Administration guide

PRISMAdirect

Configuration

A CANON COMPANY

Canon

Production Systems - Cutsheet

Copyright

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US

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Software version

This documentation describes the functionality of PRISMAdirect v1.2.

Contents

Chapter 1
Login

[Login]

Introduction

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

Procedure

1. Enter your user name.
2. Enter your password.
3. Click [Log in].

NOTE
A [Web user] or [LDAP user] can login to the server when that user belongs to the [Services] group.

NOTE
A system administrator can login to the server.

Chapter 2
Start using the application

Add, edit or delete

Introduction

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

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

Chapter 3
User management

Users

Add or edit a user

Introduction

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

The [User type] of an automatically created user becomes:
- [Windows user] if the user is authenticated via Windows authentication.
- [LDAP user] if the user is authenticated via Forms authentication.

The [User type] of a user created in this dialog becomes [Web user].

Procedure

1. Define the user name. The user name must be unique.

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

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

NOTE
The password can not be changed for any user logged in to System Administration at the same time.

4. Confirm the password.

5. You can add a user to one or more user groups.
6. When a user is added to one or more user groups:
   You must add a user to a default user group. The budget of the default user group is used for this user.
7. [Custom filter settings:]
   Enable this option to allow only the use of custom filters for this user in the [Order processing].
   You can create the custom filters in the [Manage filters] dialog of [Order processing settings].
   When you enable this option, the other filters in the [Order processing] are disabled.
8. Click [Save].

Import users from an LDAP server or uniFLOW server

Introduction

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

Procedure

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

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

4. Click the [Import] button.

Assign a cost centre to a user

Introduction

You can assign one or more cost centres to a user for each web shop. You can create the cost centres for each web shop in [Web shop settings].

Procedure

1. Select a user.
   The available cost centres for the user appear.
2. Click the view icon to view the configuration of the cost center. The icon appears when you hover the mouse pointer over a cost center.
3. You can assign multiple cost centres to the user.
   The cost centers are added to the [Assigned cost centers].
4. Deselect the cost centers that you want to remove for the user in section [Available cost centers]. Or you can click the delete icon in section [Assigned cost centers]. The icon appears when you hover the mouse pointer over a cost center.
5. Click [Save].

Manage the price approval settings for a user

Introduction

You can configure the price approval settings per user per web shop. You can configure the default price approval settings per web shop in [Web shop settings].

Procedure

1. Select a user.
   The cost approval settings for the user appear.
2. Click [Add new level].
   Define a maximum price for the current level. You can type a value in the spinbox for the budget. When the price exceeds the maximum price, an approver of the current level must approve or reject the order. If the price exceeds the maximum price of the next level, an approver of that level must also approve or reject the order.
3. Define the email address of the approver for the current level. When you add more than one email address, you must use a semicolon to separate the addresses.
   The approver(s) must approve or reject the job when the price exceeds the maximum price for the current level.

NOTE
The [Approver] for level 1 can send the approval form to the [Approver] for level 2.

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

User groups

Add or edit a user group

Introduction

You can manage the cost centers per web shop in workspace [Web shop settings]. You can assign the cost centers to the users and user groups in workspace [User management].

Procedure

1. Define the user group name. The name must be unique.

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

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

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

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

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

6. [Copyright administration]
   - [Web shop settings]
     Use the settings for [Copyright administration] as defined in dialog [Submission settings] in [Web shop settings].
   - [Custom]
     Use custom settings for [Copyright administration] for this user group. The custom settings overrule the web shop settings for this user group. The custom settings are used in all web shops for this user group.
7. [Allow Web Submission user to change the language]
   - [Web shop settings]
     Use the settings for [Allow Web Submission user to change the language] as defined in dialog [Permissions for customers] in [Web shop settings].
   - [Custom]
     Use custom settings for [Allow Web Submission user to change the language] for this user group. The custom settings overrule the web shop settings for this user group. The custom settings are used in all web shops for this user group.
8. [Custom columns]
   - [Web shop settings]
     Use the settings for [Custom columns] as defined in dialog [Custom columns] for jobs and orders in [Web shop settings].
   - [Custom]
     Use custom settings for [Custom columns] for this user group. The custom settings overrule the web shop settings for this user group. The custom settings are used in all web shops for this user group.
9. [Enable 'Download' page]
   - [Web shop settings]
     Use the settings for [Enable 'Download' page] as defined in dialog [Layout settings] in [Web shop settings].
   - [Custom]
     Use custom settings for [Enable 'Download' page] for this user group. The custom settings overrule the web shop settings for this user group. The custom settings are used in all web shops for this user group.
10. [File hosting service]
    - [Web shop settings]
      Use the settings for [File hosting service] as defined in [Global settings] and [Web server] of the administration dialog.
    - [Custom]

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

11. [Enable payment]
    - [Web shop settings]
      Use the settings for [Enable payment] as defined in dialog [Enable payment] in [Web shop settings].
    - [Custom]
      Use custom settings for [Enable payment] for this user group. The custom settings overrule the web shop settings for this user group. The custom settings are used in all web shops for this user group.
12. Click [Save].

Import a user group

Introduction

You can import user groups from a file.

Procedure

1. Click the [Import] button.
2. Browse to the file.

NOTE
The file type can be csv or xml.

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

Import user groups from an LDAP server or uniFLOW server

Introduction

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

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

Procedure

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

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

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

Assign a cost center to a user group

Introduction

You can assign one or more cost centres to a user group for each web shop. You can create the cost centres for each web shop in [Web shop settings].

Procedure

1. Select a user group.
   The available cost centers for the user group appear.
2. Click the view icon to view the configuration of the cost center. The icon appears when you hover the mouse pointer over a cost center.
3. You can assign multiple cost centers to the user group.
   The cost centers are added to the [Assigned cost centers].
4. Deselect the cost centers that you want to remove for the user group in section [Available cost centers].
   Or you can click the delete icon in section [Assigned cost centers]. The icon appears when you hover the mouse pointer over a cost center.
5. Click [Save].

Manage the price approval settings for a user group

Introduction

You can configure the price approval settings per user group per web shop. You can configure the default price approval settings per web shop in [Web shop settings].

Procedure

1. Select a user group.
   The cost approval settings for the user group appear.
2. Click [Add new level].
   Define a maximum price for the current level. You can type a value in the spinbox for the budget. When the price exceeds the maximum price, an approver of the current level must approve or reject the order. If the price exceeds the maximum price of the next level, an approver of that level must also approve or reject the order.
3. Define the email address of the approver for the current level. When you add more than one email address, you must use a semicolon to separate the addresses.
   The approver(s) must approve or reject the job when the price exceeds the maximum price for the current level.

NOTE
The [Approver] for level 1 can send the approval form to the [Approver] for level 2.

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

Chapter 4
Web shop settings

Introduction

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

Configure the general settings

Setting	Description
[Enable anonymous access]	When you enable anonymous access to a web shop, you allow anonymous customers to browse the web shop. Anonymous customers cannot order from the web shop. Customers have to log in to the web shop to order products.
[Overwrite existing reports]	Select the [Overwrite existing reports] option to overwrite any existing reports on the report server.
[Remember the user name and password]	Remember the user name and password of the Web Submission user.

Allow self-registration

Settting	Description
[Allow self-registration]	Customers can create their own accounts when you enable this option. The link [Create an account] appears in the login screen of the Web Submission.
[Use CAPTCHA]	Customers have to type the displayed alphanumerical characters while creating an account.
[Self-registration is manda-tory]	

Configure the permissions for customers

Setting	Description
[Allow users to change their password]	Enable this option to allow users of [Web Submission] to change their password.
[Allow Web Submission user to change the language]	Enable this option to allow a user to change the language of the Web Submission. If this option is disabled, Web submission is displayed in the installation language and the user is not able to change the language. Select which languages are available for the user in dialog [Active languages].

Configure the layout settings

Setting	Description
[Language:]	Select the language of the Web Submission logon page here.
[Login instructions:]	You can type in the user instructions that will be displayed on the Web Submission logon page. These login instructions are visible in Web Submission when the user logs on via custom authentication. The login instructions will not be translated when you select a different language for the logon page.
[Enable 'Download' page]	You can enable or disable the 'downloads' link within Web Submission here. When the Web Submission user clicks the 'downloads' link, the 'Download' page will appear. See [Downloads] for the available downloads.

Web Submission view

Configure the displayed information

Introduction

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

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

Procedure

1. Select:
   - [Custom columns for job] to configure the displayed information for jobs in the Web Submission.
   - [Custom columns for order] to configure the displayed information for orders in the Web Submission.
2. You can drag and drop available items to the active 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. Drag each active item to set the order of the items.
   The item in the top becomes the leftmost displayed item. The item at the bottom becomes the rightmost displayed item.
4. Click 'Save'.

Create a filter

Introduction

The filter determines which orders are visible for a user of [Web Submission].

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

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

Procedure

1. Select an item that you want to add to the filter and enable option [Use in filter].
   An item is marked with a funnel icon when the item is added to the filter.
2. Configure the values for the item.
3. If required, you can add more than one item to the filter.
   By default, the 'AND' operator is used when you add more than one item to the filter. When you enable the [Allow the OR operator in the filter] option, the 'OR' operator is used when you add more than one item to the filter.
4. Click [Save].

Configure the submission settings

Setting	Description
[Allowed file types]	• [*] All document types are accepted. • You can type the supported types of digital documents (for example PDF, DOC, PS, ...). Use a comma to separate the custom document types.
[Overview of warnings]	When you enable this option, the user can open the overview of warnings in the Web Submission. The order is checked for warnings before the order is submitted. The [Overview of warnings] dialog displays any detected warnings. It is recommended that the user solves any warning(s) before the user submits the order. Therefore, it is recommended that you enable the [Enable overview of warnings] option.
[Copyright administration]	Enable this option to make the customer responsible that submitted files are not copyright protected. The customer can only submit a job with option [Copyright administration message:] enabled. When the customer enables this option, the customer indicates that the submitted files are not copyright protected.
[Copyright administration message:]	A default message is displayed to the customer or operator when: 1. The [Copyright administration message:] option is enabled in this dialogue. 2. The customer or operator tries to submit an order, but he or she has not enabled the [Copyright administration message:] option in the order ticket.

Price settings

Manage the cost centers

Introduction

You can manage the cost centers per web shop. You can create, edit and delete the cost centers. You can assign the cost centers to the users and user groups in workspace [User management].

NOTE
[Budget management] is disabled when you enable option [Use payment providers].

NOTE
You can setup an interface between the PRISMAdirect server and the uniFLOW server. The uniFLOW server then manages the cost centres. See workspace [Order management] - [uniFLOW interface settings].

Procedure

1. Click the plus icon to add a cost center. An empty cost center is created.
   Click the pencil icon to edit the cost center. The cost center is expanded.
2. Edit the caption. The caption is the displayed name of the cost center.
   You can use the characters: 'a. - z.', 'A. - Z.', '0. - 9.', '_' . Spaces are allowed for the caption.
3. Type a description for the cost center.
   The default language is displayed in the top of section [Captions]. You can define a description for each language.
4. Define the email address of the approver for level 1. When you add more than one email address, you must use a semicolon to separate the addresses.
   The approver(s) must approve or reject the job when the price exceeds the maximum price for level 1.

NOTE
You can only define the approver(s) for level 1. You can define the approver(s) for additional levels in dialog [Price approval settings] and in workspace [User management]. The [Approver] for level 1 can send the approval form to the [Approver] for level 2.

5. Define the available budget for the cost center.
6. [Send warning at threshold [%]:]
   Define a percentage of the [Budget]. When this percentage of the budget is exceeded, an email message is sent to the approver of the customer. The [Approver] is defined in the [Profile settings] dialog of the [Web Submission].
   The email message is predefined but it can be changed. It can be changed from the [Workflow configuration], in the section [Email templates].
7. [Use cost center one level down:]
   For example, you can create a top level cost center which contains the total budget. Then you create a cost center per department. The cost center for each department uses part of the total budget. When you enable this option for the top level cost center, then users can only select one of the departmental cost centers.
8. Select the default cost center.
   The default cost center is used for the web shop when more than one cost center is defined. Customers can always select another cost centers in the web shop.
   When multiple cost centers are assigned to a user, the default cost center is used for that user.
9. Click [Save].

Reset the spent budget

Introduction

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

Procedure

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

Manage the price approval settings

Introduction

You can define the default price approval settings for each web shop. You can define custom price approval settings for users and user groups in workspace [User management]. The custom settings overwrite the default price settings for each web shop.

NOTE
You can setup an interface between the PRISMAdirect server and the uniFLOW server. The uniFLOW server then manages the price approval workflow. See workspace [Order management] - [uniFLOW interface settings].

Procedure

1. Click [Add new level].
   Define a maximum price for the current level. You can type a value in the spinbox for the budget. When the price exceeds the maximum price, an approver of the current level must approve or reject the order. If the price exceeds the maximum price of the next level, an approver of that level must also approve or reject the order.
2. Define the email address of the approver for the current level. When you add more than one email address, you must use a semicolon to separate the addresses.
   The approver(s) must approve or reject the job when the price exceeds the maximum price for the current level.

NOTE
The [Approver] for level 1 can send the approval form to the [Approver] for level 2.

3. Click the [Add new level] button to define a maximum price for the new level. The maximum price of the new level must be higher than the maximum price of the previous level.
4. [Allow an approver to accept on behalf of higher level approvers.]
   When you enable this option, each approver can always accept or reject an order, regardless of the price.
5. Type a [Motivation to approve price]. The message is shown to each approver of each level in the language that you typed the message.
6. Click [Save].

Configure the default price estimation settings

Introduction

In this dialogue, you can define the default price estimation settings for the web shop. The [User group settings] can overwrite the default price settings of the web shop.

NOTE
You can define a number of price related settings per product in the [Product & order editor]. The price related settings in the product overrule the default settings in this dialog.

Setting	Description
[Price estimation]	• [Yes] The [Price estimation] option is available in Web Submission. A user is always presented with an estimation of the job cost. • [No] The [Price estimation] option is not available in Web Submission. A user is never presented with an estimation of the job cost. • [Always] A user is always presented with an estimation of the job cost. The user cannot submit the job until the cost estimation to be presented.
[Select formulas]	Drag and drop the available formulas to the active formulas. Do this for both the jobs and the orders. NOTE You can select price estimation formulas per product in the [Product & order editor]. The formulas in the product overrule the formulas assigned to the web shop in this dialog.

Configure the default quotation settings

Introduction

In this dialog, you can define the default quotation settings for the web shop. The [User group settings] can overwrite the default price settings of the web shop.

NOTE
You can define a number of price related settings per product in the [Product & order editor]. The price related settings in the product overrule the default settings in this dialog.

NOTE
A license is required to use the quotation functionality.

Setting	Description
[Quotation]	• [Yes] The [Quotation] option is available in Web Submission. A user can request a quotation. • [No] The [Quotation] option is not available in Web Submission. A user cannot request a quotation. • [Always] A user is always presented with a quotation. The user cannot disable the request to calculate a quotation. NOTE A license is required to use the quotation functionality. The operator calculates and sends the quotation to the customer.
[Price can be accepted on behalf of the customer:]	Enable this option to allow the operator to accept the quotation on behalf of the customer. Disable this option to force the customer to accept or reject the quotation.
[An order can be printed only after the price has been calculated.]	Enable this option to force the operator to always calculate the quotation. The quotation must be calculated for a correct budget control.
[Formula for job:]	You have to select a formula to calculate the quotations of the jobs. NOTE You can select a quotation formula per product in the [Product & order editor]. The formulas in the product overrule the formulas assigned to the web shop in this dialog.
[Formula for order:]	You have to select a formula to calculate the quotations of the orders. NOTE You can select a quotation formula per product in the [Product & order editor]. The formulas in the product overrule the formulas assigned to the web shop in this dialog.

Enable payment

Introduction

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

When a customer is part of a user group, the [User group settings] can overwrite the payment setting of the web shop.

Payment

Enable the [Enable payment] option. Customers have to pay their orders before they can submit their orders via the web shop.

Type the contact information settings

Introduction

The [Contact information settings] are used in the [About] link in [Web Submission].

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

Select the active languages for the web shop

Introduction

You can select the active languages for the web shop. A language link will become available in the [Web Submission]. The customer can change the display language via the language link.

1. Select the default language of the web shop from the drop-down list.
2. Enable all languages that you want to offer to your customers.

Chapter 5
Submission settings

Configure the general settings

Setting	Description
[Preview resolution (in DPI):]	You can define the resolution of the preview of the job in the [Web Submission]. The higher the resolution, the higher the quality of the preview. NOTE A high DPI value can decrease the performance of the application.
[Put the web site into maintenance mode]	Enable this option to put the web server into maintenance. Customers cannot access the web shop anymore.
[Trace level]	Set the trace level for the web server: • [Debug] The [Debug] trace level provides the most detailed log information. • [Error] The errors are logged. • [Info] The errors and information messages are logged NOTE The [Debug] trace level can impact the performance of the application.

Define the desk submission users

Introduction

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

Procedure

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

Create friendly URLs

Introduction

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

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

Procedure

1. Select a web shop.
2. Type a user-friendly URL for the web shop.
3. Click [Save].

Chapter 6
Printer settings

Introduction

In this screen you manage your printers.

Main screen components

1. The list at the left-hand side of the screen shows the currently installed printers.
2. The buttons above the printer list in the top left corner provide the actions to add printers and to refresh the printers list.
3. The right hand windows contains all controls to facilitate the current action.

Currently installed printers

The list at the left-hand side of the screen shows the currently installed printers.

If you click on one of the printers in the list you can change the settings for that printer or delete the printer.

You see a Save button whenever you change settings for the printer. You must click it before you can continue.

See *Manage the general settings* on page 54.

Action buttons

The buttons above the printer list in the top left corner provide the actions to add printers and to refresh the printers list.

Here is a list of the action buttons and their function:

- [Add]
  With the add button a new printer is added to the system.
  See *Add a printer* on page 53.
- [Discover]
  The [Printer discovery tool] can find printers in the network through the SNMP protocol.
  See *Printer discovery tool* on page 48.
- [Refresh]
  Refresh the printers list.

Manage the printers for the application

[Printer discovery tool]

Introduction

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

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

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

[Printer discovery method]

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

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

Click [Search] to start the discovery of printers.

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

[Advanced discovery]

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

Scan process properties

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

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

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

Settings SNMP V1

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

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

Settings SNMP V3

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

Search result window

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

Column header	Explanation
[IP address]	The printer IP address.
[Printer name]	The printer name. The Windows printer name if the printer is already defined in the local Windows system, otherwise the model name is used as the printer name.
[Printer model]	The printer model.

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

Add a printer manually

Click the [Add additional printer] button to add a printer manually. For example, SNMP is not enabled on a printer. Therefore, the printer discovery tool cannot find the printer. See: *Add a printer* on page 53.

[Add a printer]

Introduction

Here you can add printers to the system.

Add printer dialog

1. Select the [Printer model:] and [Controller version:] of your printer.
2. The [Printer name:] is filled in from the [Printer model:].
   If you want another name you can change the printer name.
3. Enter the [IP address:] of the printer.
4. Click OK.

Edit the printer settings

Manage the general settings

Introduction

The general settings define the properties and the availability of each printer.

Printer image

You can change the printer image: *Select a printer image* on page 55.

Preferences

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

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

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

NOTE
This option is available for variable data documents.

PDL Settings

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

[Web sites for the printer:]

You can add one or more URLs to the text field.

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

NOTE
This option is available in PRISMAdirect only.

[Select a printer image]

Introduction

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

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

You can also upload your own image for the printer.

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

Manage the printer configuration

Introduction

Define the queue settings for the selected printer. The queue settings are printer dependent.

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

Manage the destination settings

1. Select a queue and click button [Default] to define a default queue. The default value is used for the concerning printer in the [Print] dialog.
2. Click [Import DocBoxes] to import DocBoxes that are defined on the printer.

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

Manage the finishers for the printer

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

1. Click [Get printer configuration] to get the configuration from the printer.

NOTE
The option [Get printer configuration] is only available on printers that support this.

2. You can define the default output location in column [Default]. The default value is used for the concerning printer in the [Print] dialog.
   All available output locations are displayed in the [Output locations] pane. The paper output locations depend on the selected finishers. These output locations are available in setting [Output location] on tab [Finishing] in the [Print] dialog.
3. You can define the default output location for unused cyclic media in column [Unused cyclic media]. The default value is used for the concerning printer in the [Print] dialog.
   Any unused cyclic media, such as tab media, is deposited in an [Output location].

Manage the connection settings

Introduction

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

Enable the [Printer monitoring] option to support printer monitoring via SNMP.

Procedure

1. Define the [Printer connection] settings:

Setting	Description
[Printer URL:]	The URL of the printer. For example: http://10.29.167.169. You can edit [Printer URL:] only if the printer connection type is "JMF" or when the printer is not installed in the Windows spooler. The setting is disabled when the address is retrieved from the Windows spooler.
[Connection type:]	The connection type used for printing. This parameter can be modified only when more than one connection type is supported for the selected printer. The possible connection types : • Windows spooler • LPD • JMF
[Connection timeout (ms):]	Define the connection timeout in ms.
[Print to file]	Select this option to send the print data to a file. You can enable this option to diagnose a print problem.

2. Enable the [Printer monitoring] option to monitor printers via SNMP.
For example, you can monitor the toner level, printer status, etc. Define the [Printer monitoring] settings:
[Retry timer [s]:] Define the frequency to monitor the printer in seconds. The range is: 5 - 900 seconds.
You can select which SNMP version is supported by the printer:
- SNMP V1
- SNMP V3
  SNMP V3 introduces a user-based security model for authentication and privacy services.

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

Settings SNMP V1

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

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

Settings SNMP V3

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

Manage the printer clusters

Add or edit a printer cluster

Introduction

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

Procedure

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

Application settings

Add a color strip

Introduction

You can manage the color strips available to the users.

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

Procedure

1. Click the plus icon.
2. Browse to the color strip(s) that you want to add.

NOTE
The system accepts EPS/PDF/TIF/TIFF files

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

Add an imposition layout

Introduction

You can manage the specific imposition layouts available to the users. The application offers a number of imposition layout types. You can add user-defined imposition types to the application. You can disable any imposition layout. A disabled imposition layout used by a document type is still applied while printing a document using this disabled imposition layout.

The main imposition types are:

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

Variable data documents can also be printed using an imposition layout. For example: [VDP N-up].

NOTE
See the help file of the application for a complete description of the default imposition types.

Procedure

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

Chapter 7
Order management

Service settings

JDD service settings

Manage the JDD service settings

Introduction

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

Procedure

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

   Each template defines custom values which depend on the expected size and number of jobs submitted from the [Web Submission].
2. Set the trace level for the JDD service:
   - [Debug]
     The [Debug] trace level provides the most detailed log information.
   - [Error]
     The errors are logged.
   - [Info]
     The errors and information messages are logged

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

Resubmit a failed job

Introduction

In the [JDD service settings] dialog you can also handle failed jobs. A failed job is a job which is not successfully received on the server. You can handle only one failed job at a time. The failed jobs are displayed in a list.

You can resubmit a failed job.

1. If the job is received on the [Server], the job is removed from the list.
2. If the job is not received on the [Server], the job must be deleted manually.

Procedure

1. Select a failed job.
   You can select only one job at a time.
2. Click button [Resubmit]
   The job is submitted. If the job is received on the [Server], the job is removed from the list.
3. Click the [Refresh] button to update the list of failed jobs.
   The list of failed jobs is not updated automatically.

Delete a failed job

Procedure

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

Automatic process settings

Introduction

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

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

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

The preflight operation checks if any rules are violated in the PDF file(s). The set of rules is fixed. Some of the rules can be configured in [Order processing settings] - [Preflight settings].

Procedure

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

NOTE
The selected conversion application must be installed on the web server.

3. Select a merge application from the drop-down list.
   The automatic merge service merges two or more PDF files into one PDF file. For example, two or more PDF files are automatically merged when you view a job with multiple PDF files.
   Select a merge application from the drop-down list:
   - PDFNetMerge
     PDFNetMerge is the preferred merge application.
   - AcrobatMerge

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

4. Define if you want to use automatic preflight.
   You can configure if the preflight operation automatically fixes violations of the preflight rules in submitted orders. Some violations are detected by the preflight operation but cannot be fixed automatically. It is recommended that the operator fixes these violations manually before the operator prints the job.

5. Set the number of preflight processes.
   The number of processes can impact the performance of the application.
6. Set the trace level for the automatic process settings:
   - [Debug]
     The [Debug] trace level provides the most detailed log information.
   - [Error]
     The errors are logged.
   - [Info]
     The errors and information messages are logged

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

7. Click [Save].

Configure the clean-up settings

Introduction

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

Procedure

1. Define the [Number of hours between two clean-up operations:].

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

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

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

4. Click [Save].

JDF service settings

Manage the general settings for the JDF service

Introduction

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

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

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

Procedure

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

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

4. Click [Save].

Add or edit JDF end points

Introduction

In this dialog, you can setup the JDF end points.

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

Procedure

1. Click the [Add JDF end point] button.
   Select a [JDF end point] and click [Edit] to edit an existing [JDF end point].
2. Define the [JDF end point] data.
   1. [Name:]
      This is the name you want to use to identify this [JDF end point].
   2. [URL:]
      This is the URL used to access this [JDF end point].

NOTE
This field is automatically generated and cannot be changed.

   3. [Web shop]
      Select for which web shop you want to create the JDF end point.
3. Select the desired [Authentication] method and define the required data.
   1. [Windows authentication]:
      Select this option to use the [Windows authentication] method.
      The Windows user is actually the user under which the “Print JDF Service” is running.
      You can lookup the user of “Print JDF Service” in the Services dialogue of Microsoft Windows.
      This user must be an LDAP user and the LDAP server must exist in PRISMAdirect for the authentication of the end point to be successful.
   2. [Custom authentication]:
      If you want to use [Custom authentication] you need to specify the following credentials : [User name:] and [Password:]. Here a valid PRISMAdirect user and its password must be provided.
      You can use the [Test connection] button to check the entered credentials.
4. If you want to use your own [Mapping files] you have to define the [Mapping files] section.
   Enable [Use custom mapping files].
   Use the browse button to browse to the mapping files that you want to use.
   Use [JDF ticket:] for the mapping of JDF to PRISMAdirect ticket items. A mapping file is used to construct a valid PRISMAdirect ticket with the values taken from the JDF ticket.
   Use [Job status:] for the mapping of the job status in PRISMAdirect to JDF.

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

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

Default mapping files

Introduction

[Default mapping file for JDF ticket]

This file is used to map JDF to PRISMAdirect ticket items. A mapping file is used to construct a valid PRISMAdirect ticket with the values taken from the JDF ticket.

[Default mapping file for JDF ticket]

This file is used to map the job status in PRISMAdirect to JDF.

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

Location of the default mapping files

Go to: [Order management] - [JDF service] - [JDF end points].

Click the following links to download the mapping files:
- [Default mapping file for JDF ticket]
- [Default mapping file for JDF ticket]

Print Prepare Manager service settings

Introduction

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

NOTE
The port for the Print Prepare Manager service must be accessible from the Order processing and the Web server.

Procedure

1. Define the port for the Print Prepare Manager service.
2. Set the trace level for the Print Prepare Manager service:
   - [Debug]
     The [Debug] trace level provides the most detailed log information.
   - [Error]
     The errors are logged.
   - [Info]
     The errors and information messages are logged

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

Print Licence Monitoring service settings

Introduction

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

Procedure

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

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

Security settings

Configure the connection to the server and web server

Introduction

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

Procedure

1. [Use secure connections (HTTPS)]
   Use this option to specify if you want to use the secure HTTPS connection for Web Submission. If you select this option you have to use the [Certificates settings] to configure the appropriate Certificates. A certificate guarantees a secure (HTTPS) connection to the Web Submission server.
2. [Use only HTTP connections to the server]
   Enable this option if you want to use HTTP only connections to the server. For example, the firewall is allowed to open only one HTTP port.
   Disable this option if you want to use HTTPS and TCP connections to the server. You must open the TCP port on the server.

Select the authentication type

Introduction

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

Procedure

1. Select the authentication type.
   The installed services, the [Configuration] and the System Administration always use [Custom authentication].

Create self-signed certificates

Introduction

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

Additional information

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

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

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

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

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

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

Procedure

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

Remove certificate

Introduction

You can only remove self-signed Certificates here.

Procedure

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

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

NOTE
You can only remove self-signed Certificates here.

Advanced infrastructure settings

Introduction

The support requests are organized based on the country where your local representative resides. The country setting is used to find your PRISMAdirect installation on the remote service website in the specified country. A local representative can connect to the servers of the application via TeamViewer. Each server appears as a unique entry in the Océ Remote Service website. You have to enable remote assistance when you want to allow this.

Procedure

1. [Logon credentials for installed components]
   Consider a distributed system. Several components of the application authenticate themselves to the [Server] with this account. These components must use these logon credentials. You must define these logon credentials for each component when you install the component.
   - Define a username and password.

   This user must belong to the [Services] group.

   NOTE
   The application restarts when you change the username or password.

2. [Remote assistance settings]
   A local representative can connect to the servers of the application via TeamViewer. Each server appears as a unique entry in the Océ Remote Service website. You have to enable remote assistance when you want to allow this.
3. Select the country.
   The country setting is used to find your PRISMAdirect installation on the remote service website in the specified country.
4. Define the proxy settings.
   You have to define the proxy settings when you need special permissions for TeamViewer in your network.

Configure the VDP settings

Procedure

1. Define the maximum number of pages of a variable data document shown in the [Preview] or [Proof PDF]. The maximum value for this option is 2000 pages.

NOTE
A high number of pages can decrease the performance of the application.

Order history settings

Procedure

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

Backup and restore

Introduction

It is recommended that you create a backup after each installation and patch installation.

You must define the [Temporary data folder:] before you can backup the [Order data]. For example, your jobs are stored on a drive, which is nearly full. You can define the [Temporary data folder:] on an other drive. The [Order data] backup file is created in the [Temporary data folder:]. You can store the [Order data] backup file in an other folder. See [Temporary folder settings].

The backup files for the [Configurations] and the [Order data] are password protected zip files.

Procedure

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

Restore

Procedure

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

Select the active languages for the system

Introduction

You can select the active languages for the system. A language link will become available in the components of the system, e.g. the [Order processing]. The user can change the display language via the language link.

Procedure

1. Enable all languages that you want to offer to your users.
   By default, the installation language is enabled.

Define the path for the temporary folder

Introduction

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

Procedure

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

Setup the uniFLOW interface

Introduction

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

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

Procedure

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

Chapter 8
Order processing settings

Configure the general settings

Introduction

Configure the general settings for the [Order processing] workspace.

Setting	Description
[Allow the operator to change the files of jobs]	Enable this option to allow the operator to change the files of jobs in the job details of the selected job. When this option is enabled, the operator can: • [Add digital file], [Add paper original] and [Add other digital file]. • A product can contain a fixed document. The operator can remove the fixed document and can add other files to the job. • A product can contain a fixed VDP document. The operator can remove the fixed VDP document and can add other files to the job. • Delete a file. • Replace a file. • Edit a non-PDF file. NOTE [Web Submission]users submit files to the [Order processing]. The [Web Submission] users must be confident that the files are printed exactly as submitted. When you enable this option, there is no guarantee that the submitted files will remain unchanged before the job is printed.
[Always add the OrderID to the email subject]	Enable this option to add the OrderID to the subject of each email which is sent from the application. To be able to identify the job in the email client, the OrderID must be added to the subject. NOTE This option must be enabled when Microsoft Outlook is installed. The operator can create jobs and accept jobs in Microsoft Outlook.
[Overview of warnings]	When you enable this option, the operator can open the overview of warnings in the [Order processing]. The order is checked for warnings before the order is submitted. The [Overview of warnings] dialog displays any detected warnings. It is recommended that the operator solves any warning(s) before the operator submits the order. Therefore, it is recommended that you enable the [Enable overview of warnings] option.
[Current job number]	This option contains the job number of the last job. You can define any job number with a maximum value of 999999999. The next submitted job has job number: [Current job number] + 1. NOTE Multiple jobs with the same job number can appear in the job list, when you change the [Current job number].

Setting	Description
[Current order number:]	This option contains the number of the last order. You can define any number with a maximum value of 999999999. The next submitted order has order number: [Current order number:] + 1. NOTE Multiple orders with the same order number can appear in the order list, when you change the [Current order number:].
[Preview resolution (in DPI):]	You can define the resolution of the preview of the job in the [Order processing]. The higher the resolution, the higher the quality of the preview. NOTE A high DPI value can decrease the performance of the application.

Define the font settings

Procedure

1. Define the font settings for the ticket.
   - [Ticket title settings]
     Define how the title of the job ticket must be printed.
   - [Group item settings]
     Define how the group items of the job ticket must be printed.
   - [Item settings]
     Define how the job ticket items must be printed.
2. For each job ticket category, you can define the font with option [Font name:].
3. For each job ticket category, you can define the [Font size:].
4. For each job ticket category, you can define the [Font style:]
   - [Bold]
   - [Italic]
   - [Underline]
   - [Strikethrough]

Define the logo settings

Introduction

Define the settings for the logo in the ticket.

Procedure

1. Enable the [Print logo in ticket] option to print the logo in the job ticket.
2. Click button [Browse] to select an image.
   The allowed image file types are: .bmp, .jpg, .gif, .png.
   Click [Clear] to remove a selected image.
3. Select the position for the logo from the drop-down list.
4. [Scale logo to page size]
   You can scale the logo to the page size. Enable the [Keep ratio] option to use the same relation between width and height for the logo as for the page size. You have to define the width [%] for the image.
5. Click [Save].

Configure the preflight rules

Introduction

You can preflight a PDF file. The preflight operation checks if any rules are violated in the PDF file(s). The set of rules is fixed. You can configure some of the rules. The preflight operation automatically fixes the violations according to the configured rules. A preflight report and an annotated file are generated. The preflight report shows a summary of the problems that have been found and fixed.

NOTE
If the preflight operation cannot fix a violation, the violation is reported.

Procedure

1. Configure the available rules:
   Click the following rules to configure the rules. When you configure these rules, the preflight operation automatically fixes the violations of these rules.
   - [PDF actions and scripting rule:]
   - [Content too close to border rule:]
   - [Embedded fonts rule:]
   - [Hairline rule:]
   - [Image compression is too high rule:]
   - [Image resolution is too high rule:]
   - [Image resolution is too low rule:]

   You can only enable or disable the following rules. You cannot configure these ruler.
   - [Restricted permissions rule:]
   - [Transparency rule:]
   - [Overprint rule:]
2. Enable or disable each rule in the [Enabled] column.
3. Define the [Severity] of each rule.
   - [Warning]
     A violation of the rule is detected. You can ignore the warning, or the preflight operation can fix the violation.
   - [Error]
     A violation of the rule is detected. The violation of the rule must be fixed by the preflight operation.
4. You can define a [Timeout for preflight [min.]]. The value is the timeout value in minutes. When the timeout value is exceeded, the preflight operation is canceled.
5. Click [Save].

Manage filters

Create a filter

Introduction

The filter determines which orders are visible for a user of [Order processing].

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

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

Procedure

1. Click the plus icon to add a filter.
2. Assign the filter to one or more users. You can manage the users in [User management] - [Users].
3. Type a name and description for the filter. The name must be unique.
4. Select an item that you want to add to the filter and enable the [Use in filter] option.
   An item is marked with a funnel icon when the item is added to the filter.
5. Configure the values for the item.
6. If required, you can add more than one item to the filter.
   By default, the 'AND' operator is used when you add more than one item to the filter. When you enable the [Allow the OR operator in the filter] option, the 'OR' operator is used when you add more than one item to the filter.
7. Click [Save].

Workflow configuration

General settings

Manage the operators

Introduction

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

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

Procedure

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

Manage the categories

Introduction

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

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

You cannot edit or delete the predefined categories.

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

Procedure

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

Configure the workflow

Introduction

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

Procedure

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

Configure the other settings

Procedure

1. [Print both the job ticket and the job.]
   The job ticket is inserted as a banner page before the job.
2. [Allow operator to attach files when sending email.]
   When you enable this option, you can attach files to the email messages to the customer.
3. [Enable automatic document preparation]
   When you enable this option, the automation templates of PRISMAprepare become available in the products in [Product & order editor]. You can activate the automation templates in each product in view [Print room]. The active automation templates will be applied to the jobs as soon as the jobs arrive on the server. The jobs receive the layout as defined by the templates.
   When this option is disabled, the products do not contain any automation templates in [Product & order editor].
   When PRISMAprepare is not installed on the server, then no automation templates will be available in the products in [Product & order editor].
4. Click [Save].

User settings

Configure the reminders

Introduction

You can configure reminders about jobs that are nearly due. You can have up to 5 reminders with different colors. The [Job number] column receives the selected color of the concerning reminder.

Procedure

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

Email templates

Configure the email templates

Introduction

The application allows you to automatically send email messages to the customer. You can configure the subject and content of the message by entering a default message.

You can configure the following email templates:

- [Order received - customer]
  The customer receives a confirmation email about the submitted order.
- [Order received - operator]
  The operator receives a notification about a new order.
- [Quotation]
  When the customer has requested a calculation of the price, you must send a quotation to the customer. The customer can accept or reject the price.
- [Price approval]
  An approver must accept or reject the price of the order.
- [Price approved]
  An approver has accepted the price of the order. The customer receives an email that the price is accepted.
- [Price rejected]
  An approver has rejected the price of the order. The customer receives an email that the price is rejected.
- [Proof PDF of order]
  An operator has created a proof PDF of the order. The customer can check the proof PDF to see if the merged document is correct. If the merged document is correct, the customer accepts the proof PDF.
- [Quotation accepted]
  An operator has accepted the price of the order on behalf of the customer.
- [Order accepted]
  An operator has accepted the order.
- [Order rejected]
  An operator requests the customer to change the order.
- [Order ready]
  An operator has printed the order.
- [Order dispatched]
  An operator has dispatched the order.
- [Order finalized]
  An operator has finalised the order.
- [Export completed]
  The operator receives a notification that all selected orders are exported.
- [Reset password]
  The customer receives an email to change the login password.

Procedure

1. Select the email message that you want to configure.
2. You can change the subject of the email message.
   You can change the default email message for each available language. The languages are enabled in [Active langauges for system] in the [Order management] component.
   Click [Revert to default] to use the default email message again. Your changes will be discarded.

3. Your e-mail message can contain variables from the job ticket. This allows you to send a dynamic message, containing job-specific information. You can use variables from the list of [Order items] and/or the [Product items]. The [Product items] can only be used in text field [Job information (per job):]. Drag and drop the variable into the message at the desired position. A variable is indicated by '%' symbols.
   You can include a hyperlink to the order in your email. Drag and drop [Hyperlink to order] into the message. When the customer clicks the hyperlink, a web page opens. The web page contains the concerning order.
4. You can configure which files are automatically attached to the email message.
   - Select the [Attach the document] option to attach the PDF document to the email message.
   - Select the [Attach the job ticket] option to attach the job ticket to the email message.
   - Select the [Attach the preflight report] option to attach the preflight report to the email message.

NOTE
The operator can attach additional files to an email message when the [Allow operator to attach files when sending email.] option is enabled. See [Other settings] in the [Workflow configuration] dialog.

5. Click [Save].
6. Repeat these steps for all email templates.

Chapter 9
License settings

Define the license server settings

Procedure

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

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Canon

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