

# User guide

**PRISMA**direct

Order processing



A CANON COMPANY

**Canon**

Production Systems - Cutsheet

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# Software version

This documentation describes the functionality of PRISMAdirect v1.3.0.

# 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.  
You can use the User Principal Name notation: user@domain.  
For example, there are LDAP servers in "domain1" and in "domain2".  
Login with: user. The search for "user" starts in the LDAP server in "domain1". If "user" does not exist in the LDAP server in "domain1", the search for "user" continues in the LDAP server in "domain2".  
Login with: user@domain1. The search is forced and limited to the LDAP server in "domain1".
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 must enable cookies in the browser to support this option.
4. Click [Log in].



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# **Chapter 1**

## Introduction

# Introduction

## Introduction

Customers submit orders to the print shop. An order can contain one or more jobs. A job can contain one or more files. The operator processes the orders using the [Order processing] application. Two different views are available to the operator: the [Order view] and the [Job view].

- You can manage and process the orders in the order view.

The order view displays the list of orders on the left. Select an order to display list of jobs belonging to that order, the workflow steps and the order details.

You can add, edit and remove jobs from an order, on behalf of the customer, as long as the order is not accepted and the payment is not yet completed. You can cancel an order on behalf of the client, as long as the order is not accepted.

- You can manage and print the jobs in the job view.

The job view displays the list of jobs. The jobs are displayed without reference to the orders they belong to. Select a job to display the files and the job details.

You can add or remove files from a job, on behalf of the customer, as long as the order is not accepted and the payment is not yet completed. You can prepare the job. For example, you can preflight and page program the merged document. And finally, you can print the job.

Ticket items are available at order level and at job level. At order level, the items define the commercial information. For example the order name, the delivery address, the billing information, etc. At job level, the items contain the requested settings and any remarks of the customer. A ticket item can be used at order level or at job level, but not at both levels. You can edit the ticket items both at order level and at job level.

The customer defines order ticket items before submitting the order. The operator can edit the order ticket items that were defined by the customer. The operator also has a set of operator specific items available in the order view.

Some ticket items are used by the page program application when you page program the document. For example, [Orientation and binding edge]. These job ticket items are marked with a blue dot in the job ticket. Some ticket items are used by the printer when you print the document. For example, [1-sided or 2-sided]. These job ticket items are marked with a white square or circle. Some job ticket items are only valid for specific printers. The white square appears in the job ticket only when the specific printer is selected in the list of printers.



### NOTE

The system administrator defines which ticket items can be used by the page program application and/or the printer.

A small preview of the job is available in the job details dialog.









# Job types

## Introduction

The first column of the print jobs list contains icons that indicate the type of job.

Up to 4 icons can be displayed for a job: [Locked], [Page programmed], [Printed] and [Ready].















## Icons for the job types

Icon	Functional name	Description
	[New]	This is a new job.
	[Page programmed]	This job contains page program settings.   <b>NOTE</b> This can also be a new job which is already page programmed.
	[Stationery]	This job is a job of type [Stationery].
	[VDP]	This job contains VDP data.
	[Printed]	This job was printed at least one time.
	[Ready]	This job was marked [Ready].
	[Locked]	This job is currently locked.

# The toolbar







## Introduction

The following buttons are available to you in the application. Not all buttons are available in all dialogs.

Button	Description
	[Add] Add a new item. An item can be an order, ticket item, etc.
	[View] Shows the content of the selected job in Adobe Acrobat.
	[Save as] Save the current job with a different name.
	[Delete] Delete the selected order or job.
	[Preflight] Preflight the selected job.
	[Program pages] Opens the selected job in PRISMAprepare.
	[Print] Print the selected job.
	[Print test job] Test print the selected job.
	[Print job ticket] Print the job ticket of the selected job.
	[Import orders] Import one or more orders.
	[Export orders] You can select one or more orders. Export the selected orders.
	[Copy job] Make a copy of the selected job.
	[Automation templates] Apply an automation template to the selected job.
	[Undo] Undo the last change you made.

## The order and job states

The state of an order depends on the state of its jobs and the current step in the workflow. Each order can contain one or more jobs. Each job can be in a different job state. The order state is equal to the lowest job state.

Color	Status
	[New], [Uploading], [Incoming]
	[Request for change], [Request to accept quotation], [Quotation rejected], [Proof PDF sent], [Canceled], [Failed]
	[Job is changed], [Quotation accepted], [Accepted], [Proof PDF accepted], [Processing]
	[Ready]
	[Dispatched]
	[Finalized]





# **Chapter 2**

## Order view

# Sort the orders

## Introduction

You can sort the orders in the order view. You can use the sorting mechanism to group the orders based on the same ticket item. For example, you can sort on [Order is paid] to group all orders which are paid.

## Procedure

1. Right-click the column header and select the ticket item that you want to use to sort the orders. The selected ticket item becomes the column header.  
Select option [Edit options] when the ticket item that you want to use is not available. Scroll to the required ticket item and enable the item. Click OK. The enabled ticket items are displayed as order information in the list of orders.
2. Click the column header to apply ascending sorting or descending sorting.

# Display the order information

## Introduction

You can configure which order information is displayed for each order. You can make the most important information of the orders available to you 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.

## Procedure

1. Right-click the column header and select the [Edit options] option.
2. Scroll to the required ticket items and enable the items. It is recommended that you enable not more than 12 items. When you enable more than 12 items, then item 13 is displayed instead of item 1 in the order information, etc.
3. Use the arrows to set the order of the ticket items.  
The items are displayed as shown in the gray area in the [Edit options] dialog.
4. Click OK.

# Manage the orders

## Create a new order

### Introduction

On behalf of a customer, you can create a new order.

The order and its jobs are created with [Communication state] = [New].

### Procedure

1. Click [New order].
2. When you create a new job from the [Order processing]:



#### NOTE

You cannot select a server or customer when you create a new job from Microsoft Outlook.

1. Select a server.  
You can select:
  - The local PRISMAdirect database.
  - An LDAP server, which is used for authentication.
2. Select the correct customer.
3. Select for which web shop you create the order.  
The selected web shop will charge the customer for the order.
4. Click [Apply].  
The available customer information is filled in automatically.
3. You can define the values for the available ticket items at order level. At order level, the items define the commercial information. For example the order name, the delivery address, the billing information, etc.  
For more information, see [Edit the order ticket on page 37](#).
4. Click [Add job].  
The right-hand pane displays the products that are available to the operator.
5. Select a product to create the job.  
The job details dialog appears.
6. Continue with step: [Add a file to a job on page 23](#).  
You can add files to the job and edit the job ticket in the right-hand pane. The available file options and ticket items depend on the selected product to create the job.

# Create an order from Microsoft Outlook

## Introduction

The customer can create an email and attach one or more files to it. In the email, the customer can define the order. For example: 20 copies, booklet, and send a proof PDF before production starts. The customer sends the email to the print room.

You can create an order in Microsoft Outlook with button [Create order from email].

You can accept a [Quotation] or [Proof PDF] on behalf of a customer with the [Accept order] button.

Several steps in the workflow of an order can require the response of a customer. The operator can request a response via email, for example via a [Quotation] or [Proof PDF] email. These email messages contain a link. The customer can click the link to approve or reject the [Quotation] or [Proof PDF].

The customer can also reply to the email instead of using the link in the email message. If the operator receives the reply message, the operator can accept on behalf of the customer using the [Accept order] button in Microsoft Outlook.

The [Accept order] button only allows the operator to accept on behalf of the customer. The customer must click the link in the email message to reject the [Quotation] or [Proof PDF].



### NOTE

The administrator configures if you can create a job from Microsoft Outlook. The email integration is only available for Microsoft Outlook.

## Procedure

1. Open Microsoft Outlook.
2. Select an email with attachments.  
All attachments are added to the order. You cannot select a subset of the attachments.
3. Click the [Create order from email] button.  
The [Order processing] opens. The [Order processing] allows you to create the order without the possibility to add any jobs to the order.



### NOTE

You cannot select a server or customer when you create a new job from Microsoft Outlook.

4. You can manage the files of the new order.
  - If the new job contains multiple files, you must determine the order of the files. All files are combined into one document by the operator in the print room.  
Use the 'Up' and 'Down' buttons to set the order of your files.
  - Click [Delete] to remove a file.
  - You can click the [Edit] icon to edit a file. The file is opened in the appropriate application. You cannot edit the file if no application is associated with the file type.
5. You can define the values for the available ticket items at order level. At order level, the items define the commercial information. For example the order name, the delivery address, the billing information, etc.  
The following items are copied from the email into the order:
  - Email address
  - The owner information and UserID. These items are only available when the LDAP server is configured correctly.
  - The email message.

The first 3000 characters of the email message are added to the output settings in section [Job details].

6. Click [Add job].  
The right-hand pane displays the products that are available to the operator.
7. Select a product to create the job.  
The job details dialog appears.
8. Define the values for the available job ticket items.  
Section [Job details] contains the output settings. The output settings determine how the job is produced. Use the information from the email to fill in the output settings. For example, you can define the required media, copies, etc.
9. Click [OK] to convert the email into a new order.  
The job is added to the [Order processing] with [Communication state] = [New].

## Add a job to an order

### Introduction

On behalf of a customer, you can add one or more jobs to an order as long as:

- The customer has not paid the order.
- The operator has not accepted the order.



#### NOTE

You can create a new job from Microsoft Outlook.

To add a new job to an order, do the following steps:

1. Select the order.
2. Select a product to create the job.
3. Select the files for the job.
4. Define the values for the job ticket. The job ticket contains the output settings, the number of copies, etc.
5. Submit the job.

### Procedure

1. Select the order.  
The list of jobs that belong to the order and the order ticket items become available.
2. Click the '+' icon in the selected order.  
The right-hand pane displays the products that are available to the operator.
3. Select a product to create the job.  
The job details dialog appears.
4. Continue with step: [Add a file to a job on page 23](#).  
You can add files to the job and edit the job ticket in the right-hand pane. The available file options and ticket items depend on the selected product to create the job.

## Add a file to a job

### Introduction

You can add different kinds of files to your job. The system administrator defines which kinds of files you can add and which file sources you can browse to in order to add files.

This procedure describes how to add content to most product types. For "Business cards" or "Variable data documents" type products, see the following procedures:

- [Select the content for a product of type "Business cards" on page 24](#)
- [Select the content for a variable data document on page 26](#)

You cannot add content to a product when the product contains a fixed document. The fixed document is added to the product by the system administrator.




#### NOTE

The system administrator can enable the [Allow the operator to change the files of jobs] option in the System Administration. Then, you can add or change the content of a product that contains a fixed document. See [Change the files of the job on page 61](#).

### Procedure

1. Click the '+' icon in section [Files] in the job details dialog.

2. Select which type of file you want to add.

Type of file	Actions
[Add digital file]	<p>A dialog appears that allows you to select the file(s) that you want to use. Browse to the file(s) and click [Open]. The file(s) are added to your job. You can also drag and drop files into the [Files] area.</p> <p>The file types that can be added by the user are configured by the System Administrator. For each allowed file type, an application must be available to the operator that can open the file type. An error message will appear when you select a non-supported file type.</p>
[Add paper original]	<p>A text box appears. You can enter the file name for a paper original. You can submit a job without an attached file. Only a job ticket is submitted. The customer can send the paper original to the print room, for example via the internal mail. The operator can automatically attach a scanned original to a print job.</p> <p> <b>NOTE</b> Option [Paper original] is also used for copy jobs. For accounting reasons such copy jobs can be added to a print job.</p>
[Add other digital file]	<p>A text box appears. You can enter a file name and extension for an other digital file.</p> <p>You can submit a job without an attached file. Only a job ticket is submitted. This option can be used when the digital file cannot be added to the job yet. For example, a digital file on a CD.</p> <p>The customer can send the other digital file to the print room, for example via the internal mail.</p>

3. You can continue to add more file(s) to your job.

If the job contains multiple files, the PDF files are automatically merged into a single document. The order of the files determines how the files are merged.

4. You can manage the file(s) of your job.

- Drag the file up or down.
- Click [Delete] to remove a file.



**NOTE**

You can click the [Edit] icon to edit a file. The file is opened in the appropriate application. You cannot edit the file if no application is associated with the file type.

## Select the content for a "Business cards" type project

### Introduction

The system administrator has selected a [VDP document] for "Business cards" type products. However, you can use your own VDP document. You must select a data source or you must provide manual input for the product. The variable data from the data source or the manual input is applied to the VDP document to create the business cards.

The supported data source types are: \*.accdb, \*.mdb, \*.xlsx, \*.xls and \*.csv. Password-protected data sources of type \*.xlsx, \*.xls and \*.csv are not supported.

The item [Business cards per set] defines the number of business cards in the VDP document. This item is read-only. The value of the [Sets per row] item defines how many times one row of the data source is applied to the VDP document. The user defines the value for the [Sets per row]



item. When the user provides manual input, the manual input is considered to be one row of a data source. The user defines the value for item [Sets].

For example: [Business cards per set] = 10 and [Sets per row] = 10. Now, 100 business cards are printed for each row of the data source.



**NOTE**

The system administrator defines if you can select a data source or if you must provide manual input for the product.

**Procedure**

1. Select a product of type "Business cards".  
The system administrator has selected a [VDP document] for "Business cards" type products. However, you can use your own VDP document.
  1. Click the [Browse] button.
  2. Browse to the VDP document.
  3. Select the VDP document and click [Open].  
The application checks if the VDP document is valid. An error message will appear when the VDP document is invalid.
2. You must select a data source or you must provide manual input for the product.

Variable data	Actions
Select the [Data source]	<ol style="list-style-type: none"> <li>1. Click the [Browse] button. Select which file source you want to browse. A [Browse] dialog will appear.</li> <li>2. Browse to the data source file.</li> <li>3. Select the data source file and click [Open]. The application checks whether the data source is valid for the VDP document. An error message will appear when the data source contains incompatible field type(s) and/or required fields are missing.</li> <li>4. Select which table or sheet of the data source must be used. If the data source type is *.csv or *.txt, you must define the [Text separator]. Optionally, you can define the [Text delimiter]. For example: "field1";"field2";"field3", where: " is the [Text separator] ; is the [Text delimiter]</li> <li>5. Define a value for item [Sets per row].</li> <li>6. The rows in the data source are applied to the VDP document. The number of business cards printed for each row of the data source is: [Business cards per set] * [Sets per row].</li> </ol>
Provide [Manual input]	<ol style="list-style-type: none"> <li>1. The dialog displays the required structure for the VDP document. The user can enter the variable data manually for each field instead of using a data source. The user can enter one value for each field.</li> <li>2. Define a value for item [Sets].</li> <li>3. The manual input is applied to the VDP document. The number of business cards printed using the manual input is: [Business cards per set] * [Sets].</li> </ol>

3. Click button [Generate preview] to preview the business cards.  
The VDP document is loaded. The data source or manual input is applied to the VDP document.

## Select the content for a variable data document

### Introduction

You have selected a product of type "Variable data document". You have to select a [VDP document]. You have to select a data source or you have to provide manual input for the product. The variable data from the data source or the manual input is applied to the VDP document to create the variable data document. You have to select a zip file containing images when the [VDP document] contains image frames.



**NOTE**

The data source must contain a relative path to each image frame. You cannot submit the order when the data source contains absolute paths.

The supported data source types are: \*.accdb, \*.mdb, \*.xlsx, \*.xls and \*.csv. Password-protected data sources of type \*.xlsx, \*.xls and \*.csv are not supported.

The system administrator defines if you can select a data source or if you must provide manual input for the product.

### Procedure

1. Select a "Variable data document" type product.
2. Select the [VDP document]:
  1. Click the [Browse] button. Select which file source you want to browse. A [Browse] dialog will appear.
  2. Browse to the VDP document.
  3. Select the VDP document and click [Open].  
The application checks if the VDP document is valid. The document must contain VDP data, else the document cannot be added to the product.



**NOTE**


You cannot select a VDP document when the product contains a fixed VDP document. The fixed VDP document is added to the product by the system administrator.

3. You have to select a data source or you have to provide manual input for the product.

Variable data	Actions
Select the [Data source]	<ol style="list-style-type: none"> <li>1. Click the [Browse] button. Select which file source you want to browse. A [Browse] dialog will appear.</li> <li>2. Browse to the data source file.</li> <li>3. Select the data source file and click [Open]. The application checks whether the data source is valid for the VDP document. An error message will appear when the data source contains incompatible field type(s) and/or required fields are missing.</li> <li>4. Select which table or sheet of the data source must be used. If the data source type is *.csv or *.txt, you must define the [Separator]. Optionally, you can define the [Delimiter]. For example: "field1";"field2";"field3", where: " is the [Separator] ; is the [Delimiter]</li> <li>5. The rows in the data source are applied to the VDP document. ▶</li> </ol>

Variable data	Actions
[Manual input]	<ol style="list-style-type: none"> <li>1. The dialog displays the required structure for the VDP document. The user can enter the variable data manually for each field instead of using a data source. The user can enter one value for each field.</li> <li>2. The manual input is applied to the VDP document.</li> </ol>

4. You have to select a zip file containing images when the [VDP document] contains image frames.

Variable data	Actions
Select the zip file	<ol style="list-style-type: none"> <li>1. Click the [Browse] button. A [Browse] dialog will appear.</li> <li>2. Browse to the zip file that contains the images. Images of type BMP, GIF, TIFF, TIF, JPEG, JPG, PNG and EPS are supported.</li> <li>3. Click [Open]. The application unzips the file and applies the root of the images to the relative path of each image frame in the data source.</li> </ol> <p> <b>NOTE</b> The data source must contain a relative path to each image frame. You cannot submit the order when the data source contains absolute paths.</p> <ol style="list-style-type: none"> <li>4. The images are applied to the VDP document.</li> </ol>
[Manual input]	<ol style="list-style-type: none"> <li>1. The dialog displays the required structure for the VDP document. The user can enter the variable data manually for each field instead of using a data source. The user can enter one value for each field. You can enter the relative path to the image and the image name. Images of type BMP, GIF, TIFF, TIF, JPEG, JPG, PNG and EPS are supported.</li> <li>2. The manual input is applied to the VDP document.</li> </ol>

5. Click button [Generate preview] to preview the variable data document.  
The VDP document is loaded. The data source or manual input is applied to the VDP document.

## Validate the [VDP] data

### Introduction

The [Validate VDP] operation checks if any rules are violated in the variable data document. Only the selected rows of the data source are validated. The [Validate VDP] operation cannot fix most of the detected violations. It is recommended that you fix these problems manually before you print the job. You can configure a number of rules which are used by the [Validate VDP] operation.

The following rules cannot be configured:

- [The data source contains incompatible field type(s) and/or required fields are missing.]
- [The image folder is invalid or cannot be accessed.]
- [The field type or field format is invalid.]
- [The frame is too small to contain all text.]

[The frame is too small to contain the image.]

- [A font is invalid.]
- [The text contains non-printable character(s).]

The system administrator can configure the [Preflight] rules in the workspace [Configuration]:

- [Content too close to border rule]

This rule is used to check if frames are too close to the page border.

- [Image compression is too high rule]
- [Image resolution is too high rule]

The preflight operation can fix the violations detected by this rule.

- [Image resolution is too low rule]
- [Hairline rule]

This rule is used to check the line weight of the frame borders. The preflight operation can fix the violations detected by this rule.



### NOTE

When automatic preflight is enabled, the configured rules for automatic preflight are used. When automatic preflight is disabled, the configured rules for manual preflight are used.

## Procedure

1. Click [Validate].

The [Validate] operation checks if any rules are violated in the variable data document. Only the selected rows of the data source are validated.

2. The [Overview of warnings] report is generated. Click the icon next to button [Validate] to open the report. The report shows the problems that have been found.

- The [Validate] operation cannot fix most of the detected violations. It is recommended that you fix these problems manually before you print the job.



### NOTE

The validation report is not updated when you fix a violation. Generate the report again to update the report.

## Define the values for the job ticket

### Introduction

You can define the values for the available job ticket items. The job ticket contains the output settings, the number of copies, etc.

### Procedure

1. Define the values for the available job ticket items.  
Section [Job details] contains the output settings. The output settings determine how the job is produced. For example, you can define the required media, copies, etc. The available values for the output settings are configured in the [Product and order editor].
2. Continue with step [Submit the new job on page 30](#)

## Submit the new job

### Procedure

1. Click [Submit] in the selected order to create the new job.  
The job is added to the order with [Communication state] = [New].

## Copy a job in an order

### Introduction

On behalf of a customer, you can add one or more jobs to an order as long as:

- The customer has not paid the order.
- The operator has not accepted the order.

### Procedure

1. Select the order.  
The list of jobs that belong to the order and the order ticket items become available.
2. Click the [Copy job] icon. The icon appears when you hover the mouse pointer over the job.  
The job is copied and added to the order with [Communication state] = [New].

## Edit a job in an order

### Introduction

You can edit one or more jobs in an order on behalf of a customer, as long as:

- The customer has not paid the order.
- The operator has not accepted the order.

### Procedure

1. Select the order.  
The list of jobs that belong to the order and the order ticket items become available.
2. Select the job that you want to edit.  
The right-hand pane displays the files of the job and the job ticket.
3. You can manage the files of the job and edit the job ticket in the right-hand pane. The available file options and ticket items depend on the product used to create the job.



## Delete a job from an order

### Introduction

On behalf of a customer, you can delete one or more jobs from an order as long as:

- The customer has not paid the order.
- The operator has not accepted the order.
- The order contains two or more jobs.

### Procedure

1. Select the order.  
The list of jobs that belong to the order and the order ticket items become available.
2. Click the [Delete] icon. The icon appears when you hover the mouse pointer over the job.
3. Confirm that you want to delete the job.  
The job is removed from the order.  
An order must contain at least one job.

## Apply an automation template

### Introduction

If PRISMAprepare is installed on the server, the PRISMAprepare automation templates are available in the application. Automation templates are applied to jobs automatically when the [Enable automatic document preparation] option is enabled in workspace [Configuration]. 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.

You can also apply automation templates manually.

### Procedure

1. Select an order.
2. Click the [Apply automation templates] button.  
The list with available templates appears.
3. You can:
  - Click the automation template that you want to apply to the order.  
You can apply one template at a time. After the template is applied, you can apply another template.
  - Select the [Multiple automation templates] option.  
Select which templates you want to apply. Put the templates in the correct order. Click [OK].

The templates are applied to all jobs of the order. The jobs receive the layout as defined by the templates.

# Copy an order

## Introduction

On behalf of a customer, you can copy an order as long as:

- The order and its jobs are not in state [Failed].

## Procedure

1. Select the order.  
The list of jobs that belong to the order and the order ticket items become available.
2. Click the [Copy order] icon in the top right corner of the selected order.  
The order and its jobs are copied and added to the list of orders.  
The order and its jobs are created with [Communication state] = [New].

## Delete an order

### Introduction

On behalf of a customer, you can delete an order as long as:

- The customer has not paid the order.
- The operator has not accepted the order.

### Procedure

1. Select the order.  
The list of jobs that belong to the order and the order ticket items become available.
2. Click the [Delete] icon in the top right corner of the selected order.
3. Confirm that you want to delete the order.  
The order is removed from the list of orders.

# Edit the order ticket

## Introduction

Ticket items are available at order level and at job level. At order level, the items define the commercial information. For example the order name, the delivery address, the billing information, etc. At job level, the items contain the requested settings and any remarks of the customer. A ticket item can be used at order level or at job level, but not at both levels.

The customer defines order ticket items before submitting the order. The operator can edit the order ticket items that were defined by the customer. The operator also has a set of operator specific items available in the order view.

Some ticket items are used by the page programme application when you page programme the document. For example, [Orientation and binding edge]. These job ticket items are marked with a blue dot in the job ticket. Some ticket items are used by the printer when you print the document. For example, [1-sided or 2-sided]. These job ticket items are marked with a white square or circle. Some job ticket items are only valid for specific printers. The white square appears in the job ticket only when the specific printer is selected in the list of printers.



### NOTE

The system administrator defines which ticket items can be used by the page programme application and/or the printer.

You can edit the ticket items both at order level and at job level. For example, a customer has entered '[Copies:] 4', but the number of copies must be 7. You can change the [Copies] item and handle the job according to the new value.

Some ticket items are visible only for operators. For example, item [Assigned to:] contains the name of the operator who is responsible for the job.

Some ticket items are not visible for any user. These ticket items can be used by the page programme application and/or the printer. Read-only items cannot be edited. These are just displayed in the ticket.

## Procedure

1. Select an order.  
The list of jobs that belong to the order and the order ticket items become available. When you click a job, the ticket items at job level and the files of the job become available. See chapter "Job view" for more information.
2. Double-click on the value of the ticket item that you want to change.



### NOTE

You cannot edit read-only items. These are just displayed in the ticket.

3. Change the value of the job ticket item.  
Mandatory ticket items are marked with a dot to the left of the value box. You must fill in these mandatory items.
4. Click outside the pane that shows the ticket items to save your changes.

# Manage the workflow of an order

## Introduction

The workflow section offers an overview of the current status of an order and the remaining steps to complete the order. An order can contain one or more jobs. Each job in an order can have a different [Communication state]. The [Communication state] of the order is equal to the lowest job state.

The steps of the workflow are defined by buttons in the order details. Click a button to force the next step to completion of the order.



### NOTE

It is recommended that the [Communication state] column be displayed.

## Request for change

### Introduction

A customer has submitted an order. An order can contain one or more jobs. A job can contain one or more files. When there is a problem with one of the files, you can request the customer to change the order. For example, the new order contains a file which is password protected. You can also request changes to the job ticket.

When payment is required, the customer pays for the order when the order is submitted. When the payment was successful, the customer must be refunded when you request the customer to change the order. The application offers you the possibility of refunding the customer automatically. You can also refund the customer manually. The customer pays for the changed order when the customer submits the changed order.



### NOTE

It is recommended that the [Job is paid] column be displayed. This column allows you to determine if a customer has paid for a submitted order.

### Procedure

1. Check if the order is correct.  
The [Communication state] of the order and its jobs is [New]. The order and its jobs are marked with the color: ■.
2. Click the [Request for change] button if the customer must change the order.  
The [Send a change request for:] dialog box appears.
3. Select which files the customer must change and click OK. You can also request changes to the job ticket.  
The message [I do not wait for the response of the customer.] appears.  
The [Communication state] of the order and the job that must be changed becomes [Request for change]. The order and the job that must be changed are marked with color: ■.
4. When payment is required, the customer pays for the order when the order is submitted. When the payment was successful, the customer must be refunded when you request the customer to change the order. A dialog opens with the following text:  
[The customer has already paid the order. When you request that the customer change the order, the value of the payment is automatically refunded to the customer. Do you want to continue?]
  - Click the [OK] button to refund the value of the payment to the customer. If the automatic refund fails, you must refund the customer manually.
  - Click the [Cancel] button to refund the customer manually.

5. Wait until the customer has changed the order. The customer can also request that you make certain changes to the order.  
It is recommended that you wait until the customer has changed the order. Optionally, you can click the [OK] button in the [I do not wait for the response of the customer.] message. Then, you can continue with the next step of the workflow.  
The [Communication state] of the order and the job that are changed becomes [Job is changed].  
The order and the job that are changed are marked with color: ■.
6. Continue with the next step in the workflow.

## Send quotation

### Introduction

When the customer has requested a calculation of the order cost, you must send a quotation to the customer. The customer can accept or reject the quotation.

In the [PRISMAAccess Administration] a maximum cost per order can be defined for each customer. When the calculated cost exceeds the maximum cost, a [Approver] must approve or reject the cost after the customer has accepted the cost.

### Procedure

1. Select the order to calculate the order cost.  
The [Communication state] of the order is [Quotation requested].
2. Click the [Send quotation] button.  
The [Calculate price] dialog opens.
3. Define the correct settings to calculate the order cost.
4. Click the [OK] button.  
An email message opens. The email message contains the link to the web page where the order cost is displayed.  
If required, you can change the email message.
5. Send the email message to the customer.  
The [Communication state] of the order becomes [Request to accept quotation].The order is marked with color: ■.  
The message [Price can be accepted on behalf of the customer.] appears. It is recommended that you wait until the customer accepts the quotation.



#### NOTE

The system administrator defines if you can accept the order cost on behalf of the customer.

6. Wait until the customer has accepted the quotation. The customer can make certain changes to the order to reduce the cost.
  - In message [Price can be accepted on behalf of the customer.]:  
You can click button [OK] and continue with the next step of the workflow.
7. The customer has accepted the quotation.  
The [Communication state] of the order becomes [Quotation accepted].The order is marked with color: ■.  
The message [Price can be accepted on behalf of the customer.] disappears.
8. Continue with the next step in the workflow.  
When you click button [Accept], the application checks if the calculated order cost does not exceed the maximum order cost.  
If the maximum order cost is exceeded, an email is sent to the [Approver]. The [Approver] can accept or reject the order cost.  
The message [Accept the price on behalf of the approver.] appears. It is recommended that you wait until the cost approver accepts the order cost.  
The [Communication state] of the order becomes [Request to accept quotation].The order is marked with color: ■.
9. Wait until the cost approver has accepted the order cost.
  - In message [Accept the price on behalf of the approver.]:  
You can click button [OK] and continue with the next step of the workflow.



**NOTE**

The system administrator defines if you can accept the order cost on behalf of the customer.

10. The job cost approver has accepted the order cost.  
The message [Accept the price on behalf of the approver.] disappears.  
The [Communication state] of the order becomes [Quotation accepted]. The order is marked with color: ■.
11. Continue with the next step in the workflow.

## The quotation is rejected

### Introduction

When the customer has requested a calculation of the order cost, you must send a quotation to the customer. The customer can accept or reject the quotation.

In the [PRISMAaccess Administration] a maximum cost per order can be defined for each customer. When the calculated cost exceeds the maximum cost, a [Approver] must approve or reject the cost after the customer has accepted the cost.

### Procedure

1. The customer or the cost approver can reject the quotation.
  - **The customer rejects the quotation:**
    - When the order is canceled: The [Communication state] of the order becomes [Quotation rejected]. The order is marked with color: ■.
    - When the order is edited to reduce the cost of the order, the order is submitted again by the customer.  
The [Communication state] of the order and the job that are changed becomes [Job is changed]. The order and the job that are changed are marked with color: ■.
  - **The [Approver] rejects the quotation:**  
The [Remarks] pane displays the reason to reject the quotation.  
The [Communication state] of the order becomes [Quotation rejected].  
The customer can now change the order or cancel the order.
    - When the order is canceled: The [Communication state] of the order becomes [Quotation rejected]. The order is marked with color: ■.
    - When the order is edited to reduce the cost of the order, the order is submitted again by the customer.  
The [Communication state] of the order and the job that are changed becomes [Job is changed]. The order and the job that are changed are marked with color: ■.

# Accept

## Introduction

A customer has submitted an order. You can accept an order when:

- The order contains all required files.
- All files can be used by the operator.
- The order ticket and the job ticket are correctly filled in.
- If required, the customer has paid the order.

When you accept the order, the order and its jobs cannot be changed or cancelled anymore by the customer.

## Procedure

1. Check if the order is correct.
2. Click button [Accept] if the order can be printed.
  - The [Communication state] of the order and its job becomes [Accepted]. The order and its jobs are marked with colour: ■.
  - When you click button [Accept], the application checks if the calculated order cost does not exceed the maximum order cost.  
If the maximum order cost is exceeded, an email is sent to the [Approver]. The [Approver] can accept or reject the order cost.  
The message [Accept the price on behalf of the approver.] appears. It is recommended that you wait until the cost approver accepts the order cost.  
The [Communication state] of the order becomes [Request to accept quotation].The order is marked with colour: ■.

An email can be sent to the customer when the job is [Accepted].
3. Continue with the next step in the workflow:  
[Send proof PDF on page 43](#), or  
[Mark as ready on page 45](#)

## Send proof PDF

### Introduction

The application converts any non-PDF files to PDF. When all files are PDF files, the files can be merged into a single document per job.

When the customer has requested a proof PDF, you must send a proof PDF of the merged document to the customer. The customer can check the proof PDF for correctness. If the merged document is correct, the customer accepts the proof PDF. If the merged document is incorrect, the customer can contact you to have the merged document corrected.

The customer can request a proof PDF of a variable data document. The variable data document is created by applying the variable data from the data source or the manual input to the [VDP document]. You can control the file size of the proof PDF in the email message.

- You can apply all rows of the data source to the VDP document. The file size of the proof PDF can exceed the limitations for email attachments.



#### NOTE

The system administrator defines the maximum number of pages of a variable data document for the [Proof PDF]. The proof PDF will be trimmed to the maximum number of pages.

- You can apply a dedicated row of the data source to the VDP document.

### Procedure

1. Click the [Send proof PDF] button.

The [Send a proof PDF for:] dialog box appears.

2. Select for which jobs you want to send a proof PDF and click OK.
3. An email message opens.

To control the file size of the proof PDF for a VDP document in the email message, you can:

- Select the [Use all rows] option to apply all rows of the data source to the VDP document. The file size of the proof PDF can exceed the limitations for email attachments.



#### NOTE

The system administrator defines the maximum number of pages of a variable data document for the [Proof PDF]. The proof PDF will be trimmed to the maximum number of pages.

- Select the [Use row number:] option to apply a dedicated row of the data source to the VDP document.
4. Click the [Send] button.  
An email is sent to the customer. The email message contains a link. The customer can click the link to approve or reject the [Proof PDF].  
The [Communication state] of the order and the jobs for which a proof PDF must be sent becomes [Proof PDF sent]. The order and the jobs for which a proof PDF must be sent are marked with color: ■.  
The message [I do not wait for the response of the customer.] appears.
  5. Wait until the customer has accepted the proof PDF. The user can also request that you make certain changes to the job.  
It is recommended that you wait until the customer accepts the proof PDF. Optionally, you can click the [OK] button in the [I do not wait for the response of the customer.] message. Then, you can continue to print the job.

6. The customer has accepted the proof PDF.  
The [Communication state] of the order and the jobs for which a proof PDF were sent becomes [Proof PDF accepted]. The order and the jobs for which a proof PDF were sent are marked with color: ■.  
The message [I do not wait for the response of the customer.] disappears.
7. Print the job.
8. Continue with the next step in the workflow:  
[Mark as ready on page 45](#)

# Mark as ready

## Introduction

A customer has submitted an order. An order can contain one or more jobs. A job can contain one or more files. When you have printed the job, you can mark the job as ready.

## Procedure

1. Print the job.
2. Click the [Mark as ready] button.  
The [Mark as ready:] dialog box appears.
3. Select which jobs you want to mark as ready and click OK.  
The [Communication state] of the order and the selected jobs becomes [Ready]. The order and its jobs are marked with colour: ■.  
An email can be sent to the customer when the job is [Ready].
4. Continue with the next step in the workflow.

# Dispatch

## Introduction

Each job marked as ready can be dispatched. You have to configure the package details when the customer has requested shipping.



### NOTE

The system administrator defines if shipping is enabled.

## Procedure

1. Click the [Dispatch] button.  
The [Dispatch] dialog box appears.
2. Select which jobs you want to dispatch and click OK.  
The [Package details] dialog appears when the customer has requested shipping.
  1. Select a shipping provider and a pickup date for the package.
  2. Click [New package] to define the type, value, measurements, etc of the package. You also have to select the delivery option.  
Click the button again to define the settings of another package.
  3. Click [Calculate] to send the package details to the shipping provider.  
The shipping provider returns a price when the package details are correct. Or a message that details which settings need to be changed.
  4. Click [OK] to confirm the shipment.  
The shipping provider returns a tracking number and a shipping label that you can paste to the package. Click [Print shipping label] in section [Shipping] to print the shipping label.
3. You can notify the customer about the shipment with the email message that appears.  
The [Communication state] of the dispatched jobs becomes [Dispatched]. The dispatched jobs are marked with colour: ■.  
When all jobs of an order are dispatched, then the order state also becomes [Dispatched].
4. Continue with the next step in the workflow when the order state is [Dispatched].

---

# Finalize

## Introduction

A customer has submitted an order. An order can contain one or more jobs. When the order and its files are printed and dispatched, you can finalise the order. When you finalize the order, the accounting information is collected.



### NOTE

The system administrator determines whether the accounting is enabled.

When an order is finalized, you can only [Save] and [Copy] the order.

The customer can enable the [Archive] option in the job ticket. When you finalize the order, the order is exported to a predefined export folder and archived. The ticket items of the [Archive options] are indexed for later retrieval of the order.

## Procedure

1. As long as the [Communication state] is [Ready], you can:
  - Print the order again.
  - Change the [Communication state] of the order.
2. Click the [Finalize] button.

The accounting information is collected. The system administrator determines whether the accounting is enabled.

The [Communication state] of the order and its jobs becomes [Finalized]. The order and its jobs are marked with color: ■.

## Change to a previous state

### Introduction

When part of an order has not printed successfully or has not been handled correctly, you may want to process the order again.

### Procedure

1. Select an order.
2. Click the step in the workflow which you want to execute again.



#### NOTE

You cannot change the order state when the [Communication state] is [Dispatched] or [Finalized].



---

# Filter orders

## Introduction

You can apply filters to the list of orders. Only those orders are shown that match the criteria of the filter. To show all orders again, do:

## Procedure

1. Click the drop-down list in the footer of the list of orders.
2. Select the [Show all orders] option.  
Any applied filters are removed. All orders are displayed.

## Select a predefined filter



### NOTE

The system administrator determines whether the predefined filters are available to you.

## Procedure

1. Click the drop-down list of the filters in the footer of the list of orders.  
The drop-down list contains an icon of a funnel.
2. Select a predefined filter.
  - [Order state]  
For example, you can select [Accepted]. All orders which are in state [Accepted] are displayed in the list of orders.

## Select a custom filter

The system administrator can create and assign custom filters to you.



### NOTE

The system administrator determines whether you are allowed to create custom filters.

### Procedure

1. Click the drop-down list of the filters in the footer of the list of orders.  
The drop-down list contains an icon of a funnel.
2. Select a custom filter.  
The custom filters can be found below the [Save filter as...] option and above the predefined filter [Order state].

# View the order history

## Introduction

The order history displays the history of a selected order.

## Procedure

1. Select an order.
2. Click the link [Show history].  
A dialog opens that shows the history of the selected order.
  - Click any column header to apply ascending sorting or descending sorting.
  - Click the [Refresh] button to refresh the order history.
3. Click OK to close the dialog.



# **Chapter 3**

## Job view

# Configure the columns

## Introduction

You can configure which columns are available in the job view. You can make the most important information of the jobs available to you in one view. It is recommended that you add the column [Delivery date] to the [Job view]. In this way, you can see the creation date of the job and the requested delivery date in one view.

You can select any ticket item as column header. The job ticket of a print job often contains a subset of all available ticket items. You can select an item that is not visible in the job ticket of a print job. In this case, the default value of the item is displayed in the column for the concerning print job.



### NOTE

A job ticket can be extended with one or more custom job ticket items. The actual value of the custom item is displayed in the column for print jobs that use the extended job ticket. The default value of the custom item is displayed for print jobs that use the old job ticket.

By default, the following columns are displayed:

Item	Description
[Job type]	Displays the icons that indicate the type of job. See <a href="#">Job types on page 13</a>
[Color]	Displays whether the job contains color pages, black & white pages, or both.
[Job number]	Displays the [Job number]
[Job name]	Displays the name of the job.
[Communication state]	Displays the state of the job according to the workflow. The steps of the workflow are defined by buttons in the order details.
[Internal job state]	Displays the state of the job according to actions performed on the job. For example, action [Preflight] can result in [Internal job state] = [Preflighted] or in [Internal job state] = [Preflight error].

## Procedure

1. Right-click the column header.  
A context menu appears. The context menu contains the currently available columns. Disable a column to remove the column from the job view.
2. Select option [Select columns] to configure the columns.  
The [Select columns] dialog contains all available ticket items that can be used as column header.
3. Scroll to the required ticket items and enable the items.
4. Use the arrows to set the order of the ticket items.  
The item in the top is first column in the job view.
5. Click OK.

# Sort the jobs

## Introduction

You can sort the jobs in the job view. You can use the sorting mechanism to group the jobs based on the same ticket item. For example, you can sort on [Communication state] = [Accepted] to group all jobs that can be printed.

## Procedure

1. Click the column header to apply ascending sorting or descending sorting. You can use any column header to sort the jobs.

# Assign a job to an operator

## Introduction

You can assign jobs to an operator. In this way, you can divide the work between several operators. By default, the [Assign to] list contains all operators defined by the system administrator.

## Procedure

1. Select a job.
2. Click option [Assign to] in the job details.  
A drop-down list appears.
3. Select an operator.  
The job is assigned to the selected operator.



# Assign a job to a category

## Introduction

You can assign jobs to predefined categories and to custom categories.

The predefined categories are:

- [New jobs]
- [Ready jobs]
- [Finalized jobs]

## Procedure

1. Select a job.
2. Click option [Category:] in the job details.  
A drop-down list appears.
3. Select a [category].  
The job is assigned to the selected category.

# Preview the job

## Introduction

A small preview of the job is available in the job details dialog. When a job contains more than one file, the merged document is displayed. The order of the files determines how the files are merged.

The preview cannot display all options. For example, tab media cannot be displayed. The preview can show the following layout options:

- [Cover]
- [1-sided or 2-sided]
- [Binding]
- [Orientation and binding edge]
- [Color]
- [Cover media]
- [Document media]
- [Punching]
- [Folding]

The preview shows only 10% of a variable data document with a maximum of 10 pages when a data source is used.



### NOTE

The system administrator determines the options available to you.  
The system administrator determines which options can be changed by you.








### NOTE

The preview is not available when the job is created from a type [Generic] product.

## Procedure

1. Select a job to view the job details.  
The preview of the job is displayed below the files of the job.
2. You can use the following tools to browse through the preview:

Tool	Description
[Go to page:]	Enter a page number.
	<b>[First page]</b>
Less	Move six pages back in the document.
	<b>[Previous page]</b> This button is available on the left of the preview and below the preview.
Visible pages	Click a visible page number to go to that page.
	<b>[Next page]</b> This button is available on the right of the preview and below the preview.
More	Move six pages forward in the document.
	<b>[Last page]</b>
	[Automation templates] Apply an automation template to the selected job.

# View the files or the merged document

## Introduction

An order can contain one or more jobs. A job can contain one or more files. You can view the files and the merged document of a job. The merged document is the PDF file in the top of section [Files]. The files of the merged document are indented.

You must enable pop ups for the Web Submission site to view the files or the merged document.

## Procedure

1. Click the job.  
The job ticket and the files of the job are shown.
2. You can view the files or the merged document. If the job contains multiple files, the PDF files are automatically merged into a single document. The order of the files determines how the files are merged.
  - Click the view icon to view the merged document. The icon appears when you hover the mouse pointer over the merged document.
  - Click the view icon to view a file. The icon appears when you hover the mouse pointer over a file.

# Save the files or the merged document

## Introduction

You can save the files or the merged document to disk.



### NOTE

If you want to save the complete print job (PDF file and job ticket), use the [Export orders] option in [Order view].

## Procedure

1. Select a job.  
The files of the job are shown.
2. You can save the files or the merged document to disk.
  - Click the [Save] icon to save the merged document. The icon appears when you hover the mouse pointer over the merged document.
  - Click the [Save] icon to save a file. The icon appears when you hover the mouse pointer over a file.

The file becomes available in its original file format in the lower left-corner of the application.

3. Click the file in the lower left-corner of the application.  
The file opens in an application that can handle the file format.
4. Browse to the location where you want to save the file.
5. Enter a file name and click [Save].  
The file is saved to disk without the job ticket.

# The files of the job

## Change the files of the job

### Introduction

The system administrator can enable the [Allow the operator to change the files of jobs] option in the System Administration. Enabling this option allows the operator to change the files of jobs in the job details of the selected job.

When this option is enabled, the operator can:

- Add files to a job.
- 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. The operator can also replace files, for example to use the latest version of the files.
- [Edit] a non-PDF file. The operator can change the content of the files of the job.

## Add a file to a job

### Introduction

You can add different kinds of files to your job. The system administrator defines which kinds of files you can add and which file sources you can browse to in order to add files.

This procedure describes how to add content to most product types. For "Business cards" or "Variable data documents" type products, see the following procedures:

- [Select the content for a product of type "Business cards" on page 24](#)
- [Select the content for a variable data document on page 26](#)

You cannot add content to a product when the product contains a fixed document. The fixed document is added to the product by the system administrator.




#### NOTE

The system administrator can enable the [Allow the operator to change the files of jobs] option in the System Administration. Then, you can add or change the content of a product that contains a fixed document. See [Change the files of the job on page 61](#).

### Procedure

1. Click the '+' icon in section [Files] in the job details dialog.

2. Select which type of file you want to add.

Type of file	Actions
[Add digital file]	<p>A dialog appears that allows you to select the file(s) that you want to use. Browse to the file(s) and click [Open]. The file(s) are added to your job. You can also drag and drop files into the [Files] area.</p> <p>The file types that can be added by the user are configured by the System Administrator. For each allowed file type, an application must be available to the operator that can open the file type. An error message will appear when you select a non-supported file type.</p>
[Add paper original]	<p>A text box appears. You can enter the file name for a paper original. You can submit a job without an attached file. Only a job ticket is submitted. The customer can send the paper original to the print room, for example via the internal mail. The operator can automatically attach a scanned original to a print job.</p> <p> <b>NOTE</b> Option [Paper original] is also used for copy jobs. For accounting reasons such copy jobs can be added to a print job.</p>
[Add other digital file]	<p>A text box appears. You can enter a file name and extension for an other digital file.</p> <p>You can submit a job without an attached file. Only a job ticket is submitted. This option can be used when the digital file cannot be added to the job yet. For example, a digital file on a CD.</p> <p>The customer can send the other digital file to the print room, for example via the internal mail.</p>

3. You can continue to add more file(s) to your job.

If the job contains multiple files, the PDF files are automatically merged into a single document. The order of the files determines how the files are merged.

4. You can manage the file(s) of your job.

- Drag the file up or down.
- Click [Delete] to remove a file.



**NOTE**

You can click the [Edit] icon to edit a file. The file is opened in the appropriate application. You cannot edit the file if no application is associated with the file type.

## Select the content for "Business cards" product types

### Introduction

The system administrator has selected a [VDP document] for "Business cards" type products. However, you can use your own VDP document. You must select a data source or you must provide manual input for the product. The variable data from the data source or the manual input is applied to the VDP document to create the business cards.

The supported data source types are: \*.accdb, \*.mdb, \*.xlsx, \*.xls and \*.csv. Password-protected data sources of type \*.xlsx, \*.xls and \*.csv are not supported.

The item [Business cards per set] defines the number of business cards in the VDP document. This item is read-only. The value of the [Sets per row] item defines how many times one row of the data source is applied to the VDP document. The user defines the value for the [Sets per row]

item. When the user provides manual input, the manual input is considered to be one row of a data source. The user defines the value for item [Sets].

For example: [Business cards per set] = 10 and [Sets per row] = 10. Now, 100 business cards are printed for each row of the data source.



**NOTE**

The system administrator defines if you can select a data source or if you must provide manual input for the product.

**Procedure**

1. Select a product of type "Business cards".  
The system administrator has selected a [VDP document] for "Business cards" type products. However, you can use your own VDP document.
  1. Click the [Browse] button.
  2. Browse to the VDP document.
  3. Select the VDP document and click [Open].  
The application checks if the VDP document is valid. An error message will appear when the VDP document is invalid.
2. You must select a data source or you must provide manual input for the product.

Variable data	Actions
Select the [Data source]	<ol style="list-style-type: none"> <li>1. Click the [Browse] button. Select which file source you want to browse. A [Browse] dialog will appear.</li> <li>2. Browse to the data source file.</li> <li>3. Select the data source file and click [Open]. The application checks whether the data source is valid for the VDP document. An error message will appear when the data source contains incompatible field type(s) and/or required fields are missing.</li> <li>4. Select which table or sheet of the data source must be used. If the data source type is *.csv or *.txt, you must define the [Text separator]. Optionally, you can define the [Text delimiter]. For example: "field1";"field2";"field3", where: " is the [Text separator] ; is the [Text delimiter]</li> <li>5. Define a value for item [Sets per row].</li> <li>6. The rows in the data source are applied to the VDP document. The number of business cards printed for each row of the data source is: [Business cards per set] * [Sets per row].</li> </ol>
Provide [Manual input]	<ol style="list-style-type: none"> <li>1. The dialog displays the required structure for the VDP document. The user can enter the variable data manually for each field instead of using a data source. The user can enter one value for each field.</li> <li>2. Define a value for item [Sets].</li> <li>3. The manual input is applied to the VDP document. The number of business cards printed using the manual input is: [Business cards per set] * [Sets].</li> </ol>

3. Click button [Generate preview] to preview the business cards.  
The VDP document is loaded. The data source or manual input is applied to the VDP document.

## Select the content for a variable data document

### Introduction

You have selected a product of type "Variable data document". You have to select a [VDP document]. You have to select a data source or you have to provide manual input for the product. The variable data from the data source or the manual input is applied to the VDP document to create the variable data document. You have to select a zip file containing images when the [VDP document] contains image frames.



**NOTE**

The data source must contain a relative path to each image frame. You cannot submit the order when the data source contains absolute paths.

The supported data source types are: \*.accdb, \*.mdb, \*.xlsx, \*.xls and \*.csv. Password-protected data sources of type \*.xlsx, \*.xls and \*.csv are not supported.

The system administrator defines if you can select a data source or if you must provide manual input for the product.

### Procedure

1. Select a "Variable data document" type product.
2. Select the [VDP document]:
  1. Click the [Browse] button. Select which file source you want to browse. A [Browse] dialog will appear.
  2. Browse to the VDP document.
  3. Select the VDP document and click [Open].  
The application checks if the VDP document is valid. The document must contain VDP data, else the document cannot be added to the product.



**NOTE**

You cannot select a VDP document when the product contains a fixed VDP document. The fixed VDP document is added to the product by the system administrator.


3. You have to select a data source or you have to provide manual input for the product.

Variable data	Actions
Select the [Data source]	<ol style="list-style-type: none"> <li>1. Click the [Browse] button. Select which file source you want to browse. A [Browse] dialog will appear.</li> <li>2. Browse to the data source file.</li> <li>3. Select the data source file and click [Open]. The application checks whether the data source is valid for the VDP document. An error message will appear when the data source contains incompatible field type(s) and/or required fields are missing.</li> <li>4. Select which table or sheet of the data source must be used. If the data source type is *.csv or *.txt, you must define the [Separator]. Optionally, you can define the [Delimiter]. For example: "field1";"field2";"field3", where: " is the [Separator] ; is the [Delimiter]</li> <li>5. The rows in the data source are applied to the VDP document. ▶</li> </ol>



Variable data	Actions
[Manual input]	<ol style="list-style-type: none"> <li>1. The dialog displays the required structure for the VDP document. The user can enter the variable data manually for each field instead of using a data source. The user can enter one value for each field.</li> <li>2. The manual input is applied to the VDP document.</li> </ol>

4. You have to select a zip file containing images when the [VDP document] contains image frames.

Variable data	Actions
Select the zip file	<ol style="list-style-type: none"> <li>1. Click the [Browse] button. A [Browse] dialog will appear.</li> <li>2. Browse to the zip file that contains the images. Images of type BMP, GIF, TIFF, TIF, JPEG, JPG, PNG and EPS are supported.</li> <li>3. Click [Open]. The application unzips the file and applies the root of the images to the relative path of each image frame in the data source.</li> </ol> <p> <b>NOTE</b> The data source must contain a relative path to each image frame. You cannot submit the order when the data source contains absolute paths.</p> <ol style="list-style-type: none"> <li>4. The images are applied to the VDP document.</li> </ol>
[Manual input]	<ol style="list-style-type: none"> <li>1. The dialog displays the required structure for the VDP document. The user can enter the variable data manually for each field instead of using a data source. The user can enter one value for each field. You can enter the relative path to the image and the image name. Images of type BMP, GIF, TIFF, TIF, JPEG, JPG, PNG and EPS are supported.</li> <li>2. The manual input is applied to the VDP document.</li> </ol>

5. Click button [Generate preview] to preview the variable data document.  
The VDP document is loaded. The data source or manual input is applied to the VDP document.

## Validate the [VDP] data

### Introduction

The [Validate VDP] operation checks if any rules are violated in the variable data document. Only the selected rows of the data source are validated. The [Validate VDP] operation cannot fix most of the detected violations. It is recommended that you fix these problems manually before you print the job. You can configure a number of rules which are used by the [Validate VDP] operation.

The following rules cannot be configured:

- [The data source contains incompatible field type(s) and/or required fields are missing.]
- [The image folder is invalid or cannot be accessed.]
- [The field type or field format is invalid.]
- [The frame is too small to contain all text.]

[The frame is too small to contain the image.]

- [A font is invalid.]
- [The text contains non-printable character(s).]

The system administrator can configure the [Preflight] rules in the workspace [Configuration]:

- [Content too close to border rule]

This rule is used to check if frames are too close to the page border.

- [Image compression is too high rule]
- [Image resolution is too high rule]

The preflight operation can fix the violations detected by this rule.

- [Image resolution is too low rule]
- [Hairline rule]

This rule is used to check the line weight of the frame borders. The preflight operation can fix the violations detected by this rule.



### NOTE

When automatic preflight is enabled, the configured rules for automatic preflight are used. When automatic preflight is disabled, the configured rules for manual preflight are used.

## Procedure

1. Click [Validate].

The [Validate] operation checks if any rules are violated in the variable data document. Only the selected rows of the data source are validated.

2. The [Overview of warnings] report is generated. Click the icon next to button [Validate] to open the report. The report shows the problems that have been found.

- The [Validate] operation cannot fix most of the detected violations. It is recommended that you fix these problems manually before you print the job.



### NOTE

The validation report is not updated when you fix a violation. Generate the report again to update the report.

## Move file up or down

### Introduction

The customer defines the order of the files in the Web Submission. However, the operator can change the order of the files. This order is reflected in the merged document.

### Procedure

1. Select a job.  
The files of the job are shown.
2. Select a file.
3. Drag the file up or down.

## Delete a file from a job

### Introduction

A job is always part of an order. On behalf of a customer, you can delete one or more files from a job as long as:

- The customer has not paid the order.
- The operator has not accepted the order.
- The job contains more than one file.

### Procedure

1. Select a job.  
The files of the job are shown.
2. Click the [Delete file] icon. The icon appears when you hover the mouse pointer over the file.  
A job must contain at least one file. The [Delete file] icon appears when the job contains more than one file.
3. Confirm that you want to delete the file.  
The file is deleted from the job.

## Replace a file in a job

### Introduction

A job is always part of an order. On behalf of a customer, you can replace one or more files in a job as long as:

- The customer has not paid the order.
- The operator has not accepted the order.

### Procedure

1. Select a job.  
The files of the job are shown.
2. Click the [Replace] icon. The icon appears when you hover the mouse pointer over the file.
3. Browse to the file that you want to attach to the job.
4. Click button [Open].  
The selected file is replaced by the new file.

## Edit a file in a job

### Introduction

A job is always part of an order. On behalf of a customer, you can edit one or more files in a job as long as:

- The customer has not paid the order.
- The operator has not accepted the order.

### Procedure

1. Select a job.  
The files of the job are shown.
2. Click the [Edit] icon. The icon appears when you hover the mouse pointer over the file.
  - A PDF file is opened in Adobe Acrobat.
  - A non-PDF file is opened in the associated application.
3. Edit the file.
4. Close the application.  
The changed file is saved on the server.

# Automatic conversion of the files

## Introduction

The application automatically converts every non-PDF file into a PDF file.

## Merge the files of the job

### Introduction

If the job contains multiple files, the PDF files are automatically merged into a single document. The order of the files determines how the files are merged. You can drag a file to the correct position.



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## Redistill a file

### Introduction

If the job contains multiple files, the PDF files are automatically merged into a single document. When the files are merged into a single document, the document can contain errors. A redistill of the PDF files can solve these errors. After the redistill, the files must be merged again.

You can click the [Revert to original] button to undo the redistill.



#### NOTE

Option [Redistill] uses the printer 'Redistill Driver'. When a PDF file is redistilled, the printing preferences of the 'Redistill Driver' are applied on the PDF file.

### Question: What is a redistill of a file?

Answer: When you redistill a PDF file you print it to Postscript and then convert that Postscript back into PDF.

### A scenario for use of redistill can be:

A user submits 2 PDF files to the Operator Console. One PDF file contains a button with name "O1". The second PDF file contains a check box with the same name "O1".

The operator merges those 2 files. The result is a PDF file that contains 2 buttons, instead of one button and one check box. This is because the elements have the same name and when the files are merged the first found element is used.

The solution is to redistill the PDF files before you merge them. The elements are converted to images during redistill. Now the files can be merged. The PDF file will now correctly contain the button with name "O1" and the check box with name "O1".

## Redistill a file

### Procedure

1. Select a job.  
The files of the job are shown.
2. Click the [Redistill] icon. The icon appears when you hover the mouse pointer over the file.  
You must select an original PDF file. You cannot select a file that was converted to PDF.  
The file is redistilled.

## Preflight the files of the job

### Introduction

The preflight operation checks if any rules are violated in the PDF file(s). The set of rules is fixed. Some of the rules can be configured in the [Configuration]. The system administrator configures if the preflight operation automatically fixes violations of the rule. Some violations are detected by the preflight operation but cannot be fixed automatically. It is recommended that you fix these violations manually before you print the job.

A preflight report and an annotated file are generated. The preflight report shows a summary of the problems that have been found. You must fix or ignore any found problems.



#### NOTE

The preflight report for the files of the job is also available for the customer in the [Web Submission].

The preflight report for the merged document is not available for the customer in the [Web Submission].

## Preflight the files and the merged document

### Introduction

An order can contain one or more jobs. A job can contain one or more files. You can preflight:

- Each file separately
- All files of the jobs
- The merged document

The merged document is the PDF file in the top of section [Files]. The files of the merged document are indented.

### Procedure

1. Click the job.  
The job ticket and the files of the job are shown.
2. Select the preflight operation:

Action	Description
Preflight one file	Click the [Preflight] icon to preflight a file. The icon appears when you hover the mouse pointer over a file. The selected file is preflighted.
[Preflight attached files]	Click [Preflight] - [Preflight attached files] in the toolbar. All files of the job are preflighted. The merged document is not preflighted.
[Preflight merged PDF]	Click [Preflight] - [Preflight merged PDF] in the toolbar to preflight a job with multiple PDF files. The merged document is preflighted. The files of the job are not preflighted.

A preflight report and an annotated file are generated.

## Fix any found problems

### Introduction

The system administrator configures if the preflight operation automatically fixes violations of the rule. Some violations are detected by the preflight operation but cannot be fixed automatically. It is recommended that you fix these violations manually before you print the job.

A preflight report and an annotated file are generated. The preflight report shows a summary of the problems that have been found. You must fix or ignore any found problems.

### Procedure

1. Click the job.  
The job ticket and the files of the job are shown.
2. You can open the preflight report of the files or the merged document.
  - Click the [Preflight report] icon of the merged document. The icon appears when you hover the mouse pointer over the merged document.
  - Click the [Preflight report] icon of a file. The icon appears when you hover the mouse pointer over a file.

The preflight report shows a summary of the problems that have been found.

3. You can click button [View annotated PDF file].  
Any found problems are annotated in the PDF file.
4. Some violations are detected by the preflight operation but cannot be fixed automatically. It is recommended that you fix these violations manually before you print the job.
5. Click [Close].

## Undo the preflight of the files and the merged document

### Introduction

You can undo the preflight of the files and the merged document. When you undo the preflight, the preflight report and annotated PDF file are deleted.

### Procedure

1. Click the job.  
The job ticket and the files of the job are shown.
2. You can undo the preflight of the files and the merged document.
  - Click the [Undo preflight] icon of the merged document. The icon appears when you hover the mouse pointer over the merged document.
  - Click the [Undo preflight] icon of a file. The icon appears when you hover the mouse pointer over a file.

When you undo the preflight, the preflight report and annotated PDF file are deleted.

## Program pages

### Introduction

The page programmer offers an easy way to prepare and print your document.

When you select a print job, the job ticket will be displayed. Some job ticket items are used when a document is page programmed. These job ticket items are marked with a blue dot in the job ticket.

**NOTE**

The page programmer only accepts PDF files.

**NOTE**

A page program application must be available.

**NOTE**

The page programming of the document is undone when the files are changed.

### Procedure

1. Click the job.  
The job ticket and the files of the job are shown.
2. You can prepare the merged document.
  - Click the [Page programming] icon to prepare the merged document. The icon appears when you hover the mouse pointer over the merged document.

## Apply an automation template

### Introduction

If PRISMAprepare is installed on the server, the PRISMAprepare automation templates are available in the application. Automation templates are applied to jobs automatically when the [Enable automatic document preparation] option is enabled in workspace [Configuration]. 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.

You can also apply automation templates manually.

### Procedure

1. Select a job.
2. Click the [Apply automation templates] button.  
The list with available templates appears.
3. You can:
  - Click the automation template that you want to apply to the files of the job.  
You can apply one template at a time. After the template is applied, you can apply another template.
  - Select the [Multiple automation templates] option.  
Select which templates you want to apply. Put the templates in the correct order. Click [OK].

The jobs receive the layout as defined by the templates.

## The automation template cannot be applied

### Introduction

The automation template cannot be applied to the job partially or completely. An error is reported on job level in section [Automatic document preparation].

### Possible actions

Action	Description
[Continue]	The automation template cannot be applied to the job partially or completely. The job does not have the layout as defined by the template. Continue with the job as it is.
[Revert to original]	Revert to the original job. The automation template will not be applied to the job.
[Open in PRISMAprepare]	Open the job in PRISMAprepare. You can manually apply the missing steps from the template to the job.

## Revert to the original files

### Introduction

You can revert files that were redistilled or page programmed. You can also revert the application of automation templates to jobs.

### Procedure

1. Select a job.  
The files of the job are shown.
2. Select the file that you want to revert to the original state. Select the job when you want to revert the application of automation templates.
3. Click the [Revert to original] icon. The icon appears when you hover the mouse pointer over the file.  
When you use this option you will lose the changes you have made.

# Edit the job ticket

## Introduction

Ticket items are available at order level and at job level. At order level, the items define the commercial information. For example the order name, the delivery address, the billing information, etc. At job level, the items contain the requested settings and any remarks of the customer. A ticket item can be used at order level or at job level, but not at both levels.

The customer defines order ticket items before submitting the order. The operator can edit the order ticket items that were defined by the customer. The operator also has a set of operator specific items available in the order view.

Some ticket items are used by the page programme application when you page programme the document. For example, [Orientation and binding edge]. These job ticket items are marked with a blue dot in the job ticket. Some ticket items are used by the printer when you print the document. For example, [1-sided or 2-sided]. These job ticket items are marked with a white square or circle. Some job ticket items are only valid for specific printers. The white square appears in the job ticket only when the specific printer is selected in the list of printers.



### NOTE

The system administrator defines which ticket items can be used by the page programme application and/or the printer.

You can edit the ticket items both at order level and at job level. For example, a customer has entered '[Copies:] 4', but the number of copies must be 7. You can change the [Copies] item and handle the job according to the new value.

Some ticket items are visible only for operators. For example, an [Assigned to:] item contains the name of the operator who is responsible for the job.

Some ticket items are not visible for any user. These ticket items can be used by the page program application and/or the printer. Read-only items cannot be edited. These are just displayed in the ticket.

## Procedure

1. Select a job.  
The ticket items at job level and the files of the job become available.
2. Double-click on the value of the ticket item that you want to change.



### NOTE

You cannot edit read-only items. These are just displayed in the ticket.

3. Change the value of the job ticket item.  
Mandatory ticket items are marked with a dot to the left of the value box. You must fill in these mandatory items.
4. Click outside the pane that shows the ticket items to save your changes.



---

# Filter jobs

## Introduction

You can apply filters to the list of jobs. Only those jobs are shown that match the criteria of the filter. To show all jobs again, do:

## Procedure

1. Click the drop-down list in the footer of the list of jobs.
2. Select the [Show all jobs] option.  
Any applied filters are removed. All jobs are displayed.

## Select a predefined filter



### NOTE

The system administrator determines whether the predefined filters are available to you.

## Procedure

1. Click the drop-down list of the filters in the footer of the list of jobs.  
The drop-down list contains an icon of a funnel.
2. Select a predefined filter.
  - [Assign to]  
Select an operator to display the jobs which are assigned to the selected operator.
  - [Category]  
For example, you can select [Ready jobs]. Only the [Ready jobs] are displayed.
  - [Job state]  
For example, you can select [Unprocessed]. All jobs which are not yet [Ready] or [Finalized] are displayed in the list of jobs.

## Select a custom filter

The system administrator can create and assign custom filters to you.



### NOTE

The system administrator determines whether you are allowed to create custom filters.

### Procedure

1. Click the drop-down list of the filters in the footer of the list of jobs.  
The drop-down list contains an icon of a funnel.
2. Select a custom filter.  
The custom filters can be found below option [Save filter as...] and above the predefined filter [Assign to].

# View the job history

## Introduction

The job history displays the history of a selected job.

## Procedure

1. Select a job.
2. Click the link [Show history].  
A dialog opens that shows the history of the selected job.
  - Click any column header to apply ascending sorting or descending sorting.
  - Click the [Refresh] button to refresh the job history.
3. Click OK to close the dialog.



# **Chapter 4**

## Printer section

# Configure the printer list

## Introduction

The printer list displays all available printers and printer clusters. Each printer displays the progress of a printed job in %. If a printer in a cluster encounters a problem, an attention icon is displayed. A tooltip with additional information appears when you hover the mouse pointer over the icon.

## Location of the printer list

The printer list can be on the right of the application, or on the bottom.

Click the icons in the lower-left corner of [Order processing] to configure the location of the printer list.

## The hidden printer area

The printer list contains a hidden printer area at the bottom of the list. You can drag and drop one or more printers and printer clusters into the area. You cannot use the printers in the hidden area.

You can drag and drop printers and printer clusters from the hidden area into the printers list.



### NOTE

You can add the default printer for jobs to the hidden area. The first printer in the list becomes the default printer for jobs.

You can add the default printer for job tickets to the hidden area. You must manually set a printer as default printer to print the job tickets.

## Resize the printer list

Click the icon in the upper-right corner of the printer list.

The '-' icon collapses the dialog.

The '+' icon expands the dialog.

# Configure the printers

## Introduction

The [Printers] section displays the printers that are available to you to print the jobs.

You can drag a job to a printer to print the job.

## Procedure

1. Right-click a printer to configure the printer.
2. Option [Set as default printer to print the files]  
This printer becomes the default selected printer. You can always select another printer from the list of printers. The files are printed on the currently selected printer.  
You can also set the default printer in the [Workflow configuration] dialog.
3. Option [Set as default printer to print the ticket]  
This printer becomes the default printer to print the job tickets of all jobs.  
You can also set the default printer in the [Workflow configuration] dialog.
4. Option [Open the printer settings]
  - If the job is not page programmed and option [Open the printer settings] is disabled, the job is printed on the selected printer.
  - If the job is not page programmed and option [Open the printer settings] is enabled, the printer driver of the selected printer opens.
  - If the job is page programmed, the [Print] dialog of the page programmer opens. Some printers open the [Print] dialog for page programmed jobs and non-page programmed jobs.

# Configure the printer settings

## Introduction

You can configure the [Printer settings] in the [Printer settings] administration console.



### NOTE

An operator has limited configuration rights. A system administrator has full configuration rights.

## Procedure

1. Click [Configuration] - [Printer settings].
2. Configure the [Printer settings].  
Click the [Help] button to read how you can configure the [Printer settings].



# **Chapter 5**

## Accounting

# Accounting

## Introduction

You can collect accounting information. To collect accounting information, a 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. [User ID]



### NOTE

There are no mandatory ticket fields for jobs of type "Stationery". The accounting information for "Stationery" type jobs is always collected.



### NOTE

The system administrator can edit the captions of these items.



### 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.

## Accounting reports

The accounting information is saved in an SQL database. Use the Report Manager to generate reports that contain the accounting information. To open the Report Manager:

- Type the URL "http://localhost/reports\$printroom" when you use SQL 2005.
- Type the URL "http://localhost/reports\_printroom" when you use SQL 2008.

## When is the accounting information collected

Accounting information is collected when:

- The [Enable accounting] option is enabled in the System Administration, and
- The order is [Finalized], and
- The ticket fields for accounting have valid values.

# **Chapter 6**

## Configuring

# Create a filter

## Introduction

You can apply filters to the list of jobs. Only those jobs are shown that match the criteria of the filter. You can apply predefined filters and custom filters.



### NOTE

The system administrator determines whether the predefined filters are available to you.



### NOTE

The system administrator determines whether you are allowed to create custom filters.

## Create a custom filter

### Procedure

1. Click the drop-down list of the filters in the footer of the list of jobs.
2. Click [Edit filter].  
The [Edit filter] dialog opens.
3. Select a ticket item from the list of items.
4. Enable the [Use job ticket item in filter] option.
5. Assign a value to the job ticket item.
6. Repeat step 2, 3 and 4 until you have define your filter.
7. Click the [OK] button.  
The filter is added as a [Temporary filter] to the drop-down list of the filters.  
If you want to save the filter, continue with the following steps.
8. Click the drop-down list of the filters in the footer of the list of jobs.
9. Select the [Save filter as...] option.  
The [Save filter] dialog opens.
10. Type a filter name and a description for the filter.
11. Click the [OK] button.  
The filter is added to the drop-down list of the filters in the footer of the list of jobs.



### NOTE

The custom filter is not available to other operators.

## Rename a custom filter

### Procedure

1. Click the drop-down list of the filters in the footer of the list of jobs.
2. Click option [Rename filter].
3. Select the filter that you want to rename.  
The [Edit filter] dialog opens.
4. Type a filter name and a description for the filter.
5. Click the [OK] button.  
The filter is renamed.



#### NOTE

You cannot rename the filters created by the system administrator.

## Delete a custom filter

### Procedure

1. Click the drop-down list of the filters in the footer of the list of jobs.
2. Click option [Delete filter].  
The [Delete filter] dialog opens.
3. Click the [OK] button.  
The filter is deleted.



#### NOTE

You cannot delete the filters created by the system administrator.

# **Chapter 7**

## Reports

# Export the payment report

## Introduction

The payment information is collected for each customer payment and for each refund to a customer. The payment procedure starts when the customer clicks the [Pay & submit] button. The payment procedure ends when the payment was successful or when the payment fails. The refund procedure is logged when the refund is successful.

The payment information 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 information. The accounting functionality and the payment report can be enabled independently.

## Procedure

1. Click [Options] - [Export payment report] in the lower-right corner of the application.  
The [Export payment report] dialog box appears.
2. Select the file format.  
You can save the payment report as a \*.csv or \*.xml file. If the selected file format is \*.csv, you must define the [Delimiter].  
For example: field1;field2;field3, where ; is the [Delimiter].
3. Define the start date and the end date for the report.
4. Click [Export].  
The payment information is collected for the defined period of time. The payment report is generated and becomes available in the lower-left corner of the application.



# Export the shipping report

## Introduction

The shipping information is collected for each shipment to a customer. The shipping procedure starts when the operator clicks button [Dispatch].

The shipping information is stored in the accounting database on the SQL server.

## Procedure

1. Click [Options] - [Export shipping report] in the lower-right corner of the application.
2. Select the file format.  
You can save the report as a \*.csv or \*.xml file. If the selected file format is \*.csv, you must define the [Delimiter].  
For example: field1;field2;field3, where ; is the [Delimiter].
3. Define the start date and the end date for the report.
4. Click [Export].  
The shipping information is collected for the defined period of time. The shipping report is generated and becomes available in the lower-left corner of the application.



# **Chapter 8**


## The Print dialog

# Introduction

## Introduction

The print settings are retrieved from the document. You can optimize the printing process by configuring the print settings.

## Optimize

Tab	Description
[Media]	<ul style="list-style-type: none"> <li>• Select on which media you want to print.</li> </ul> <p> <b>NOTE</b> You can rename the media in the page programmer for easy recognition of job partitions.</p>
[Layout]	<ul style="list-style-type: none"> <li>• Cover media</li> <li>• Document media</li> <li>• Imposition settings</li> <li>• Same up settings</li> <li>• Document type options</li> <li>• Page marks</li> </ul>
[Image]	<ul style="list-style-type: none"> <li>• Specify the printer resolution</li> <li>• Specify color quality</li> <li>• Color adjustment</li> <li>• Color template</li> <li>• And more...</li> </ul>
[Finishing]	<ul style="list-style-type: none"> <li>• Stapling options</li> <li>• Feed edge</li> <li>• Trimming mode</li> </ul>
[Delivery]	<ul style="list-style-type: none"> <li>• Define your [Output] Location (e.g. tray 1)</li> <li>• Define your [Presentation] settings ( e.g. offset stacking)</li> </ul>
[Accounting]	<ul style="list-style-type: none"> <li>• The accounting information</li> </ul>

# Error avoidance

## Introduction

At print time, PRISMAdirect informs you about requests impossible to produce on the selected printer. This information is a warning. The warnings are displayed in the notification area just below the job information.

Error avoidance is not available on all the supported printer models. You will be notified about this in the notification area when you select that printer.

## How does it work

The prerequisite to get correct error avoidance warnings is an up-to-date printer configuration (i.e. which finishers are available at the printer).

During the preparation and printing of a document you choose the most appropriate resources to obtain the requested result. Resources may be media, printers and finishers. Due to the multiplicity and complexity of the possible combinations of resources your choice may be not optimal or even impossible.

Also, a document may be prepared optimally for printer A and because this printer is not available it can be printed on printer B. Printer A and B may have different capabilities and limits that will impact the produced document.

At print time, PRISMAdirect informs you about requests impossible to produce on the selected printer. This information is a warning. The document can still be printed on the target printer. The exception is when the requested media is not supported; in this case the print job is blocked.

The error avoidance operation takes only the features of a printer into account that are supported by PRISMAdirect. The media mapping is taken into account for all new VarioPrint, imagePRESS and imageRUNNER printers.

The print settings requested via the printer driver are not covered by the error avoidance checks. Offline finishing is ignored during the error avoidance checks.

# Define the print settings

## Select a printer

### Introduction

The printer selection pane is on the left hand side. The pane content can be changed by using the buttons at the bottom of the pane. The left button will display the printer image and printer name. The right button will display only the printer names. You can sort the printers ascending or descending.

### Procedure

1. Select the [Printer] that you want to send your document to.
2. If available, you can click the printer driver button to define options that are not available in the [Print] dialogue. You can find this button next to the printer driver in the [Print] dialog. For example, the printer driver of a color printer can offer color settings which are not supported by PRISMAdirect. If the [Print] dialogue offers all driver settings, then the driver settings button is not added to the [Print] dialogue.
3. Specify the [Number of sets].  
A message can appear behind the number of sets:
  - [{} sets printed as 1 copy]  
The print file is sent to the printer. The file is printed once.
  - [{} sets printed as {} copies]  
The print file is sent to the printer along with an instruction to print the file {} times.
4. Specify the [Job name].



#### NOTE

By default, the PDF file name is used.

5. Specify the [Operator note].



#### NOTE

The [Operator note] is displayed on the operator panel, if your printer supports this functionality.

6. Select the [Print range].

# Split and merge

## Introduction

When you select option [Split], the document is printed without any finishing settings.

## Split and merge

- **[None]**  
The document is printed on one printer.
- **[Split]**  
The printer only prints the marked sheets. For example, you have marked all color sheets in the document. If one side of a sheet is a color page, then the complete sheet is printed on a color printer.  
The percentage of marked sheets is shown.
- **[Merge]**  
This setting will print your document and insert the marked sheets at the right place in the document.

When you select the [Split] or [Merge] option, you can select:

- **[Use separate paper trays]**  
Select this option to allocate a separate paper tray for each type of insert sheet.  
So, if you have five different insert sheets in your document, you need at least six paper trays. One paper tray for the normal paper and five paper trays for the insert pages.  
If you do not select this option, the different insert sheets must be put in one paper tray. So, if you have two different insert sheets, then put the insert sheets cyclic (1-2, 1-2, ...) in one paper tray.

## Load balancing

### Introduction

You can print a job to a printer or to a printer cluster. You can use the printer cluster for load balancing. The application uses the print speed to calculate the workload per printer when you enable load balancing.

You can enable load balancing for both normal documents and VDP documents. When you enable load balancing for a VDP document, then the application balances the load based on the variable data documents. When certain settings are selected, for example [VDP N-up], the application cannot balance the load based on variable data documents anymore. In such cases, the application balances the load based on the number of copies.

### Load balancing

1. Select a printer cluster.
2. Enable the [Automatic balancing] option.  
The application calculates the workload per printer.  
If you do not enable option [Automatic balancing], you have to set the number of copies per printer yourself.



# Print preview window

## Introduction

In the top section of the [Print] dialog, you can see a mini preview window.

Certain finishing settings can only be handled by a specific finisher. If the specific finisher is not installed, the print preview will not show the concerning finishing settings.

## Procedure

1. Click the magnifier button or left click on the mini preview to get a full size print preview window. The preview allows you to scroll through the print job and zoom.
2. Click the [Save as...] button to save the print preview in a PDF file. The saved PDF file does not contain any finishing settings.


# Optimize the printed document

## Define the [Media] settings

### Introduction

The print settings are retrieved from the document. You can optimize the printing process by configuring the print settings. This topic describes the [Media] settings.

### Define the [Media] settings

Setting	Description
[Media]	<p>All media that is used within your document is displayed here. Use the selection-box to specify the media that you want to print. This allows you to print your job in multiple batches and combine the job afterwards.</p> <p>Rename media for easy recognition of job partitions.</p> <p> <b>NOTE</b> The media name is displayed on the operator panel, if your printer supports this functionality.</p>
Column [Use this]	In this column you can verify if the media in the document is correctly mapped to media in the printer.
Button [Map the media]	You can map the media manually when the media in the document is not correctly mapped to media in the printer. Click the [Map the media] button to map the media manually.

## Map the media

### Introduction

The application maps the media in the document to media in the printer. In some cases, the application cannot map the media automatically. You can map the media manually if the automatic mapping is not correct or not possible. You can change the media properties that are supported by the printer. The media properties that are not supported by the printer are grayed-out. The values in the drop-down lists depend on the selected printer.



#### NOTE

You can send documents with page programmed settings to any printer. However, some printers cannot process all programmed settings. In such a case a printer window appears. With the printer window you can set the programmed settings to the capabilities of the selected printer.

### When to do

The application downloads the media catalog from the printer. Then, the application compares the media used in the document with the media catalog from the printer. When possible, the media in the document is mapped automatically to media from the printer catalog. You can map the media manually if the automatic mapping is not correct or not possible.

## Procedure

1. Map the media manually:



### NOTE

The printer model determines which settings you can configure.

Setting	Description
[Catalog]	<ul style="list-style-type: none"> <li>• The selected media after mapping is displayed.</li> <li>• [Undefined] is displayed when automatic mapping is incomplete or not possible.</li> </ul>
[Name]	Enter the media [Name].
[Size]	<ul style="list-style-type: none"> <li>• You can select a default media size from the drop-down list, for example 'A4' and 'Letter'.</li> <li>• You can create a custom media size. Select [Custom] from the drop-down list and change the [Width] and [Height]. Define the unit for the custom media.</li> </ul>
[Weight]	Specify the media [Weight]. For example '80 g/m2' for A4 and '16 lb bond' for Letter.
[Type]	Select the media [Type]. For example [Plain], [Glossy], or [Transparent]. Select [Custom] from the drop-down list to define a custom media type.
[Color]	Select the media [Color]. For example [White], [Green], or [Orange]. Select [Custom] from the drop-down list to define a custom color.
[Insert]	Select [Insert] if the media is used for insert sheets.
[Tab]	Select [Tab] if the media is tabbed media.
[Preprinted]	Select [Preprinted] to indicate that the media is pre-printed (for example with a company logo).
[1-sided]	Select [1-sided] if this media can only be used on one side. For example: the media is transparent.
[Punched]	Select [Punched] if the media is punched media. Use the [Punch pattern] setting to define the number of holes in the punched media.
[Cyclic]	Select [Cyclic] if the media is part of a set (for example a set of tabs). Use the [Cycle length] setting to specify the length of the set. For example, one set of tabs contains 5 tab sheets.
Tray	Select which tray of the printer must be used.

2. Click [OK].

## Define the [Layout] settings

### Introduction


The print settings are retrieved from the document. You can optimize the printing process by configuring the print settings. This topic describes the [Layout] settings. The [Layout] tab allows the user to modify the position of the page content on a sheet.




**NOTE**

The layout tab settings are disabled if your document contains different media orientations. For example: A4 landscape + A4 portrait.


### Define the [Layout] settings

Setting	Description
[Cover media]	<ul style="list-style-type: none"> <li>• [Media]: You can change the [Media] size of your cover here.</li> <li>• [Custom]: Select [Custom] if you want to create a custom sized sheet size with the [Width] and [Height] settings.</li> </ul> <p>The [Portrait] and [Landscape] settings allow you to specify the sheet orientation.</p> <p> <b>NOTE</b> The [Cover media] option is disabled if your document does not have a cover.</p>
[Document media]	<ul style="list-style-type: none"> <li>• [Media]: You can change the [Media] size of your document here. This sheet size is applied to the whole document.</li> <li>• [Custom]: Select [Custom] if you want to create a custom sized sheet size with the [Width] and [Height] settings.</li> </ul> <p>The [Portrait] and [Landscape] settings allow you to specify the sheet orientation.</p>

Setting	Description
[Imposition]	 <b>NOTE</b> A subset of the [Imposition] settings is available when different media sizes are used in the document. <ul style="list-style-type: none"> <li>• [None]</li> <li>• [2-up] Two pages are placed on each sheet side in (left to right) reading order.</li> <li>• [4-up], [9-up], [16-up] 4, 9, 16 pages are placed on each sheet side in the (left to right and top to bottom) reading order.</li> <li>• [ 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.</li> <li>• [VDP N-up] Several pages with variable data 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.</li> <li>• [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.</li> <li>• [Octavo] Generates the same imposition as the [Octavo signature book] document type.</li> <li>• [Quarto] Generates the same imposition as the [Quarto signature book] document type.</li> </ul>

Setting	Description
[Imposition]: [Cut and stack]	<ul style="list-style-type: none"> <li>• [Cut and stack] The Cut &amp; 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.</li> <li>• [Cut and stack] The left and right pages are printed in the same orientation.</li> <li>• [Cut and stack with binding edge inside] The left image(s) are rotated 180 degrees compared to the right image(s). The binding edges of the images are on the inside of the sheet.</li> <li>• [Cut and stack with binding edge outside] The right image(s) are rotated 180 degrees compared to the left image(s). The binding edges of the images are on the outside of the sheet.</li> <li>• [Cut and stack] (4) Four pages per sheet side are placed in a way that, after cutting the paper in 4 parts, the piles are stacked to create the full document.</li> <li>• [Cut and stack] (N) The number of pages per sheet side is computed depending on the page size and media size. Pages are placed in a way that, after cutting the paper, the piles are stacked to create the full document.</li> <li>• [VDP cut and stack - N stacks] The number of pages per sheet side is computed depending on the page size and media size. Each page contains variable data. Pages are placed in a way that, after cutting the paper, the piles are stacked to create the full document.</li> </ul>
[Imposition]: [Same-up]	<ul style="list-style-type: none"> <li>• [Same-up] The same page is printed twice per sheet side.</li> <li>• [Same-up with binding edge inside] The same page is printed twice per sheet side. The left image(s) are rotated 180 degrees compared to the right image(s). The binding edges of the images are on the inside of the sheet.</li> <li>• [Same-up with binding edge outside] The same page is printed twice per sheet side. The right image(s) are rotated 180 degrees compared to the left image(s). The binding edges of the images are on the outside of the sheet. For example, use this option when pre-punched paper is used with the punched holes on both ends of the paper.</li> <li>• [VDP same-up] The same page with variable data is printed twice per sheet side. The pages are printed with one edge attached to each other. For example, use this option when you want to print a ticket with ticket stub.</li> </ul>
[Gutter]	<ul style="list-style-type: none"> <li>• Define the distance between the imposed pages on the sheet with the [Horizontal] and [Vertical] settings.</li> </ul>

Setting	Description
[Position on sheet]	<p>Use the [Same on both sides] option to keep front and rear the same. You can handle the position on [Front side] and [Back side] separately if [Same on both sides] is not enabled.</p> <p>Horizontal position can be Left/Center/Right. Use the shift option to shift this position Left or Right.</p> <p>Vertical position can be Top/Center/Bottom. Use the shift option to shift this position Up or Down.</p>
[Print content]	<p>You can select which PDF box should be printed. The content of the selected PDF box will be printed. Or use a custom print area. In this process the page contents are not scaled. You can select one of the options listed below:</p> <ul style="list-style-type: none"> <li>• [Crop box] Default option. The content of the crop box will be printed.</li> <li>• [Trim box] The content of the trim box will be printed.</li> <li>• [Bleed box] The content of the bleed box will be printed.</li> <li>• [Custom] Click the edit icon to the right to enter a distance from the page edges. That distance will be taken inward from the largest PDF box to determine what the printed page content will be.</li> </ul>
[Same-up]	<p>Select how many images you want to print on one side of the sheet.</p> <ul style="list-style-type: none"> <li>• [1]: One image.</li> <li>• [Maximum]: The application calculates the maximum number of images that fit on one side of the sheet. For example, two A4 images on one A3 sheet. The calculation takes several settings into account. For example, only one A4 image on one A3 sheet if a bleed area is needed.</li> <li>• [Custom]: Define the number of images yourself with the [Horizontal] and [Vertical] settings.</li> </ul>
[Gutter]	<ul style="list-style-type: none"> <li>• Define the distance between the images on the sheet with the [Horizontal] and [Vertical] settings.</li> </ul>

Setting	Description
<p>[Creep compensation] and [Inside creep compensation]</p>	<p>Use [Creep compensation] to make sure that the margins on all pages are equal after the booklet is folded and trimmed. The [Creep compensation] factor is calculated from the [Thickness] of the paper.</p> <ul style="list-style-type: none"> <li>• Select [Creep compensation] to shift the page content to the outside of the booklet.</li> <li>• Select [Creep compensation] and [Inside creep compensation] to shift the page content to the inside of the booklet.</li> </ul> <p><b>For example:</b>            You have 30 sheets, which you fold to make a booklet. The sheets in the middle of the booklet stick out compared with the cover of the booklet. When you trim the sheets that stick out, the distance between the page content and the sheet edges is changed. This means that the page content creeps towards the edge of the sheets due to the trim action.</p> <p> <b>NOTE</b>            The [Thickness] of the used media must be defined when you enable option [Creep compensation].</p>
<p>[Gain]:</p>	<p>With the [Gain] option you can increase or decrease the calculated [Creep compensation] factor.</p>
<p>[Collating marks]</p>	<p>Use this option to print black marks on the outside fold of each different signature in bookbinding.            The black marks are positioned differently on the outside fold of each different signature in bookbinding to aid in collating.</p>



Setting	Description
[Page marks]	<p>You can define which marks are printed on the output media.</p> <ul style="list-style-type: none"> <li data-bbox="520 302 1450 436">• [Corner trim marks] These marks are lines printed in the corners of the sheets to indicate where to trim the paper. You can define the size and the location of these marks.</li> <li data-bbox="520 436 1450 571">• [Center marks] Center marks are vertical lines used to indicate the centre of the printed page. For example, the centre of the spine of a booklet. You can define the size and the location of these marks.</li> <li data-bbox="520 571 1450 705">• [Fold marks] Fold marks are vertical lines used to indicate where the printed page must be folded. The fold marks overwrite center marks. You can define the size and the location of these marks.</li> <li data-bbox="520 728 1450 884">• [Registration marks] Registration marks print outside the trim area of printing. These may include bulls-eye targets, corner trim marks, etc. These marks allow the operator to accurately align printed pages and better align cuts when trimming.</li> <li data-bbox="520 884 1450 952">• [File name] Print the file name on each page.</li> <li data-bbox="520 952 1450 1019">• [Print date] Print the print date on each page.</li> <li data-bbox="520 1041 1450 1108">• [Remarks] Print the remarks on each page.</li> <li data-bbox="520 1131 1450 1265">• [Color strip] You can add a color strip to the printed pages. You can select a color strip from the drop-down list. You can define the location and the alignment of the color strip.</li> <li data-bbox="520 1288 1450 1469">• [Print marks] You can define if the selected marks must be printed on all sheets or only on the first sheet. Select the [No marks on binding edge] option when you do not want to print marks on the binding edge. For example, you can select this option for perfect binding documents.</li> </ul>

## Define the [Image] settings

### Introduction

The print settings are retrieved from the document. You can optimize the printing process by configuring the print settings. This topic describes the [Image] settings.

### Define the [Color quality] settings

Setting	Description
[Resolution]	The resolution that you can select depends on the printer.
[Color management]	<ul style="list-style-type: none"> <li>• [No color management]</li> <li>• [Printer\PostScript color management]</li> </ul> Color management is the controlled conversion between the color representations of the document in the application to the Postscript file.
[Overprint simulation]	By default, when you print opaque, overlapping colors, the top colour knocks out the area underneath. Overprinting prevents knockouts and makes the topmost overlapping printing ink appear transparent in relation to the underlying ink. This setting is used by Adobe Acrobat. This setting is not available for all printer models.
[Use PDF output intent]	The PDF output intent describes how you plan to print the entire document. If the file contains device-independent colors, the output intent provides data which defines how the color data must be printed. The output intent provides all the information required to ensure that the file can be printed consistently, even when device independent color data is used. This setting is used by Adobe Acrobat. This setting is not available for all printer models.
[Enhanced color rendering]	Color rendering relates to the color appearance of printed color pages under a given light source. You can select: <ul style="list-style-type: none"> <li>• [Printer default] Use the color rendering algorithm of the selected printer.</li> <li>• [On] Use the color rendering algorithm of this application.</li> <li>• [Off] Disable color rendering.</li> </ul> This setting is not available for all printer models.
[Color bar]	You can add a color bar to the printed pages. The drop-down list contains the available color bars of the selected printer. You can define the location and the alignment of the color bar. This setting is not available for all printer models.
[Information bar]	You can add an information bar to the printed pages. The drop-down list contains the available information bars of the selected printer. You can define the location and the alignment of the information bar. This setting is not available for all printer models.
[Trapping]	Printer misregistration can cause gaps between colors on the printed pages. You can enable [Trapping] to compensate for potential gaps between colors. ►

Setting	Description
[Trapping pre-sets]	<p>A trapping preset is a collection of trap settings you can apply to pages in a PDF. The drop-down list contains the available [Trapping pre-sets] of the selected printer.</p> <p>This setting is not available for all printer models.</p>
[Image smoothing]	<p>[Image smoothing] blends adjacent colors in an image to make color transitions less noticeable. Use this setting when the printer resolution is higher than the image resolution.</p> <p>This setting is not available for all printer models.</p>
[Fattening]	<p>You can apply [Fattening] to the text and lines of the document. You can select:</p> <ul style="list-style-type: none"> <li>• [Printer default] Use the fattening algorithm of the selected printer.</li> <li>• [On] Use the fattening algorithm of this application.</li> <li>• [Off] Disable fattening.</li> </ul> <p>This setting is not available for all printer models.</p>
[Minimum line width]	<p>Select this option to print all lines with a minimum line width. This option ensures that all lines are visible in the printed document. You can select:</p> <ul style="list-style-type: none"> <li>• [Printer default] Use the minimum line width of the selected printer.</li> <li>• [Fine]</li> <li>• [Normal]</li> <li>• [Off] Disable the [Minimum line width] option. Thin lines might not be printed in the document.</li> </ul> <p>This setting is not available for all printer models.</p>

### Define the [Color adjustment] settings

Setting	Description
[Halftone]	<p>Select the [Halftone] setting.</p> <p>A halftone image is made up of a series of dots rather than a continuous tone. Larger dots are used to represent darker, more dense areas of the image, while smaller dots are used for lighter areas.</p> <p>As long as the resolution of the image is high enough, the dots appear as a continuous image to the human eye.</p> <p>This setting is not available for all printer models.</p>
[Brightness]	<p>You can overrule the defined [Brightness] settings in the document, without losing the original [Brightness] settings.</p> <ul style="list-style-type: none"> <li>• [Printer default]</li> <li>• [Custom]</li> </ul> <p>This setting is not available for all printer models.</p>

Setting	Description
[Contrast]	<p>You can overrule the defined [Contrast] settings in the document, without losing the original [Contrast] settings.</p> <ul style="list-style-type: none"><li>• [Printer default]</li><li>• [Custom]</li></ul> <p>This setting is not available for all printer models.</p>

### Define the [Color pre-set] settings

Setting	Description
[Color pre-sets]	<p>The drop-down list contains the available color templates of the selected printer.</p> <p>When the printer is not available, the color templates cannot be loaded. In this case, the default templates are loaded:</p> <ul style="list-style-type: none"><li>• [Black and white mode] Select this template for black and white documents.</li><li>• [Office documents] Select this template for documents that contain low quality images. For example, graphs.</li><li>• [Photographic content] Select this template for documents that contain high quality images. For example, photos.</li></ul> <p>You can define custom color pre-sets. See <a href="#">Colour settings on page 116</a>.</p> <p>This setting is not available for all printer models.</p>

## Colour settings

### Introduction

You can create color pre-sets for your document types, workflows or color applications with the settings editor on the printer controller. You can use the new color pre-sets in the print dialog.

### [Color preset]

A color pre-set is a collection of color and quality settings that matches a specific document type, workflow or color application. A color pre-set is defined at the printer controller and available at the printer driver. Use the settings editor of the printer controller to create new color pre-sets. Use this setting to print with an optimal print quality.

### [Custom color presets]

Use the [Custom color presets] to change the color settings of the selected color pre-set for the current job only. When you click [Custom color presets], the [Custom color presets] window opens. Use the settings editor of the printer controller to create new color pre-sets.

### [Custom color pre-sets] window

The printer controller uses the embedded color profiles and rendering intents of the objects in the document. Objects with a color specification in DeviceRGB or DeviceCMYK have no embedded

color profile and rendering intent. For these objects a default input color profile and rendering intent are defined by the printer driver for optimal print quality.

Setting	Description
[Name]	<p>The name of the color pre-set. The default names of the color pre-sets are the following.</p> <ul style="list-style-type: none"> <li>• Black and white</li> <li>• Office documents</li> <li>• Photographic content</li> </ul> <p>If you change a setting in the printer driver, the [Name] changes into [Custom color pre-sets].</p>
[Description]	The [Description] of the color pre-sets informs you when you can apply the color pre-set.

### Define the [Color] settings

Setting	Description
[Color]	Print in [Color] or [Black & white].
[Halftone for graphics and images]	Defines the halftone screening for graphics and images. You are advised to use the default option.
[Halftone for text]	Defines the halftone screening for text. You are advised to use the default option.
[Spot color matching]	<p>A spot color in a document is defined by a color name and an alternative color specification. The printer controller uses the color name to match with the closest color of the printer. The colors of the printer are defined in color libraries on the printer controller.</p> <ul style="list-style-type: none"> <li>• Select [No] to use the alternative color specification</li> <li>• Select [Yes] (default) to match the document colors with the color library of the printer controller</li> </ul>
[Color mapping group]	<p>You can select a color mapping group to apply color transformations to the image colors. Color mapping re-maps the image values to be suitable for printing purposes.</p> <p>You can select a color mapping group for RGB, CMYK or spot color to re-map the images to a spot color.</p>
[PDF/X output intent]	<p>The output intent is defined by a profile. The output intent represents what the author had in mind for the final output of the document.</p> <p>For example, the author creates the document in an RGB color space, but the document must be printed on a SWOP press. In this case, you can select a SWOP profile as the [PDF/X output intent].</p>
[PDF overprint simulation]	<p>By default, when you print opaque, overlapping colors, the top colour knocks out the area underneath. Overprinting prevents knockouts and makes the topmost overlapping printing ink appear transparent in relation to the underlying ink.</p> <p>This setting is used by Adobe Acrobat.</p> <p>This setting is not available for all printer models.</p>
[Force black overprint]	Enable this option to make sure that a black type always overprints colored objects behind it.

## Define the [DeviceRGB / Embedded profiles] settings

Setting	Description
[Input profile]	<p>[Input profile] defines a reference color workspace for the color data of the objects in the document. An [Input profile] is used to define colors in a device independent way.</p> <p>The following DeviceRGB options are available.</p> <ul style="list-style-type: none"><li>• sRGB Use this input profile in Windows Office or similar environments.</li><li>• [None] Use this option to use the printer device colors.</li><li>• AdobeRGB1998 Use this input profile if the documents are prepared for use on high chroma devices.</li><li>• AppleRGB Use this input profile if the documents are prepared in Apple environments.</li><li>• ColorMatchRGB Use this input profile if the color data was created in a very big color workspace. Make sure you use [Perceptual] as [Rendering intent] to avoid that color areas clip and to preserve details.</li></ul>

Setting	Description
[Rendering intent]	<p>The [Rendering intent] defines the color conversion strategy that is needed because colour gamuts differ per device (monitors, printers). The required print quality determines the rendering intent you need for an optimal color conversion.</p> <p>The following options are available.</p> <ul style="list-style-type: none"> <li>• [Absolute colorimetric] The exact colors that are within the gamut of the printer are kept, even the colors near the white point. Prints white areas with a light background. The out-of gamut colors are mapped to colors on the border of the printer gamut. Details, continuity and contrast in colored areas can be lost due to the mapping. This setting is useful to map spot colors and it is useful to make proof prints.</li> <li>• [Relative colorimetric] The exact colors that are within the gamut of the printer are kept, except the colors near the white point. Prints white areas perfectly white (no toner or ink is used). The out-of gamut colors are mapped to colors on the border of the printer gamut. Details, continuity and contrast in colored areas can be lost due to the mapping. This setting is useful to make proof prints.</li> <li>• [Perceptual] (default) All colors are converted relative to each other, preserving details, continuity and contrast. The out-of gamut colors are mapped to colors within the printer gamut. Prints white areas perfectly white (no toner or ink is used). This setting is useful to print images or photos.</li> <li>• [Saturation] All colors are converted relative to each other, preserving saturated colors and pure colors as much as possible. The out-of gamut colors are mapped to colors within the printer gamut. Prints white areas perfectly white (no toner or ink is used). This setting is useful for presentations, line-art, histograms, artist impressions, business graphics, et cetera.</li> </ul>
[Use embedded profiles and DeviceRGB settings]	Embedded color profiles are used. [Input profile] and [Rendering intent] settings are used for objects in documents with DeviceRGB color specification.
[Overrule embedded profiles with DeviceRGB settings]	Embedded color profiles are overruled with the [Input profile] and [Rendering intent] settings. [Input profile] and [Rendering intent] settings are used for objects in documents with DeviceRGB color specification.

### Define the [DeviceCMYK / Embedded profiles] settings

Setting	Description
[Input profile]	<p>[Input profile] defines a reference color workspace for the color data of the objects in the document. An [Input profile] is used to define colors in a device independent way.</p> <p>The DeviceCMYK profiles list contains color profiles as defined by formal standardization organizations. Select the same CMYK color profile that was used to create the document. Select no color profile to leave the DeviceCMYK color specification as is.</p>

Setting	Description
[Rendering intent]	<p>The [Rendering intent] defines the color conversion strategy that is needed because colour gamuts differ per device (monitors, printers). The required print quality determines the rendering intent you need for an optimal color conversion.</p> <p>The following options are available.</p> <ul style="list-style-type: none"> <li>• [Absolute colorimetric]                     <p>The exact colors that are within the gamut of the printer are kept, even the colors near the white point. Prints white areas with a light background. The out-of gamut colors are mapped to colors on the border of the printer gamut. Details, continuity and contrast in colored areas can be lost due to the mapping.</p> <p>This setting is useful to map spot colors and it is useful to make proof prints.</p> </li> <li>• [Relative colorimetric]                     <p>The exact colors that are within the gamut of the printer are kept, except the colors near the white point. Prints white areas perfectly white (no toner or ink is used). The out-of gamut colors are mapped to colors on the border of the printer gamut. Details, continuity and contrast in colored areas can be lost due to the mapping.</p> <p>This setting is useful to make proof prints.</p> </li> <li>• [Perceptual] (default)                     <p>All colors are converted relative to each other, preserving details, continuity and contrast. The out-of gamut colors are mapped to colors within the printer gamut. Prints white areas perfectly white (no toner or ink is used). This setting is useful to print images or photos.</p> </li> <li>• [Saturation]                     <p>All colors are converted relative to each other, preserving saturated colors and pure colors as much as possible. The out-of gamut colors are mapped to colors within the printer gamut. Prints white areas perfectly white (no toner or ink is used).</p> <p>This setting is useful for presentations, line-art, histograms, artist impressions, business graphics, et cetera.</p> </li> </ul>
[Use embedded profiles and DeviceCMYK settings]	<p>Embedded color profiles are used. [Input profile] and [Rendering intent] settings are used for objects in documents with DeviceCMYK color specification.</p>
[Override embedded profiles with DeviceCMYK settings]	<p>Embedded color profiles are overruled with the [Input profile] and [Rendering intent] settings. [Input profile] and [Rendering intent] settings are used for objects in documents with DeviceCMYK color specification.</p>




## Define the [Finishing] settings

### Introduction

The print settings are retrieved from the document. You can optimize the printing process by configuring the print settings. This topic describes the [Finishing] settings.

### Define the [Finishing] settings

Setting	Description
[Finishing]	<p>You can overrule the defined finishing settings in the document, without losing the original finishing settings.</p> <ul style="list-style-type: none"> <li>• [As in document] Print the document with the original finishing settings.</li> <li>• 'No finishing' Print the document without any finishing settings.</li> <li>• [1 Edge staple] Print the document with 1 staple, but without any fold and punch settings.</li> <li>• [2 Edge staples] Print the document with 2 staples, but without any fold and punch settings.</li> <li>• [Corner staple] Print the document with 1 staple in the corner, but without any fold and punch settings.</li> </ul> <p>For example, you make a test print with option [1 Edge staple]. The document is printed with 1 staple, but without any fold and punch settings. Then you select option [As in document] and print again. The document is printed with the original finishing settings as defined in the application.</p>
[Feed edge]	<p>The paper can be fed into the printer with the long edge or the short edge. This depends how the paper is loaded in the paper tray.</p> <ul style="list-style-type: none"> <li>• [Printer default] Use paper from the default paper tray of the printer.</li> <li>• [Short edge] Use paper from a paper tray where the [Feed edge] is [Short edge].</li> <li>• [Long edge] Use paper from a paper tray where the [Feed edge] is [Long edge].</li> </ul>
[Trimming mode]	<ul style="list-style-type: none"> <li>• [Off]</li> <li>• [From] Only the front edge of the page is cut. Use the [Finishing size] option to define the page size after trimming. The drop-down list contains predefined page sizes, e.g. A4. Or you can select the [Custom] value to define the width of the page yourself.</li> <li>• [Front, top, bottom] The front edge and the top and bottom of the page are cut. Use the [Finishing size] option to define the page size after trimming. The drop-down list contains predefined page sizes, e.g. A4. Or you can select the [Custom] value to define the width and the height of the page yourself. You can also define the [Bottom offset].</li> </ul>

Setting	Description
[Saddle press]	<p>Enable the [Saddle press] option to apply mechanical pressure to a folded document. The result is a tightly folded document. Use the [Adjustment] option to increase or decrease the mechanical pressure.</p> <p> <b>NOTE</b> Check if your finisher supports this option.</p>

## Define the [Delivery] settings

### Introduction


The print settings are retrieved from the document. You can optimize the printing process by configuring the print settings. This topic describes the [Delivery] settings.

### Define the [Output] settings

Setting	Description
[Destination]	Define to which queue of the selected printer you want to print.
[Output location]	Depending on the configured output locations and the selected printer, you can select an available [Output location].
[Unused cyclic media]	Any unused cyclic media, such as tab media, is deposited in an [Output location]. Depending on the configured output locations and the selected printer, you can select an available [Output location].

### Define the [Presentation] settings

Setting	Description
[Sort]	You can specify the sorting method: <ul style="list-style-type: none"> <li>• [By set] The pages of a job will be sorted in the order 123, 123, 123.</li> <li>• [By page] The pages of a job will be sorted in the order 111, 222, 333.</li> <li>• [By variable data document] The pages with variable data will be sorted in the order 111, 222, 333.</li> </ul>
[Offset stacking]	You can select: <ul style="list-style-type: none"> <li>• [Off] The job is stacked in the [Output location] as one straight stack.</li> <li>• [By set] The job is stacked in the [Output location] with a small offset between each set.</li> <li>• [By output group] The job is stacked in the [Output location] with a small offset between each output group. The output groups are defined in the [Document] workspace.</li> <li>• [By variable data document] The job is stacked in the [Output location] with a small offset between each variable data document.</li> </ul>
[Reverse order]	By default, the first sheet of the job is delivered first. When you select the [Reverse order] setting, the last sheet of the job is delivered first. <b>Example</b> Normal order: 1-2 3-4 5-6 7-8 9-10 [Reverse order]: 10-9-8-7-6-5-4-3-2-1

Setting	Description
[Swap pages]	<p>Use this setting to turn the pages in the [Output location].</p> <p><b>Example</b>                      Normal order: 1-2 3-4 5-6 7-8 9-10                      [Swap pages]: 2-1 4-3 6-5 8-7 10-9</p> <p> <b>NOTE</b>                      [Swap pages] &amp; [Reverse order]: 9-10-7-8-5-6-3-4-1-2</p>
[First sheet to end]	<p>Select this setting if you want to move the first sheet to the end of the job. You can use this setting, for example, if the first A3 sheet is used as a cover sheet for the rest of the A4 job.</p>
[Rotate 180 degrees]	<p>The [Output location] of a job can be an [External finisher]. Some external finishers require a 180 degree rotation of the jobs before the jobs go into the external finisher. The documentation of the external finisher describes how a job must go into the external finisher.</p> <p>If a 180 degree rotation is required, you select this setting.</p>
[Separator sheet]	<p>Select this option to separate each set with a [Separator sheet].</p>

---

## Define the [Accounting] settings

### Introduction

The print settings are retrieved from the document. You can optimize the printing process by configuring the print settings. This topic describes the [Accounting] settings.

The accounting information is stored in a log file on the controller. The administrator configures when the [Accounting] settings are available to you.

### Define the [Accounting] settings

Setting	Description
[Account ID]	Type the [Account ID].
[Cost center]	Type the [Cost center].
[Custom]	Type any additional information.

# Buttons

## Introduction

The [Print] dialog contains buttons that allow you to restore the default print settings or restore the last used print settings. You can create a test print and submit or cancel your print job.

## Buttons

Button	Description
[Print settings]	<p>Click this button to change the printer settings.</p> <ul style="list-style-type: none"> <li>• [Defaults] Restore the default print settings as defined in the application.</li> <li>• [Last saved] Restore the last saved print settings from the document.</li> <li>• [Save] Save the current print settings into memory. The saved print settings remain valid until you close the application. You can save the print settings in the document. You must enable option [Save the print settings] when you close or save the document.</li> </ul>
[Proof PDF]	<p>Click this button to create a Proof PDF. A proof PDF is used to show a customer the final layout of the product before final production.</p>
[Print]	<p>Click this button to print the job. The [Print] dialog remains open.</p> <p>[Test print] Click this button to make one test print of the job. The [Print] dialog remains open.</p>
[Cancel]	<p>Click this button to cancel printing and close the [Print] dialog.</p>

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# Canon

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