.

You can select which finisher(s) are available for the printer.

Manage the destination settings

1. Select which queues you want to enable for the printer. When you enable more than one queue, you have to select a default queue from the drop-down list. The default value is used for the concerning printer in the [Print] dialog.
2. Click [Import DocBoxes] to import DocBoxes that are defined on the printer.

NOTE
The option [Import DocBoxes] is only available on printers that support DocBoxes.

Manage the finishers for the printer

You can select which finisher(s) are available for the printer. All available finishers are displayed in the [Finishers] pane.

1. Click [Get printer configuration] to get the configuration from the printer.
   The option [Get printer configuration] is only available on printers that support this.
2. You can select the default output location from the drop-down list. The default value is used for the concerning printer in the [Print] dialog.
   All available output locations are displayed in the [Output locations] pane. The output locations depend on the selected finisher. These output locations are available in setting [Output location] on tab [Finishing] in the [Print] dialog.
3. You can select the default output location for unused cyclic media from the drop-down list. The default value is used for the concerning printer in the [Print] dialog.
   Any unused cyclic media, such as tab media, is deposited in an [Output location].

Manage the connection settings

Introduction

Define the [Printer connection] settings when you want to:
- Import or export the media catalog via a network to or from the printer.
- Support DocBoxes. Check the specifications of your printer to determine if the printer supports DocBoxes.
- Support printer monitoring via SNMP.

Enable the [Printer monitoring] option to support printer monitoring via SNMP. Click [Printer settings] - [Printers] and select an available printer.

Procedure

1. Define the [Printer connection] settings:

Setting	Description
[Printer URL:]	The URL of the printer. For example: http://10.29.167.169. You can edit [Printer URL:] only if the printer connection type is "JMF" or when the printer is not installed in the Windows spooler. The setting is disabled when the address is retrieved from the Windows spooler.
[Print to file]	Select this option to send the print data to a file. You can enable this option to diagnose a print problem.
[Connection type:]	Select if you want to print using a protocol or the Windows spooler. This parameter can be modified only when more than one connection type is supported for the selected printer. • Windows spooler • LPD • JMF
[Connection timeout (ms):]	Define the connection timeout in ms. The printer must respond to each request before the timeout expires. When the timeout does expire, the request to the printer is canceled.

2. Enable the [Printer monitoring] option to monitor printers via SNMP.
For example, you can monitor the toner level, printer status, etc.

Setting	Explanation
Retry timer	Define the frequency to monitor the printer in seconds. The range is: 5 - 900 seconds.

You can select which SNMP version is supported by the printer:
- SNMP V1
- SNMP V3
  SNMP V3 introduces a user-based security model for authentication and privacy services.

You can define the following settings when you select SNMP V1:

Settings SNMP V1

Setting	Description
[Read community:]	The read community name is used to identify the group of devices that support printer monitoring. Default value 'public'.

You can define the following settings when you select SNMP V3:

Settings SNMP V3

Setting	Description
[Security user name:]	Define a user name for the authentication service.
[Context:]	'Context' refers to the collection of management information accessible by the SNMP entity. This setting is optional.
[Authentication protocol:]	Select the authentication protocol that is used by the printer. • None • MD5 • SHA
[Authentication password:]	The 'Authentication password' is the password required for the authentication service.
[Confirm password:]	Confirm the authentication password.
[Privacy protocol:]	Select the encryption algorithm that is used by the printer. • None • DES • AES
[Privacy password:]	The 'Privacy password' is the password required for the privacy (encryption) service. This setting is optional.
[Confirm password:]	Confirm the privacy password.

Manage the printer clusters

Add or edit a printer cluster

Introduction

You can group printers into printer clusters. You can use the printer cluster for load balancing.

Procedure

1. Click [Printer settings].
2. Click the plus icon to create a printer cluster. Or select an existing cluster to edit the cluster.
3. Define a name. The name must be unique.
   You can use the characters: 'a - z', 'A - Z', '0 - 9', '_' . Spaces are allowed.
4. Type a description for the printer cluster.
5. You can drag and drop available printers to the active printers.
   You can define the print speed of each printer that you add to the cluster. The application uses the print speed to calculate the workload per printer when you enable load balancing. The print speed is often based on optimal paper formats and no finishing. When you use non-optimal paper formats and/or finishing, the print speed decreases. You can decrease the print speed to ensure a better calculation of the workload per printer.
   Drag and drop active printers to the available printers to remove the printers from the cluster.
6. Click [Save].

Application settings

Add a color strip

Introduction

You can manage the color strips available to the users.

Color strips are used in PRISMAdirect as color proofing strips on the printed output.

Procedure

1. Click [Printer settings] - [Application settings] - [Color strips].
2. Click the plus icon.
3. Browse to the color strip that you want to add.

   NOTE
   The supported file types are: *.eps, *.pdf, *.tif and *.tiff.

4. You can select one or more color strips.
5. Click the [Open] button.
   The added color strip is enabled by default. You can disable the color strip by deselecting the checkbox.

Add an imposition layout

Introduction

The application offers a number of imposition layout types. You can add and delete user-defined imposition layouts. You can disable any imposition layout. When a document uses a disabled imposition layout, the layout is still applied when that document is printed.

The main imposition types are:
- [None]
- [N-up]
  Several pages are placed on one sheet side in the (left to right and top to bottom) reading order. The number of pages per sheet side is computed depending on the page size and media size.
  This imposition layout has several sub-types. For example: [2-up]
- [Folio]
  Four pages per sheet are placed in a way so that each sheet can be folded in half. All the folded sheets are stacked.
- [Octavo]
  Generates the same imposition as the [Octavo signature book] document type.
- [Quarto]
  Generates the same imposition as the [Quarto signature book] document type.
- [Cut and stack]
  The Cut & Stack imposition enhances printer productivity when printing large documents. Two pages are printed per sheet side. The sheets are cut in two parts. The left stack is stacked on top of the right stack to form a perfect sequential order.
  This imposition layout has several sub-types. For example: [Cut and stack with binding edge inside]
- [Same-up]
  The same page is printed twice per sheet side.
  This imposition layout has several sub-types. For example: [Same-up with binding edge outside]
- Variable data documents can also be printed using an imposition layout. For example: [VDP N-up].

NOTE
See the help file of the [Order processing] for a complete description of the default imposition types.

Procedure

1. Click [Printer settings] - [Application settings] - [Imposition layouts].
2. Click the plus icon.
3. Browse to the layout file(s) that you want to add.
4. You can select one or more layout files.
5. Click the [Open] button.
   The added imposition layout is enabled by default. You can disable the imposition layout by deselecting the checkbox.

Chapter 9
Price and formula editor

Select a formula manager

Introduction

You can configure the prices and build the formulas for the price workflows with the [Price and formula editor].

When you have upgraded from PRISMAaccess to PRISMAdirect, you can choose to keep using the formula manager of PRISMAaccess.

Procedure

1. Click [Price and formula editor] - [General settings].
2. [Use the prices and formulas from the Excel sheet]
   Enable this setting to use the formula manager, i.e. the Excel sheet, of PRISMAaccess.
   Disable this setting to configure the prices and build the formulas for the price workflows with the [Price and formula editor].
3. Click [Save].

Pricing

Configure the prices

Introduction

You have to configure the prices in the following locations in workspace [Configuration]:

1. [Price and formula editor]
   You have to configure the prices for the system.
   You have to configure the prices for media, printing and finishing options. You can configure the prices for choice items that you want to use in formulas. You have to configure the prices for stationery products. When you have configured the prices, you can create formulas for jobs and for orders.
2. [Web shop]
   When the prices are configured for the system, you can configure the prices for each web shop. The prices for a web shop overrule the settings for the system. See *Configure the prices* on page 114.

All items for media, printing and finishing are defined in and retrieved from the [Product and order editor]. This is also true for the choice items.

This topic describes how you can configure the prices for the system.

Configure the prices for media, printing and finishing items

1. Click [Price and formula editor] - [Pricing].
2. Click [Prices for media].
3. Define values for all options in the dialog. You can type a value in the text field. Or you can click the arrow buttons to increase or decrease the value.
4. Click [Save].
5. Do the same for:
   - [Prices for printing]
   - [Prices for finishing]

Configure the prices for choice items

1. Click [Price and formula editor] - [Pricing].
2. Click [Prices for choice items for jobs].
3. Click the drop-down list and select the choice item that you want to configure.
4. Click [Add].
   All options of the choice item are added to the dialog. You can add and configure more choice items to the dialog.
5. Define values for all options in the dialog. You can type a value in the text field. Or you can click the arrow buttons to increase or decrease the value.
6. Click [Save].
7. Do the same for:
   - [Prices for choice items for orders]

Configure the prices for stationery products

1. Click [Price and formula editor] - [Pricing].
2. Click [Prices for stationery products].
3. Define values for all stationery products in the dialog. You can type a value in the text field. Or you can click the arrow buttons to increase or decrease the value.

4. Click [Save].

Formulas

Create the formulas

Introduction

You can create formulas for:

- Jobs and orders
  You have to configure the prices for media, printing and finishing options. You can configure the prices for choice items that you want to use in formulas. When you have configured the prices, you can create formulas for jobs and for orders. You can create one or more constants. You can use the constants in the formulas. You can configure discounts for everyone or for specific user groups. You can use the discounts in combination with the formulas.
  - [Formulas for jobs]
    You create a formula by adding formula parts. By default, the first formula part for jobs is InitialCost.
    - InitialCost = ((prices for media * number of pages) + (prices for media * number of covers) + (prices for printing * number of pages) + prices for finishing) * number of copies
      The number of covers depends on the value of CoverPlace: 0 for none, 1 for front or back, 2 for front and back.

    A formula for jobs is applied to jobs. Each job contains one type of media.
  - [Formulas for orders]
    By default, TotalCost is available for formulas for orders. TotalCost can be used as a formula part. It is available in the list of [Variables] that you can use for an expression. Just drag TotalCost in field [Expression] and click [Save].
    - TotalCost = the total of the prices of all jobs of the order.

    A formula for orders is applied to orders. Each order can contain multiple jobs. Each job can use a different type of media than any other job in the order.
- Shipping
  The shipping formulas calculate the postage & packing. The shorter the delivery period, the higher the postage. You have to create the shipping formulas based on agreements with each shipping provider. Note that the actual postage is calculated when the operator clicks [Dispatch] in the [Order processing] workspace.
  - [Shipping formulas for orders]
    Create a formula for each delivery time that you offer to the customers. The shorter the delivery time, the higher the postage. The customer can select a delivery time in the web shop. The calculated postage & packing is displayed to the customer. The calculated price is a contract between the customer and the web shop. You can create one or more shipping formulas for each web shop.

Procedure

1. Click [Price and formula editor] - [Formulas] and select:
   - [Formulas for jobs], or
   - [Formulas for orders], or
   - [Shipping formulas for orders]
2. Click [Add].
3. Define a name. The name must be unique.
   You can use the characters: 'a - z', 'A - Z', '0 - 9', '_' . Spaces are allowed.
4. Click a language to type the caption in that language. The available languages are displayed just above the text field.

5. Click [New part of formula].
   By default, the first formula part for jobs is InitialCost.
   1. Select the type of the formula part.
      - [Addition]
        The result of this formula part is added to the result of the previous formula part.
      - [Subtraction]
        The result of this formula part is subtracted from the result of the previous formula part.
      - [Exit]
        The result of this formula part will halt the execution of the formula. The calculated result until the exit statement is returned for the formula.
   2. Define a name. The name must be unique.
      You can use the characters: 'a - z', 'A - Z', '0 - 9', '_' . Spaces are allowed.
   3. Define the result of the formula part in field [Value].
      You can only use variables that return a numerical value. Drag the variables in the field [Value]. For more information concerning the variable types, see *The variable types* on page 180.
   4. Select how you want to use the value of the formula part in option [Use expression as:].
      - [Value]
        The result of this formula part is added to or subtracted from the result of the previous formula part as a value.
      - [Percentage]
        The result of this formula part is added to or subtracted from the result of the previous formula part as a percentage.
   5. Create the condition for the expression in field [Condition:]. You can use all variables and operators in the condition. The value of this formula part is used when the condition is met. The value of this formula part is always used when you do not create a condition.
      For more information concerning the variable types, see *The variable types* on page 180.
6. You can repeat step 5 to add additional formula parts to the formula.
7. You can drag each formula part to the correct position in [Parts of formula]. The formula parts are executed in the given order starting with the first formula part.
8. Click [Save].
   The formula becomes available for the user groups, web shops and the products.
9. Do the same for:
   - [Formulas for jobs], or
   - [Formulas for orders], or
   - [Shipping formulas for orders]

The variable types

Introduction

A number of variable types are available when you create a formula part.

Variables of type "Choice"

You can use a variable of type [Choice] as follows:
- Field [Value]
  The variable contains the option of a choice item that is valid for the job. For example: Suppose that the **choice item** DocumentMediaColor contains 10 color options for media colour. For the formula, the **variable** DocumentMediaColor only contains the color that is actually used for the media in this job.
- Field [Condition:]
  You can use variables of type [Choice] in field [Condition:]. In this field, you can use all options of the **choice item** to create the condition:

1. Drag the variable into the field.
2. Drag or type the operator into the field.
3. Type the quotation marks ("") in the field.
   The list of options for the concerning choice item appears. For example:
   Suppose that the **choice item** DocumentMediaColor contains 10 color options for media colour. For the condition, you can use all 10 options of the choice item.
4. Select an option from the list to create the condition.

Overview of the variable types and examples of their usage

Icon	Variable type	Where used + example of usage
$	Number result This variable or constant contains a numerical value. Or the result of this variable is a numerical value. NOTE You have to configure the prices for media, printing, and finishing, see *Configure the prices* on page 177.MediaPricing, PrintingPricing, FinishingPricing and StationeryPricing receive their values from these dialogs.	Field [Value] • PrintingPricing • CoverMediaColor.cost Field [Condition:] • PrintingPricing == 8 • CoverMediaColor.cost < 5
	Text This variable contains the name of the product used to create the job.	Field [Condition:] • ProductName == "Flyer"
user	Text This variable contains a user name.	Field [Condition:] • User == "User 1"
user group	Text This variable contains a user group name.	Field [Condition:] • User group == "User group 1"
	[Date] This variable contains a date.	Field [Condition:] • FinalizedDate < CreationDate + 5
	[Choice] This variable contains the option of a choice item that is valid for the job.	Field [Condition:] • DocumentMediaColor == "Red"
	[Number] This variable contains a numerical value.	Field [Value] • Pages Field [Condition:] • Pages > 150
	[Text] This variable contains text.	Field [Condition:] • FinalizedBy == "Operator"
	[Yes/No] The result of this variable is a boolean.	Field [Condition:] • IsJobCostApproved

Icon	Variable type	Where used + example of usage
	PrintInColor [Choice] This variable contains the option of a choice item that is valid for the job. For example:	Field [Condition:] For an example, see variable type [Choice]
	NewCoverMedia [Choice] This variable contains the option of a choice item that is valid for the job. For example:	
	CoverPlace [Choice] This variable contains the option of a choice item that is valid for the job. For example:	
	Plexity [Choice] This variable contains the option of a choice item that is valid for the job. For example:	
	Folding [Choice] This variable contains the option of a choice item that is valid for the job. For example:	
	OrientationAndBindingEdge [Choice] This variable contains the option of a choice item that is valid for the job. For example:	
	Media [Choice] This variable contains the option of a choice item that is valid for the job. For example:	
	Punching [Choice] This variable contains the option of a choice item that is valid for the job. For example:	
	BindingMethod [Choice] This variable contains the option of a choice item that is valid for the job. For example:	

Test the formulas

Introduction

You can test the formulas that you have created. You just have to upload an order to test a formula.

Before you begin

There are two ways to test each formula:

1. You create specific orders for each formula. You use these orders in this dialogue. The system applies a formula based on the data inside the order. You can see which formula was applied in the detailed test result.
2. You can also assign the formula that you want to test directly to a product or to a web shop. You have to create specific orders to test the formula. See *Configure the default price estimation settings* on page 115 and *Configure the default quotation settings* on page 116

Procedure

1. Click [Price and formula editor] - [Formulas] - [Test formula].
2. Click [Use exported order].
3. Browse to the zip file that contains one order.
   You can create a zip file containing one order in the [Order processing]. Select one order in the [Order processing] and click [Export orders]. You have to create a zip file of the exported order.
4. The formula is tested. The detailed test result of the formula is displayed.

Apply a discount

Introduction

You can apply a discount to products and/ or user groups. When you apply multiple discounts to a product or a user group, the order of the discounts is important. The first discount in the list will be applied to the concerning product or user group. Any other discounts in this list for that product or user group will not be applied.

To change the currency for the discounts, click [System] - [Currency].

Procedure

1. Click [Price and formula editor] - [Discounts].
2. Click [Add].
3. [Amount]
   Define the amount for the discount. You can type a value in the text field. You can use the decimal separator "." in the value. Or you can click the arrow buttons to increase or decrease the value.
   - [Value]
     The discount is a value subtracted from the formula result.
   - [Percentage]
     The discount is a percentage subtracted from the formula result.
4. [Discount type]
   - [Everyone]
     The discount is available for everyone who uses the selected product.
   - [User group]
     Click Browse to select one or more user groups. The discount is available for the users in the specified user groups.
5. [Product name]
   You can apply the discount to one or more products.
6. [Web shop]
   You can apply the discount to one or more web shops.
7. [Show discounts to customers]
   Enable this option to show the discounts for the selected products and web shops. Each selected product displays the value or the percentage of the discount in a red field.
8. Click [Save].

Create a constant

Introduction

You can create one or more constants. You can use the constants in the formulas.

Procedure

1. Click [Price and formula editor] - [Constants].
2. Click [Add].
3. Define a name. The name must be unique.
   You can use the characters: 'a - z', 'A - Z', '0 - 9', '_' . Spaces are allowed.
4. Define a value for the constant. You can type a value in the text field. Or you can click the arrow buttons to increase or decrease the value.
5. Click [Save].
   The constant is added to the list of variables for the formulas. You can use the constant in the formulas.

Configure the currency settings

Procedure

1. Click [Price and formula editor] - [Currency].
2. Select a currency from the drop-down list.
   You can also define a custom currency. Enable the [Custom] option to type a custom currency sign.
3. Define the location of the currency sign:
   - [Before the amount]
   - [After the amount]
4. Configure the allowed number of decimals for the job cost.
5. Click [Save].

Backup and restore

Introduction

It is recommended that you create a backup after each change in the [Price and formula editor]. The backup files are password protected zip files. The backup files are created in the temporary data folder. See *Define the path for the temporary folder* on page 99

Export and import of the settings

You can import and export the settings of the [Price and formula editor]. Then, you can use the exported settings to configure another installation of PRISMAdirect. The import and export file are not machine related.

When you export the settings, all settings will be exported. When you import the settings, all settings will be imported.

Procedure

1. Click [Price and formula editor] - [Backup and restore].
2. You can export the [Settings] of the [Price and formula editor]. Click the [Export] button.
   The exported file is stored in the [Downloads] folder. The exported file does not contain any machine dependant settings. Therefore, you can import this file on all machines.

Restore

Procedure

1. You can import the [Settings] of the [Price and formula editor]. Click the [Import] button.
   The import file does not contain any machine dependant settings. Therefore, you can import this file on all machines.
2. Browse to the folder where the backup file is located.
3. Click [Open].
   All settings of the [Price and formula editor] are being restored.

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