Administration guide

PRISMAdirect

Product & order editor

A CANON COMPANY

Canon
Production Systems - Cutsheet

Copyright

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Software version

This documentation describes the functionality of PRISMAdirect v1.2.

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Chapter 1
Introduction

Introduction

The [Product & order editor] offers the following workspaces:

- [Product items]
  The product items are ticket items that are available for the products. The ticket definition contains a number of default items. You can also create and configure custom items.
  An item can be placed in one or more views. These views define how a product is displayed in the web shop and in the print shop.
- [Products]
  A product defines the layout for the job and defines a number of other settings. A product represents a description of the production process.
- [Order items]
  The order items are ticket items that are available for the order ticket. The ticket definition contains a number of default items. You can also create and configure custom items.
  An item can be placed in one or more views. These views define how an order ticket is displayed in the web shop and in the print shop.
- [Order view]
  In the order view, you can define which ticket items are displayed in the web shop and in the print shop.

The ticket items used in the [Product items] and in the [Order items] are unique for each workspace. For example, a ticket item with the same name and caption can be available in both workspaces. When you delete the item from one of the workspaces, the item remains available in the other workspace.

Sort the items and the products

Introduction

You can sort the items and products in the [Product & order editor]. You can use the sorting mechanism to group the items and products on their type. Or you can sort the items and products alphabetically.

Procedure

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

Chapter 2
Product items and order items

Visual ticket items

By default, the following ticket items are available:

Icon	Visual ticket item
	PrintInColor
	NewCoverMedia
	CoverPlace
	Plexity
	Folding
	OrientationAndBindingEdge
	Media
	Punching
	BindingMethod

These ticket items are called visual ticket items. The preview always displays the visual ticket items. When a visual ticket item is part of a product, the preview shows the selected value for the item. When a visual ticket item is not part of a product, the preview shows the default value for the item. It is recommended that you assign a neutral default value to the visual ticket items.

NOTE
All visual ticket items are choice items. You cannot add or remove choices for most of the visual ticket items. Only for NewCoverMedia and Media you can change the available choice items.

The item types

Introduction

The ticket definition contains a number of default ticket items. You can also create and configure custom items. For each custom item, you must define the item type. The new items are added to the ticket definition. The [Product items] and the [Order items] show all available items.

NOTE
It is recommended that the ticket definition does not contain more than 256 items.

Item types

Icon	Item type	Description
	[Number]	[Number] allows the user to enter a numeric value.
	[Yes/No]	[Yes/No] allows the users to enable or disable an item.
	[Text]	Text items can be single-line or multi line. Single line item allows the user to enter maximum 1 line of text. Multi-line item allows the user to enter more than 1 line of text.
	[Date]	Date items are items where the user can enter a date.
	[Choice]	Choice items are items where the user can select an option from a drop-down list.

Icon	Item type	Description
	[Lookup]	[Lookup] items retrieve their values from a data source. The values are displayed in a drop-down list. For example, the data source contains account numbers. The [Lookup] item connects to the data source and retrieves the available set of account numbers. The account numbers are then displayed in the drop-down list of the [Lookup] item. The user can select a account number as value for the [Lookup] item. NOTE The value of the [Lookup] item is added to the job ticket as plain text. NOTE The user must create an ODBC data source. ODBC cannot be used from a remote machine. In a distributed system, the user must: • Create and configure the ODBC driver on the web server(s) in the distributed system. The name of the ODBC driver must be the same on each machine. • The data source must be identical on the web server(s) in the distributed system. NOTE To configure the [Lookup] item, the user must have knowledge of: • Connection strings • SQL

Create a new item

Introduction

The ticket definition contains a number of default ticket items. You can also create and configure custom items. For each custom item, you must define the item type. The new items are added to the ticket definition. The workspaces [Product items] and [Order items] show all available items.

You cannot change the item name or item type after you create the item.

NOTE
It is recommended that the ticket definition does not contain more than 256 items.

Procedure

1. Select the workspace where you want to create the new item: [Product items] or [Order items].
2. Click [New item].
   The [New item] dialog opens.
3. Define the item name. You can use the characters: 'a. - z.', 'A. - Z.', '0. - 9.', '_' . Spaces are not allowed. The name must be unique.
   The item name must not exceed 128 characters. The accounting information cannot be collected if the job ticket definition contains an item with a name longer than 128 characters.
4. Define the item type. Select one of the following item types:

Item types

Icon	Item type	Description
	[Number]	[Number] allows the user to enter a numeric value.
	[Yes/No]	[Yes/No] allows the users to enable or disable an item.
	[Text]	Text items can be single-line or multi line. Single line item allows the user to enter maximum 1 line of text. Multi-line item allows the user to enter more than 1 line of text.
	[Date]	Date items are items where the user can enter a date.
	[Choice]	Choice items are items where the user can select an option from a drop-down list.

Icon	Item type	Description
	[Lookup]	[Lookup] items retrieve their values from a data source. The values are displayed in a drop-down list. For example, the data source contains account numbers. The [Lookup] item connects to the data source and retrieves the available set of account numbers. The account numbers are then displayed in the drop-down list of the [Lookup] item. The user can select a account number as value for the [Lookup] item. NOTE The value of the [Lookup] item is added to the job ticket as plain text. NOTE The user must create an ODBC data source. ODBC cannot be used from a remote machine. In a distributed system, the user must: • Create and configure the ODBC driver on the web server(s) in the distributed system. The name of the ODBC driver must be the same on each machine. • The data source must be identical on the web server(s) in the distributed system. NOTE To configure the [Lookup] item, the user must have knowledge of: • Connection strings • SQL

5. Continue with the options that you can change after the item is created. These options become available when you select the item type.
   See *Edit an item* on page 17.

Edit an item

Introduction

When you create an item, options become available when you select the item type. You can edit these options after the item is created.

You cannot change the item name or item type after you create the item.

Procedure

1. Select the item in workspace [Product items] or [Order items].
2. Define the [Captions]. The caption is the displayed name of the item.
   You can use the characters: 'a. - z.', 'A. - Z.', '0. - 9.', '_' . Spaces are allowed for the caption.
   The default language for the item is displayed in the top of section [Captions]. You can define a caption for each language. See procedure *Manage the languages* on page 22 if you want to add or remove a language for an item.
3. Define the tooltip for the item.
   You can define the tooltip in the text field on the right. The text field for the tooltip is colored yellow.
   You can define a tooltip for each language.
4. Define the [Configuration].
   In this dialog, you define the values for the item. The values for the item are available in the ticket definition.

NOTE
It is recommended that you assign a neutral default value to the item: None, No, 0, False, [empty string].

[Configuration]

Item type	Description
[Number]	[Number] items are items that allow the user to enter a numeric value. When you define a number item, you can define the following: • [Default value:] • [Minimum value:] • [Maximum value:] • [Number of decimals:] When the user types more decimals than defined, the number is rounded according to the defined number of decimals.
[Yes/No]	[Yes/No] items are items that allow the user to enable or disable an item. You can define the default value for the item. A checkmark in the checkbox means that the default value is 'Yes'. An empty checkbox means that the default value is 'No'. You can define custom captions for the 'Yes' and 'No' values. For example, 'True' and 'False'. For each caption, you can define the tooltip in the text field on the right. The text field for the tooltip is colored yellow. ['Undefined' caption:] Option [Default value] is overruled when you define a caption for this option. The user must always select a value for this item. No default value is offered to the user.

Item type	Description
[Text]	[Text] items are items that allow the user to type text. Text items can be single-line or multiple lines. An item like [Remarks] is typically a multiple lines item. You can type a text that is displayed as the default string in the job ticket. If the user is allowed to edit the text item, the user can change the default string. You can specify the maximum number of characters that the user can enter. You can define a mask for the text. The mask is compared to the entered text. When the pattern matches, the text is valid. The mask must be a regex (regular expression). NOTE To inform the user about the mask, you can put information about the mask in the tooltip of the item.
[Date]	[Date] items are items that allow the user to enter a date. The [The default date is today plus offset:] option allows you to define when an action must be performed. The action is related to the job. When you enter '0' today's date is displayed when the item is used. When you enter another number, that number is added to today's date. The resulting date is displayed, but the user can change the date. The syntax of notation [1.00:12:00 AM] means [days.hours:minutes:seconds]. The maximum values for the first and the last valid date relative to the default date are 4700 days. For example, for item [Delivery date] the following values are defined: • [The default date is today plus offset:] 4 • [First valid date relative to the default date:] -4 • [Last valid date relative to the default date:] 4 • [Allowed days:] Monday to Friday The job is submitted on Thursday, June 15. The default delivery date becomes Monday, June 19. The job is allowed to be delivered at the earliest on Thursday, June 15, and on Friday, June 23 at the latest. NOTE All seven days of the week are used to calculate the first and last valid date relative to the default date. The [Allowed days:] option is not used in the calculation. You can select which days of the week are allowed for the new item of type [Date].

Item type	Description
[Choice]	[Choice] items are items that allow the user to select an option from a drop-down list. Click the '+' icon to add a new option to the choice item. 1. Define the option name. You can use the characters: 'a. - z.', 'A. - Z.', '0. - 9.', '_' . Spaces are not allowed. The name must be unique. 2. Define the option caption. The option caption is the displayed name of the option. The default language for the option is displayed in the top. You can use the characters: 'a. - z.', 'A. - Z.', '0. - 9.', '_' . Spaces are allowed for the caption. You can define a caption for each language. 3. You can define the tooltip in the text field on the right. The text field for the tooltip is colored yellow. 4. Click [Browse] to add a custom image to an option of a choice item. If the image path is empty, the custom image of the option is removed. Click the pencil icon to edit an option. The icon appears when you hover the mouse pointer over an option. You cannot change the option name of an existing option. Use the 'Up' and 'Down' buttons to change the order of choice items. Select the default option for the choice item from the drop-down list. NOTE All visual ticket items are choice items. You cannot add or remove choices for most of the visual ticket items. Only for NewCoverMedia and Media you can change the available choice items. Select edit or import the media catalog (*Import the media catalog of PRISMAprepare* on page 60).

Item type	Description
[Lookup]	[Lookup] items retrieve their values from a data source. The values are displayed in a drop-down list. 1. [ODBC driver name:] You must define the ODBC driver name. This is the ODBC connection string to the data source. 2. [Username] and [Password]: Use the credentials of a Windows user to connect to the data source. 3. [Query:] The query defines which data is requested from the data source and how the data is presented. The type of query depends on the data source. For example, you must define an SQL query if the data source is an SQL server. NOTE The first 999 values returned by the query are available in the drop-down list. 4. You can define the default value for the item. NOTE The user can select only the default value for the [Lookup] item when: • The time-out expired for the query. • The query returns zero values. • The query is invalid.

5. Enable option [Log item] if the item must be visible in the log file.
6. Click [Save].

NOTE
The ticket items used in a product can be configured exclusively for that product in the workspace [Products]. The ticket items used in a view can be configured exclusively for that view.

Example

Clauses in an SQL query

You can use the TOP-clause and/or the WHERE-clause in an SQL query. The following profile items can be used in the WHERE-clause:

- FirstName
- LastName
- Department
- Location
- Company
- TelephoneNumber
- EmailAddress
- Account
- BudgetOwner
- Language (RFC 4646 compliant)

Each profile item used in the SQL query must be enclosed in $-signs. For example:

Select Col1 from [ConfigStore].[Config_Object] where Col2 LIKE $EmailAddress$

Delete an item

Introduction

You can delete ticket items from the [Product items] and the [Order items].

Some items, [Author] and [User ID] for example, are predefined and connected to system files. These items can not be deleted. When you select such an item, the [Delete item] button is disabled.

If the ticket item is added to one or more views or products, you must confirm that you want to delete this item. Then the item will be deleted from all views and products.

Procedure

1. Click the delete icon to delete an item. The icon appears when you hover the mouse pointer over an item.
2. Confirm that you want to delete the item.
   The item is deleted from the views and products too.

Manage the languages

Introduction

You can specify the caption and tooltip of the ticket items in different languages. First, you must add the required languages. The languages are added for all items.

Procedure

1. Click [Options] - [Add language].
   The [Add language] dialog opens.
2. Select the languages you want to add. Deselect the languages you want to remove.
3. Click [OK].
   The languages are added for all items.

Define an item caption per language

Introduction

When you have specified additional languages, these languages are available for each ticket item. Now, you can define an item caption per language.

Procedure

1. Select the item in the [Product items] or [Order items].
2. Define the item captions in section [Captions]. The caption is the displayed name of the item.
   You can use the characters: 'a. - z.', 'A. - Z.', '0. - 9.', '_' . Spaces are allowed for the caption.
   The default language for the item is displayed in the top of section [Captions]. You can define a caption for each language. See procedure *Manage the languages* on page 22 if you want to add or remove a language for an item.
3. Define the tooltip for the item.
   You can define the tooltip in the text field on the right. The text field for the tooltip is colored yellow.
   You can define a tooltip for each language.
4. Click [Save].

Chapter 3
Views on the product and order form

Introduction

Introduction

You can use the ticket items available in workspace [Product items] to define a product. You can use the ticket items available in workspace [Order items] to define an order form. The ticket items use the item values as defined in the workspace [Product items] and [Order items]. However, you can use custom values for each ticket item used in a product and order form. A ticket item can be placed in one or more views. The custom values are valid only in the selected view for the selected product. The views indicate what is visible for the operator and the owner of the job.

The items and group section

A ticket item can be placed in one or more views. The views indicate what is visible for the operator and for the customer of the web shop.

You can use groups to sort ticket items together in a view. Define to which group or subgroup each ticket item belongs. You can always change the group or subgroup afterwards. You can use a number of predefined groups. These groups use a fixed set of ticket items.

System view	
[Owner information]	This predefined group contains the ticket items related to the owner information. These ticket items are displayed in the [Order processing] and for desk submission users in the [Web Submission]. [Web Submission] users need access to a subset of the ticket items. This group is available in workspace [Order view].
[Email notifications]	This predefined group contains the ticket items related to the email notifications workflow. These ticket items are displayed in the [Order processing] and in the [Web Submission]. This group is available in workspace [Products] and [Order view].
[Price approval]	This predefined group contains the ticket items related to cost approval. These ticket items are displayed in the [Web Submission]. The items in this view are available in the ticket when [Job quote] is enabled in the [PRISMAaccess Administration]. This group is available in workspace [Order view].

System view	
[Cost estimation]	This predefined group contains the ticket items related to cost estimation. These ticket items are displayed in the [Order processing] and in the [Web Submission]. The items in this view are available in the ticket when [Cost estimation] is enabled in the [PRISMAaccess Administration]. This group is available in workspace [Products] and [Order view].
[Add group]	You can create groups and subgroups for the ticket items. Drag the group and/or subgroup into the pane.

The [Views] section

The predefined views section displays the different views on the ticket items of the product and the order form. The predefined views section contains four tabs. When you select a tab all groups, subgroups and ticket items of the product for that view are displayed.

To add an item to a view, select the item in the items list and drag the item to a group or subgroup of the view. You can remove items from a specific view.

The ticket items use the item values as defined in the workspace [Product items] and [Order items]. However, you can use custom values for each ticket item used in a product and order form. A ticket item can be placed in one or more views. The custom values are valid only in the selected view for the selected product. The views indicate what is visible for the operator and the owner of the job.

The views

System view	
[Web shop]	This view displays the ticket items of the product and order form that must be visible for the customer of the web shop. The view [Web shop] is selected by default in pane [Detailed product settings].
[Print room]	This view displays the ticket items of the product and order form that must be visible for the operator in the print shop. The operator needs all ticket items available to the customers and some extra items. You can, for example, add an item 'IntakeOperator' in this view. The name of the operator can be entered in this item when the print job is finished. The item is only visible in the [Print room] and will not be displayed in the [Web shop].
[Print ticket for web shop]	The customer can print a ticket in the web shop. This view displays which ticket items are printed on the ticket.
[Print ticket for print room]	The operator can print a ticket in the print shop. This view displays which ticket items are printed on the ticket.

Add an item to a view

Introduction

You can use the ticket items available in workspace [Product items] to define a product. A ticket item can be placed in one or more views. The views indicate what is visible for the operator and for the customer of the web shop.

You can use groups to sort ticket items together in a view. Define to which group or subgroup each ticket item belongs. You can always change the group or subgroup afterwards.

Procedure

1. Select the workspace [Products].
2. Select one of the available views.
   The view [Web shop] is selected by default in pane [Detailed product settings].
3. Select the item in the [Job ticket items and predefined views] section.
4. Drag the item from the items list to the exact position in the view.
   When you drop the item in a group or subgroup, the item is added at the exact position where the item was dropped. To change the position of the item (within a group or subgroup) drag the item to the new position (in a group or subgroup).
5. You can use a predefined group of items in the view. For example, you can drop the group [Cost estimation] in the view to add all ticket items related to the cost estimation workflow. Drag [Add group] into the view to create a custom group.
6. Click the [Save] icon in the tab of workspace [Product & order editor] or [Web shop editor].
   Saving could take some time. The status bar indicates the progress.

Remove an item from a view

Introduction

You can remove ticket items from a specific view.

Procedure

1. To remove an item from a view, select the specific view, select the item in the view in the right-hand section.
2. Click the delete button.
   If you want to remove the item from multiple views, repeat the procedure for every view.

NOTE
If you remove a group or a subgroup from a view, all items in that group or subgroup are removed from the view too.

NOTE
The item is still available in the ticket definition.

3. Click the [Save] icon in the tab of workspace [Product & order editor] or [Web shop editor].
   Saving could take some time. The status bar indicates the progress.

Edit an item in a view

Introduction

The ticket items use the item values as defined in the workspace [Product items]. However, you can use custom values for each ticket item used in a product. A ticket item can be placed in one or more views. The custom values are valid only in the selected view for the selected product. The views indicate what is visible for the operator and the owner of the job.

Procedure

1. Select one of the available views.
   The view [Web shop] is selected by default in pane [Detailed product settings].
2. Select the item and click the edit icon.
   The edit dialog opens.
3. Enable the [Use custom value] option to enable section [Configuration]. You can define custom values for the item in section [Configuration]. The custom values cannot exceed the item values as defined in the workspace [Product items]. You can only use a subset of these values. For example, if the job ticket item has a maximum value of 5, the setting at product level must be 5 or lower.

NOTE
It is recommended that you assign a neutral default value to the item: None, No, 0, False, [empty string].

4. Define the [Captions]. The caption is the displayed name of the item.
   You can use the characters: 'a. - z.', 'A. - Z.', '0. - 9.', '_' . Spaces are allowed for the caption.
   The default language for the item is displayed in the top of section [Captions]. You can define a caption for each language. See procedure *Manage the languages* on page 22 if you want to add or remove a language for an item.
5. Define the tooltip for the item.
   You can define the tooltip in the text field on the right. The text field for the tooltip is colored yellow.
   You can define a tooltip for each language.
6. [Custom settings]
   Define the permission to the item value of the ticket item:

Item	Description
[Value is read-only]	The user cannot change the value of the item.
[Value is editable]	The user can change the value of the item.
[Value is editable and required]	The user must define the value of the item, otherwise the job cannot be processed.
[Store value of job ticket item]	Enable this option to store the submitted value of the item. The submitted value is stored per view per user. For example: The operator defines 30 minutes for item [Time to finish job]. Next time the operator starts to process a job, value '30 minutes' is filled in automatically for item [Time to finish job].

7. Click [OK].
   The custom values are defined for the selected view for the selected product.

Change the order of items in the ticket

Introduction

You can change the order of items in the ticket in two ways:

Procedure

1. Select the view [Print ticket for web shop] or [Print ticket for print room].
2. Change the group or subgroup the item belongs to.
   When you add an item to a view, you specify the group or subgroup the item belongs to. The use of groups allows you to sort related items together in the job ticket. You can select the item and drag the item to the new group or subgroup in the groups view. The item is added where you drop it. You can change the exact position of the item within the group or subgroup afterwards.
3. Change the order of an item in a group or a subgroup
   Select the item and drag the item to the new position in the group or subgroup.

Chapter 4
Products

Sort the products

Introduction

You can sort the list of products.

Procedure

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

Create a new product

Introduction

You can create and configure new products. For each product, you must define the product type. The workspace [Products] shows all available products.

Procedure

1. Select the workspace [Products].
2. Click [New product].
3. Select the product type.
   You cannot change the product type after you selected a product type.

Product type	Description
[Document with binding]	A product where you can add some settings that can be visible in a previewer in the Web Submission and the Operator Console. There are constraints for certain settings to the document. For example, the [Folding] setting is not allowed for a document with binding.
[Flyer]	A product where you can add some settings that can be visible in a previewer in the Web Submission and the Operator Console. There are constraints for certain settings to the document. For example, the [Binding] setting is not allowed for a flyer.
[Business cards]	A product that allows a user to order business cards. There are constraints for certain settings to the document. For example, the [Binding] setting is not allowed for a flyer.
[Generic]	A product with no constraints and no visualization of the settings. A default generic product is available. The default generic product is used to create new jobs, import PRISMAdirect v 1.2 jobs created with the generic product, or import jobs created with a product that no longer exists.
[Stationery]	A product that allows a user to order a stationery product. For example: a USB stick. The product is not printable. You can add some settings. For example: memory size for USB sticks.
[Group of products]	A product that you can use to group a number of already defined products.

4. Continue with *Edit a product* on page 34.

Edit a product

Edit a product: [Document with binding], [Flyer]

Introduction

This section applies to products of product type [Document with binding] and [Flyer]. You can use [VDP data] in these products.

The product [VDP (default)] is available in the [Product & order editor] only. This product is used only to support jobs that have been created with a VDP product that does not exist anymore. A VDP product is a product that contains [VDP data]. You cannot set another VDP product as the default VDP product.

NOTE
The VDP functionality is available under license.

Procedure

1. Select the workspace [Products] and select the product that you want to edit from the list of products.
   - Click the pane [General product settings] to edit the general product settings.
   - Click the pane [Detailed product settings] to edit the detailed product settings and the views.

   This step is only needed when you edit an existing product. In case of creating a new product, the following steps occur in the given order.
2. Define the product name. You can use the characters: 'a. - z.', 'A. - Z.', '0. - 9.', '_' . Spaces are not allowed. The name must be unique.
   You cannot change the product name after you create the product.
3. Define the caption and give some information about this product. The caption is the displayed name of the product. The information is displayed to the user.
   Define the image for this product. If the image path is empty, the custom image of the product is used. Select a color for the product.
4. Click the pane [Detailed product settings] to edit the detailed product settings and the views.
   The view [Web shop] is selected by default in pane [Detailed product settings].
   - [Web shop]
     Define the product for the web shop. You can configure which files the customer can add. You can also configure the job settings and the price estimation formula.
     Click the icon directly next to [Web shop] to copy its items and settings to the product for the print room.
   - [Print room]
     Define the product for the print room. You can configure the job settings and the quotation formula. You can also configure the automation templates.
   - [Print ticket for web shop]
     Define the print ticket for the web shop.
   - [Print ticket for print room]
     Define the print ticket for the print room.
5. The [Automation templates] section:
   You can drag and drop available automation templates to the active automation templates. Drag each automation templates up or down to put them in the correct order.
   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.

The application of a template can fail. The automation template cannot be applied to the job partially or completely. An error is reported on job level in section [Automatic document preparation]. However, no errors are reported to the print room operator when you enable option [Ignore errors].

6. The [Files] section:

Options	Description
[File source]	Enable one or more file sources. The user can select files from the file sources. For example: Select [File hosting service] to allow users to select files from file hosting providers like Dropbox.
[Fixed document]	Assign a fixed document to the product. For example: a biology book. You can select a document from the file system or from the archive. The user cannot remove the document nor can the user add other files to the job. The operator can page program the fixed document. The operator can remove the fixed document and can add other files to the job when you enable the [Allow the operator to change the files of jobs] option. You can enable the [Allow the operator to change the files of jobs] option in workspace [Configuration]. Define the preview of the fixed document for the Web Submission user. • [Complete document] The preview shows the complete document. • 10% of the document The preview shows the first 10% of the pages of the document with a maximum of 10 pages. • [Number of pages] The preview shows the entered number of pages of the document. A watermark is applied to the pages of the document in the [Preview].

Options	Description
[VDP data]	Select the [VDP document]. • [File source] Enable one or more file sources. The user can select a VDP document from the file sources. • [Fixed document] Assign a fixed VDP document to the product. You can select a VDP document from the file system. The user cannot remove the VDP document. The operator can page program the VDP document. The operator can remove the fixed VDP document and can add other files to the job when you enable the [Allow the operator to change the files of jobs] option. You can enable the [Allow the operator to change the files of jobs] option in workspace [Configuration]. NOTE The document must contain VDP data, else the document cannot be added to the product.
	Select the [Data source]. • [File source] Enable one or more file sources. The user can select a data source from the file sources. • [Define info] The dialog contains the required structure of the data source after a VDP document is added to the product. You can add additional information. The information in this dialogue is available for the user and the operator. The [Define info] option is not available when you select the [Manual input] option. • [Manual input] The dialog displays the required structure of the data source 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.

NOTE
The VDP functionality is available under license.

7. The [Layout] section:
Select the output settings of the product. Select the ticket items that are available for the user. A number of items have a checkbox in the top left corner. Use the checkbox of the items to enable or disable the items. When you enable an item, the item is visible for the user.
   1. Drag the ticket item or the group to the [Layout] pane or the [Fixed layout settings] pane. Click an item to edit the item.
   The [Layout] pane contains settings that are visible for the user. The user can select a value for these items. Only those visual ticket items are allowed that are valid for the type of product. By default, each product has some visual ticket items in this pane that are not editable in the [Product & order editor]. These settings define the product. For example, the [Binding] option is set to none for a flyer. These settings cannot be changed or deleted. Visual ticket items and choice items are allowed in this pane, but not more than 14 items. Visual ticket items have effect on the preview. For example, if media is set to green then the media is displayed as green in the preview. The choice items do not affect the preview. You can add

non-visual and non-choice items to the [More ticket items] section. Click [More ticket items] to add or delete an item from section [More ticket items].
The [Fixed layout settings] pane contains items which define the layout. You can define the value for each item only in the product. The value cannot be change by a user or operator. The items in this pane are not visible for the user or the operator.
For example, the [Layout] pane contains option [Binding]. The [Fixed layout settings] pane contains the [Orientation and binding edge] option with its value set to [Landscape, top edge binding]. The product will always generate a landscape document with top edge binding. The user can only select a value for the [Binding] option, for example [Wire-O-Bind].

NOTE
Settings that are present in the [Fixed layout settings] pane cannot be dragged to the [Layout] pane.

8. The [Remarks] section:
   Allow the user to enter remarks for the print room operator.
9. The [Price settings] section:
   Select the [Price estimation formula] and the [Quotation formula] for the product.
   The jobs created with this product will use the selected formulas. The formulas in the product overrule the formulas assigned to the user in workspace [Configuration].
   You can select the formula [Default price settings] for the product. Then, the created jobs will use the settings and formulas as defined in the dialog [Price settings] in the workspace [Configuration].

NOTE
You must enable the [Price estimation formula] option and the [Quotation formula] option in the workspace [Configuration] for the concerning users and user groups.

10. Click the [Save] icon in the tab of workspace [Product & order editor] or [Web shop editor].
    Saving could take some time. The status bar indicates the progress.

Edit a product: [Business cards]

Introduction

This section applies to products of product type [Business cards]. You can use [VDP data] in this product.

The product [VDP (default)] is available in the [Product & order editor] only. This product is used only to support jobs that have been created with a VDP product that does not exist anymore. A VDP product is a product that contains [VDP data]. If required, any jobs created with a product of type [Business cards] are supported by the [VDP (default)] product. You cannot set another VDP product as the default VDP product.

NOTE
The VDP functionality is available under license.

Procedure

1. Select the workspace [Products] and select the product that you want to edit from the list of products.
   - Click the pane [General product settings] to edit the general product settings.
   - Click the pane [Detailed product settings] to edit the detailed product settings and the views.

   This step is only needed when you edit an existing product. In case of creating a new product, the following steps occur in the given order.
2. Define the product name. You can use the characters: 'a. - z.', 'A. - Z.', '0. - 9.', '_' . Spaces are not allowed. The name must be unique.
   You cannot change the product name after you create the product.
3. Define the caption and give some information about this product. The caption is the displayed name of the product. The information is displayed to the user.
   Define the image for this product. If the image path is empty, the custom image of the product is used. Select a color for the product.
4. Click the pane [Detailed product settings] to edit the detailed product settings and the views.
   The view [Web shop] is selected by default in pane [Detailed product settings].
   - [Web shop]
     Define the product for the web shop. You can configure which files the customer can add. You can also configure the job settings and the price estimation formula.
     Click the icon directly next to [Web shop] to copy its items and settings to the product for the print room.
   - [Print room]
     Define the product for the print room. You can configure the job settings and the quotation formula. You can also configure the automation templates.
   - [Print ticket for web shop]
     Define the print ticket for the web shop.
   - [Print ticket for print room]
     Define the print ticket for the print room.
5. The [Automation templates] section:
   You can drag and drop available automation templates to the active automation templates. Drag each automation templates up or down to put them in the correct order.
   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.
   The application of a template can fail. The automation template cannot be applied to the job partially or completely. An error is reported on job level in section [Automatic document preparation]. However, no errors are reported to the print room operator when you enable the [Ignore errors] option.

6. The [Files] section:
   Select the [VDP document].

NOTE
The document must contain VDP data, else the document cannot be added to the product.

Select the [Data source].
- [File source]
  Enable one or more file sources. The user can select files from the file sources.
  For example: Select [File hosting service] to allow users to select files from file hosting providers like Dropbox.
- [Define info]
  The dialog contains the required structure of the data source after a VDP document is added to the product. You can add additional information. The information in this dialogue is available for the user and the operator.
  The [Define info] option is not available when you select the [Manual input] option.
- [Manual input]
  The dialog displays the required structure of the data source 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.

NOTE
The VDP functionality is available under license.

7. The [Layout] section:
   Select the output settings of the product. Select the ticket items that are available for the user. A number of items have a checkbox in the top left corner. Use the checkbox of the items to enable or disable the items. When you enable an item, the item is visible for the user.
   1. Drag the ticket item or the group to the [Layout] pane or the [Fixed layout settings] pane. Click an item to edit the item.
      The [Layout] pane contains settings that are visible for the user. The user can select a value for these items. Only those visual ticket items are allowed that are valid for the type of product. By default, each product has some visual ticket items in this pane that are not editable in the [Product & order editor]. These settings define the product. For example, the [Binding] option is set to none for a flyer. These settings cannot be changed or deleted. Visual ticket items and choice items are allowed in this pane, but not more than 14 items. Visual ticket items have effect on the preview. For example, if media is set to green then the media is displayed as green in the preview. The choice items do not affect the preview. You can add non-visual and non-choice items to the [More ticket items] section. Click [More ticket items] to add or delete an item from section [More ticket items].
      The [Fixed layout settings] pane contains items which define the layout. You can define the value for each item only in the product. The value cannot be change by a user or operator. The items in this pane are not visible for the user or the operator.
      For example, the [Layout] pane contains option [Binding]. The [Fixed layout settings] pane contains the [Orientation and binding edge] option with its value set to [Landscape, top edge binding]. The product will always generate a landscape document with top edge binding. The user can only select a value for the [Binding] option, for example [Wire-O-Bind].

NOTE
Settings that are present in the [Fixed layout settings] pane cannot be dragged to the [Layout] pane.

Define the number of business cards in the VDP document in item [Business cards per set]. This item is read-only for the user. 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 number of business cards printed for each row of the data source is: [Business cards per set] * [Sets per row].

8. The [Remarks] section:
   Allow the user to enter remarks for the print room operator.
9. The [Price settings] section:
   Select the [Price estimation formula] and the [Quotation formula] for the product.
   The jobs created with this product will use the selected formulas. The formulas in the product overrule the formulas assigned to the user in workspace [Configuration].
   You can select the formula [Default price settings] for the product. Then, the created jobs will use the settings and formulas as defined in the dialog [Price settings] in the workspace [Configuration].

NOTE
You must enable the [Price estimation formula] option and the [Quotation formula] option in the workspace [Configuration] for the concerning users and user groups.

10. Click the [Save] icon in the tab of workspace [Product & order editor] or [Web shop editor].
    Saving could take some time. The status bar indicates the progress.

Edit a product: [Generic]

Introduction

This section applies to products of product type [Generic]. You can use [VDP data] in this product.

The product [VDP (default)] is available in the [Product & order editor] only. This product is used only to support jobs that have been created with a VDP product that does not exist anymore. A VDP product is a product that contains [VDP data]. You cannot set another VDP product as the default VDP product.

NOTE
The VDP functionality is available under license.

Procedure

1. Select the workspace [Products] and select the product that you want to edit from the list of products.
   - Click the pane [General product settings] to edit the general product settings.
   - Click the pane [Detailed product settings] to edit the detailed product settings and the views.

   This step is only needed when you edit an existing product. In case of creating a new product, the following steps occur in the given order.
2. Define the product name. You can use the characters: 'a. - z.', 'A. - Z.', '0. - 9.', '_' . Spaces are not allowed. The name must be unique.
   You cannot change the product name after you create the product.
3. Define the caption and give some information about this product. The caption is the displayed name of the product. The information is displayed to the user.
   Define the image for this product. If the image path is empty, the custom image of the product is used. Select a color for the product.
4. Click the pane [Detailed product settings] to edit the detailed product settings and the views.
   The view [Web shop] is selected by default in pane [Detailed product settings].
   - [Web shop]
     Define the product for the web shop. You can configure which files the customer can add. You can also configure the job settings and the price estimation formula.
     Click the icon directly next to [Web shop] to copy its items and settings to the product for the print room.
   - [Print room]
     Define the product for the print room. You can configure the job settings and the quotation formula. You can also configure the automation templates.
   - [Print ticket for web shop]
     Define the print ticket for the web shop.
   - [Print ticket for print room]
     Define the print ticket for the print room.
5. The [Automation templates] section:
   You can drag and drop available automation templates to the active automation templates. Drag each automation templates up or down to put them in the correct order.
   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.
   The application of a template can fail. The automation template cannot be applied to the job partially or completely. An error is reported on job level in section [Automatic document preparation]. However, no errors are reported to the print room operator when you enable the [Ignore errors]option.
6. The [Files] section:

Options	Description
[File source]	Enable one or more file sources. The user can select files from the file sources. For example: Select [File hosting service] to allow users to select files from file hosting providers like Dropbox.
[Fixed document]	Assign a fixed document to the product. For example: a biology book. You can select a document from the file system or from the archive. The user cannot remove the document nor can the user add other files to the job. The operator can page program the fixed document. The operator can remove the fixed document and can add other files to the job when you enable the [Allow the operator to change the files of jobs] option. You can enable the [Allow the operator to change the files of jobs] option in workspace [Configuration]. Define the preview of the fixed document for the Web Submission user. • [Complete document] The preview shows the complete document. • 10% of the document The preview shows the first 10% of the pages of the document with a maximum of 10 pages. • [Number of pages] The preview shows the entered number of pages of the document. A watermark is applied to the pages of the document in the [Preview].

Options	Description
[VDP data]	Select the [VDP document]. • [File source] Enable one or more file sources. The user can select a VDP document from the file sources. • [Fixed document] Assign a fixed VDP document to the product. You can select a VDP document from the file system. The user cannot remove the VDP document. The operator can page program the VDP document. The operator can remove the fixed VDP document and can add other files to the job when you enable the [Allow the operator to change the files of jobs] option. You can enable the [Allow the operator to change the files of jobs] option in workspace [Configuration]. NOTE The document must contain VDP data, else the document cannot be added to the product.
	Select the [Data source]. • [File source] Enable one or more file sources. The user can select a data source from the file sources. • [Define info] The dialog contains the required structure of the data source after a VDP document is added to the product. You can add additional information. The information in this dialogue is available for the user and the operator. The [Define info] option is not available when you select the [Manual input] option. • [Manual input] The dialog displays the required structure of the data source 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.

NOTE
The VDP functionality is available under license.

7. The [Layout] section:
   Select the output settings of the product. Select the ticket items that are available for the user.
   1. Drag the ticket item or the group to the [Layout]. Click an item to edit the item.
8. The [Remarks] section:
   Allow the user to enter remarks for the print room operator.
9. The [Price settings] section:
   Select the [Price estimation formula] and the [Quotation formula] for the product.
   The jobs created with this product will use the selected formulas. The formulas in the product overrule the formulas assigned to the user in workspace [Configuration].
   You can select the formula [Default price settings] for the product. Then, the created jobs will use the settings and formulas as defined in the dialog [Price settings] in the workspace [Configuration].

NOTE
You must enable the [Price estimation formula] option and the [Quotation formula] option in the workspace [Configuration] for the concerning users and user groups.

10. Click the [Save] icon in the tab of workspace [Product & order editor] or [Web shop editor]. Saving could take some time. The status bar indicates the progress.

Default generic product

Introduction

You can set any product of type Generic as default generic product.

Characteristics of the default generic product

- Each definition must have a default generic product.
- The default generic product is available in the Web Submission.
- The default generic product is used to import PRISMAdirect jobs, that were created with a product that does not exist anymore.
- The default generic product is used to open jobs, that were created with a product that does not exist anymore. The jobs open in the Web Submission and [Order processing].
- Jobs created with the Microsoft® Outlook® plugin use the default generic product.

Edit a product: [Stationery]

Introduction

This section applies to products of product type [Stationery].

The product [Stationery (default)] is available in the [Product & order editor] only. This product is used only to support jobs that have been created with a product of type "Stationery" that no longer exists. You cannot set another "Stationery" type product as the default stationery product.

Procedure

1. Select the workspace [Products] and select the product that you want to edit from the list of products.
   - Click the pane [General product settings] to edit the general product settings.
   - Click the pane [Detailed product settings] to edit the detailed product settings and the views.

   This step is only needed when you edit an existing product. In case of creating a new product, the following steps occur in the given order.
2. Define the product name. You can use the characters: 'a. - z.', 'A. - Z.', '0. - 9.', '_' . Spaces are not allowed. The name must be unique.
   You cannot change the product name after you create the product.
3. Define the caption and give some information about this product. The caption is the displayed name of the product. The information is displayed to the user.
   Define the image for this product. If the image path is empty, the custom image of the product is used. Select a color for the product.
4. Click the pane [Detailed product settings] to edit the detailed product settings and the views.
   The view [Web shop] is selected by default in pane [Detailed product settings].
   - [Web shop]
     Define the product for the web shop. You can configure which files the customer can add. You can also configure the job settings and the price estimation formula.
     Click the icon directly next to [Web shop] to copy its items and settings to the product for the print room.
   - [Print room]
     Define the product for the print room. You can configure the job settings and the quotation formula. You cannot configure the automation templates for a product of product type [Stationery].
   - [Print ticket for web shop]
     Define the print ticket for the web shop.
   - [Print ticket for print room]
     Define the print ticket for the print room.
5. The [Layout] section:
   Select the output settings of the product. Select the ticket items that are available for the user. A number of items have a checkbox in the top left corner. Use the checkbox of the items to enable or disable the items. When you enable an item, the item is visible for the user.
   1. Drag the ticket item or the group to the [Layout] pane or the [Fixed layout settings] pane. Click an item to edit the item.
      The [Layout] pane contains settings that are visible for the user. The user can select a value for these items. Only those visual ticket items are allowed that are valid for the type of product. By default, each product has some visual ticket items in this pane that are not editable in the [Product & order editor]. These settings define the product. For example, the [Binding] option is set to none for a flyer. These settings cannot be changed or deleted. Visual ticket items and choice items are allowed in this pane, but not more than 14 items. Visual ticket items have effect on the preview. For example, if media is set to green then the media is

displayed as green in the preview. The choice items do not affect the preview. You can add non-visual and non-choice items to the [More ticket items] section. Click [More ticket items] to add or delete an item from section [More ticket items].
The [Fixed layout settings] pane contains items which define the layout. You can define the value for each item only in the product. The value cannot be change by a user or operator. The items in this pane are not visible for the user or the operator.
For example, the [Layout] pane contains option [Binding]. The [Fixed layout settings] pane contains the [Orientation and binding edge] option with its value set to [Landscape, top edge binding]. The product will always generate a landscape document with top edge binding. The user can only select a value for the [Binding] option, for example [Wire-O-Bind].

NOTE
Settings that are present in the [Fixed layout settings] pane cannot be dragged to the [Layout] pane.

For a stationery product, you or the user can define the [Quantity].

2. Browse to an image for the [Stationery] product. The image is used in the preview.

6. The [Remarks] section:
Allow the user to enter remarks for the print room operator.
7. The [Price settings] section:
Select the [Price estimation formula] and the [Quotation formula] for the product.
The jobs created with this product will use the selected formulas. The formulas in the product overrule the formulas assigned to the user in workspace [Configuration].
You can select the formula [Default price settings] for the product. Then, the created jobs will use the settings and formulas as defined in the dialog [Price settings] in the workspace [Configuration].

NOTE
You must enable the [Price estimation formula] option and the [Quotation formula] option in the workspace [Configuration] for the concerning users and user groups.

8. Click the [Save] icon in the tab of workspace [Product & order editor] or [Web shop editor].
Saving could take some time. The status bar indicates the progress.

Edit a product: [Group of products]

Introduction

This section applies to products of product type [Group of products].

Before you begin

One or more products are created.

Procedure

1. Select the workspace [Products] and select the product that you want to edit from the list of products.
   This step is only needed when you edit an existing product. In case of creating a new product, the following steps occur in the given order.
2. Define the product name. You can use the characters: 'a. - z.', 'A. - Z.', '0. - 9.', '_' . Spaces are not allowed. The name must be unique.
   You cannot change the product name after you create the product.
3. Define the caption and give some information about this product. The caption is the displayed name of the product. The information is displayed to the user.
   Define the image for this product. If the image path is empty, the custom image of the product is used. Select a color for the product.
4. Drag the products that are part of the group into the yellow pane.

NOTE
A product of the type [Group of products] cannot be part of another product of type [Group of products].

5. Click the [Save] icon in the tab of workspace [Product & order editor] or [Web shop editor].
   Saving could take some time. The status bar indicates the progress.

Copy a product

Introduction

You can create a new product by making a copy of an existing product.

Procedure

1. Select the product.
2. Click the [Copy product] icon.
3. Define the caption. The caption is the displayed name of the product. The information is displayed to the user.
   You cannot change the product type.
4. Click [Save].
   A new product is created.
5. Edit the caption and other settings if needed.
   See *Edit a product* on page 34.

Delete a product

Procedure

1. Select the product.
2. Click the [Delete] icon.
   If the product is added to one or more shop windows, you must confirm that you want to delete this product. Then the product will be removed from the shop windows too.

NOTE
It is not possible to delete the default generic product.

NOTE
The product is not deleted from orders that are present in the Web Submission.

Print the ticket of a product

Introduction

When you print the ticket of a product, the default values are printed. Use the ticket, for example, to check the defaults.

Procedure

1. Select the product.
2. Select the [Detailed product settings].
3. Select the view [Print ticket for web shop] or [Print ticket for print room].
4. Click [Print ticket].
5. Select the printer.
6. Click [OK].

Overview of the used ticket items

Introduction

You can select the output settings for each product. You can select the ticket items that are available for the user. The pane [Overview] offers you an overview of the used ticket items in the product and the print ticket.

Procedure

1. Select the workspace [Products] and select the product that you want to edit from the list of products.
2. Click the pane [Overview] for an overview of the used ticket items in the product and the print ticket.
3. To add or delete ticket items from the product and the print ticket, do:
   - Click the pane [General product settings] to edit the general product settings.
   - Click the pane [Detailed product settings] to edit the detailed product settings and the views.

Chapter 5
Order form

Create the order form

Introduction

You can use the ticket items available in workspace [Product items] to define a product. You can use the ticket items available in workspace [Order items] to define an order form. The ticket items use the item values as defined in the workspace [Product items] and [Order items]. However, you can use custom values for each ticket item used in a product and order form. A ticket item can be placed in one or more views. The custom values are valid only in the selected view for the selected product. The views indicate what is visible for the operator and the owner of the job.

Procedure

1. Select the workspace [Order view].
2. Select one of the available views.
   The view [Web shop] is selected by default in pane [Detailed product settings].
3. Select the item in the [Job ticket items and predefined views] section.
4. Drag the item from the items list to the exact position in the view.
   When you drop the item in a group or subgroup, the item is added at the exact position where the item was dropped. To change the position of the item (within a group or subgroup) drag the item to the new position (in a group or subgroup).
5. You can use a pre-defined group of items in the view. For example, you can drop the group [Cost estimation] in the view to add all ticket items related to the cost estimation workflow. Drag [Add group] into the view to create a custom group.
6. Click the [Save] icon in the tab of workspace [Product & order editor] or [Web shop editor].
   Saving could take some time. The status bar indicates the progress.

Chapter 6
Manage items, products and order form

Save the changes to the server

Introduction

When a ticket item, product or order form is updated, it must be saved. When an item is saved, the definition on the server is updated. All existing jobs on the server are updated according to the new definition. Also the Accounting tables are updated according to the new definition.

Procedure

1. Click the [Save] icon in the tab of workspace [Product & order editor] or [Web shop editor]. Saving could take some time. The status bar indicates the progress.

NOTE
The VDP functionality is available under license. Any VDP products are removed from the product groups and product catalogs when:
- You do not have a license that supports the VDP functionality.

Export the items, products and order form

Introduction

You can export all items in the workspaces [Product items], [Products], [Order items] and the [Order view]. The products can contain a [VDP document] or a [Fixed document]. These files are exported as well. You can use the export file as a backup file for the current configuration of the [Product & order editor].

Procedure

1. Click [Options] - [Export].
   The [Export] dialog opens.
2. Browse to the location where you want to save the file.
3. Enter a file name and click [Save].
4. Click [OK].
   The current configuration is saved to disk.

NOTE
The current configuration is saved to disk as a ZIP-file.

Import the items, products and order form

Introduction

You can import a configuration of the [Product & order editor].

You can import all items for the workspaces [Product items], [Products], [Order items] and the [Order view]. The products can contain a [Fixed document], or a [VDP document] with [Data source]. These files are available after import as well.

Procedure

1. Click [Options] - [Import].
   The [Import] dialog opens.
2. Click the browse button for the [Path to job ticket definition file:] option.
3. Browse to the configuration file. The configuration file is a ZIP-file.
4. Click [Open].
5. Click [OK].
   The items, products and order form are imported from the configuration file.

Chapter 7
The media catalog

Import the media catalog of PRISMAprepare

Introduction

You can import the media catalog of PRISMAprepare directly into the workspace [Product & order editor].

The media catalog file must have the format 'PRISMAprepare file'. See the help file of PRISMAprepare.

Procedure

1. Click [Options] - [Import media catalog].
2. Browse to the media catalog file.
   The media catalog file is an XML file.
   The XML file must have the format 'PRISMAprepare file'. See the help file of PRISMAprepare.
3. Click [Open].
   The media catalog file is imported.
   The media is available for the ticket items: 'NewCoverMedia' and 'Media'.

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