Canon

PRISMAdirect

Administration guide

Configuration

PRISMA direct

PRISMA

Copyright and Trademarks

Copyright

Language

Original instructions are in English.

Trademarks

Edition 2024-04

Software version 2.0.0

EN

Data security

Introduction

Security is about safeguarding communication and data and keeping our online society and economy secure. It is critical for our customer's business and we take it seriously at Canon Production Printing. Security is incorporated in the early stages of our product development process. Our hardware and software products are developed according to industry security standard working methods, and equipped with the required features to protect our printing products and PRISMA workflow and application software against cyber security threats.

Policy / Guidelines / Rules

Canon's Secure Development Life Cycle (SDLC) process is an agile based development process that also models itself comparing with the National Institute of Standards and Technology (NIST) and Open Web Application Security Project (aka OWASP).

It uses the practice of sprints to take advantage of the continuous delivery and flexibility that an agile process enables.

Our back office support program (development of service tools and online services) is ISO/IEC 27001:2013 certified.

Regulation notices

For more detailed information on the security of our products, services and solutions please refer to your local Canon representative or to *https://cpp.canon/security* .

Contents

Chapter 1

Start using the application

Software version

This documentation describes the functionality of PRISMAdirect v2.0.0.

Documentation

- The manuals available in the product might not contain the most recent help information. The latest manuals are available on *http://downloads.cpp.canon*
- The help files are available online

[Login]

Depending on the active options at the time of account creation, you may have to change your password at the first login.

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

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

Manage your profile

When you log on for the first time, the [Edit profile] dialog will appear. You must define your profile settings before you can continue. The email address is mandatory. Depending on the active options at the time of account creation, you may have to change your password at the first login.

The profile data of users can be stored on an LDAP server. For these users, the profile settings are automatically filled in with profile data from the LDAP server. These users cannot change their profile settings.

1. Click the pencil icon to edit your profile settings. The icon appears when you hover the mouse pointer over your username in the top-right corner of the workspace.
2. Change your profile.
3. Click [Save].

Add, edit or delete

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 2
Procedures

Introduction

This chapter contains complete procedures for configuring PRISMAdirect. Each procedure describes the configuration of a workflow that must be configured in two or more dialogs. For example, you have to configure the payment workflow in several dialogs.

The other chapters in this document describe the configuration of each separate dialog of PRISMAdirect.

Configure the workflow for wide format printing

Introduction

You can create a connection to ONYX to enable printing on a wide format printer.

This topic describes the complete configuration of the workflow for wide format printing.

You have to create a connection to ONYX in the [Configuration] workspace:

1. **Create a connection to ONYX**
   You have to create at least one connection to ONYX. You can create connections to ONYX Thrive and ONYX Hub.
   When you have created a connection to ONYX:
   - The wide format printer with name [ONYX printer] becomes available in the [Order processing] console.
   - The media catalog containing wide format media becomes available for import in the [Product and order editor] workspace.

You have to import the ONYX media catalog and you have to configure the wide format product in the [Product and order editor] workspace:

1. **Import the ONYX media catalog**
   The ONYX media catalog contains the available media for wide format printing. The wide format media is imported into ticket item [Wide format media]. You cannot edit the wide format media in ticket item [Wide format media].
   Each entry in the media catalog defines one valid combination of the media, the media print mode, and the printer which will be used to print an order.
2. **Configure the wide format product**
   You can only use a wide format product for wide format printing via ONYX.

Create a connection to ONYX

1. In the [Configuration] workspace, click [System]→[Connectivity]→[ONYX settings].
2. Click [New connection].
3. Type a name for the connection to ONYX.
4. Type the Fully Qualified Domain Name (FQDN) of the computer where you have installed ONYX Thrive or ONYX Hub. For example: myserver.mydomain.net:port.
5. Select the ONYX application which is installed on the computer specified in option [URL].
6. Click [Save].

Import the ONYX media catalog

1. Open the [Product and order editor] and click [Options]. The drop-down list [Options] is available in the top right of the [Product and order editor] workspace.
2. Select [Import ONYX media catalog].
3. Select from which connection you want to import the wide format media.
4. Click [OK].
5. The wide format media is imported into ticket item [Wide format media]. Click [Product items] to view ticket item [Wide format media].
6. Click the [Publish] icon in the tab of workspace [Product and order editor].
   Publishing the changes to the PRISMAdirect server could take some time. The status bar indicates the progress.

Configure the wide format product

Configure the existing [Wide format] product or create a new [Wide format] product in the [Product and order editor].

Configure the payment workflow

Introduction

The payment providers offer a payment service for your customers. When you select one or more payment providers, each customer can pay for their orders directly.

This topic describes the complete configuration of the payment workflow.

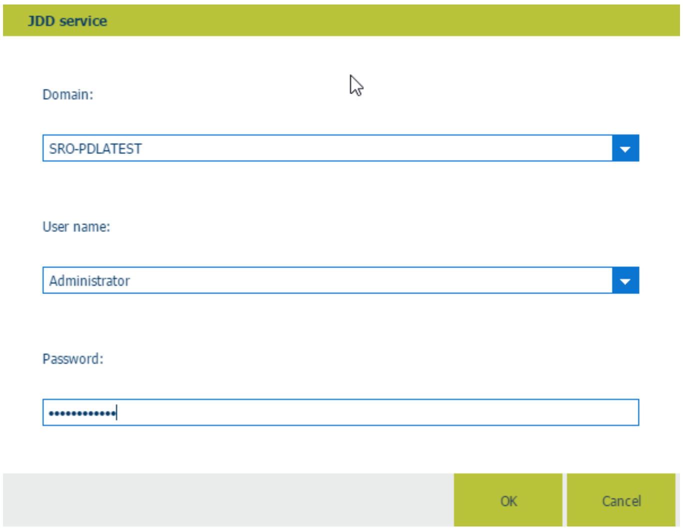
You have to configure the payment settings in the [Configuration] workflow:
1. **Check that the JDD service user has Internet access**
   The JDD service user is the user that runs the "Print Job Data Dispatcher" service. The user must have Internet access.
2. **Select the payment providers for PRISMAdirect**
   You can select which payment providers are available for PRISMAdirect.
   Configure the authentication to the SQL server instance. PRISMAdirect creates a payment report per payment provider on the SQL server when the authentication is correct.
   The payment report is stored in the accounting database on the SQL server. You do not have to enable the accounting functionality to create and access the payment report. The accounting functionality and the payment report can be enabled independently.
3. **Configure the payment providers per web server**
   You have to configure the payment providers for each web server once the payment service is enabled for PRISMAdirect.
4. **Enable payment per web shop**
   You have to enable the payment service for each web shop where you want to offer the payment service.
5. **Optionally, you can customize the payment settings per user group**
   You can customize the payment settings for each user group. The custom settings overrule the web shop settings for the concerning user group. The custom settings are used in all web shops for the corresponding user group.

Check that the JDD service user has Internet access

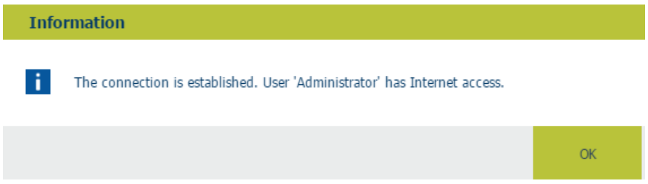
The JDD service user is the user that runs the "Print Job Data Dispatcher" service. It is recommended that you change the user only when:
1. The user has a local system account. And
2. You want to use the file hosting services and/or the payment providers. The user must have Internet access.

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

1. Click [System] - [Services settings] - [Advanced infrastructure].
2. The read-only text box displays the current JDD service user. Click [Test connection] to test if the user has Internet access.
   You can change the user:
   1. Click the [Change] button.
   2. Select the domain and user name. For example, you can select the user that runs the services of PRISMAdirect. The user must have Internet access if you want to use the file hosting services and/or the payment providers.
      Type the password. Letters in passwords must be typed using the correct case.



3. Click button [OK] and click [Test connection] to test if the user has Internet access.

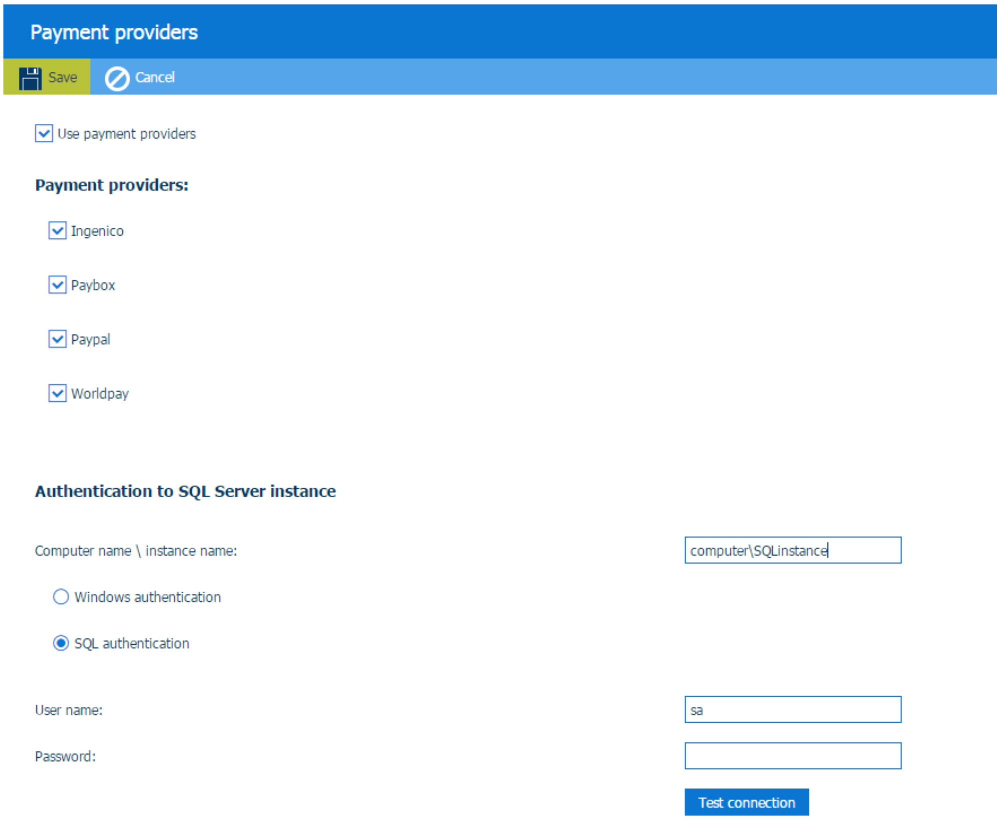


4. Click [OK].

3. Click [Save].

Select the payment providers for PRISMAdirect

1. Click [System] - [Connectivity] - [Payment providers].
2. Enable option [Use payment providers] to enable payment for PRISMAdirect.
3. Select which payment providers will be available for PRISMAdirect.



4. Configure the credentials for the SQL server. The application creates a payment report per payment provider and stores them on the SQL server.
   The same SQL server is used for the accounting workflow, see [System] - [Accounting and reporting] - [Accounting] - [Accounting workflow]. When you change the settings for the SQL server in that dialog, the settings will also change in this dialog and vice versa.
   1. Define the [Computer name \ instance name:].
      With this option, you define where the payment reports are stored. For example: SQL_server_name\SQL_server_instance_name.
   2. You have to define how the [Order processing] connects to the SQL server. The authentication type depends on the location of the SQL server:

Location of the SQL server	Description
Local SQL server	SQL authentication (recommended) Type the account credentials of an existing login account for the SQL server.
Remote SQL server inside the domain	Windows authentication (recommended) The Windows user credentials are used for the authentication. The user is not prompted for a user name and password.
SQL server outside the domain	SQL authentication (mandatory) Type the account credentials as defined by the customer for the SQL server.

   3. Type the password of user `sa`. You have defined the password for user `sa` when you installed PRISMAdirect.

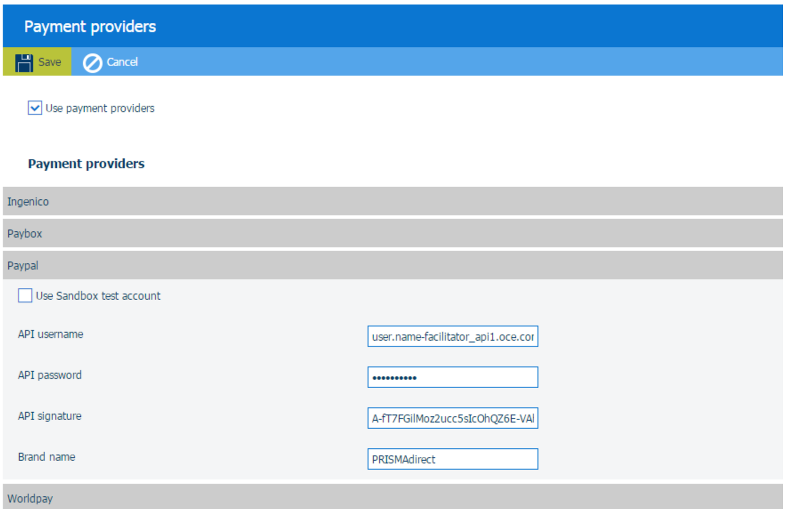
Accounting information can be collected when the user has system administration rights on the accounting database.

4. [Test connection]
   Click this button to test the connection to the SQL server.
5. Click [Save].

Configure the payment providers per web server

You have to configure the [Payment providers] for each web server.

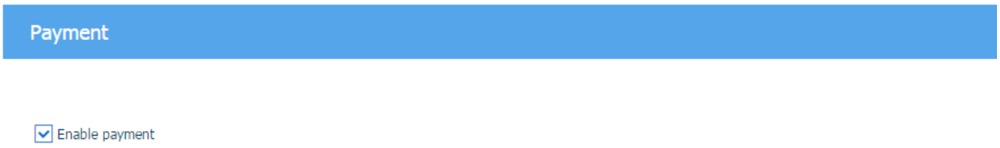
1. Click [System] - [Web submission] - <web server> - [Payment providers].
2. Option [Use payment providers]
   - Enabled
     You can enable one or more payment providers for the concerning web server. For example: PayPal.
   - Disabled
     For example, your company uses a local area network. You can disable the payment providers in this dialog since your Web server has no Internet access. The customer does not receive an "unable to connect" message from the payment provider.
3. Configure each payment provider.
   Click on the bar of the payment provider that you want to configure. For example: PayPal. The bar expands and you can fill in the required settings. Each payment provider delivers the required settings to you when you create a merchant account.



4. Click [Save].

Enable payment per web shop

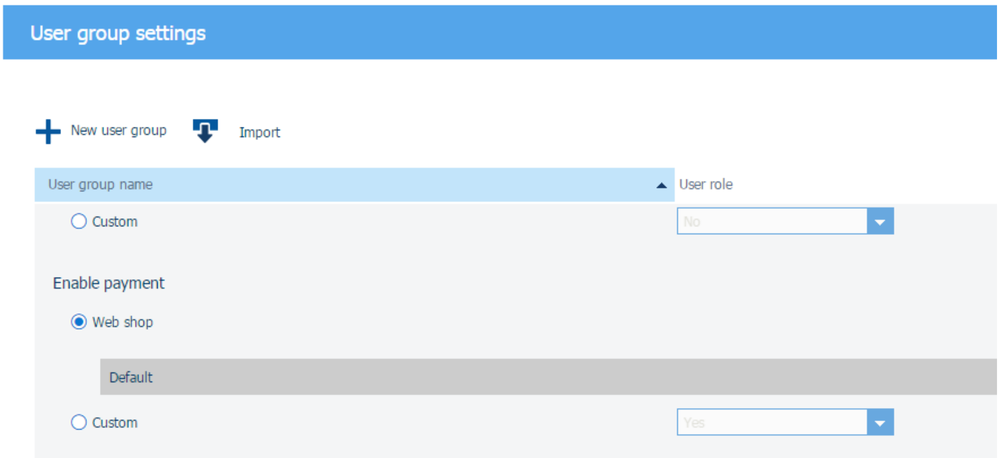
1. Click [Web store] - <web shop> - [Pricing] - [Payment].
2. Enable the [Enable payment] option. Customers have to pay their orders before they can submit their orders via the web shop. The payment providers as defined for the web server are available for the customers.
   You can customise this setting for one or more user groups. See procedure *Optionally, you can customize the payment settings per user group*.



3. Click [Save].

Optionally, you can customize the payment settings per user group

1. Click [User management] - [User groups] - [User group settings].
2. Click on the bar of the user group that you want to customize. The user group expands.
3. Scroll to section [Enable payment].
4. A customer can be part of a user group. The settings of the user group overwrite the payment settings of each web shop.
   - Web shop
     The user group uses the value of setting [Enable payment] as defined for the web shop.
   - Custom = Yes
     Payment is enabled for each web shop for the concerning user group. A requirement is that the payment providers are configured, see procedure *Configure the payment providers per web server*.
   - Custom = No
     Payment is disabled for each web shop for the concerning user group.



5. Click [Save].

Configure the file hosting services, for example, Dropbox

Important information concerning Dropbox

If you use Dropbox as a file hosting service, you have to:

1. Upgrade to PRISMAdirect 1.3.3, or higher. PRISMAdirect 1.3.3, or higher, uses Dropbox API v2.
2. Send the return URLs to the support channel of PRISMAdirect. The support channel must include the URLs to the Dropbox App management page for successful access authentication. The URLs are the DNS names / Friendly URLs used to access each web shop and the order processing console.

Reason:

Dropbox ends the support for the Dropbox API v1 on September 28th, 2017. From September 28th, 2017 onwards, Dropbox will only support Dropbox API v2. This API version implements OAuth2 authentication, which requires significant changes related to the way the access authentication works.

Introduction

The file hosting services provide an Internet hosting service specifically designed to host user files. When you enable file hosting services, the users can add files from the hosting service—the "cloud"—to their job. Both the print room operator and the customers can use the file hosting services, for example, Dropbox.

This topic describes how you can enable and configure Dropbox. After configuration, PRISMAdirect is allowed to access the Dropbox accounts on behalf of the customers. Each available file hosting service must be configured in a similar manner.

You have to configure the file hosting settings in the [Configuration] workspace:

1. **Check that the JDD service user has Internet access**
   The JDD service user is the user that runs the "Print Job Data Dispatcher" service. The user must have Internet access.
2. **Enable and configure the file hosting services**
3. **Optionally, you can customize the file hosting services per user group**
   You can customize the file hosting services for each user group. The custom settings overrule the web shop settings for the concerning user group. The custom settings are used in all web shops for the corresponding user group.

You have to configure the products in the [Product and order editor] workspace:

1. **Enable option [File hosting service] for one or more products**

Check that the JDD service user has Internet access

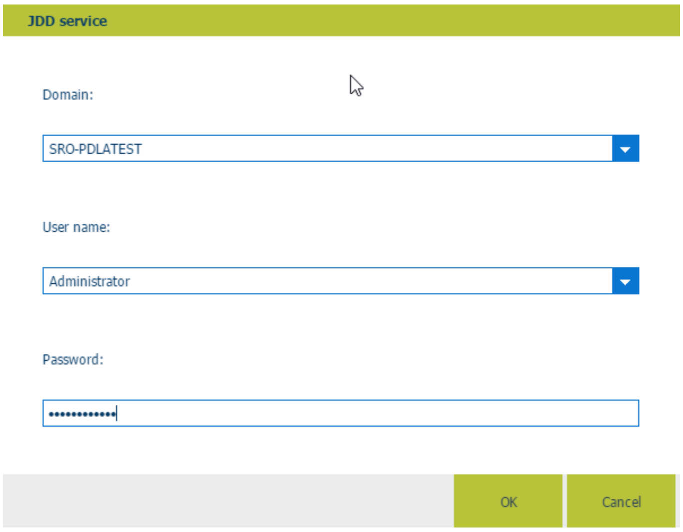
The JDD service user is the user that runs the "Print Job Data Dispatcher" service. It is recommended that you change the user only when:

1. The user has a local system account. And
2. You want to use the file hosting services and/or the payment providers. The user must have Internet access.

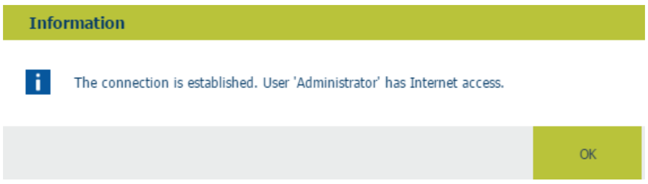
A number of services will be restarted when the user is changed. Orders that are being submitted by customers will become corrupt. The following services will be restarted:

- The Message Queuing service
- The Print Job Data Dispatcher service

1. Click [System] - [Services settings] - [Advanced infrastructure].
2. The read-only text box displays the current JDD service user. Click [Test connection] to test if the user has Internet access.
   You can change the user:
   1. Click the [Change] button.
   2. Select the domain and user name. For example, you can select the user that runs the services of PRISMAdirect. The user must have Internet access if you want to use the file hosting services and/or the payment providers.
      Type the password. Letters in passwords must be typed using the correct case.

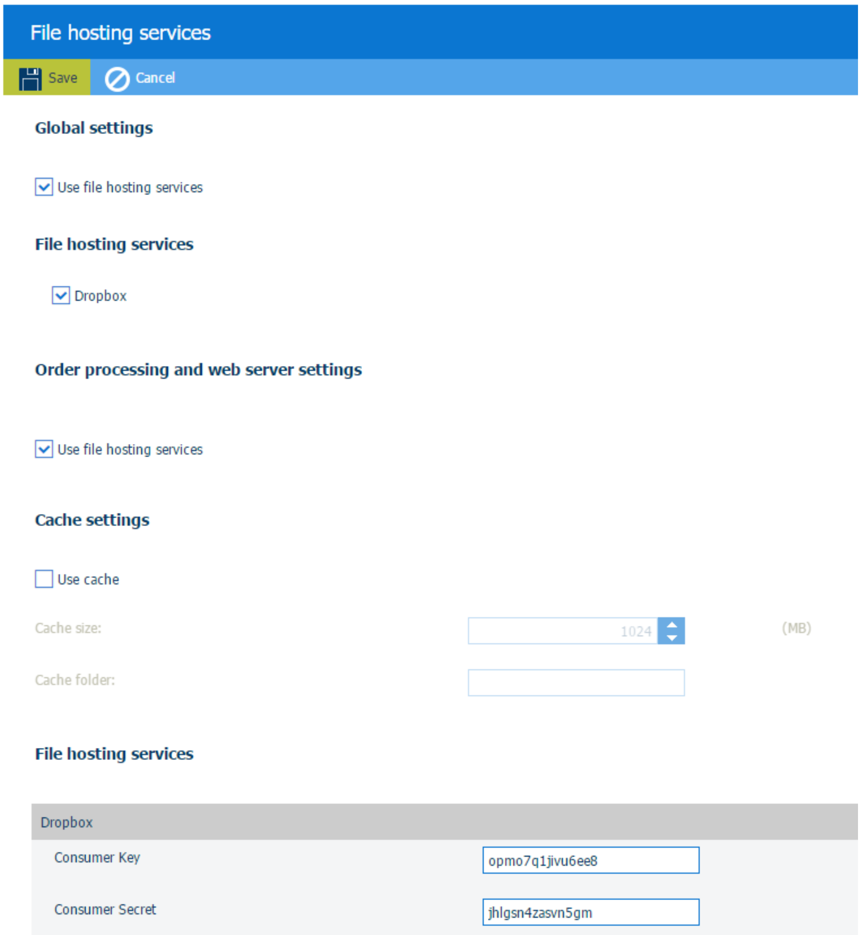
   3. Click button [OK] and click [Test connection] to test if the user has Internet access.

   4. Click [OK].
3. Click [Save].

Enable and configure the file hosting services

1. Click [System] - [Connectivity] - [File hosting services].
2. Enable option [Use file hosting services] in section [Global settings].
3. Select which file hosting services will be available for PRISMAdirect. For example, Dropbox.



4. Enable option [Use file hosting services] in section [Order processing and web server settings].
   In other words, enable the selected file hosting services for both the print room operator and the customers.

   NOTE
   Dropbox can be disabled for PRISMAdirect. However, you can configure Dropbox when it is enabled for [Order processing and web server settings]. Then, you can enable Dropbox for one or more user groups. See procedure *Optionally, configure the file hosting services per user group* below. You can do this for each available file hosting service.

5. Section [Cache settings]
   You can store the data of the file hosting services within a cache. If requested data is contained in the cache, the request can be served by simply reading the cache. This is comparatively faster than fetching data from its original storage location in the cloud.
   Define both the cache size and the cache folder.

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

6. Configure each file hosting service.

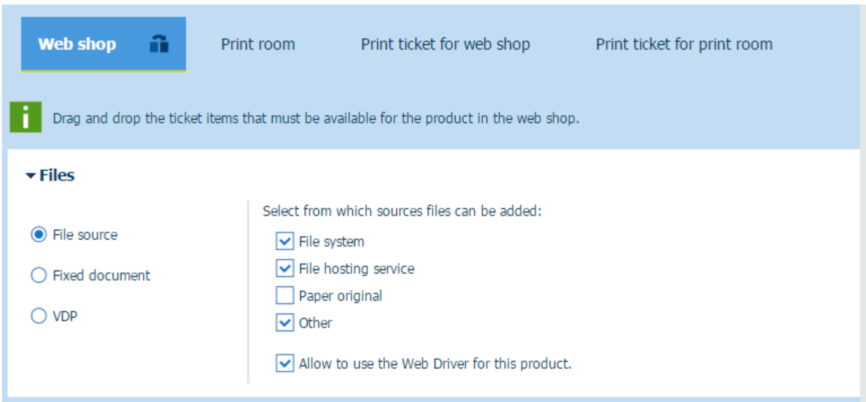
Click on the bar of the file hosting service that you want to configure. The bar expands and you can fill in the required settings. Each file hosting service delivers the required settings to you when you create an account. For example, for Dropbox you have to define the:
1. [Consumer Key]
2. [Consumer Secret]

7. Configure other available file hosting services in a similar manner.
8. Click [Save].
   Now, PRISMAdirect is allowed to access the Dropbox accounts on behalf of the customers.

Enable option [File hosting service] for one or more products

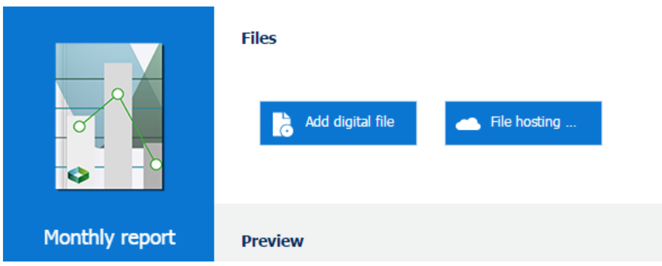
Enable option [File hosting service] for each product for which you want to allow, for example, Dropbox as file source.

1. Open the [Product and order editor] and click [Products].
2. Select a product for which you want to allow Dropbox as file source.
3. Click the pane [Detailed product settings].
4. Enable option [File source] - [File hosting service] in section [Files]. Section [Files] is available in the view [Web store].
5. Click [Update].
6. Repeat this procedure for all products for which you want to allow Dropbox as file source.
7. Click the [Publish] icon in the tab of workspace [Product and order editor].
   Publishing the changes to the PRISMAdirect server could take some time. The status bar indicates the progress.



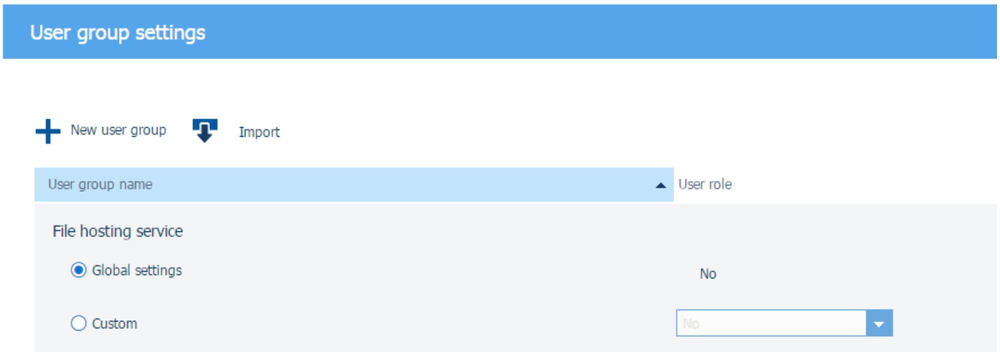
Result

Option "File hosting ..." is now available for your customers and operators:



Optionally, you can customize the file hosting settings per user group

1. Click [User management] - [User groups] - [User group settings].
2. Click on the bar of the user group that you want to customize. The user group expands.
3. Scroll to section [File hosting service].
4. A customer or operator can be part of a user group. The settings of the user group overwrite the settings for PRISMAdirect.
   - Global settings
     The user group uses the settings of the file hosting services as defined for PRISMAdirect.
   - Custom = Yes
     File hosting services are enabled for each web shop for the concerning user group. A requirement is that the file hosting services are configured, see procedure *Enable and configure the file hosting services*.
   - Custom = No
     File hosting services are disabled for each web shop for the concerning user group.



5. Click [Save].

Configure linking to a file or folder

PRISMAdirect can act as a file hosting service. You can configure a folder containing files and subfolders. The folder must exist on the file system of the server of PRISMAdirect. Or you can use a folder on a network share that is accessible to the server.

When the customer creates an order, the customer can browse to the folder and select one file.

You have to configure the folder containing linkable files in the [Configuration] workspace:
1. **Configure linking to a file or folder**

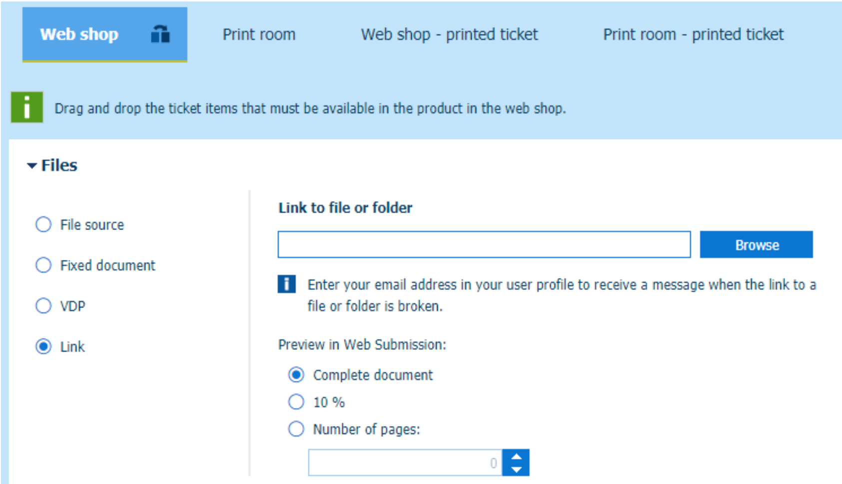
You have to configure the products in the [Product and order editor] workspace:
1. **Enable option [Link] for one or more products**

Configure linking to a file or folder

1. Click [System] - [Connectivity] - [Folder for linkable files].
2. [Configure the folder containing linkable files]
   Click on the bar of [Folder for linkable files]. The bar expands and you can type the path to the folder containing linkable files.
   The folder can contain files and subfolders. The folder must exist on the file system of the server of PRISMAdirect. Or you can use a folder on a network share that is accessible to the server. Note that the path to the folder is only validated when you define it on the server. You can check if the typed folder path is correct in log file "JobDataDispatcher.log", see *Analyze log files and view which services log information* on page 67.
   The customer can select a file only from the defined folder or its subfolders. The customer cannot access the rest of the file system.
3. Click [Save].

Enable option [Link] for one or more products

Enable option [Link] for each product for which you want to offer a link to a file or folder.
1. Open the [Product and order editor] and click [Products].
2. Select a product for which you want to allow linking to a file or folder.
3. Click the pane [Detailed product settings].
4. Enable option [Link] in section [Files]. Section [Files] is available in the view [Web store].
5. Click [Browse]. Click the plus icon to select a file or folder. The icon appears when you hover the mouse pointer over the item. The folder has been configured in the [Configuration] workspace.
   When you assign a link to a folder, the customer must select one file from the folder before submitting the order. When you assign a link to a file, the file is added to the order automatically when the customer submits the order.
6. Click [OK] and click [Save].
7. Repeat this procedure for all products for which you want to offer a link to a file or folder.
8. Click the [Publish] icon in the tab of workspace [Product and order editor].
   Publishing the changes to the PRISMAdirect server could take some time. The status bar indicates the progress.


Web shop
Print room
Web shop - printed ticket
Print room - printed ticket
Drag and drop the ticket items that must be available in the product in the web shop.
Files
File source
Fixed document
VDP
Link
Link to file or folder
Browse
Enter your email address in your user profile to receive a message when the link to a file or folder is broken.
Preview in Web Submission:
Complete document
10 %
Number of pages:
0

Setup the uniFLOW interface

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 centers 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.

This topic describes the complete configuration of the uniFLOW interface. You have to configure the uniFLOW interface in the [Configuration] workspace:

- **Setup the uniFLOW interface**
  You have to pair a unique URL of the PRISMAdirect server with the service URL of the uniFLOW server.
- **Enable the interface between the web server and the uniFLOW server**
  All web shops accessible via the web servers connected to the uniFLOW server will use the workflow as defined by uniFLOW. You can also disconnect a web server from the uniFLOW server. The web shops accessible via the disconnected web server will use the workflow as defined by PRISMAdirect.
- **Configure access to web shops per web server**
  All web shops accessible via the web servers connected to the uniFLOW server will use the workflow as defined by uniFLOW. However, you can explicitly configure which web shops can be accessed from which web servers. The web shops that are not accessible via the web server will use the workflow as defined by PRISMAdirect.

Setup the uniFLOW interface

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

6. Click [Save].

Enable the interface between the web server and the uniFLOW server

Setting [Enable uniFLOW interface] becomes available for the remote web servers when you have paired the PRISMAdirect server with the uniFLOW server.

For the remote web servers, do:

1. Click [System] - [Web submission] - [Remote web servers].
2. Click [Configure] to open a dedicated configuration dialog for the concerning web server. You can find the link [Configure] directly behind the displayed registration time.
3. Open the dialog [General settings].
4. [Enable uniFLOW interface]
   Enable the interface between the web server and the uniFLOW server. All web shops accessible via the web servers connected to the uniFLOW server will use the workflow as defined by uniFLOW. You can also disconnect a web server from the uniFLOW server. The web shops accessible via the disconnected web server will use the workflow as defined by PRISMAdirect.
5. Click [Save].

Configure access to web shops per web server

1. Click [System] - [Web submission] - <web server> - [Web store access from web servers].
2. Enable or disable access to the web shops from each available web server.
   All web shops accessible via the web servers connected to the uniFLOW server will use the workflow as defined by uniFLOW. However, you can explicitly configure which web shops can be accessed from which web servers. The web shops that are not accessible via the web server will use the workflow as defined by PRISMAdirect.
3. Click [Save].

Set the trace level for the uniFLOW interface

- [Debug]
  The [Debug] trace level provides the most detailed log information. The [Debug] trace level can impact the performance of the application.
- [Error]
  The errors are logged.
- [Info]
  The errors and information messages are logged

Setup the Pressero interface

You can setup an interface between the PRISMAdirect server and the Pressero storefront system.

This topic describes the complete configuration of the Pressero interface. You have to configure the Pressero settings in the [Configuration] workspace:

- **Setup the Pressero interface**
  You have to pair a unique URL of the PRISMAdirect server with the service URL of the Pressero server.
- **Enable the interface between the web server and the Pressero system**
  All web shops connected to the Pressero server will use the workflow as defined by Pressero. The web shops accessible via the disconnected web server will use the workflow as defined by PRISMAdirect.

Setup the Pressero settings

1. Click [System] - [Connectivity] - [Pressero settings].
2. [Enable Pressero interface]
   Enable the Pressero interface for the PRISMAdirect server and the local web server.
3. Type in the user name and password.
4. Input the ID of the subscription.
5. Type the URL. This URL is defined by the Pressero system.
6. Click [Test connection].
7. Select the PRISMAdirect web store.
8. Pick the default product.
9. Input a list of file types (extensions) separated by a comma sign.
10. [Timeout for orders containing multiple jobs [min.]:]
    You have to set the timeout for orders containing multiple jobs. All jobs have to be imported before the timeout expires. If the timeout expires, the order including any imported jobs is marked as [Failed].
11. [Logging intermediate files:]
    Specify the path to a folder in which PRISMAdirect should save all the intermediate files of the transformation process.
12. [Disable automatic price estimation and quotation]
    When this option is disabled, the prices are automatically calculated after the import of an order, only if any of the cost-related item used in formula is changed.
13. [Transform XML/JDF to JDF by XSLT file]:
    Apply a transformation based on the [XSLT File] supplied using the [Upload]. If no file was supplied, the default will be used.
14. [Use custom mapping files]
    Enable this option to use your own mapping file. The [Mapping files] are used every time the [JDF endpoint] is used. Do not move, delete or rename these files.

Setting	Description
[Default XSLT file for JDF ticket] [Default mapping file for JDF ticket] [Default mapping file for job status]	You can download the default mapping files and use these files to create a custom mapping. See the links in the top-right of the dialog.
[Upload]	Browse to the mapping files that you want to use.

Setting	Description
[JDF ticket:]	This file is used to map JDF to PRISMAdirect ticket items. A mapping file is used to construct a valid PRISMAdirect ticket with the values taken from the JDF ticket.
[Job status:]	This file is used to map the job status in PRISMAdirect to JDF.

15. [Add Attribute]
    Custom Pressero attributes have to be manually added in pairs of [Attribute:] and [Value:].

    NOTE
    No validation can be performed until the order is submitted.

    After you added at least one pair, the saved items are displayed in a table.
16. Click [Save].

Configure the shipping workflow

Introduction

You can offer a shipping service to your customers. When you select one or more shipping providers, each customer can request shipment of an order via the web shop.

This topic describes the complete configuration of the shipping workflow.

You have to configure the shipping settings in the [Configuration] workspace:

1. **Create shipping formulas**
   You have to create the shipping formulas based on agreements with each shipping provider.
2. **Select the shipping providers for PRISMAdirect**
   You can select which shipping providers are available for PRISMAdirect.
   The selected shipping providers will be available in the [Order processing] workspace. The customer can only select whether or not to ship an order. The operator can select which shipping provider will ship the order.
3. **Configure the shipping providers per web server**
   PRISMAdirect can run multiple web servers. You have to configure the shipping providers for each web server once shipping is enabled for PRISMAdirect.
4. **Enable shipping per web shop**
   A web server can run multiple web shops. You have to configure shipping for each web shop once shipping is enabled for the concerning web server.
   All shipping providers that are enabled and configured on the web server are available for the web shop. You cannot select or deselect shipping providers on web shop level. You can only enable or disable the shipping service.
5. **Configure the default shipping label**
   The default label will be used when the shipping provider does not offer a shipping label.
6. **Type the default origin address**
   You can use the default origin address when you have only one web shop. When you have multiple web shops, you have to type an origin address for each separate web shop.
   You ship your packages from the origin address.
7. **Type the origin address per web shop**
   When you have multiple web shops, you have to type an origin address for each separate web shop.
   You ship your packages from the origin address.
8. **Define any custom box sizes**
   Each shipping provider offers a range of default box sizes. You can define one or more custom box sizes for each shipping provider.

   NOTE
   When you select an additional shipping provider for PRISMAdirect, that provider is also added to each existing custom box. Now, you have to configure each existing custom box for the new provider.

9. **Optionally, you can customize the shipping settings per user group**
   You can customize the shipping settings for each user group. The custom settings overrule the web shop settings for the concerning user group. The custom settings are used in all web shops for the corresponding user group.

Create shipping formulas

1. Click [Price and formula editor] - [Formulas] - [Shipping formulas for orders].
2. Create the shipping formulas based on agreements with each shipping provider. See chapter [Price and formula editor] for a description of how you can create formulas.

Select the shipping providers for PRISMAdirect

1. Click [System] - [Connectivity] - [Shipping] - [General settings].
2. Enable the [Use shipping providers] option.
3. Select which shipping providers will be available for PRISMAdirect. For example, FedEx.
4. You can type a message to the customer for each provider.
   Click a language to type a message in that language. The available languages are displayed just above the text field. The available languages are equal to the active languages for PRISMAdirect. See: [System] - [Active languages for system].
   Most providers offer a link that customers can click to track their package. If a provider does not offer such a link, then you can type the web site of the shipment provider in the message. For example: Go to *shipmentprovider.com* to track your order.
5. Click [Save].
   Shipment is now enabled for PRISMAdirect. However, PRISMAdirect can run multiple web servers. Now, you have to enable or disable shipping per web server, see procedure *Configure the shipping providers per web server* below.

Configure the shipping providers per web server

1. Click [System] - [Web submission] - <web server> - [Shipping providers].
2. Option [Use shipping providers]
   - Enabled
     You have enabled shipment for the concerning web server. The web server can run one or more web shops. In this dialog, you have to configure the shipping providers first. Then, you have to enable or disable shipping per web shop, see procedure *Enable shipping per web shop* below.
   - Disabled
     You have disabled shipment for the concerning web server. The web server can run one or more web shops. Customers of these web shops cannot request shipment of their orders.
3. Configure each shipping provider.
   Click on the bar of the shipping provider that you want to configure. The bar expands and you can fill in the required settings. For example, you can define the setting *User key*, et cetera when you use the FedEx API. Each shipping provider delivers the required settings to you when you create an account.
4. Click [Save].

Enable shipping per web shop

1. Click [Web store] - <web shop> - [Pricing] - [Shipping].
2. Enable the [Enable shipping] option.
   Customers of this web shop can now request shipment of their orders.
3. Click [Add].
   You can configure one or more delivery times and assign shipping formulas to each delivery time.
   1. Configure the maximum time to deliver an order. The shorter the delivery time, the higher the postage.
      You can type a value in the text field. Or you can click the arrow buttons to increase or decrease the value.
   2. Assign a shipping formula to the delivery time. Select a formula from the drop-down list.
   3. Do this for each delivery time.
4. Click [Save].
   The customer can choose one of the configured delivery times in the web shop.

Configure the default shipping label

1. Click [System] - [Connectivity] - [Shipping] - [Default label].
2. You can use variables from the list of [Order items] and/or the [Origin address] to create the shipment label. This allows you to use dynamic information in the label. Drag and drop the variable into the label at the desired position. A variable is indicated by '%' symbols. You can also type fixed text in the label.
3. Define the font settings for the label.
4. Select the size of the media on which the default label will be printed.
5. Enable option [Print logo in label] when you want to add a logo to the label.
   - Click button [Browse] to select an image.
     The allowed image file types are: .bmp, .jpg, .gif, .png.
     Click [Clear] to remove a selected image.
   - Select the position for the logo from the drop-down list.
   - [Scale logo to page size]
     You can scale the logo to the page size. Enable option [Keep ratio] if you want 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.
6. Click button [Preview] to preview the shipment label.
7. Click [Save].

Type the default origin address

1. Click [System] - [Connectivity] - [Origin address].
2. Type the origin address for your web shop. You can use the default origin address when you have only one web shop. When you have multiple web shops, you have to type an origin address for each separate web shop.
   The address will not be validated in this dialog. The address will be validated when:
   - The operator requests a shipment in the [Order processing] workspace. The selected shipment provider returns an error message if any of the values are incorrect.
   - The operator or customer creates an order while tax services workflow is enabled. The tax service returns an error message if any of the values are incorrect.
3. Click [Save].

Type the origin address per web shop

1. Click [Web store] - <web shop> - [Contact information] - [Origin address].
2. [Use default origin address]
   - Enabled
     The web shop uses the default origin address. See: [System] - [Connectivity] - [Origin address].
   - Disabled
     Type the origin address for your web shop. When you have multiple web shops, you have to type an origin address for each separate web shop.
     The address will not be validated in this dialog. The address will be validated when:
     - The operator requests a shipment in the [Order processing] workspace. The selected shipment provider returns an error message if any of the values are incorrect.
     - The operator or customer creates an order while tax services workflow is enabled. The tax service returns an error message if any of the values are incorrect.
3. Click [Save].

Define any custom box sizes

1. Click [System] - [Connectivity] - [Shipping] - [Custom box sizes].

2. You can create one or more custom box sizes for each shipping provider. Do this for each shipping provider enabled for PRISMAdirect.
3. Click [Save].

Optionally, you can customize the shipping settings per user group

1. Click [User management] - [User groups] - [User group settings].
2. Click on the bar of the user group that you want to customize. The user group expands.
3. Scroll to section [Enable shipping].
4. A customer can be part of a user group. The settings of the user group overwrite the shipping settings of each web shop.
   - Web shop
     The user group uses the value of setting [Enable shipping] as defined for the web shop.
   - Custom = Yes
     Shipping is enabled for each web shop for the concerning user group. A requirement is that the shipping providers are configured, see procedure *Configure the shipping providers per web server*.
   - Custom = No
     Shipping is disabled for each web shop for the concerning user group.
5. Click [Save].

Configure the tax services workflow

Introduction

The tax service calculates the sales taxes for the orders.

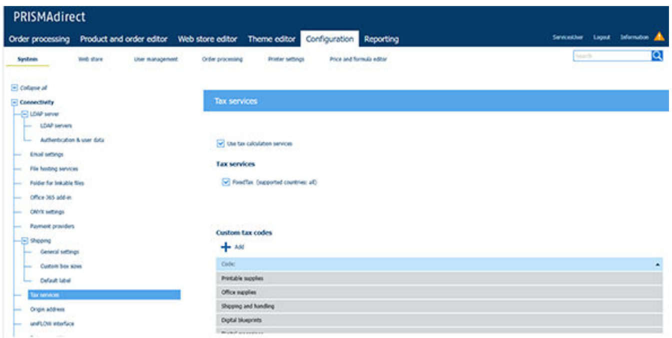
This topic describes the complete configuration of the tax services workflow.

You have to configure the tax settings in the [Configuration] workspace:
1. **Select the tax services for PRISMAdirect** : FixedTax
2. **Configure the tax services per web server**
   PRISMAdirect can run multiple web servers. You have to configure the tax services for each web server once tax calculation is enabled for PRISMAdirect.
3. **Enable tax services per web shop**
   A web server can run multiple web shops. You can select one tax service per web shop once tax calculation is enabled for the concerning web server.
4. **Configure the price estimation settings per web shop**
   The price estimation formula is used when the customer submits an order. The quotation formula can only be used by the operator after the order has been received.
   The prices for the orders and jobs must be calculated first before the sales tax can be calculated.

You have to configure the products in the [Product and order editor] workspace:
1. **Assign a tax code to the products**
   The selected tax code determines the sales tax for each order created with the product. When the customer must pay for the order, the sales tax is displayed in the [Checkout] area of the web store.

Select the tax services for PRISMAdirect

1. Click [System] - [Connectivity] - [Tax services].
2. Enable the [Use tax calculation services] option.
3. Select which tax services will be available for PRISMAdirect. .
4. You can add additional codes for FixedTax.
   Click the button [Add] from custom codes, the select the name and the desired percentage.

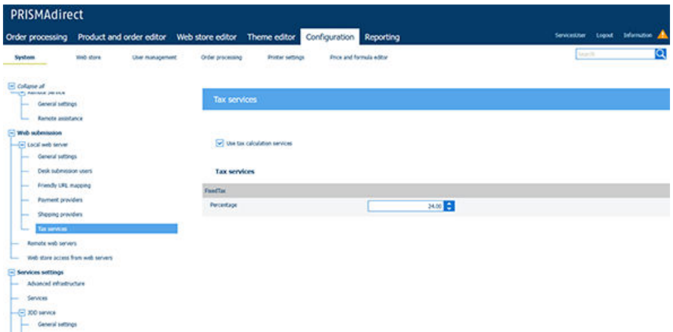


5. Click [Save].
   Tax calculation services are now enabled for PRISMAdirect. However, PRISMAdirect can run multiple web servers. Now, you have to enable or disable tax services per web server, see procedure *Configure the tax services per web server* below.

Configure the tax services per web server

1. Click [System] - [Web submission] - <web server> - [Tax services].

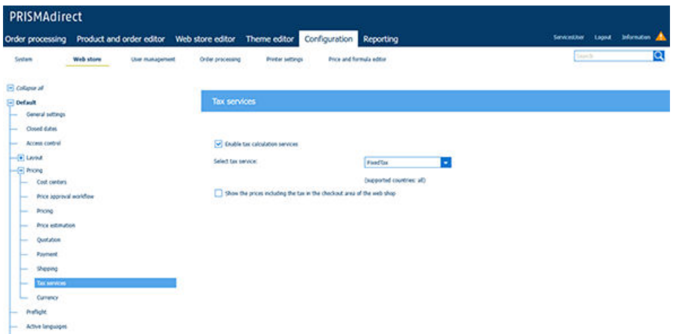
2. Option [Use tax calculation services]
   - Enabled
     You have enabled tax calculation services for the concerning web server. The web server can run one or more web shops. In this dialog, you have to configure the tax services first. Then, you have to enable or disable tax services per web shop, see procedure *Enable tax services per web shop* below.
   - Disabled
     You can disable the tax services in this dialog when your Web server has no Internet access. For example, your company uses a local area network. The user does not receive an "unable to connect" message.
3. You can choose the default percentage for FixedTax.



4. Click [Save].

Enable tax services per web shop

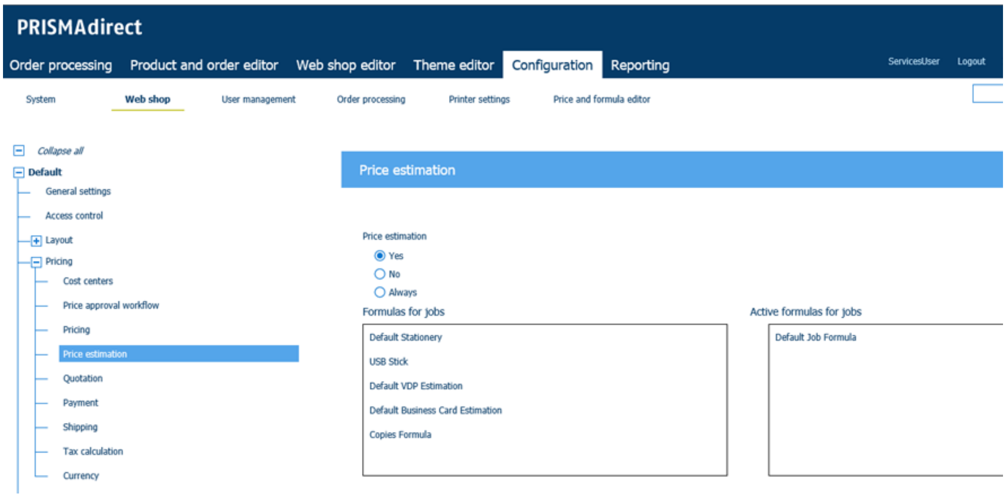
1. Click [Web store] - <web shop> - [Pricing] - [Tax services].
2. Enable the [Enable tax calculation services] option.
3. Select the tax service FixedTax.



4. Click [Save].
   The tax service calculates the sales taxes for the orders submitted through this web shop.

Configure the price estimation settings per web shop

1. Click [Web store] - <web shop> - [Pricing] - [Price estimation].
2. Enable price estimation. Select either [Yes] or [Always].
   The prices for the orders and jobs must be calculated first before the sales tax can be calculated.
3. Drag and drop the formula that you want to use to the active formulas. Do this for both the jobs and the orders.



4. Click [Save].

Assign a tax code to the products

1. Open the [Product and order editor] and click [Products].
2. Select a product.
3. Assign a tax code to the product. The option [Tax code:] is available in the pane [General product settings].
4. Click [Update].
5. Repeat this procedure for all products.
6. Click the [Publish] icon in the tab of workspace [Product and order editor].
   Publishing the changes to the PRISMAdirect server could take some time. The status bar indicates the progress.

Configure the self-registration workflow

Introduction

You can allow self-registration for each web shop. Customers can then create an account to the web shop. Without an account, customers have to fill in their name and address details for every order.

This topic describes the complete configuration of the self-registration workflow.

You have to configure the self-registration settings in the [Configuration] workspace:
1. **Allow self-registration per web shop**
   - Configure if users are allowed to create an account for a web shop via self-registration.
   - Configure if each account is activated automatically or manually.
2. **Activate self-registered users manually**
   You can activate or deactivate any self-registered user accounts.

Allow self-registration per web shop

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

Activate self-registered users manually

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

Configure the languages

Introduction

You can activate multiple languages for PRISMAdirect. A language link becomes available in the components of PRISMAdirect. When you, an operator, or a customer select an available language, the user interface will be shown in the selected language.

This topic describes how you can activate languages for PRISMAdirect and the web shops.

You have to configure the languages in the [Configuration] workspace:

1. **Select the active languages for PRISMAdirect**
   A language link becomes available in the components of PRISMAdirect, e.g. the [Order processing] console. You or an operator can change the display language via the language link.
2. **Allow customers to change the language per web shop**
3. **Select the active languages per web shop**
   Configure which of the languages for PRISMAdirect are available per web shop.
4. **Select the language for the logon page per web shop**
5. **Optionally, you can customize the permission to change the language per user group**
   You can customize the permission to change the language of web shops for each user group. The custom settings overrule the web shop settings for the concerning user group. The custom settings are used in all web shops for the corresponding user group.

Select the active languages for PRISMAdirect

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

Allow customers to change the language per web shop

1. Click [Web store] - <web shop> - [General settings].
2. [Allow the customer to change the language]
   Enable this option to allow a customer to change the language of the web shop.
   If this option is disabled, the web shop is displayed in the installation language and the customer is not able to change the language.
3. Click [Save].

Select the active languages per web shop

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

Select the language for the logon page per web shop

1. Click [Web store] - <web shop> - [Layout] - [Layout].
2. Select the language for the logon page of the web shop from the drop-down list.
3. Select the theme for the web shop from the drop-down list.
4. Type the login instructions in the selected language.
5. Click [Save].

Optionally, you can customize the permission to change the language per user group

1. Click [User management] - [User groups] - [User group settings].
2. Click on the bar of the user group that you want to customize. The user group expands.
3. Scroll to section [Allow the customer to change the language].
4. A customer can be part of a user group. The settings of the user group overwrite the shipping settings of each web shop.
   - Web shop
     The user group uses the value of setting [Allow the customer to change the language] as defined for the web shop.
   - Custom = Yes
     Customers that are part of the concerning user group are allowed to change the language of each web shop. A requirement is that more than one language is active, see procedure *Select the active languages per web shop*.
   - Custom = No
     Customers that are part of the concerning user group are not allowed to change the language of each web shop.
5. Click [Save].

Configure the preflight workflow

Introduction

A preflight operation is a quality check of your document.

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. If enabled, the automatic preflight operation is applied when a customer submits an order. The automatic preflight operation allows you to fix the violations according to the configured rules or cancel the operation with that document. A preflight report and an annotated file are generated. The preflight report shows a summary of the problems that have been found. The annotated file shows the complete document with the location of any found problems and fixes. The manual preflight operation automatically fixes the violations according to the configured rules. Some problems are detected by the preflight operation, but cannot be fixed automatically. It is recommended that you fix these problems manually before you print the job.

This topic describes the complete configuration of the preflight workflow.

You have to configure the preflight settings in the [Configuration] workspace:

1. **Enable and configure the preflight rules for the [Order processing] console**
   Option preflight is now available in the [Order processing] console. The operator can manually preflight the PDF files.
2. **Enable and configure the preflight rules per web shop**
   Option preflight is now available in the web shop. The operator can manually preflight the PDF files.You can configure the preflight settings for each web shop. These settings will also be used when you create an order for this web shop in the [Order processing].
3. **Configure the number of preflight processes**
   You can configure the number of preflight processes that can run in parallel.
4. **Email the preflight report to your customer**
   You can attach the preflight report to emails to your customer.
5. **Optionally, you can customize the preflight settings per user group**
   You can customize automatic preflight for each user group. The custom settings overrule the web shop settings for the concerning user group. The custom settings are used in all web shops for the corresponding user group.

Enable and configure the preflight rules for the [Order processing] console

1. Click [Order processing] - [Preflight].
2. Enable the rules that you want to use in column [Enabled].
3. Click on the bar of the rule that you want to configure. If the bar expands, you can configure the rule. If the bar does not expand, you can only enable or disable the rule.
   You can configure some rules to detect and fix a violation. Other rules can only be configured to detect a violation. These violations can only be solved in the corresponding PDF file by the customer or the operator.
4. Define the [Severity] of each rule.
   - [Warning]
     A violation of the rule is detected. You can ignore the warning.
   - [Error]
     A violation of the rule is detected. The violation of the rule must be fixed.
5. You can define a timeout.
   When the timeout value is exceeded, the preflight operation is canceled.
6. Click [Save].

Enable and configure the preflight rules per web shop

1. Click [Web store] - <web shop> - [Preflight].
2. Enable the rules that you want to use in column [Enabled].
3. Click on the bar of the rule that you want to configure. If the bar expands, you can configure the rule. If the bar does not expand, you can only enable or disable the rule.
   You can configure some rules to detect and fix a violation. Other rules can only be configured to detect a violation. These violations can only be solved in the corresponding PDF file by the customer or the operator.
4. Define the [Severity] of each rule.
   - [Warning]
     A violation of the rule is detected. You can ignore the warning.
   - [Error]
     A violation of the rule is detected. The violation of the rule must be fixed.
5. You can define a timeout.
   When the timeout value is exceeded, the preflight operation is canceled.
6. [Enable automatic preflight]
   When you enable this option, the application preflights each PDF file that the customer adds to an order in the web shop. When the customer adds a non-PDF file, then the file must be converted to PDF first before the preflight operation can start.
7. Click [Save].

Configure the number of preflight processes

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

Email the preflight report to your customer

1. Click [Order processing] - [Workflow configuration] - [Email templates].
2. Select an email template.
3. Enable the [Attach the preflight report] option.
   Most, but not all, email templates offer option [Attach the preflight report].

Optionally, you can customize the preflight settings per user group

1. Click [User management] - [User groups] - [User group settings].
2. Click on the bar of the user group that you want to customize. The user group expands.
3. Scroll to section [Enable automatic preflight].
4. A customer or operator can be part of a user group. The settings of the user group overwrite the settings for PRISMAdirect.
   - Web shop
     The user group uses the value of setting [Enable automatic preflight] as defined for the web shop.
   - Custom = Yes
     Automatic preflight is enabled for each web shop for the concerning user group. You have to configure the preflight rules, see procedure *Enable and configure the preflight rules per web shop*.
   - Custom = No
     Automatic preflight is disabled for each web shop for the concerning user group.
5. Click [Save].

Configure the email workflow

Introduction

This topic describes the complete configuration of the email workflow.

You have to configure the email settings in the [Configuration] workspace:
1. **Configure the SMTP server of the print room and the email settings**
2. **Create default email messages**
   You can create default email messages for the customers, approvers, etc. The emails can be sent at various stages while processing an order. Emails can also be sent at certain stages of a workflow, for example, budget control.
3. **Allow the operator to attach additional files to email messages**
4. **Allow the operator to edit the email messages before sending them**
   You also have to configure if email messages are sent to the customers, approvers, etc.

Configure the SMTP server of the print room and the email settings

1. Click [System] - [Connectivity] - [Email settings].
2. Type the email address of the print room.
   When you type a different email address for a web shop, then this email address is overwritten. See: [Web store] - <web shop> - [Contact information] - [Contact information].
3. Type the name that will be used in the 'From' field of the email message. For example: 'Print room'.
4. Type any Cc addresses. You can enter multiple email addresses, separated with a semicolon (;).
5. The operator can add or remove email addresses from the 'Cc' field when you enable option [Allow the operator to add Cc addresses].
6. Configure the SMTP server.
   1. Type the address and the port number of your email server. The default port number for SMTP is 25.
      Ask your IT department for details.
   2. Click button [Test connection] to test the connection to the email server.

   Configure the SMTP authentication.
   1. [Enable SSL]
      Select this option if you want to create a secure SMTP connection. You have to update the port number. The default port number for an SMTP connection secured by SSL is 587.
      Ask your IT department for details.
   2. You can allow self-signed certificates for the secure connection.
      SMTP server can treat self-signed certificates the same as a certificate issued by an untrusted CA. Depending on their policy, they may drop the connection or decide to transmit emails anyways.
   3. Configure the authentication of the sender.
      The value for this option depends on how the client has configured the SMTP server.

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

7. It is recommended that you send a test email to check your configuration of the SMTP server.
8. Click [Save].

Create default email messages

1. Click [Order processing] - [Workflow configuration] - [Email templates].
2. Select the email template that you want to configure.
3. Click a language to configure the email message in that language. The available languages are displayed just above the subject field. The available languages are equal to the active languages for PRISMAdirect. See: [System] - [Active languages for system].
4. Create the email message.
   - Type the text. Use the icons to use different font types, font color, text alignment, etc.
   - You can add images, for example, your company logo.
   - You can use the order items and product items as variables. Drag and drop the variable into the message at the desired position. A variable is enclosed by '%' symbols. You can also type fixed text in the label.
     You can use the product items only for jobs. Drag and drop the layout item [Job information (per job)] into the email message to create a job specific text box.
   - You can include a hyperlink to the order in your email. Drag and drop [Hyperlink to order] into the message. When the customer clicks the hyperlink, a web page opens that contains the concerning order.

   Click [Revert to default] to use the default email message again. Your changes will be discarded.
5. You can configure which files are automatically attached to the email message.
   - Select option [Attach the document] to attach the final PDF document to the email message.
   - Select the [Attach the tickets] 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.

   The operator can attach additional files to an email message when the [Allow operator to attach files when sending email] option is enabled. See procedure *Configure the email workflow* on page 46.
6. Click [Preview email] to check your email message.
7. Click [Save].
8. Repeat these steps for all email templates.

Allow the operator to attach additional files to email messages

1. Click [Order processing] - [Workflow configuration] - [General settings] - [Other settings].
2. [Allow operator to attach files when sending email]
   You can define the email templates in section [Email templates]. In that section, you can define which files will be attached to the emails by default. When you enable this option, the operator is allowed to attach additional files to the email messages to the customer.
3. Click [Save].

Allow the operator to edit the email messages before sending them

1. Click [Order processing] - [Workflow configuration] - [General settings].
2. Select one of the order state changes that trigger sending an email, for example, *Order accepted*.
   The emails can be sent at various stages while processing an order. Emails can also be sent at certain stages of a workflow, for example, *Price approval* of the budget management workflow.

3. Enable option [Send email] when you want to send an email when the order changes into the concerning state. You can select several options for sending an email:
   - [Always]
     The email message for the concerning order state change is always send to the customer.
   - [When requested by customer]
     The email message for the concerning order state change is only sent to the customer when the customer has requested this.
   - [Send an email to the customer]
     The email message for the concerning order state change is always send to the customer.
   - [Send an email to the operators]
     The email message for the concerning order state change is always send to the operator.
4. [Allow to edit the email message before sending]
   Default email messages have been created for the order state changes that trigger sending an email. When you enable this option:
   - At a particular order state change, the concerning default email message opens.
   - The operator can change the email message.
   - The operator has to manually send the email message.

   When you disable this option, any default email message is sent automatically.
   Most, but not all, triggers contain option [Allow to edit the email message before sending].
5. Click [Save].

Use custom fonts in the emails of PRISMAdirect

In the following procedure, the custom font "Viner Hand ITC Regular" is made available to PRISMAdirect:

1. **Install the custom font on all required computers**

   Install the custom font on:

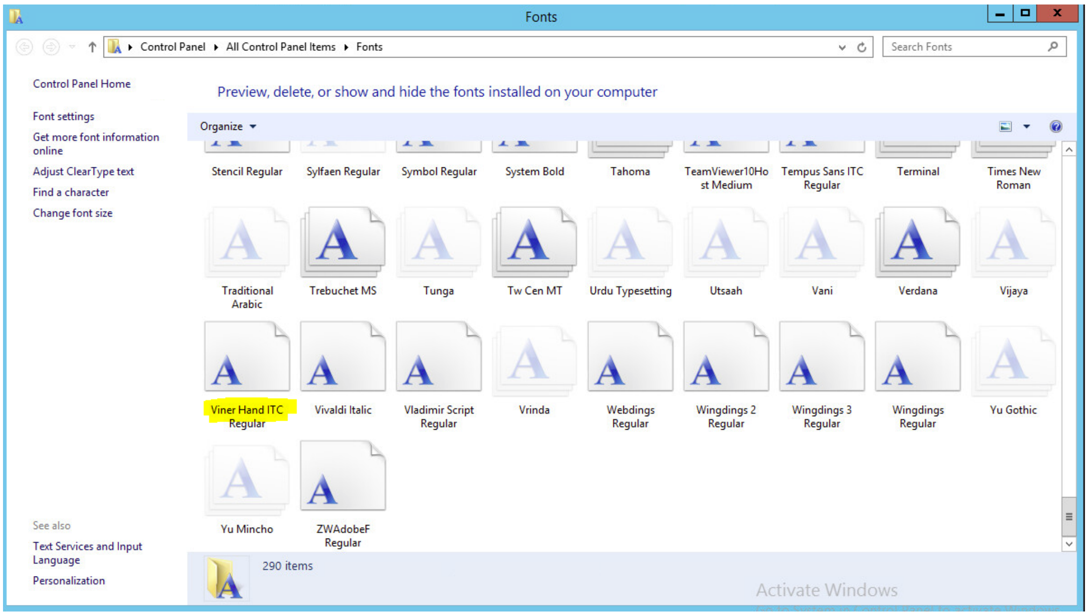
   - The PRISMAdirect server

     The PRISMAdirect server runs the order processing sessions.
   - The computers of the customers that receive the emails

     The customers receive emails that use a default font when the custom font is not installed on their computers.

   You can verify that the custom font is installed on the required computers. For each computer, do:

   1. Open the Search dialog of Windows and type "View installed fonts".
   2. Click "View installed fonts" for an overview of the fonts installed on the concerning computer.



2. **Make the custom font available to PRISMAdirect**
   1. Browse to: `<drive>:\Program Files (x86)\Canon\PRISMAdirect\WebFolder\Scripts\redactor`
   2. Open the file `fontfamily.js` in an editor, for example, Notepad++.
   3. Look for the part in the JavaScript file that lists the fonts:

      `var fonts = [ 'Arial', 'Helvetica', 'Georgia', 'Times New Roman', 'Monospace' ];`

      The code `var fonts = [ 'Arial', ...];` is an array of font names. Each font can be selected by its name in PRISMAdirect.
   4. For each custom font, do:

      Add the name of the custom font to the list of font name. You can add the name wherever you want: at the beginning, in the middle or at the end. In this example, the font name is added at the beginning of the array:

      `var fonts = [ 'Viner Hand ITC, sans-serif', 'Arial', 'Helvetica', 'Georgia', 'Times New Roman', 'Monospace' ];`

      - The font name must be enclosed by single quotation marks. In this example 'Viner Hand ITC, sans-serif'.

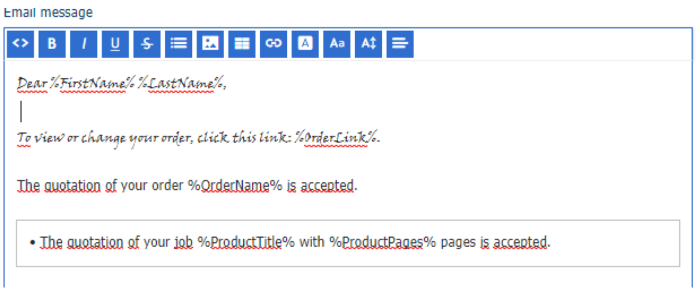
- The array of font names is comma separated.

```
(function($)
{
    $.Redactor.prototype.fontfamily = function()
    {
        return {
            init: function ()
            {
                var fonts = [ 'Viner Hand ITC, sans-serif', 'Arial', 'Helvetica', 'Georgia', 'Times New Roman', 'Monospace' ];
                var that = this;
                var dropdown = {};

                $.each(fonts, function(i, s)
                {
                    dropdown['s' + i] = { title: s, func: function () { that.fontfamily.set(s); } };
                });

                dropdown.remove = { title: 'Remove Font Family', func: that.fontfamily.reset };

                var button = this.button.add('fontfamily', 'Font');
                this.button.setIcon(button, '<i class="re-icon-fontfamily"></i>');
                this.button.addDropdown(button, dropdown);

            },
            set: function (value)
            {
                this.inline.format('span', 'style', 'font-family:' + value + ';');
            },
            reset: function()
            {
                this.inline.removeStyleRule('font-family');
            }
        };
    };
})(jQuery);
```

5. Save the file `fontfamily.js`.

3. **Clear the cache of the browser**
   For Google Chrome, you can hold down the "CTRL" button and then press F5.
4. **The custom font is now available and can be used in PRISMAdirect**

You can apply the font to the email message:


Email message
Dear %FirstName% %LastName%,
To view or change your order, click this link: %OrderLink%.
The quotation of your order %OrderName% is accepted.
• The quotation of your job %ProductTitle% with %ProductPages% pages is accepted.

Configure the VDP workflow

Introduction

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

This topic describes the complete configuration of the VDP workflow.

You have to configure the VDP workflow in the [Configuration] workspace:

1. **Configure the port for the [Print Prepare Manager service]**
   The Order processing console and the web server connect to the PRISMAdirect server via the port for the Print Prepare Manager service. These applications must have access to the PRISMAdirect server to use the VDP functionality.
2. **Configure the preview settings for a variable data document**

Configure the port for the [Print Prepare Manager service]

1. Click [System] - [Services settings] - [Print Prepare Manager service].
2. Define the port for the Print Prepare Manager service. The default port number is 54000.
   Check that the port is available on the order processing console and the web server.
3. Click [Save].

Configure the preview settings for a variable data document

1. Click [Order processing] - [General settings] - [VDP settings].
2. Define the maximum number of pages of a variable data document shown in the [Preview] or [Proof PDF]. The maximum value for this option is 2000 pages.
   A high number of pages can decrease the performance of the application.
3. Click [Save].
4. Click [System] - [Services settings] - [JDD service] - [General settings].
5. Define the timeout for the VDP preview generation. The application does not display the VDP preview when the generation of the preview is not completed within the defined timeout.
   Do not configure this setting yourself. Change this setting only after consulting the help desk.
6. Click [Save].

Use LDAP attributes in a VDP document, e.g., for business cards

Introduction

In PRISMAdirect, you can use the values of LDAP attributes in a VDP document. Firstly, you have to map the LDAP attributes to profile settings and/or job ticket items. Then you can use the profile settings and/or job ticket items in a VDP document. Now, the values of the LDAP attributes are used as variable data in the VDP document. The mapped LDAP attributes are especially useful for creating business cards.

When to do

This topic is valid when you use PRISMAdirect in combination with PRISMAprepare or the VDP Editor.

Map the LDAP attributes

1. Go to the [Configuration] workspace of PRISMAdirect.
2. Click [System] - [Connectivity] - [LDAP server] - [LDAP servers].
3. Select an LDAP server and click [Edit].
4. Map the LDAP attributes to profile settings and/or job ticket items.
5. Click [Save].

Procedure

1. Open PRISMAprepare or the VDP Editor.
Create a new VDP document:
   1. Open a PDF file.
   2. Add one or more text frames to the PDF file. Inside the text frames, you can type the field names that you want to use. The field names must use the exact spelling of the profile settings and/or the job ticket items as defined in PRISMAdirect. You have to enclose each field name with the "<" and ">" signs, for example, <TelephoneNumber>.
   Alternatively, you can create an Excel sheet where you use the profile settings and/or job ticket items as column headers. Add the Excel sheet as data source. Click [Insert field]. Now, you can select the profile settings and/or job ticket items from a drop-down list.
   3. Save the created VDP document.

2. Open the [Product and order editor]
Create a new VDP product in the [Product and order editor]:
   1. Click [New product] and select the product type, e.g., [Business cards].
   2. Click the pane [Detailed product settings].
   3. Add the new VDP document in section [File].
   4. Select the [Manual input] option.
   5. Configure the new product as required and click [Save].

3. Open the [Web store editor]
Add the new VDP product to the product catalogue of the web shop.

4. [Web store]
   1. The customer creates an order using the new VDP product. All manual input fields are shown to the customer. Where possible, the input fields use the values of the mapped LDAP attributes. Any additional fields remain empty. The customer can manually type a value for the empty fields, e.g., the mobile phone number.

Configure the budget management workflow

Introduction

You can manage the budgets for users and user groups. You have to create one or more cost centers for each web shop. You have to assign a budget to each cost center. Then, you can assign one or more users and user groups to each cost center. For the assigned users the prices of their orders are deducted from the budget. You can set a maximum price for an order for each user or user group. An approver has to accept or reject the order when the price exceeds the maximum price. Accept or reject only applies to the price of an entire order. An approver cannot accept or reject the prices of the separate jobs in an order.

NOTE
When the payment workflow is enabled, then the budget management workflow is disabled.

This topic describes the complete configuration of the budget management workflow.

You have to configure the cost centers in the [Configuration] workspace:
1. **Create one or more cost centers per web shop**
2. **Assign cost centers to users and user groups per web shop**

You have to configure the price approval settings in the [Configuration] workspace:
1. **Configure the default maximum price of an order per web shop**
2. **Configure the maximum price of an order for the users and user groups per web shop**
   You can configure the maximum price of an order for the users and user groups per web shop. These custom settings overwrite the default maximum price of an order per web shop.

Alternatively, you can setup an interface between the PRISMAdirect server and the uniFLOW server. The uniFLOW server then manages the cost centers and the price approval workflow.

Budget: available, reserved, and spent

You can change the available budget and you can reset the spent budget. The reserved budget is a step in the approval workflow and can therefore not be reset or changed.
- Available budget:
  The total budget available for the users of the web site.
- Spent budget:
  The amount spent so far by all users of the concerning cost center. You can reset the spent budget per cost centre manually.
- Reserved budget:
  A user has submitted an order costing $10,-. The approver must accept or reject the price of the order. While waiting for accept or rejection, the $10,- is added to the reserved budget.
  - When the order is accepted, the $10,- moves to the spent budget.
  - When the order is rejected, the $10,- moves to the available budget.

Create one or more cost centers per web shop

1. Click [Web store] - <web shop> - [Pricing] - [Cost centers].
2. Click [New cost center] to create the top level cost center.
   Click the plus icon to add a cost center.
3. Type a name and description for the cost center.
   You can use the characters: 'a - z', 'A - Z', '0 - 9', '_' . Spaces are allowed for the name.
4. Define the email address of the approver for this cost center. Use a semicolon to separate multiple email addresses.
   The approver receives an email when the spent budget exceeds the specified threshold.
5. Define the available budget for the cost center.

6. [Send warning at threshold [%]:]
   Define a percentage of the available budget. The approver receives an email when the spent budget exceeds the specified threshold. The approver can increase or decrease the available budget, or reset the spent budget.
   You can edit the email message, see [Order processing] - [Workflow configuration] - [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.
   When multiple cost centers are assigned to a web shop, you can select the default cost center for that web shop. Customers can select any of the cost centers of the web shop.
9. Click [Save].

Assign cost centers to users and user groups per web shop

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

Configure the default maximum price of an order per web shop

1. Click [Web store] - <web shop> - [Pricing] - [Price approval workflow].
2. Click [New level].
3. Define the maximum price of an order for the current level. You can type a value in the spinbox.
4. Define the email address of the approver for the current level. Use a semicolon to separate multiple email addresses.
   The approver receives an email when the order price exceeds the maximum price for the current level. The approver of the current level must approve or reject the order. If the price exceeds the maximum price of the next level, an approver of that level must also approve or reject the order.

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

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

7. Click [Save].

Configure the maximum price of an order for the users and user groups per web shop

You can configure the maximum price of an order for the users and user groups per web shop. These custom settings overwrite the default maximum price of an order per web shop.

1. To customize the maximum price of an order for:
   - Users: click [User management] - [Users] - [Price approval workflow] - <web shop>.
   - User groups: click [User management] - [User groups] - [Price approval workflow] - <web shop>.
2. Select a user or user group.
3. Click [New level].
4. Define the maximum price of an order for the current level. You can type a value in the spinbox.
5. Define the email address of the approver for the current level. Use a semicolon to separate multiple email addresses.
   The approver receives an email when the order price exceeds the maximum price for the current level. The approver of the current level must approve or reject the order. If the price exceeds the maximum price of the next level, an approver of that level must also approve or reject the order.

   NOTE
   The approver for level 1 can forward the approval form to the approver for level 2.
6. Click button [New level] to define a maximum price for the new level. The maximum price of the new level must be higher than the maximum price of the previous level.
7. [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.
8. Click [Save].

Configure the prices for media, printing, and finishing

Introduction

You have to configure the prices in the [Configuration] workflow:

1. **Configure the default prices for PRISMAdirect**
   You have to configure the default prices for media, printing and finishing options. You can configure the prices for choice items that you want to use in formulas. You have to configure the prices for stationery products. When you have configured the prices, you can create formulas for jobs and for orders.
2. **Optionally, configure custom prices per web shop**
   When the default prices are configured for PRISMAdirect, you can optionally configure custom prices for each web shop. The prices for a web shop overrule the default prices for PRISMAdirect.

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

Configure the default prices for PRISMAdirect

1. Click [Price and formula editor] - [Pricing].
2. Configure all pages in paragraph [Pricing] starting with page [Prices for media].
3. Define values for all options in the dialog. You can type a value in the text field. Or you can click the arrow buttons to increase or decrease the value.
4. Click [Save].

Optionally, configure custom prices per web shop

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

Configure the price estimation workflow

Introduction

You can configure the price estimation settings for each web shop. When the price estimation workflow is enabled, the customer is always presented with an estimation of the job cost.

This topic describes the complete configuration of the price estimation workflow.

You have to configure the products in the [Product and order editor] workspace:

1. **Select a price estimation formula per product**
   Go to the [Product and order editor] workspace and select a product. You can select one price estimation formula per product. The product settings overrule the user group and the web shop settings.

You have to configure the price estimation settings in the [Configuration] workspace:

1. **Configure the default price estimation settings per web shop**
2. **Optionally, you can customize the price estimation settings per user group**
   The custom settings overrule the web shop settings for the user group. The custom settings are used in all web shops for the corresponding user group.

The application uses the following price settings and formulas to estimate a price:

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

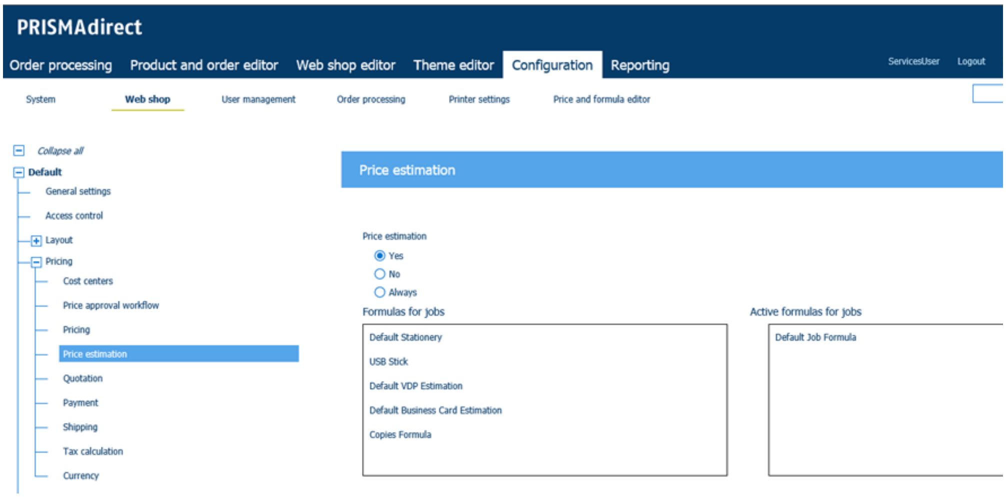
Select a price estimation formula per product

1. Open the [Product and order editor] and click [Products].
2. Select a product for which you want to use a price estimation formula.
3. Click the pane [Detailed product settings].
4. Select a quotation formula in section [Price settings] in the view [Web store].
   You can select [[Default price settings]]. In this case, the jobs created with this product will use the settings and formulas as defined in the web shop.
5. Click [Update].
6. Repeat this procedure for all products for which you want to use a price estimation formula.
7. Click the [Publish] icon in the tab of workspace [Product and order editor].
   Publishing the changes to the PRISMAdirect server could take some time. The status bar indicates the progress.

Configure the default price estimation settings per web shop

1. Click [Web store] - <web shop> - [Pricing] - [Price estimation].
2. You can define the default price estimation settings for the selected web shop.

Setting	Value
[Price estimation]	• [Yes] The option [Price estimation] is available in the web shop. A customer is always presented with an estimation of the job cost. • [No] The option [Price estimation] is not available in the web shop. A customer is never presented with an estimation of the job cost. • [Always] A customer is always presented with an estimation of the job cost. The customer cannot submit the job until the cost of the job is estimated.
[Formulas for price estimation]	Drag and drop the available formulas to the active formulas. Do this for both the jobs and the orders.



3. Click [Save].

Optionally, you can customize the price estimation settings per user group

1. Click [User management] - [User groups] - [User group settings].
2. Scroll to section [Price estimation].
3. A customer can be part of a user group. The settings of the user group overwrite the price estimation settings of each web shop.
   - Web shop
     The user group uses the price estimation settings as defined for each web shop.
   - Custom
     You can define custom price estimation settings for each web shop for the concerning user group.

Setting	Value
[Enabled]	• [Yes] The option [Price estimation] is available in the web shop. A customer is always presented with an estimation of the job cost. • [No] The option [Price estimation] is not available in the web shop. A customer is never presented with an estimation of the job cost. • [Always] A customer is always presented with an estimation of the job cost. The customer cannot submit the job until the cost of the job is estimated.
[Select formulas]	Drag and drop the available formulas to the active formulas. Do this for both the jobs and the orders.

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

4. Click [Save].

Configure the quotation workflow

Introduction

You can configure the quotation settings for each web shop. When the quotation workflow is enabled, the operator calculates and sends the quotation to the customer. A license is required to use the quotation functionality.

This topic describes the complete configuration of the quotation workflow.

You have to configure the products in the [Product and order editor] workspace:

1. **Select a quotation formula per product**
   Go to the [Product and order editor] workspace and select a product. You can select one quotation formula per product. The product settings overrule the user group and the web shop settings.

You have to configure the quotation settings in the [Configuration] workspace:

1. **Configure the quotation settings per web shop**
2. **Optionally, you can customize the quotation settings per user group**
   The custom settings overrule the web shop settings for the user group. The custom settings are used in all web shops for the corresponding user group.

The application uses the following price settings and formulas to calculate a quotation:

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

Select a quotation formula per product

1. Open the [Product and order editor] and click [Products].
2. Select a product for which you want to use a quotation formula.
3. Click the pane [Detailed product settings].
4. Select a quotation formula in section [Price settings] in the view [Print room].
   You can select [[Default price settings]]. In this case, the jobs created with this product will use the settings and formulas as defined in the web shop.
5. Click [Update].
6. Repeat this procedure for all products for which you want to use a quotation formula.
7. Click the [Publish] icon in the tab of workspace [Product and order editor].
   Publishing the changes to the PRISMAdirect server could take some time. The status bar indicates the progress.

Configure the quotation settings per web shop

1. Click [Web store] - <web shop> - [Pricing] - [Quotation].
2. You can define the default quotation settings for the selected web shop.

Setting	Value
[Quotation]	• [Yes] Option [Quotation] is available in the web shop. A customer can request a quotation. • [No] Option [Quotation] is not available in the web shop. A customer cannot request a quotation. • [Always] A customer is always presented with a quotation. The customer cannot disable the request to calculate a quotation.
[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 is 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.
[Formula for order:]	You have to select a formula to calculate the quotations of the orders.

3. Click [Save].

Optionally, you can customize the quotation settings per user group

1. Click [User management] - [User groups] - [User group settings].
2. Scroll to section [Quotation].
3. A customer can be part of a user group. The settings of the user group overwrite the quotation settings of each web shop.
   - Web shop
     The user group uses the quotation settings as defined for each web shop.
   - Custom
     You can define custom quotation settings for each web shop for the concerning user group.

Setting	Value
[Enabled]	• [Yes] Option [Quotation] is available in the web shop. A customer can request a quotation. • [No] Option [Quotation] is not available in the web shop. A customer cannot request a quotation. • [Always] A customer is always presented with a quotation. The customer cannot disable the request to calculate a quotation.
[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.

Setting	Value
[An order can be printed only after the price is calculated]	Enable this option to force the operator to always calculate the quotation. The quotation must be calculated for a correct budget control.
[Formula for job:]	You have to select a formula to calculate the quotations of the jobs.
[Formula for order:]	You have to select a formula to calculate the quotations of the orders.

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

4. Click [Save].

Configure the workflow for automation templates

Introduction

For repetitive jobs it is possible to select one or more templates with pre-defined settings. They will prepare a job using PRISMAprepare in the background. These templates are called automation templates. They can be applied manually or automatically. The benefits of the automation templates are:

- Saving time and minimizing errors as the layout is standardized and preparation is done in the background.
- Consistent layout in a multiple operator environment.

This topic describes the complete configuration of the workflow for automation templates.

1. You have to prepare the PRISMAdirect server:
    1. **Install PRISMAprepare on the PRISMAdirect server**
       You can create and maintain the automation templates in PRISMAprepare.
    2. **Install the *PRISMAdirect Web Bootstrap* on the PRISMAdirect server**
       The *PRISMAdirect Web Bootstrap* synchronizes the automation templates in PRISMAprepare with PRISMAdirect.

    The automation templates are immediately available in the [Order processing] console. The operator can apply automation templates manually to jobs.
2. Configure the automation templates in the [Configuration] workspace:
    1. **Allow the use of automation templates in the products**
       The automation templates become available in the [Product and order editor] workspace. You can assign one or more templates to a product. Each job is created using a product. The automation templates assigned to the product will be applied automatically when the job arrives on the server.
    2. **Configure the port for the [Print Prepare Manager service]**
       The automation templates functionality is available in the PRISMA Core. The PRISMA Core is installed on the server. Therefore, applying the automation templates is executed on the server. The Order processing console connects to the PRISMAdirect server via the port for the Print Prepare Manager service.
    3. **Manage the automation templates**
       You can manage the automation templates available for PRISMAdirect.
3. You have to configure the products in the [Product and order editor] workspace:
    1. **Assign automation templates to one or more products**
       You can assign one or more templates to a product. Each job is created using a product. The automation templates assigned to the product will be applied automatically when the job arrives on the server.

Install PRISMAprepare on the PRISMAdirect server

1. Install PRISMAprepare on the server
   You need a license to run PRISMAprepare.
2. Create and maintain the automation templates in PRISMAprepare.

Install the *PRISMAdirect Web Bootstrap* on the PRISMAdirect server

1. Click [System] - [Downloads].
2. Download and install the *PRISMAdirect Web Bootstrap*.
   The *PRISMAdirect Web Bootstrap* synchronizes the automation templates in PRISMAprepare with PRISMAdirect.

Manage the automation templates

Click [Order processing] - [Manage automation templates] to manage the automation templates for PRISMAdirect.

Allow the use of automation templates in the products

1. Click [Order processing] - [Workflow configuration] - [General settings] - [Other settings].
2. Enable the [Automation templates] option.
   The automation templates become available in the [Product and order editor] workspace. You can assign one or more templates to a product.
   When you disable this option, any automation templates assigned to one or more products are removed from the products.

Configure the port for the [Print Prepare Manager service]

1. Click [System] - [Services settings] - [Print Prepare Manager service].
2. Define the port for the Print Prepare Manager service. The default port number is 54000.
   Check that the port is available on the PRISMAdirect server.
3. Click [Save].

Assign automation templates to one or more products

You can assign one or more automation templates to a product. Each job is created using a product. The automation templates assigned to the product will be applied automatically when the job arrives on the server.

1. Open the [Product and order editor] and click [Products].
2. Select a product for which you want to use automation templates.
3. Click the pane [Detailed product settings].
4. Select the [Print room] view and expand section [Automation templates].
5. Drag and drop available automation templates to the active automation templates. You can activate more than one automation template per product. Drag each automation template up or down to put them in the correct order.
   - The application of a template can fail. For example, the automation template can only be applied to the job partially. In this case, an error is reported in the [Order processing] console on job level in section [Automation templates]. However, no errors are reported to the print room operator when you enable option [Ignore errors].
6. Click [Update].
7. Repeat this procedure for all products for which you want to use automation templates.
8. Click the [Publish] icon in the tab of workspace [Product and order editor].
   Publishing the changes to the PRISMAdirect server could take some time. The status bar indicates the progress.

Configure the filters

You can configure if order managers and operators are allowed to create their own filters in the [Order processing] workspace.

1. Click [User management] - [Users] - [User settings].
2. Click the pencil icon to edit the user.
3. [Allow only the use of filters created by the system administrator]
   - Enabled
     The order manager and operator cannot create any filters. They can only use the filters created by the system administrator.
   - Disabled
     The order manager and operator can create filters in the [Order processing] workspace.

   This option is not available for users with role: [Customers].
4. Click [Save].

You can create filters to determine which orders are visible for a user. A filter shows the jobs and orders that match the required filter criteria. The filter hides all other jobs and orders.

You can create and configure the filters in the following locations in workspace [Configuration]:

1. [Web store]
   The filter determines which orders are visible for a customer. You can create filters for each separate web store. See *Create a filter* on page 168.
2. [Order processing]
   The filters determine which orders and jobs are visible for order managers and operators in the [Order processing] workspace. See *Manage the filters* on page 207.

Analyze log files and view which services log information

Each service logs information in a dedicated log file. You can use the log files to troubleshoot the configuration of PRISMAdirect.

Collect and analyze the log files

Use the "PRISMAdirect software support" tool to collect and analyze logging information. Do:

1. Start the "PRISMAdirect software support" tool to collect the log files:
   Click: "Start - Search - Apps - Software Support".
2. Analyze the log files.
   Select tab "Logs" to start analyzing the log files.

Log files and services

The following services are deployed on the PRISMAdirect server and/or web servers:

- Print Automatic Processing Service
  This service performs page counting, page preview generation, merge, and native file conversion. It writes to log file "ProcessingService.log".
- Print Job Data Dispatcher
  This service uploads files during job submission and dispatches actions on jobs in the system to the Print Automatic Processing Service. It writes to log file "JobDataDispatcher.log".
- Print Monitoring Service
  This service handles notifications on changes (Orders/Files/Order status) from the JDF Framework and it caches data for the web client. It writes to the log files "MonitoringService.log", the "MonitoringWCF.log" and "LicenseState.log".
- Print Import Service
  This service imports orders from a local or remote file system, via hot folders. It writes to log file "ImportService.log".
- Print Export Service
  This service exports orders into archive files, into the configured export folder. It writes to log file "ExportService.log".
- JDF Framework
  This service handles user management and order storage on disk. It writes to log file "FW-OceJdfFramework-Trace.log".
- Print JDF Service
  This service imports orders from JDF/JMF endpoints. It writes to log file "JdfService.log".
- Print Prepare Manager Service
  This service performs the actions that involve PRISMA Core. For example, apply automation templates, VDP document and data source validation, etc. It writes to log file "PrepareManagerService.log".
- Print CleanUp Service
  This service removes files that are no longer needed. It writes to log file "CleanUpService.log".
- Print Cost Manager Service
  This service computes cost estimation, quotation and handles budget approval and operations on cost centers. It writes to the log files "CostManagerService.log" and "CostManagerWCF.log".
- Print License Monitoring Service
  This service checks the license. It writes to log file "LicenseMonitoringService.log".
- Print Machine Manager
  This service handles the IIS configuration. It writes to log file "MachineManagerService.log".
- Print ORS Service

This service handles the connection to On Remote Service. It writes to log file "ORSService.log".
- Print Synchronization Service
  This service runs only on the remote component "Web server". It handles the synchronization of settings between the server and the remote web server. It writes to log file "SynchronizationService.log".
- Print Uniflow Interface Service
  This service handles the connection to uniFLOW. It writes to log file "UniflowInteropService.log".
- Print CSVLog Service
  This service is always disabled.

The following service is deployed on client PCs:
- Print Bootstrap Service
  This service synchronizes the automation templates in PRISMAprepare with PRISMAdirect. It writes to the log files "Bootstrap.log" for the web bootstrap executable and "BootstrapService.log" for the Print Bootstrap Service.

The following service is deployed on all computers where PRISMA Core is installed:
- PRISMAprepare ORS service
  This service handles the connection between PRISMAprepare and On Remote Service.

The following table shows which services run on each component of PRISMAdirect:

Server	Web server	Client PC
• Print Automatic Processing Service • Print Job Data Dispatcher • Print Monitoring Service • Print CleanUp Service • Print Cost Manager Service • Print License Monitoring Service • Print Machine Manager • Print ORS Service • Print Import Service • Print Export Service • JDF Framework • Print JDF Service • Print Prepare Manager Service • Print Uniflow Interface Service • Print CSVLog Service (disabled) • PRISMAprepare ORS service	• Print Automatic Processing Service • Print Job Data Dispatcher • Print Monitoring Service • Print CleanUp Service • Print Cost Manager Service • Print License Monitoring Service • Print Machine Manager • Print ORS Service • Print Synchronization Service (on remote web server only)	• Print Bootstrap Service • PRISMAprepare ORS service

Chapter 3
System

Connectivity

Manage the LDAP servers

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

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

Additional actions	Description
Test the connection	Click [Test connection] to test the connection to the selected LDAP server. The connection status of each LDAP server is displayed in column [Status]. The following checks are done: • Connect + bind to the LDAP server; • Read of RootDSE; • Probe for a user entry to enumerate user attributes; • Probe for a group entry to enumerate group attributes.
Refresh the LDAP information	Click [Refresh] to refresh the generic info about the LDAP, users and groups part of that LDAP. PRISMAdirect stores some information about each LDAP locally. The information regards generic info about the LDAP, users and groups part of that LDAP. In order for it to be in sync with the real information, a service synchronizes this information automatically once a day, at midnight. If you want to synchronize this information manually, you have to use the [Refresh] functionality which starts an update of the information stored for all the LDAP servers.

Add an LDAP server

You can use LDAP servers for authentication and to retrieve user data. An LDAP server can be used for Windows authentication of users.

1. Click [System] - [Connectivity] - [LDAP server] - [LDAP servers].
2. Click [Add] or click on the bar of the LDAP server that you want to configure. The bar expands and you can fill in the required settings.

Setting	Description
[Domain name for LDAP server:]	You can define a custom name for the LDAP server. The custom name must be unique.

Setting	Description
[Credentials policy:]	The JDF Framework service uses these credentials to connect to the LDAP server. • [Use the credentials of the currently logged on user] These are the credentials that are stored in the global settings of the LDAP server. These credentials are used for each connected LDAP server. These credentials are not defined in the application by the user. This value can always be used for each LDAP server. • [Use the credentials which are stored on the LDAP server] You must supply a user name and password to retrieve information from the LDAP server. Define the [LDAP server user name:] and [LDAP user password:]. • [Use the credentials of the Windows user who runs the JDF Framework service] You can select this credential policy only for Secure-based authentication types. This credential policy supports Integrated Windows Authentication (IWA) only. These credentials are defined by the user during the installation of the application. The Windows user can be DocWorker, a local user, or a selected domain user. You can identify the Windows user who runs the JDF Framework in the Services dialogue of Microsoft Windows: • .\JdfFramework: local user • .\DocWorker: DocWorker
[Server address:]	Type the address of the LDAP server. If you define only the address of the LDAP server, the users are searched through the entire LDAP server. You can also define the server address and the search root. When you define the server address and the search root, the search for users starts at the defined root on the server. For example: `LDAP://sro.company.net:389/DC=sro,DC=company,DC=net`, where: • sro.company.net The address of the domain controller. • 389 The port which is used to connect to the LDAP server. The default port number for a non-secure connection is 389. The default port number for a secure connection is 636. • DC=sro,DC=company,DC=net The path to search for users in the active directory tree on the LDAP server.
[Server type:]	Select a server type. The server types which start with “Native…” are preferred. The other server types are available for backwards compatibility.

Setting	Description
[Use secure connection (SSL)]	Select this option if you want to create a secure connection to the LDAP server. You must update the port number in option [Server address:] when you want to use a secure connection. The default port number for a non-secure connection is 389. The default port number for a secure connection is 636. To be able to select this option, the LDAP server has to support this.
[User filter:]	A default user filter is created automatically when the LDAP server is used for authentication or to retrieve user data. Only users that pass the filter can be imported from the LDAP server. You can edit the filter. The minimum filter is the LDAP attribute for user name, for example: (sAMAccountName=%u). The user filter must contain "%u" as placeholder for the user name. The minimum filter will always work, but it is not time efficient. The filter must be updated when the [LDAP attribute for user name:] is changed.
[LDAP attribute for user name:]	You can define the LDAP attribute that contains the user name. The default LDAP attribute is used for the user name if this field is left empty. The default LDAP attribute depends on the server type.
[User group filter:]	A default user group filter is created automatically when the LDAP server is used for authentication or to retrieve user data. Only user groups that pass the filter can be imported from the LDAP server. You can edit the filter. The minimum filter is the LDAP attribute for group name, for example: (cn=%g). The user group filter must contain "%g" as placeholder for the user group name. The minimum filter will always work, but it is not time efficient. The filter must be updated when the [LDAP attribute for group name:] is changed.
[LDAP attribute for group name:]	You can define the LDAP attribute that contains the group name. The default LDAP attribute is used for the group name if this field is left empty. The default LDAP attribute depends on the server type.
[Authentication used to connect to LDAP server:]	You can define the type of authentication which the application uses to connect to the LDAP server. See *Authentication types* on page 74
[Authentication used to connect user to the LDAP server:]	You can define the type of authentication which the application uses to authenticate a user on the LDAP server. See *Authentication types* on page 74

Setting	Description
Allow automatic creation of users:	Every user who logs on to the application with a user name and password known by the LDAP server is created automatically. The [User type] of an automatically created user becomes: • [Windows user] if the user is authenticated via Windows authentication. • [LDAP user] if the user is authenticated via custom authentication. An automatically created user belongs to the group of [Customers]. The users in the [Customers] group can access the web shops.
[Separator for multi-valued attributes:]	The LDAP attributes can contain multiple values. Therefore, you have to define a separator to read each separate value correctly. In the [Product and order editor] workspace, you can create lookup items to read information from an LDAP server. Both the lookup item and the LDAP server must use the same separator. Else, the lookup item cannot return multiple values of an LDAP attribute correctly.

3. Click [Save].

Edit profile mappings

For each LDAP server, you can map information available in the LDAP server to the [Profile settings] of the customers. The precondition is that the LDAP server is used to retrieve user data. The [Profile settings] of the customers then automatically receive the data from the LDAP server.
- If the LDAP attribute contains a value, the associated profile attribute is filled in. The customer cannot change the profile attribute.
- If the LDAP attribute does not contain a value, the associated profile attribute is left empty. The customer must define the value of the profile attribute.
- If you deselect a profile attribute, the user can change the value of the profile attribute.

1. Click [System] - [Connectivity] - [LDAP server] - [LDAP servers].
2. Select an LDAP server and scroll to section [Edit profile mappings].
3. Type an LDAP attribute for each enabled profile attribute.
   The LDAP attributes may not be present in all the LDAP servers or might not contain relevant information.
4. Click [Save].
5. Check that the LDAP server is used to retrieve user data.
   When the LDAP server is used to retrieve user data, the profile attributes receive the value of the mapped LDAP attribute.
   1. Click [System] - [Connectivity] - [LDAP server] - [Authentication & user data].
   2. If required, drag and drop the LDAP server into field [Servers used to retrieve user data:].
6. Click [Save].

Map LDAP attributes to order items

You can map LDAP attributes to order items. When the LDAP server is used to retrieve user data, the order items receive the value of the mapped LDAP attribute.
1. Click [Add].
2. Select an order item from the drop-down list.
3. Type the LDAP attribute that contains the information that you want to use for the order item.
4. Do this for all order items that you want to map to LDAP attributes.

5. Click [Save].

Authentication types

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

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

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

Authentication types

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

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

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

Authentication optimizations

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

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

Authentication & retrieve user data

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

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

Select the LDAP server

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

Configure the email settings

Configure the SMTP server of the print room and the email settings

The settings in this dialog are part of the procedure to configure the email workflow. For the complete procedure, see *Configure the email workflow* on page 46.

Configure the SMTP server of the print room and the email settings

1. Click [System] - [Connectivity] - [Email settings].
2. Type the email address of the print room.
   When you type a different email address for a web shop, then this email address is overwritten. See: [Web store] - <web shop> - [Contact information] - [Contact information].
3. Type the name that will be used in the 'From' field of the email message. For example: 'Print room'.
4. Type any Cc addresses. You can enter multiple email addresses, separated with a semicolon (;).
5. The operator can add or remove email addresses from the 'Cc' field when you enable option [Allow the operator to add Cc addresses].
6. Configure the SMTP server.
   1. Type the address and the port number of your email server. The default port number for SMTP is 25.
      Ask your IT department for details.
   2. Click button [Test connection] to test the connection to the email server.

   Configure the SMTP authentication.
   1. [Enable SSL]
      Select this option if you want to create a secure SMTP connection. You have to update the port number. The default port number for an SMTP connection secured by SSL is 587.
      Ask your IT department for details.
   2. You can allow self-signed certificates for the secure connection.
      SMTP server can treat self-signed certificates the same as a certificate issued by an untrusted CA. Depending on their policy, they may drop the connection or decide to transmit emails anyways.
   3. Configure the authentication of the sender.
      The value for this option depends on how the client has configured the SMTP server.

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

7. It is recommended that you send a test email to check your configuration of the SMTP server.
8. Click [Save].

Configure the file hosting services

The settings in this dialog are part of the procedure to configure the file hosting services, for example, Dropbox. For the complete procedure, see *Configure the file hosting services, for example, Dropbox* on page 23.

Configure linking to a file or folder

The settings in this dialog are part of the procedure to configure linking to a file or folder. For the complete procedure, see *Configure linking to a file or folder* on page 28.

Integrate Office 365 and Microsoft Outlook with PRISMAdirect

You can create orders based on emails received from Office 365 and Microsoft Outlook. Furthermore, when the customer accepts the order, you can receive that status change via an email.

NOTE
Multiple order managers can work in the order processing console:
- If the order managers share one email account, then you have to configure and install the "Office 365 add-in" or the "Outlook add-in" once.
- If the order managers each use their own email account, then you have to configure and install the "Office 365 add-in" or the "Outlook add-in" for each email account.
- Since Office 365 is web-based, the order managers can access their Office 365 account from any available computer.

Precondition to integrate Office 365 with PRISMAdirect

You have to enable secure connections:
1. Click [System] - [Security] - [Connection].
2. Enable [Use secure connections (HTTPS)].
   Enable this option to use a secure HTTPS connection between the server and the web server. If you enable this option you have to have a certificate. A certificate guarantees a secure (HTTPS) connection.
   The certificate must be valid.

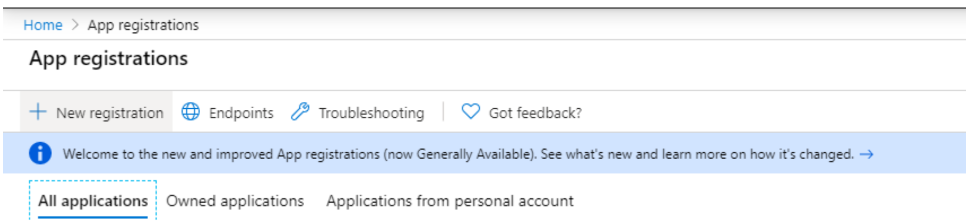
Add the OrderID to the subject of each email

It is recommended to add the OrderID to the subject of each email which is sent from the application. Add the OrderID for easy identification of the job.
1. Click [Order processing] - [General settings] - [General settings].
2. Enable the [Always add the OrderID to the email subject] option.
3. Click [Save].

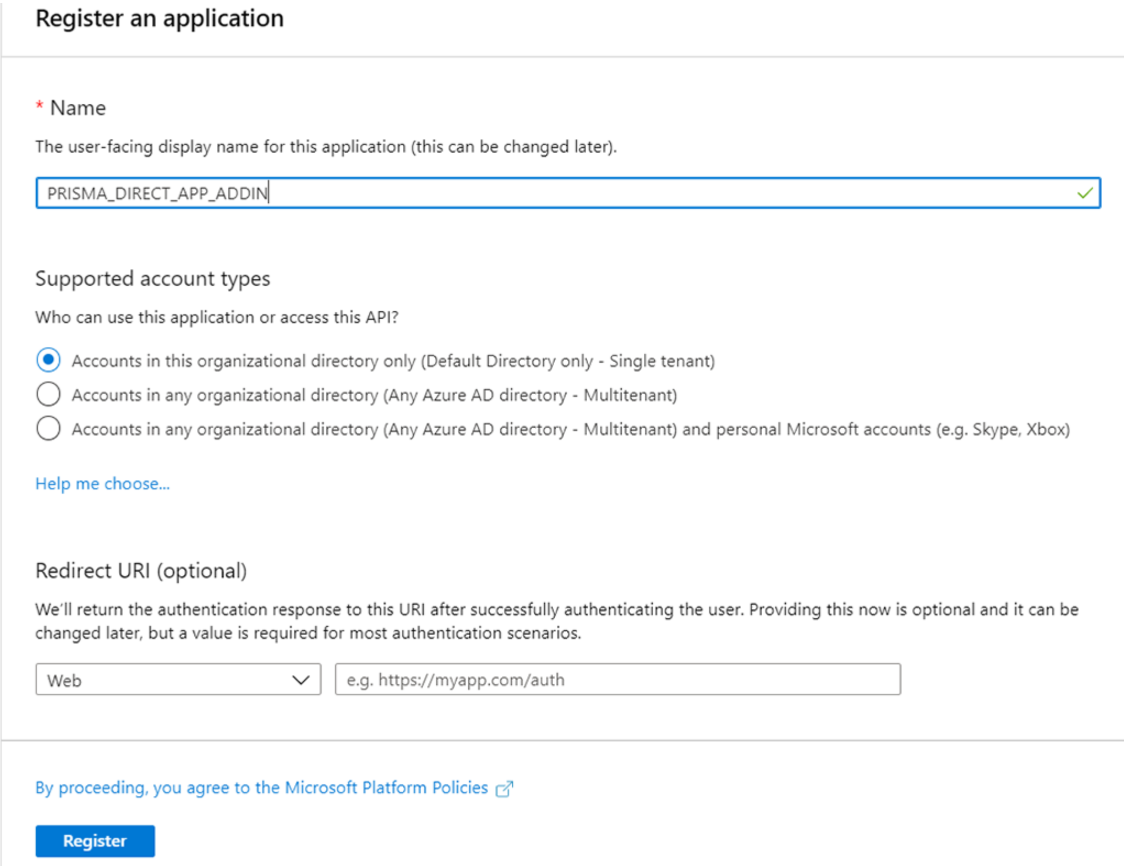
Integrate Office 365

You can install the Office 365 add-in on Windows and iOS operating systems.

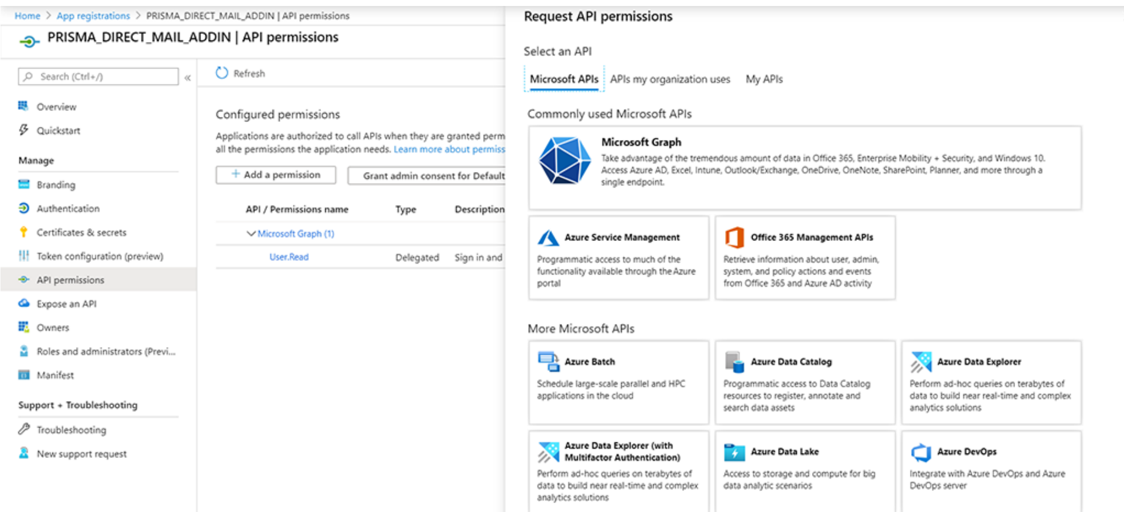
Register PRISMAdirect on the Microsoft developers site
1. Open a browser on a computer that has access to the PRISMAdirect server.
2. Go to *https://portal.azure.com/#blade/Microsoft_AAD_RegisteredApps/ApplicationsListBlade%20*.
3. Create an account and log in.
4. Click "New registration".



5. Type a name for the application and click "Register". The name is used internally by Microsoft and will not be visible for customers.

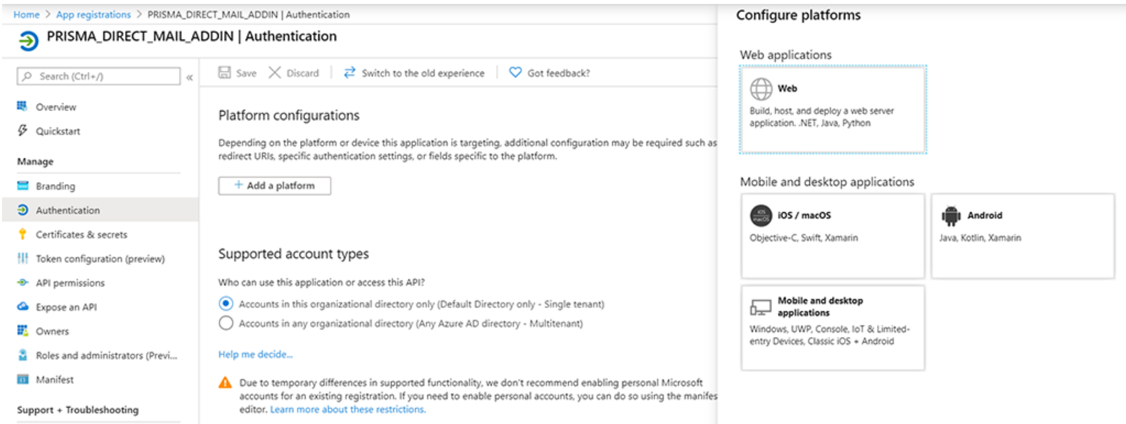


6. Go to “API permissions” and click “Add a permission”, then click “Microsoft Graph”.

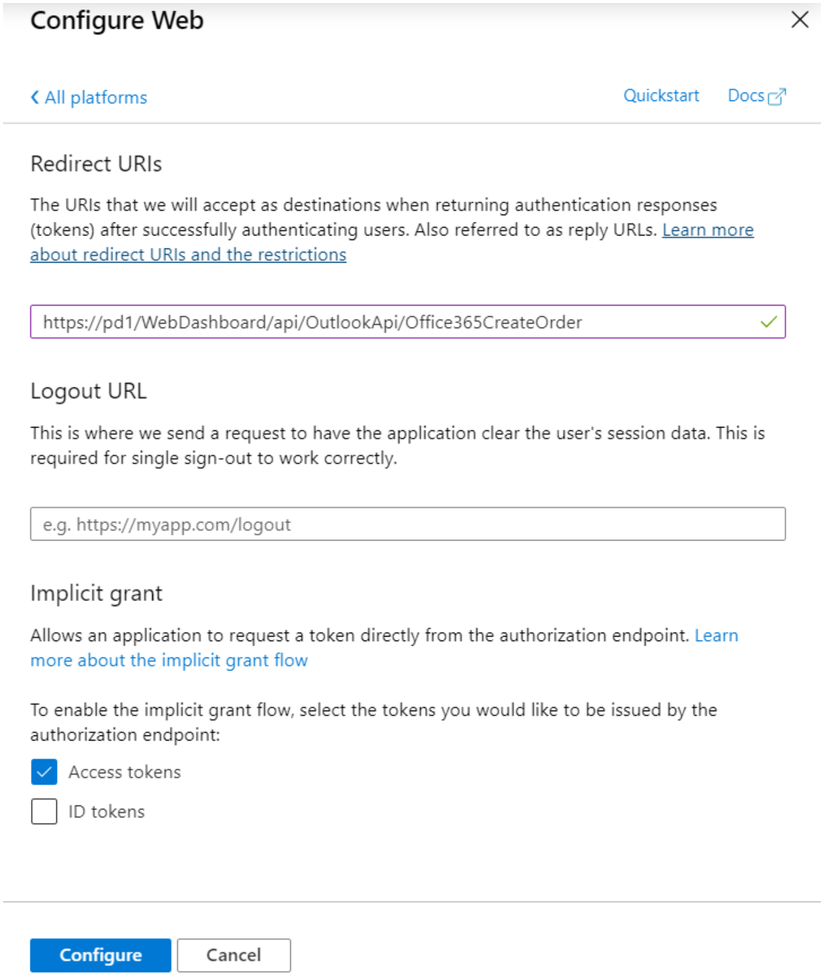


7. Click “Delegate permissions”. Go to “Mail” and enable “Mail.Read”, then click on “Add Permissions".

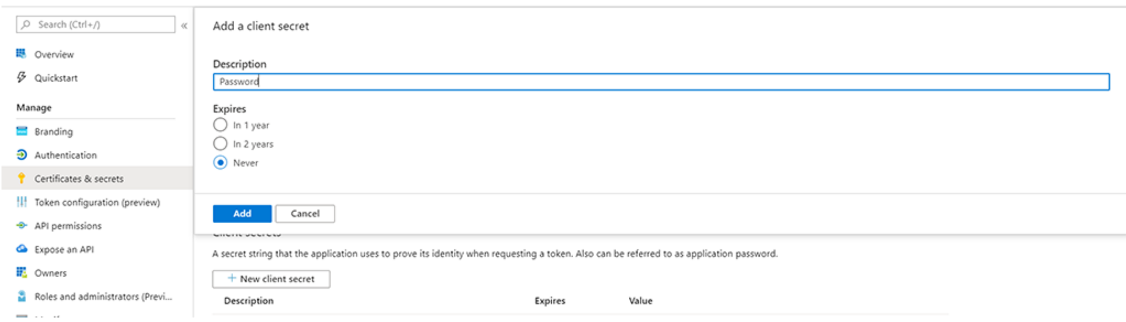
8. Go to “Authentication”, click on “Add a platform”, then click on “Web”.



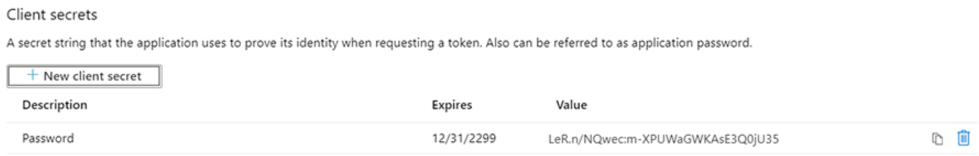
9. From PRISMAdirect, click [Configuration]→[System]→[Connectivity]→[Office 365 add-in] and copy the URL from “Redirect URL” and paste it to “Redirect URIs” from the Microsoft application.
   Also, enable “Access tokens” and click “Configure”.



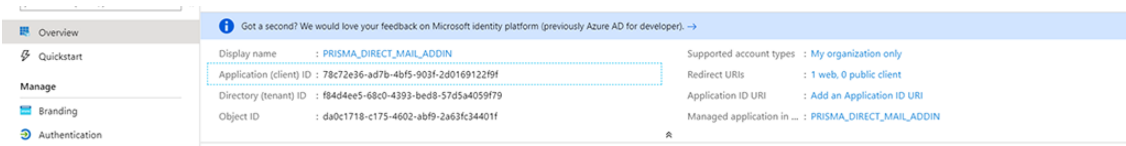
10. Go to “Certificates & secrets”, click “New client secret”, add a description, select an expiration time, and click “Add”.



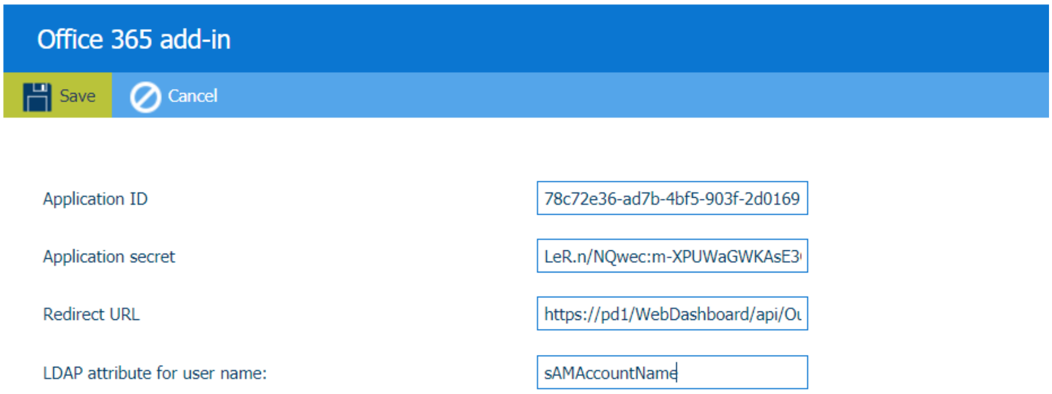
11. Copy the client secret and paste it to PRISMAdirect [Configuration]→[]→[System]→[Connectivity]→[Office 365 add-in]→[Application secret]



12. PRISMAdirect [Configuration]→[System]→[Connectivity]→[Office 365 add-in]→[Application ID]



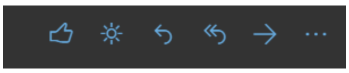
13. 13. Click [Save].



Install the add-in

You can install the add-in on every Office 365 environment that has access to the PRISMAdirect server.

1. Click [Configuration]→[System]→[Downloads]
2. Download the "PRISMAdirect Office 365 AddIn". Select option "Save File" if a dialog opens to ask you what to do with the file. The default download location for the file is the "Downloads" folder. PRISMAdirect will not notify you when the download is completed.
3. Open a browser on a computer that has access to the PRISMAdirect server.
4. Go to outlook.office365.com (*outlook.office365.com*).
5. Log in with an account that is valid for the Office 365 environment.
6. Click on a mail, click on "More options" (three dots), and then "Get add-ins".



7. Select "My add-ins".

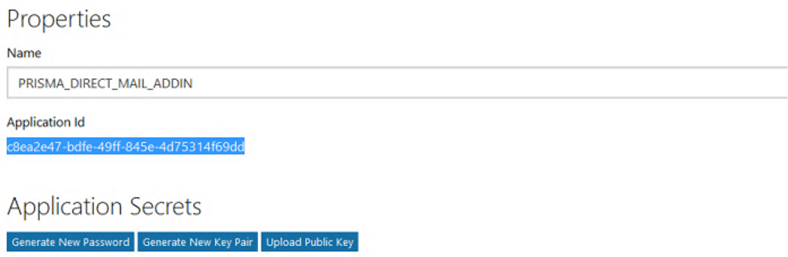
Integrate Office 365 with PRISMAdirect

During registration, Microsoft generates the [Application ID] and the [Application secret]. The [Redirect URL] is always available in PRISMAdirect. You'll need these settings to integrate Office 365 with PRISMAdirect.

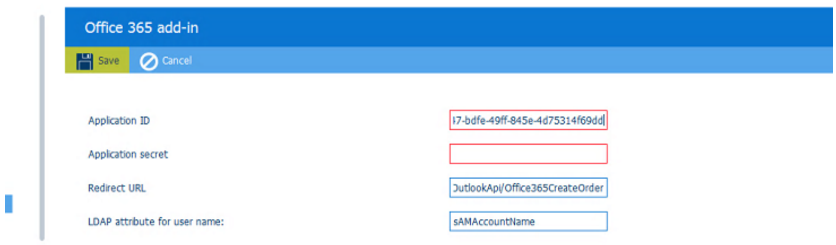
PRISMAdirect always generates a redirect URL. You can edit the URL, for example, when you want to use a friendly URL. When you register the add-in, you have to use the redirect URL in both PRISMAdirect and the add-in. The redirect URL establishes the communication between the add-in and PRISMAdirect.

The [LDAP attribute for user name:] is automatically retrieved from the LDAP server. If required, you can change the attribute manually in this dialog. PRISMAdirect uses this attribute to retrieve the user profile of the current user when sending emails. The server of PRISMAdirect is registered in a certain domain. The LDAP server that is registered in the same domain will be used to retrieve the user data. There can be only one LDAP server registered in the same domain as the PRISMAdirect server.

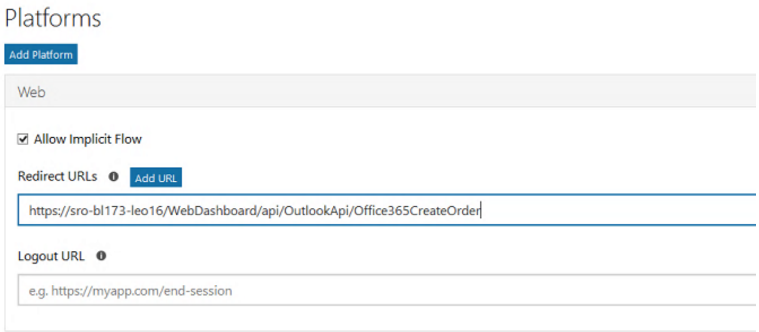
1. Copy the "Application Id" displayed in the Microsoft developers site.



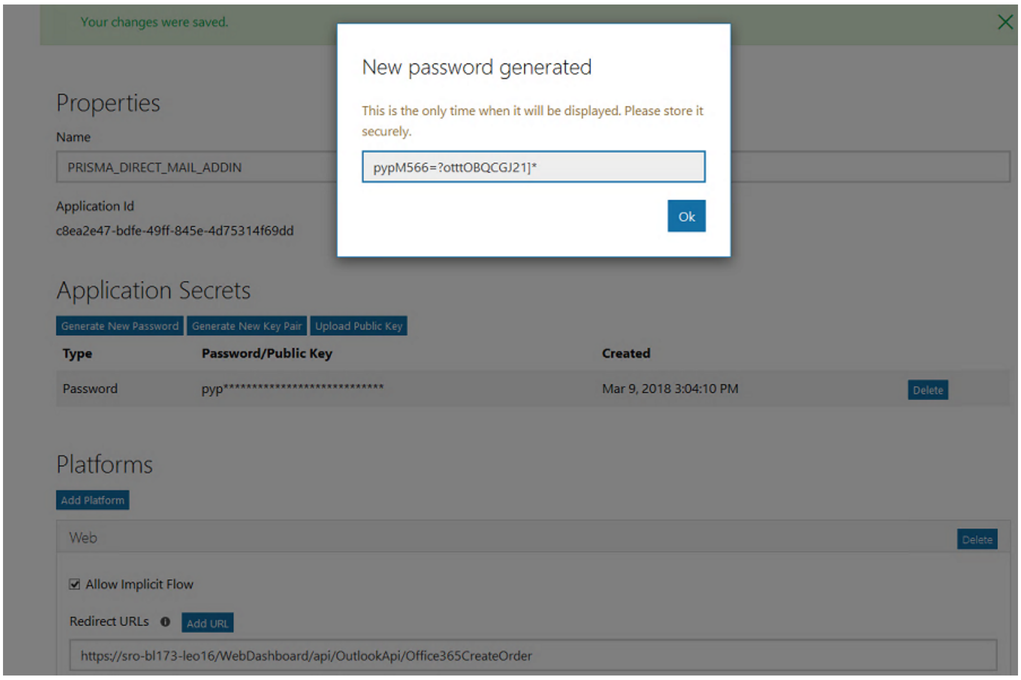
2. Click [System] - [Connectivity] - [Office 365 add-in].
3. Paste the "Application Id" into option [Application ID] in the [Office 365 add-in] dialog of PRISMAdirect.



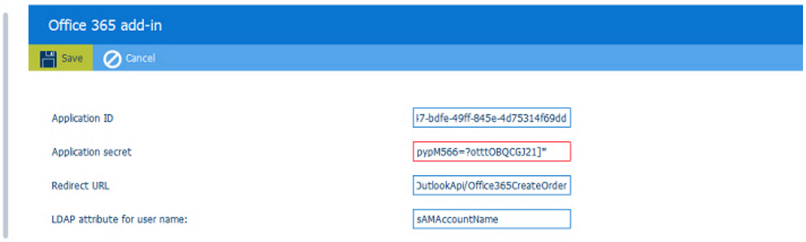
4. Click [Save].
5. Copy the [Redirect URL] displayed in the [Office 365 add-in] dialog.
   PRISMAdirect automatically fills in the [Redirect URL] and the [LDAP attribute for user name:].
6. Go to the Microsoft developers site.
7. Scroll to section "Platforms" and paste the [Redirect URL] into option "Redirect URLs".



8. Click [Save]. Do not close the web page.
   The [Save] button is available in the bottom of the web page.
9. Scroll to section "Application Secrets" and click "Generate New Password".



10. Copy the password. It is recommended that you store the password in a file. Click OK.
11. Click [System] - [Connectivity] - [Office 365 add-in].
12. Paste the password into option [Application secret] in the [Office 365 add-in] dialog of PRISMAdirect.

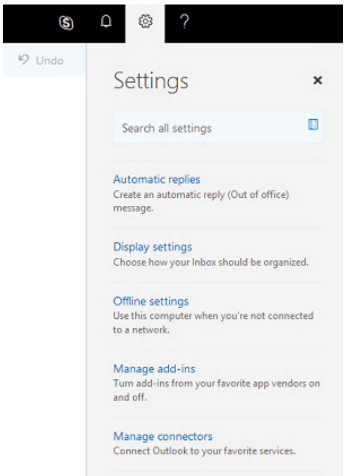


13. Click [Save].

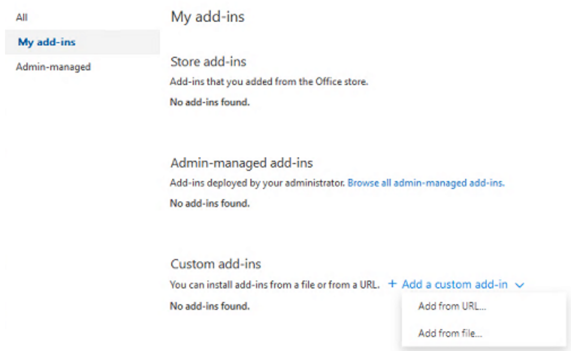
Install the add-in

You can install the add-in in every Office 365 environment that has access to the PRISMAdirect server.

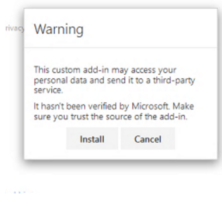
1. Click [System] - [Downloads].
2. Download the "PRISMAdirect Office 365 AddIn". Select option "Save File" if a dialog opens to ask you what to do with the file. The default download location for the file is the "Downloads" folder.
   PRISMAdirect will not notify you when the download is completed.
3. Open a browser on a computer that has access to the PRISMAdirect server.
4. Go to *outlook.office365.com*.
5. Log in with an account that is valid for the Office 365 environment.
6. Click the cogwheel icon to open the settings.
7. Select "Manage add-ins".



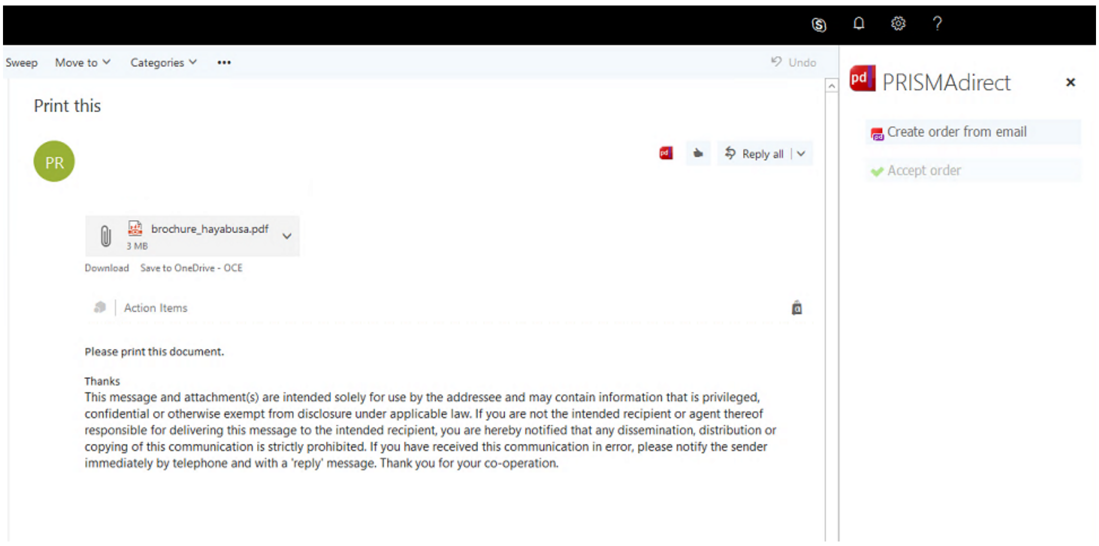
8. Select "My add-ins".
9. Select "+ Add a custom add-in", then select "Add from file..." in section "Custom add-ins".



10. Browse to the folder that contains the downloaded "PRISMAdirect Office 365 AddIn.xml" file. By default, that is the "Downloads" folder.
11. Select the file and click "Open".
12. Click "Install".



13. When installation is completed, the custom add-in "PRISMAdirect" is added to Office 365. To create an order from an email, click the small icon of the PRISMAdirect add-in. In the right-hand side, a dialog expands and you can click "Create order from email".



Integrate Microsoft Outlook

You can install the Microsoft Outlook add-in only on Windows operating systems.

1. Open workspace [Configuration] and go to [Downloads].
2. Download the "PRISMAdirect Outlook AddIn".
   Wait until the "OutlookAddInInstallerZip.exe" has been downloaded.

3. Run the executable on each computer that connects to the order processing workspace. The Outlook Addin allows the order manager and operator can create orders from emails.

Create a connection to ONYX

The settings in this dialog are part of the procedure to configure the workflow for wide format printing. For the complete procedure, see *Configure the workflow for wide format printing* on page 17.

Select the payment providers for PRISMAdirect

The settings in this dialog are part of the procedure to configure the payment workflow. For the complete procedure, see *Configure the payment workflow* on page 18.

Shipping

Select the shipping providers for PRISMAdirect

The settings in this dialog are part of the procedure to configure the shipping workflow. For the complete procedure, see *Configure the shipping workflow* on page 34.

Define any custom box sizes

Each shipping provider offers a range of default box sizes. You can define one or more custom box sizes for each shipping provider.

NOTE
When you select an additional shipping provider for PRISMAdirect, that provider is also added to each existing custom box. Now, you have to configure each existing custom box for the new provider.

The settings in this dialog are part of the procedure to configure the shipping workflow. For the complete procedure, see *Configure the shipping workflow* on page 34.

Define any custom box sizes

1. Click [System] - [Connectivity] - [Shipping] - [Custom box sizes].
2. You can create one or more custom box sizes for each shipping provider. Do this for each shipping provider enabled for PRISMAdirect.
3. Click [Save].

Configure the default shipping label

You can offer a shipping service to your customers. When you select one or more shipping providers, each customer can request shipment of an order via the web shop.

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

The default label will be used when the shipping provider does not offer a shipping label. The label only contains the information that you configure in this dialog.

The settings in this dialog are part of the procedure to configure the email workflow. For the complete procedure, see *Configure the shipping workflow* on page 34.

Configure the default shipping label

1. Click [System] - [Connectivity] - [Shipping] - [Default label].
2. You can use variables from the list of [Order items] and/or the [Origin address] to create the shipment label. This allows you to use dynamic information in the label. Drag and drop the variable into the label at the desired position. A variable is indicated by '%' symbols. You can also type fixed text in the label.
3. Define the font settings for the label.
4. Select the size of the media on which the default label will be printed.
5. Enable option [Print logo in label] when you want to add a logo to the label.
   - Click button [Browse] to select an image.
     The allowed image file types are: .bmp, .jpg, .gif, .png.
     Click [Clear] to remove a selected image.
   - Select the position for the logo from the drop-down list.
   - [Scale logo to page size]
     You can scale the logo to the page size. Enable option [Keep ratio] if you want 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.
6. Click button [Preview] to preview the shipment label.
7. Click [Save].

Select the tax services for PRISMAdirect

The settings in this dialog are part of the procedure to configure the tax services workflow. For the complete procedure, see *Configure the tax services workflow* on page 38.

Type the default origin address

You ship your packages from the origin address. You can use the default origin address when you have only one web shop. When you have multiple web shops, you have to type an origin address for each separate web shop. See: [Web store] - <web shop> - [Contact information] - [Origin address].

The origin address is part of the following procedures:
- Configuration of the shipping workflow. For the complete procedure, see *Configure the shipping workflow* on page 34.
- Configuration of the tax services workflow. For the complete procedure, see *Configure the tax services workflow* on page 38.

Type the default origin address

1. Click [System] - [Connectivity] - [Origin address].
2. Type the origin address for your web shop. You can use the default origin address when you have only one web shop. When you have multiple web shops, you have to type an origin address for each separate web shop.
   The address will not be validated in this dialog. The address will be validated when:
   - The operator requests a shipment in the [Order processing] workspace. The selected shipment provider returns an error message if any of the values are incorrect.
   - The operator or customer creates an order while tax services workflow is enabled. The tax service returns an error message if any of the values are incorrect.

   For example, the zip code is incorrect or the shipment provider is not active in the specified country.
3. Click [Save].

Setup the uniFLOW interface

The settings in this dialog are part of the procedure to set up the uniFLOW interface and to configure the uniFLOW workflow. For the complete procedure, see *Setup the uniFLOW interface* on page 30.

Setup the Pressero connection

The settings in this dialogue are part of the procedure to setup the Pressero interface and to configure the Pressero connection. For the complete procedure, see *the procedure for configuring the connection to Pressero* on page 32.

Configure for automatic license update and allow remote assistance

Remote assistance

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

Automatic license update

Updated licenses can be automatically downloaded and installed on the product. An updated license is downloaded and installed automatically when:
- The customer extends the maintenance period.
- The customer has bought optional features.
- The customer has bought support for additional users.

Customers with a valid maintenance contract are entitled to software maintenance releases. The installer verifies whether a customer is allowed to install an update of the product.

A newly downloaded license is:
- Announced to the customer.
- Automatically installed on the local Floating License Server.
  For a remote Floating License Server:
  - Specify the license folder on the remote computer. Share the license folder to install the new license file automatically.
  - The customer can copy the license file manually from the specified license path to the remote Floating License Server. Then, the customer can install the new license file manually.

The customer can verify the expiration date of the license and the maintenance period in the About box.

Configure for automatic license update

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

     NOTE
     Do not use this option when you want to allow remote assistance. Firstly, configure the settings of the proxy server manually using option [Enable proxy server]. Then do procedure "Allow remote assistance".

     NOTE
     Only use this option for automatic license update and automatic download of software updates.

The application detects the settings of your proxy server automatically. The proxy server settings as configured in your browser are used.
- [Use proxy server]
  Add the settings of the proxy server manually.
  - [Proxy URL:]
    The hostname and port. For example: `proxy.example.com:8080`

[Proxy server authentication]
Use this option if the proxy server requires authentication.
1. [Proxy domain:]
   The domain where the proxy server resides.
2. [Proxy user name:] and [Proxy password:]
   The logon credentials for the proxy server.

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

   When the service Print ORS Service is not running, the application cannot connect to [Remote Service].
   1. Click [System] - [Services settings] - [Services].

2. Start the service Print ORS Service.

Allow remote assistance

Preconditions for remote assistance:
- Do procedure "Configure for automatic license update".
- The [Proxy server settings] are configured.

1. Click [System] - [Connectivity] - [Remote Service] - [Remote assistance].
2. Enable the [Allow remote assistance] option.
   Remote assistance by our organization is based on TeamViewer. The help desk employee can request to allow a remote desktop connection for remote assistance.
3. Click [Save].

Web submission

You can configure the local web server and any remote web servers in these dialogs.

Configure the general settings

The setting [Enable uniFLOW interface] is part of the procedure to set up the uniFLOW interface. For the complete procedure, see *Setup the uniFLOW interface* on page 30.

1. Click [System] - [Web submission] - <web server> - [General settings].
2. [Put the web site into maintenance mode]
   Enable this option to put the web server into maintenance. Customers cannot access the web shop anymore.
   Type the corresponding server name or IP address. When your server is part of a network, you have to use the UNC path to the server. For example: \\<servername.domain.topdomain>\.
3. [Allow the customer to print the order ticket and job ticket]
   You can allow the customer to print the tickets of the job and order.
4. Type the address of the web server.
   1. The fixed IP address
      It is recommended to use the fixed IP address of the web server.
   2. The Fully Qualified Domain Name (FQDN), for example, *myserver.mydomain.net*.
      Use the FQDN if the web server does not have a fixed IP address. For example, the DHCP server assigns a dynamic IP address to the web server.
5. [Enable uniFLOW interface]
   Enable the interface between the web server and the uniFLOW server. All web shops hosted by the web servers connected to the uniFLOW server will use the workflow as defined by uniFLOW. You can also disconnect a web server from the uniFLOW server. All web shops hosted by the disconnected web server will use the workflow as defined by PRISMAdirect.
   Setting [Enable uniFLOW interface] becomes available when you have paired the PRISMAdirect server with the uniFLOW server.
6. Click [Save].

Define the desk submission users

You can add or remove Desk Submission users. A Desk Submission user can create jobs on behalf of customers of the web shops.

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

Create friendly URLs

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 store editor].

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

Configure the payment providers per web server

The settings in this dialog are part of the procedure to configure the payment workflow. For the complete procedure, see *Configure the payment workflow* on page 18.

Configure the shipping providers per web server

The settings in this dialog are part of the procedure to configure the shipping workflow. For the complete procedure, see *Configure the shipping workflow* on page 34.

Configure the tax services per web server

The settings in this dialog are part of the procedure to configure the tax services workflow. For the complete procedure, see *Configure the tax services workflow* on page 38.

Configure remote web servers

1. Click [System] - [Web submission] - [Remote web servers].
2. For each remote web server, do:
   1. Type a name for the web server.
   2. Type the address of the web server.
      1. The fixed IP address
         It is recommended to use the fixed IP address of the web server.
      2. The Fully Qualified Domain Name (FQDN), for example, *myserver.mydomain.net*.
         Use the FQDN if the web server does not have a fixed IP address. For example, the DHCP server assigns a dynamic IP address to the web server.
   3. Click [Configure] to open a dedicated configuration dialog for the concerning web server.
      You can find the link [Configure] directly behind the displayed registration time.
      You have to configure each separate web server.
3. Click [Save].

Configure access to web shops per web server

By default, all web shops are hosted by all web servers for load balancing. However, you can explicitly configure which web shops can be accessed from which web servers.

1. Click [System] - [Web submission] - <web server> - [Web store access from web servers].
2. Enable or disable access to the web shops from each available web server.
3. Click [Save].

Services settings

Advanced infrastructure settings

Logon credentials for installed components

Consider a distributed system. The components of the system must authenticate themselves to the server. You can define the logon credentials for the components in this dialog. Use these credentials when you install the components.

1. Click [System] - [Services settings] - [Advanced infrastructure].
2. [Logon credentials for installed components]
   - Define a username and password.
     This user must belong to the [Services] group. The application restarts when you change the username or password.

Change the password of the ServicesUser account

1. Click [System] - [Services settings] - [Advanced infrastructure].
2. Click [Change password].
3. Type a new password. 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 contain at least one symbol.
   - The password must be different from the user name.

   Confirm the password.
4. You have to restart the server and all web servers of PRISMAdirect for the system to work properly.

Check that the JDD service user has Internet access

The JDD service user is part of the following procedures:

- Configuration of the payment workflow. For the complete procedure, see *Configure the payment workflow* on page 18.
- Configuration of the file hosting services. For the complete procedure, see *Configure the file hosting services, for example, Dropbox* on page 23.

Control the services of PRISMAdirect

When you experience problems with the application, you have to check that all services of PRISMAdirect are running.

1. Click [System] - [Services settings] - [Services].
2. Start any service that is not running.
   All services of PRISMAdirect depend on the JDF Framework service. Therefore, you can only restart this service.

   NOTE
   All orders that are being submitted will become corrupt when you restart the Print Job Data Dispatcher service or the JDF Framework service.

JDD service

Manage the JDD service settings

The Job Data Dispatcher (JDD) service is used by the web shops to submit orders to the server.

The setting [VDP preview generation timeout [s]:] is part of the procedure to configure the VDP workflow. For the complete procedure, see *Configure the VDP workflow* on page 52.

1. Click [System] - [Services settings] - [JDD service] - [General settings].
2. Select a template to configure the JDD service. Each template defines custom values which depend on the expected size and number of jobs submitted from the web shops.
3. Do not configure the remaining settings in this dialog yourself. Change these settings only after consulting the help desk when you have performance issues.
4. Click [Save].

Trace level

Set the trace level for the JDD service:

- [Debug]
  The [Debug] trace level provides the most detailed log information. The [Debug] trace level can impact the performance of the application.
- [Error]
  The errors are logged.
- [Info]
  The errors and information messages are logged

Manage the 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 have to resubmit each failed job.

1. Click [System] - [Services settings] - [JDD service] - [Failed jobs].
2. Select a failed job.
   You can select only one job at a time.
3. Click [Resubmit]
   The job is submitted.
   - If the server receives the job, the job is removed from the list.
   - If the server does not receive the job, the job must be deleted manually.

Additional actions	Description
[Delete]	The failed job is deleted from the server.
[Refresh]	Click the [Refresh] button to update the list of failed jobs. The list of failed jobs is not updated automatically.

Automatic process settings

Conversion to PDF

PRISMAdirect can automatically convert non-PDF files into PDF files when you integrate Neevia Document Converter Pro into PRISMAdirect. You have to purchase and install Neevia Document Converter Pro, then you have to configure PRISMAdirect. You can install Neevia on:

- The PRISMAdirect server
  Neevia converts any non-PDF files in orders created by the operator. When the web server runs on the server, then Neevia also converts any non-PDF files in orders submitted by the customers.
- Each remote web server where you want to use automatic conversion
  Neevia converts any non-PDF files in orders submitted by the customers.

Merge PDF files

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.

Preflight operation

A preflight operation is a quality check of your document.

The setting [Preflight processes:] is part of the procedure to configure the preflight workflow. For the complete procedure, see *Configure the preflight workflow* on page 44.

Configure the automatic processes

1. Click [System] - [Services settings] - [Automatic process].
2. [Enable automatic conversion].
   PRISMAdirect can automatically convert non-PDF files into PDF files when you integrate Neevia Document Converter Pro into PRISMAdirect.
   1. Select HotfolderConverter from the drop-down list. The HotfolderConverter represents Neevia Document Converter Pro.
   2. Define the hot folders for Neevia Document Converter Pro.
      Enable option [Detect folders of the conversion application] to use the default hot folders of Neevia. Or you can type the paths of the hot folders in the text fields.
      - [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.
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 default merge application. It is always available to you.
     Disadvantage of PDFNetMerge: any bookmarks are lost after merging.
   - AcrobatMerge

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

4. Set the number of preflight processes.
   It is recommended that you define the same number of preflight processes as you have web shops for which option [Enable automatic preflight] is enabled.
   The number of processes can impact the performance of the application.

5. Click [Save].

Trace level

Set the trace level for the automatic process settings:

- [Debug]
  The [Debug] trace level provides the most detailed log information. The [Debug] trace level can impact the performance of the application.
- [Error]
  The errors are logged.
- [Info]
  The errors and information messages are logged

Delete finalize orders and configure the clean-up settings

Clean-up settings

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.

1. Click [System] - [Services settings] - [Clean-up].
2. Define the [Number of hours between two clean-up operations:].
   If the “Number of hours between two clean-up operation” is 0, then the clean-up service cleans up one more time and only then it’s deactivated.
3. Click [Save].

Finalized orders

1. Click [System] - [Services settings] - [Clean-up].
2. Define if you want to delete finalised orders automatically.
   - Enable [Delete finalized orders automatically after [days]:] option
     The application deletes any finalised orders automatically after the defined number of days.
   - Disable option [Delete finalized orders automatically after [days]:]
     The operator has to delete finalized orders manually.
3. Click [Save].

Anonymize finalized orders

Orders can be anonymized to comply with the existing GDPR legislation.

All the data for finalized and canceled orders regarding user profile information can be altered, both in the order itself, as well as inside the accounting database. The items mapped to the user profile can be found in the [Configuration]→[User management]→[User]→[User profile]

This operation is not reversible.

1. Click [System] - [Services settings] - [Clean-up].
2. Define if you want to delete accounting data automatically.
   - Enable option [Anonymize finalized orders after [days]]
     The application anonymizes any data related to the finalized orders automatically after the defined number of days.
   - Disable option [Anonymize finalized orders after [days]]
     Data related to the finalized orders will not be anonymized.
3. Click [Save].

Delete accounting data automatically

1. Click [System] - [Services settings] - [Clean-up].
2. Define if you want to delete finalised orders automatically.
   - Enable option [Delete accounting data automatically after [days]]
     The application deletes any accounting data for the finalized orders automatically after the defined number of days.
   - Disable option [Delete accounting data automatically after [days]]
     Accounting data is kept.
3. Click [Save].

Trace level

Set the trace level for the clean-up settings:

- [Debug]
  The [Debug] trace level provides the most detailed log information. The [Debug] trace level can impact the performance of the application.
- [Error]
  The errors are logged.
- [Info]
  The errors and information messages are logged

JDF service

Manage the general settings for the JDF service

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.

1. Click [System] - [Services settings] - [JDF service] - [General settings].
2. [Use secure connections (HTTPS)]
   Enable this option if you want to use only a secure HTTPS connection to submit orders via JDF.
3. Use the [Pause JDF service] check box to pause or restart the JDF service.
   You receive a notification when the JDF service is restarted.
4. Click [Save].

Trace level

Set the trace level for the JDF service:

- [Debug]
  The [Debug] trace level provides the most detailed log information. The [Debug] trace level can impact the performance of the application.
- [Error]
  The errors are logged.
- [Info]
  The errors and information messages are logged

Create a JDF endpoint

PRISMAdirect supports the JDF/JMF interface. You have to set up an JDF endpoint per web store. Then, you can submit jobs to the web store using the JDF/JMF interface. In this dialogue you can setup the JDF endpoints. You can use a JDF endpoint to transfer jobs to a web shop of PRISMAdirect. Status information of the order is sent back from PRISMAdirect. The connection status of each JDF endpoint is displayed in column [Status].

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

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

   NOTE
   When selecting VDP products, you need to also describe some specific settings:
   - for CSV-like input: [Separator] (default set to semicolon), [Delimiter] (default set to space).
   - for Excel input: the name of the spreadsheet (default set to 'Sheet1').
7. [Allowed file types]
   - To accept all document types, type: *
   - You can type the supported types of digital documents (for example PDF, DOC, PS, ...). Use a comma to separate the custom document types.

   You can customise this setting for one or more user groups. See: [User management] - [User groups] - [User group settings]. The custom settings overrule the web shop settings for the user group. The custom settings are used in all web shops for the corresponding user group.
8. [Timeout for orders containing multiple jobs [min.]:]
   You have to set the timeout for orders containing multiple jobs. All jobs have to be imported before the timeout expires. If the timeout expires, the order including any imported jobs is marked as [Failed].
9. Select the desired [Authentication] method and define the required data.

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

10. [Use custom mapping files]
    Enable this option to use your own mapping file. The [Mapping files] are used every time the [JDF endpoint] is used. Do not move, delete or rename these files.

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

11. [Apply XSLT File]
    Transforms the XML/JDF input file via [JDF endpoint] to a new JDF file according to the XSLT file. The import is done by using the mapping file.
    [Transform XML/JDF to JDF by XSLT file]
    - Enabled
      The XLST transformation will take place
    - Disabled
      The JDF file will be imported without any transformation.

    In any case, the JDF ticket is still required for the import order.

    NOTE
    The *TRM PRISMAdirect* contains detailed information concerning the mapping files.

12. [Logging intermediate files:]
    Specify the path to a folder in which PRISMAdirect should save all the intermediate files of the transformation process.
13. [Disable automatic price estimation and quotation]
    When this option is disabled, the prices are automatically calculated directly after the import of an order.
    Otherwise, the customer must click [Calculate now] to estimate the price of the order. The operator must click [Calculate now] to calculate the quotation.
14. [Collect logging for analytical purposes]

The log file contains all JMF messages of all endpoints. Use the logging to analyze the JMF messages and the JDF ticket.

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

Location of the default mapping files

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

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

Print Prepare Manager service settings

The VDP functionality is available in the PRISMA Core. The PRISMA Core is installed on the server. Therefore, all actions and validations concerning the VDP functionality are executed on the server. Jobs can be created in the web shop and the Order processing console. The web shops are hosted by web servers. The web servers must have access to the server when they are installed on separate computers. The web servers connect to the PRISMAdirect server via the port for the Print Prepare Manager service.

The setting *Port* of the Print Prepare Manager service is part of the following procedures:
- Configuration of the VDP workflow. For the complete procedure, see *Configure the VDP workflow* on page 52.
- Configuration of the workflow for automation templates. For the complete procedure, see *Configure the workflow for automation templates* on page 64.

Configure the port for the [Print Prepare Manager service]

1. Click [System] - [Services settings] - [Print Prepare Manager service].
2. Define the port for the Print Prepare Manager service. The default port number is 54000. Check that the port is available for the web servers.
3. Click [Save].

Trace level

Set the trace level for the Print Prepare Manager service:
- [Debug]
  The [Debug] trace level provides the most detailed log information. The [Debug] trace level can impact the performance of the application.
- [Error]
  The errors are logged.
- [Info]
  The errors and information messages are logged

Print Licence Monitoring service settings

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

1. Click [System] - [Services settings] - [Print Licence Monitoring service].
2. Define the port for the Print Licence Monitoring service. The server and the [Floating Licence Server] must have access to the port.
3. Click [Save].

Trace level

Set the trace level for the Print Licence Monitoring service:

- [Debug]
  The [Debug] trace level provides the most detailed log information. The [Debug] trace level can impact the performance of the application.
- [Error]
  The errors are logged.
- [Info]
  The errors and information messages are logged

Import service

Pause the import service

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

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

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

Trace level

You can define the trace level for the import service.

- [Debug]
  The [Debug] trace level provides the most detailed log information. The [Debug] trace level can impact the performance of the application.
- [Error]
  The errors are logged.
- [Info]
  The errors and information messages are logged

Create an import folder

The operator can manually import orders into the [Order processing]. It is also possible to automatically import orders into the [Order processing] via import folders.

1. Click [System] - [Services settings] - [Import service] - [Import folders].
2. Click [New import folder].
3. Define the [Import folder path].
   Type the path including the import folder name. The folder must exist on the server of PRISMAdirect, or it must be a folder on a network share that is accessible to the user running the PRISMAdirect services.
4. Select the [Import order type:].
   This setting defines the type of import folder and therefore the type of orders that can be imported.

Setting	Description
[Normal order]	This type of import folder accepts all orders of PRISMAdirect. Normal orders will be imported using the product with which they were created. If this product does not exist anymore, they will be imported using the current Default Generic Product. Additionally, you can choose to preserve the order and job state when importing orders. **[Preserve orders and jobs states]** • Enabled The order will be imported with the original state. • Disabled The order will be imported as [New].
[Legacy job]	The orders will be imported using the current Default Generic Product. Additionally, you can choose to preserve the order and job state when importing orders. **[Preserve orders and jobs states]** • Enabled The order will be imported with the original state. • Disabled The order will be imported as [New].
[JDF ticket job]	This type of import folder creates orders containing one job. Drop a JDF ticket containing a link to a file in the import folder. PRISMAdirect uses the JDF ticket and the file to create an order containing one job. • **Mapping file for the JDF ticket** A mapping file is used to construct a valid PRISMAdirect ticket with the values taken from the JDF ticket. The import folder uses a default mapping file. The mapping file describes which ticket items are allowed in the JDF ticket. NOTE The *TRM PRISMAdirect* contains detailed information concerning the mapping files. • **Custom mapping file for the JDF ticket** Click [Upload] to use a custom mapping file for this import folder. • Custom XLST transformation for the XML/JDF file Click [Upload] to use a custom XSLT file for this import folder.

Setting	Description
[JDF tickets for order with multiple jobs]	This type of import folder creates orders containing multiple jobs. Firstly, drop a JDF ticket of the order in the import folder. The ticket for the order specifies the names of the JDF tickets per job. The names of the JDF tickets must be comma-separated. The JDF ticket of the order must be submitted first. Then, the JDF tickets for each job must be submitted. PRISMAdirect starts a timer when it receives the JDF ticket of the order. The communication status of the order will be "[Incoming]". By default, the timeout is 60 minutes. All JDF tickets of the jobs must be received within that time frame. When the JDF tickets of the jobs appear within the timeout, the communication status of the order becomes "[New]". When the JDF tickets of the jobs do not appear within the timeout, the communication status of the order becomes "[Failed]". • **Mapping file for the JDF ticket** A mapping file is used to construct a valid PRISMAdirect ticket with the values taken from the JDF ticket. The import folder uses a default mapping file. The mapping file describes which ticket items are allowed in the JDF ticket. NOTE The *TRM PRISMAdirect* contains detailed information concerning the mapping files. • **Custom mapping file for the JDF ticket** Click [Upload] to use a custom mapping file for this import folder. • Custom XLST transformation for the XML/JDF file Click [Upload] to use a custom XSLT file for this import folder.
[PDF only job with default order ticket]	This type of import folder accepts only PDF files. • [Order ticket:] Define a custom order ticket for this particular import folder.
[Always accept orders and jobs]	This type of import folder accepts only PDF files. • [Order ticket:] Define a custom order ticket for this particular import folder. The imported orders receive the state [Accepted].
[Scanned job]	This type of import folder accepts only scanned files. The operator must create a job which contains a [Paper original]. The scanned file must contain the job number. Then the scanned file is automatically attached to the job. The default job ticket is used for these jobs.

5. Select the web shop
   The orders are imported for the selected web shop.
6. [Allowed file types]
   - To accept all document types, type: *
   - You can type the supported types of digital documents (for example PDF, DOC, PS, ...). Use a comma to separate the custom document types.

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

Click the drop-down list to select a product.
- Import folders not using a JDF ticket:
  The orders will be created using the selected product.
- Import folders using a JDF ticket:
  The JDF ticket can define a product that must be used to create the order. If the ticket does not define a product, then the selected default product will be used to create the new order.

NOTE
When selecting VDP products, you need to also describe some specific settings:
- for CSV-like input: [Separator] (default set to semicolon), [Delimiter] (default set to space).
- for Excel input: the name of the spreadsheet (default set to 'Sheet1').

8. [Timeout for orders containing multiple jobs [min.]:]
   You have to set the timeout for orders containing multiple jobs. All jobs have to be imported before the timeout expires. If the timeout expires, the order including any imported jobs is marked as [Failed].
9. [Allow importing an order multiple times]
   The order number will increase each time you import the same order.
10. [Preserve orders and jobs states]
    For jobs that were created with PRISMAaccess, the job state cannot be preserved and the state of the job will always be [New]
    - When this option is enabled for legacy jobs:
      If the job state of the legacy job was [Ready], the job state of the imported job is set to [Ready].
      Else, the job state of the imported job is set to [New]
    - When this option is enabled for normal jobs:
      The job state of the imported job is equal to the job state of the exported job. All the allowed job operations and restrictions imposed by the job state apply on the imported job.
    - When this option is disabled for normal jobs:
      The job state of the imported job is set to [New]
11. [Disable automatic price estimation and quotation]
    When this option is disabled, the prices are automatically calculated after the import of an order, only if any of the cost-related item used in formula is changed.
12. [Apply XSLT File]
    Transforms the XML/JDF input file via HotFolder to a new JDF file according to the XSLT file. The import is done by using the mapping file.
    [Transform XML/JDF to JDF by XSLT file]
    - Enabled
      The XLST transformation will take place
    - Disabled
      The JDF file will be imported without any transformation.

    In any case, the JDF ticket is still required for the import order.
13. Click [Save].
    The import folder is configured and added to the list of import folders.

Export service

Pause the export service

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

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

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

Trace level

You can define the trace level for the export service.

- [Debug]
  The [Debug] trace level provides the most detailed log information. The [Debug] trace level can impact the performance of the application.
- [Error]
  The errors are logged.
- [Info]
  The errors and information messages are logged

Create an export folder for orders

The operator can manually export orders from the [Order processing]. It is also possible to automatically export orders from the [Order processing] via export folders. You must create an export query. If the query is valid for an order, then that order is exported. By default, all available files of an order are exported.

1. Click [System] - [Services settings] - [Export service] - [Export folders for orders].
2. Click the [New export folder] button.
3. Define the [Export folder path].
   Type the path including the export folder name. The folder must exist on the server of PRISMAdirect, or it must be a folder on a network share that is accessible to the user running the PRISMAdirect services.
4. Define the export query.
   If the query is valid for an order, then that order is exported. The export query is an SQL query which is uses order items. You have to define a query per export folder. *Define a query* on page 131
5. Enable or disable option [Export original files and job ticket only].
   By default, all available files of an order are exported. However, when you enable this option, only the original files and the job ticket for each file are exported. The following files are not exported:
   - The JDF ticket
   - The conversion file, if available
   - The redistill file, if available
   - The merged document, if available
6. Enable or disable option [Delete order after export].
   When you enable this option, all exported orders are removed from the [Order processing].
7. Click [Save].
   The export folder is configured and added to the list of export folders.

Define a query

Procedure

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

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

   Examples:

Type	Valid value	Invalid value
Number	53	34.5
String	'Hello'	Hello
Dates	'1/1/10'	1/1/10

Type	Valid value	Invalid value
Enumeration	'Enum_value'	Enum_value
Boolean	'True'	True

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

Create an export folder for jobs

The operator can manually export one or more jobs of an order from the [Order processing]. It is also possible to automatically export jobs from the [Order processing] via export folders. You must create an export query. If the query is valid for a job, then that job is exported.

1. Click [System] - [Services settings] - [Export service] - [Export folders for jobs].
2. Click the [New export folder] button.
3. Define the [Export folder path].
   You can create a dynamic path using job items and fixed text. You can drag and drop the job items into the “Export folder path”. The backslashes are added automatically. For example, `C:\[IntakeOperator]\[JobNumber]`
   - For each job ticket item in the path, a folder or subfolder is created during export.

   This archive solution is job based, therefore you can use only the job items. This option is not available for the export of orders.
   You can create export folders on the server of PRISMAdirect, or on a network share that is accessible to the user running the PRISMAdirect services.
4. Define the export query.
   If the query is valid for a job, then that job is exported. The export query is an SQL query which is uses job items. You have to define a query per export folder. *Define a query* on page 131
   By default, the complete job is exported as a ZIP file. The ZIP file contains:
   - The files of the job
   - The job ticket
   - The conversion file, if available
   - The redistill file, if available
   - The merged document, if available
5. Enable or disable option [Export current PDF file only].
   When you enable this option, only the merged document of the job is exported as PDF file. The ZIP file described in the previous step is not exported.
6. [Export current PDF and file containing all ticket items]
   Enable this option to export the following files:
   - The merged document of the job is exported as PDF file.
   - An XML file containing all job items and order items. Note that each job always contains all job items even if these are not visible in the ticket. All job items are available in this XML file. The file also contains the job name.
7. Click [Save].
   The export folder is configured and added to the list of export folders.

Automatic printing

Pause the automatic printing service

You can pause the automatic printing of jobs.

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

1. Click [System] - [Services settings] - [Automatic print service] - [General settings].
2. Enable the [Pause automatic print service] option.
   The automatic printing service is paused. Jobs are not printed automatically anymore.
3. Click [Save].

Trace level

You can define the trace level for the automatic printing service.

- [Debug]
  The [Debug] trace level provides the most detailed log information. The [Debug] trace level can impact the performance of the application.
- [Error]
  The errors are logged.
- [Info]
  The errors and information messages are logged

Create an automatic print query

The operator can manually print the orders from the [Order processing]. It is also possible to automatically print jobs from the [Order processing] via the automatic print mechanism. You must create an automatic print query. If the query is valid for a job, then it gets printed.

1. Click [System] - [Services settings] - [Automatic printing] - [Automatic print queries].
2. Click the [New automatic print query] button.
3. Select one of the existing printers.

   NOTE
   You can have multiple automatic print queries for a printer.

4. Define the automatic print query.
   The automatic print query is an SQL expression containing job ticket items, constants and operators.
   Define a query on page 131
5. Click [Save].
   The query is configured and added to the list of automatic print queries.

Security

Select the authentication type and enable a secure connection

Authentication mode

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

1. Click [System] - [Security] - [General settings].
2. Select the authentication type.
   - Windows authentication
     - When the server is a member of the Microsoft Windows domain, you can select [Windows authentication]. Windows authentication facilitates single sign-on for the operator and for the customers of the web stores.
     - Integration of the web stores and uniFLOW
       Select [Windows authentication] when uniFLOW and PRISMAdirect are member of the same domain or trusted domains.
   - Custom authentication
     - Select [Custom authentication] when your server is not a member of a domain.
     - Select [Custom authentication] when you want to offer single sign-on via CAS or ADFS.
     - Integration of the web stores and uniFLOW
       Select [Custom authentication] when uniFLOW and PRISMAdirect are members of a workgroup or are connected to untrusted domains.

   The installed services always use [Custom authentication].
3. Click [Save].

Single sign-on providers

You have to select [Custom authentication] when you want to offer single sign-on via CAS, ADFS, or Shibboleth. Central Authentication Service (CAS), Active Directory Federation Services (ADFS) and Shibboleth are known providers for single sign-on. The single sign-on provider will authenticate customers of the web stores. The provider will store the login credentials of the customers.

1. Click [System] - [Security] - [General settings].
2. You can enable only one single sign-on provider.
   - [CAS]
     1. [Ticket validation protocol:]
        You have to select a validation protocol for one of the steps in the authentication process of customers.
        The required protocol depends on how you have configured the CAS server. In this dialog, you need to select the verification protocol that matches the configuration of the CAS server.
     2. [Timeout [min.]:]
        When the timeout expires, PRISMAdirect checks if the customer is still logged in to the single sign-on provider. When the user is still logged in, the timeout value is reset. In this way, PRISMAdirect keeps checking if the customer is still logged in to the single sign-on provider. When PRISMAdirect detects that the customer has logged out from the single sign-on provider, the customer will be logged out from PRISMAdirect as well.
     3. [CAS server URL:]

Type the URL of the CAS server that must be used to authenticate the customers. Whether you need to add a port number to the URL depends on how you have configured the CAS server.

4. [CAS server login URL:]
   Type the URL of the login page on the CAS server where customers have to type their login credentials. Whether you need to add a port number to the URL depends on how you have configured the CAS server.
5. [Server address:]
   Type the address of the PRISMAdirect server. You do not need to provide a port number. The customers will be redirected to PRISMAdirect when they are authenticated.
6. [LDAP server name]
   Optionally, you can type the name of one LDAP server. For the available LDAP servers, see: [System]→[Connectivity]→[LDAP server]→[LDAP servers]
   You have to use this LDAP server for authentication and to retrieve user data:
   1. Click [System] - [Connectivity] - [LDAP server] - [Authentication & user data].
   2. Drag and drop the LDAP server into field [Servers used for authentication:] and field [Servers used to retrieve user data:].
   3. Click [Save].

   - When a customer logs in with <username> and <password>, PRISMAdirect searches in the LDAP server for this customer.
   - PRISMAdirect does not use the setting [LDAP server name] when a customer logs in with <username>@<domain> and <password>. In this case, PRISMAdirect checks if the domain exists. When the domain exists, PRISMAdirect checks if an LDAP server exists in the domain concerned. When the LDAP server exists, PRISMAdirect searches in the LDAP server for this customer.

   When the LDAP server contains the username of the authenticated customer, then:
   - The customer receives the role of the user group.
   - The profile of the customer will be filled in automatically.

   When the LDAP server does not contain the username, the customer receives the role [Customer]. Also, the profile of the customer is empty.

- [ADFS]
  1. [Metadata for endpoint:]
     You have to load a file containing metadata to configure the endpoint for ADFS. You can find the metadata file on the ADFS server. The default path is:
     `https://{ADFSserver}/federationmetadata/2007-06/federationmetadata.xml`
  2. [Server address:]
     Type the address of the PRISMAdirect server. You do not need to provide a port number. The customers will be redirected to PRISMAdirect when they are authenticated.
  3. [LDAP server name]
     Optionally, you can type the name of one LDAP server. For the available LDAP servers, see: [System]→[Connectivity]→[LDAP server]→[LDAP servers]
     You have to use this LDAP server for authentication and to retrieve user data:
     1. Click [System] - [Connectivity] - [LDAP server] - [Authentication & user data].
     2. Drag and drop the LDAP server into field [Servers used for authentication:] and field [Servers used to retrieve user data:].
     3. Click [Save].

     - When a customer logs in with <username> and <password>, PRISMAdirect searches in the LDAP server for this customer.

        - PRISMAdirect does not use the setting [LDAP server name] when a customer logs in with <username>@<domain> and <password>. In this case, PRISMAdirect checks if the domain exists. When the domain exists, PRISMAdirect checks if an LDAP server exists in the domain concerned. When the LDAP server exists, PRISMAdirect searches in the LDAP server for this customer.

        When the LDAP server contains the username of the authenticated customer, then:
        - The customer receives the role of the user group.
        - The profile of the customer will be filled in automatically.

        When the LDAP server does not contain the username, the customer receives the role [Customer]. Also, the profile of the customer is empty.

    [Timeout [min.]:]
    You have to define a timeout when you configure the ADFS server. When the timeout expires, PRISMAdirect checks if the customer is still logged in to the single sign-on provider. When the user is still logged in, the timeout value is reset. In this way, PRISMAdirect keeps checking if the customer is still logged in to the single sign-on provider. When PRISMAdirect detects that the customer has logged out from the single sign-on provider, the customer will be logged out from PRISMAdirect as well.
  - Shibboleth
    1. [LDAP server name]
       Optionally, you can type the name of one LDAP server. For the available LDAP servers, see: [System]→[Connectivity]→[LDAP server]→[LDAP servers]
       You have to use this LDAP server for authentication and to retrieve user data:
       1. Click [System] - [Connectivity] - [LDAP server] - [Authentication & user data].
       2. Drag and drop the LDAP server into field [Servers used for authentication:] and field [Servers used to retrieve user data:].
       3. Click [Save].

       - When a customer logs in with <username> and <password>, PRISMAdirect searches in the LDAP server for this customer.
       - PRISMAdirect does not use the setting [LDAP server name] when a customer logs in with <username>@<domain> and <password>. In this case, PRISMAdirect checks if the domain exists. When the domain exists, PRISMAdirect checks if an LDAP server exists in the domain concerned. When the LDAP server exists, PRISMAdirect searches in the LDAP server for this customer.

       When the LDAP server contains the username of the authenticated customer, then:
       - The customer receives the role of the user group.
       - The profile of the customer will be filled in automatically.

       When the LDAP server does not contain the username, the customer receives the role [Customer]. Also, the profile of the customer is empty.
3. [Test connection]
   Click this button to test the connection to the server of the single sign-on provider.
4. Click [Save].

Secure connection

Orders can be sent from web stores to the [Order processing] console. You can configure if you want to use a secure connection between the server and the web server.
1. Click [System] - [Security] - [General settings].
2. [Use secure connections (HTTPS)]
   Enable this option to use a secure HTTPS connection between the server and the web server. If you enable this option you have to have a certificate. A certificate guarantees a secure (HTTPS) connection.

3. Click [Save].

Create self-signed certificates

PRISMAdirect can create a secure connection via HTTPS to the browsers of the customers. To use HTTPS, you need to create a self-signed certificate on PRISMAdirect. Or you can buy a certificate from a Certification Authority. When a customer visits a web shop, the certificate is deployed to the browser of the customer. PRISMAdirect creates a secure connection via HTTPS in the following cases:

- The customer supplies credentials for custom / self-registration authentication.
- Communication with the web server.
- Communication between a web server and the central server.
- JDF service
- Printer proxy
- PRISMAdirect Outlook AddIn
- PRISMAdirect Web Bootstrap

NOTE
It is recommended that you buy SSL certificates from a Certificate Authority when your customers use Chrome as browser. The reason is that Chrome will not setup a secure connection for self-signed certificates.

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 shop over SSL, the user's Web browser decides whether or not to trust the web shop'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.

Create a self-signed certificate

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

Additional actions	Description
Remove certificate	You can only remove self-signed Certificates here. 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.

Backup and restore

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

Backup and restore of the configurations and the order data

- The databases and configuration files will be backed up and restored in their entirety.
- The backup files contain computer 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.
- You can use the export file on any computer.
- After each restore, all services will be restarted and the PRISMAdirect website will be restarted. Therefore, users will have to log in again.

Export and import of the settings

You can import and export the configuration of PRISMAdirect. Then, you can use the exported settings to configure another installation of PRISMAdirect. You can use the export file on any computer.

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

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

Backup

1. Click [System] - [Backup and restore].
2. You can backup the [Configurations] and the [Order data]. Click [Backup].
   By default, the backup files are stored in the "Downloads" folder in your user profile folder on your computer.
3. You can export the [Settings] of the application. Click [Export].
   By default, the export file is stored in the "Downloads" folder in your user profile folder on your computer.

Restore

1. Click [System] - [Backup and restore].
2. You can restore the [Configurations] and the [Order data].
   1. Click [Restore].
   2. Browse to the folder where the backup files are located.
   3. Click [Open].
3. You can import the [Settings] of the application.
   1. Click [Import].
   2. Browse to the folder where the export file is located.
   3. Click [Open].
   4. Select which settings you want to import.

Accounting and reporting

Configure the accounting workflow

You can collect accounting information. The accounting information is saved in an SQL database. The accounting workflow uses the following order items and ticket items:

Order items:
- FinalCost
- UserId
- Account
- FinalizedTime

Ticket items:
- FinalCost
- FinalizedDate

These ticket items are available in several views in the [Product and order editor]. The system administrator can edit the captions of these items in the [Product and order editor].

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

The ticket is allowed to contain other ticket items.

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

Enable accounting

1. Click [System] - [Accounting and reporting] - [Accounting] - [Accounting workflow].
2. Enable the [Enable accounting] option.
3. Enable option [Account jobs inside bundle] if you want to account jobs inside the bundle:
   - **Enabled** - cost of jobs inside the bundle is accounted.
   - **Disabled** - cost of jobs inside the bundle is 0.
4. Configure the credentials for the SQL server.
   The same SQL server is used for the payment workflow, see [System] - [Connectivity] - [Payment providers]. When you change the settings for the SQL server in that dialog, the settings will also change in this dialog and vice versa.
   1. Define the [Computer name \ instance name:].
      With this option, you define where the accounting database is stored. For example: SQL_server_name\SQL_server_instance_name.
   2. You have to define how the [Order processing] connects to the accounting database. The authentication type depends on the location of the SQL server:

Location of the SQL server	Description
Local SQL server	SQL authentication (recommended) Type the account credentials of an existing login account for the SQL server.
Remote SQL server inside the domain	Windows authentication (recommended) The Windows user credentials are used for the authentication. The user is not prompted for a user name and password.

Location of the SQL server	Description
SQL server outside the domain	SQL authentication (mandatory) Type the account credentials as defined by the customer for the SQL server.

3. Type the password of user `sa`. You have defined the password for user `sa` when you installed PRISMAdirect.
   Accounting information can be collected when the user has system administration rights on the accounting database.
4. [Test connection]
   Click this button to test the connection to the SQL server.
5. Click [Save].

Clear the database

When PRISMAdirect is installed for a new customer, it is used in a testing environment first. During this period the database is filled with dummy information. You can clear all data from the database when PRISMAdirect is ready to switch to production. All records will be deleted and you start with a clean database again.

You have to be logged in as `servicesuser` to clear the database. You cannot use the user name and password directly above the button to login as `servicesuser`. You have to log out, then login as `servicesuser` again.

An error is reported when clearing the database fails. In this case, there are two possibilities:
- The database still contains its information.
- The database is no longer available to you.

If an error is reported, use the "Software Support" tool to export the logging. Analyze the following log file: `WebDashBoardLog.log`.

Configure the invoice settings

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

1. Click [System] - [Accounting and reporting] - [Accounting] - [Invoice].
2. Click button [Browse] to select an image.
   The allowed image file types are: .bmp, .jpg, .gif, .png.
3. Type the company name.
4. Type the company address.
5. Type your International Bank Account Number (IBAN) and Bank Identifier Code (BIC).
   The IBAN is an international standard that uniquely identifies your bank account number. Your BIC code identifies a specific bank in an international transaction. A BIC is sometimes called a SWIFT code.
6. Type your [Sales tax ID number].
   The sales tax (VAT) ID number is an identifier used in many countries, including the countries of the European Union, for value added tax purposes.
7. Type the sales tax (VAT) percentage applicable for the concerning order.
8. Type the invoice number. Or you can click the arrow buttons to increase or decrease the value.
   The invoice number will increase each time you create a new invoice.
9. You can add a header and/or trailer to the invoice number.
10. Type the due date for payment of the invoice.
11. Click [Save].

All the settings that have a value set will be present when generating an invoice in [Order processing].

Email the accounting reports

This topic describes the complete configuration to email the accounting reports.

You have to configure the settings to email the accounting reports in the [Configuration] workflow:

1. **Enable accounting**
   You have to enable accounting to:
   - Collect accounting information.
   - Enable dialog [Email accounting reports automatically]. This dialog is hidden when accounting is disabled.
2. **Configure the settings to email the accounting reports automatically**
   Configure the default email settings and create a scheduled task.
3. **Select which reports you want to attach to the email**
   Select and configure the reports. You can configure custom email settings.

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

Enable accounting

1. Click [System] - [Accounting and reporting] - [Accounting] - [Accounting workflow].
2. Enable the [Enable accounting] option.
3. Enable option [Account jobs inside bundle] if you want to account jobs inside the bundle:
   - **Enabled** - cost of jobs inside the bundle is accounted.
   - **Disabled** - cost of jobs inside the bundle is 0.
4. Configure the credentials for the SQL server.
   The same SQL server is used for the payment workflow, see [System] - [Connectivity] - [Payment providers]. When you change the settings for the SQL server in that dialog, the settings will also change in this dialog and vice versa.
   1. Define the [Computer name \ instance name:].
      With this option, you define where the accounting database is stored. For example: SQL_server_name\SQL_server_instance_name.
   2. You have to define how the [Order processing] connects to the accounting database. The authentication type depends on the location of the SQL server:

Location of the SQL server	Description
Local SQL server	SQL authentication (recommended) Type the account credentials of an existing login account for the SQL server.
Remote SQL server inside the domain	Windows authentication (recommended) The Windows user credentials are used for the authentication. The user is not prompted for a user name and password.
SQL server outside the domain	SQL authentication (mandatory) Type the account credentials as defined by the customer for the SQL server.

   3. Type the password of user `sa`. You have defined the password for user `sa` when you installed PRISMAdirect.
      Accounting information can be collected when the user has system administration rights on the accounting database.
   4. [Test connection]
      Click this button to test the connection to the SQL server.
5. Click [Save].

Configure the settings to email the accounting reports automatically

The dialog [Email accounting reports automatically] becomes available when you have enabled accounting. See the above procedure.

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

Select which reports you want to attach to the email

1. Click [System] - [Accounting and reporting] - [Reporting] - [Accounting reports].
2. Enable option [Email the report] for each report you want to attach to the email. You can select one or more reports.
   The report filenames (*.rpt) are displayed in this dialog. However, the report titles are displayed in workspace [Reporting]. It is recommended that the filename and the title of a report are similar when you create a new report.
3. Click the report to configure the report settings.
   1. Define the email address.
      - [Default]
        Send the report to the recipient defined in dialog [Email accounting reports automatically]
      - [Custom]
        Define a custom email address for the recipient. The custom email address overrules the default email address for this report.

      When you add more than one email address, you must use a semicolon to separate the addresses.
   2. [Attach the report]
      The report is attached as a file to the email.
   3. [Add hyperlink to report to the email]
      A link is added to the email. Click the link to open the report on the server.
   4. [Overwrite existing report]
      You can keep all versions of this report, or you can overwrite any existing reports on the server.

5. [Delete existing report automatically]
   Enable this option to automatically delete the report on the server when a new report is generated. You can type a value in the spinbox for the number of days.
4. Click [Save].

Configure the reports folder

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

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

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

Select the active languages for PRISMAdirect

The settings in this dialog are part of the procedure to configure the languages for PRISMAdirect and the web shops. For the complete procedure, see *Configure the languages* on page 42.

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

Manage the corrupted orders, jobs, and products

Manage the corrupted orders and jobs

A corrupted order or job is stuck in a certain state, for example, editing, redistilling, printing, etc.

1. Click [System] - [Corrupted items].
   - [Corrupted orders]
   - [Corrupted jobs]
2. Select a job from the list of corrupted orders or jobs.

Additional actions	Description
Recover corrupted orders and jobs	1. Click [Unlock]. The job returns to the previous valid state. Now, you can continue to process the job.
[Save]	1. Click [Save]. 2. Browse to a location. Click the [Save] button. The corrupted job and the job ticket are saved. The saved job and job ticket can be sent to the help desk to analyze why the job became corrupted.
[Delete]	1. Click [Delete]. The corrupted job is deleted from the server.
[Refresh]	1. Click button [Refresh] to update the list of corrupted jobs. The list of corrupted jobs is not updated automatically.

Manage the corrupted products

A corrupted product appears in the list when a user cannot use the product to create a job. The user cannot select the product because it contains an invalid or inaccessible link.

The column [Failed attempts to use product] shows how often users tried to create a job using the corrupted product.

1. Click [System] - [Corrupted items] - [Corrupted products].
2. Click the pencil icon. The icon appears when you hover the mouse pointer over a corrupted product.
   The pane [Detailed product settings] of the corrupted product opens in the [Product and order editor] workspace.
3. Type a correct link or fix the access to the folder.
   When the link is fixed, the product is automatically removed from the list of corrupted products.

Configure the system of measurement used for media

The installation language determines which system of measurement is used for the application. However, you can use a different system of measurement for the media.

1. Click [System] - [System of measurement for media:].
2. Select which system of measurement you want to use for the media.
3. Click [Save].

Result

The properties of new and existing media are displayed in the units of the selected system of media. For example, the media weight will be displayed in [lb bond] or [lb index] instead of g/m^2 when you select [Imperial].

The media caption does not change when you change the system of measurement. If required, you can manually change the captions of existing media in the [Product and order editor] workspace. For example, you can change a media caption like "A4,80 g/m2,Plain,White" into "A4,21 lb bond,Plain,White". To do so, go to the [Product and order editor] workspace and select [Product items]. Select item "Media" to change the media captions, if required.

Define the path for the temporary folder

You have to define the temporary folder path. The temporary folder:

- Stores temporary files of PRISMAdirect, for example, conversion files.
- Contains the folder "DownloadPage". You can publish documents for the customer in the web shop. Copy the files that you want to publish in the web shop in this folder. For the complete procedure, see *Configure the layout* on page 165.

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

Set up the connection to the license server

The licenses are based on a MAC address of the computer where the Floating License Server (FLS) is installed. A MAC address is the unique identifier of a network adapter. A computer may have multiple network adapters, both physical and virtual (Ethernet, Wi-Fi, VPN, VMplayer, ...). The FLS manages the licenses. The licensed application (PRISMAprepare and/or PRISMAdirect) must connect to the FLS. Therefore, you have to specify:

1. The name of the FLS. The server name can be a network name or an IP address. You have to specify the server name in the licensed application.
2. The port of the FLS. You have to specify the license server port in both the licensed application and the [License Server Administration].

Content of this article

- Configure the ports for the license server
- Check the port numbers of the license server and the licensed application
- PRISMAprepare: check the IP address or name of the FLS
- PRISMAdirect: check the IP address or name of the FLS

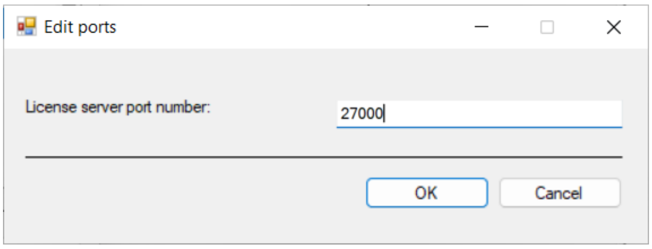
Terminology

FLS: the computer where the Floating License Server is installed.

Licensed application: PRISMAprepare and/or PRISMAdirect

Configure the ports for the license server

1. Open the [License Server Administration].
2. Select [License server settings] and click [Edit] .
3. Click [Edit ports].



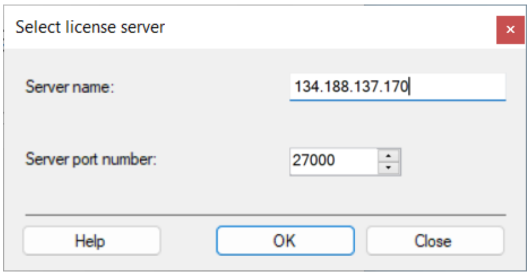
1. The license server port
   The licensed application uses this port number to initiate communications with the FLS. The process listens on the license server port.
   Range: [27000 - 27009].

Check the port numbers of the license server and the licensed application

The FLS uses TCP/IP ports to communicate with the licensed application. You have to check if the same license server port is used in both the [License Server Administration] and the licensed application.

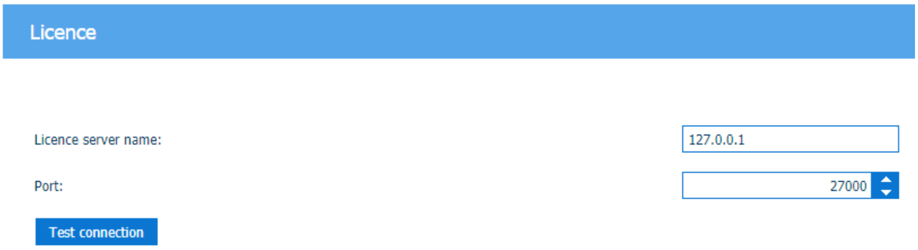
To check the license server port for the FLS in PRISMAprepare, do:

1. Open [PRISMAprepare Administration].
2. Select [Licenses] and double-click [Licenses] in the right-hand pane.
3. Click [Select license server].
4. The "Server port number" must be equal to the "License server port number" in the [License Server Administration].



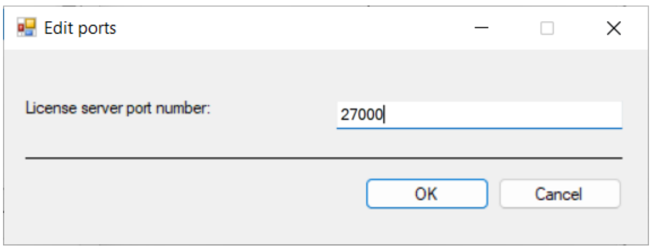
To check the license server port for the FLS in PRISMAdirect, do:

1. Open the [Configuration] workspace.
2. Click [System] and select [License].
3. The "Port" number must be equal to the "License server port number" in the [License Server Administration].



Check the TCP/IP ports used by the FLS:

1. Open the [License Server Administration].
2. Select [License server settings] and click [Edit] .
3. Click [Edit ports].



Troubleshooting

1. Check that:
   - The FLS can open the license server port for listening.
   - The licensed application can open the vendor port.

   If a port cannot be opened, an error appears in the log file `FloatingLicenseService.log`. Location of the log file: `Floating License Server\Log\FloatingLicenseService.log`
2. Check that the licensed application can connect to the FLS. For example:
   - The firewall can block access to the fixed port. You have to configure the firewall.
   - Other applications use all ports in the range [27000 - 27009]. You have to free one port in the range [27000 - 27009].

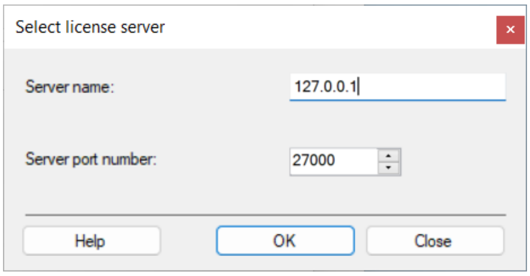
PRISMAprepare: check the IP address or name of the FLS

The FLS name can be a network name or an IP address. To check the name of the FLS, do:

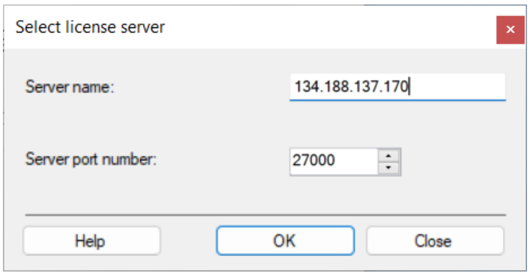
1. Open the [PRISMAprepare Administration].
2. Select [Licenses] and double-click [Licenses] in the right-hand pane.
3. Click [Select license server].

- **Local Floating License Server**
  The FLS and the licensed application are installed on the same computer. Use the following FLS name:
  1. 127.0.0.1
     This is the IP address of the local host.

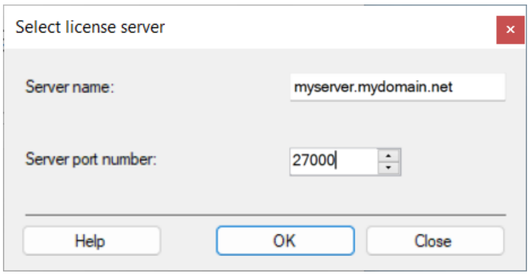
  Do not use: "localhost", the Fully Qualified Domain Name (FQDN) or a short DNS name.

- **Remote Floating License Server**
  The FLS and the licensed application are installed on different computers. Use the following FLS name:
  1. The fixed IP address
     It is recommended to use the fixed IP address of the FLS.
     - **Troubleshooting**
       If the connection is lost while you use a fixed IP address for the FLS:
       Check whether the IP address of the FLS has changed. Update the IP address in the licensed application. The following screenshot uses 134.188.137.170 as IP address. You have to use the actual IP address of your FLS.

  2. The Fully Qualified Domain Name (FQDN), for example, *myserver.mydomain.net*.
     Use the FQDN if the FLS does not have a fixed IP address. For example, the DHCP server assigns a dynamic IP address to the FLS.
     - **Troubleshooting**
       If the licensed application using an FQDN cannot connect to the FLS:
       The DNS server must know the FLS else the FLS cannot receive the dynamically generated IP address from the DHCP server. This DNS server must also be known by the licensed application.
       Ping the FQDN to check if it is already resolved by the DNS server.



Do not use: a short DNS name, for example, *myserver*. When using a short DNS name, the licensed application must try all known domain names to find or fail to find the FLS.

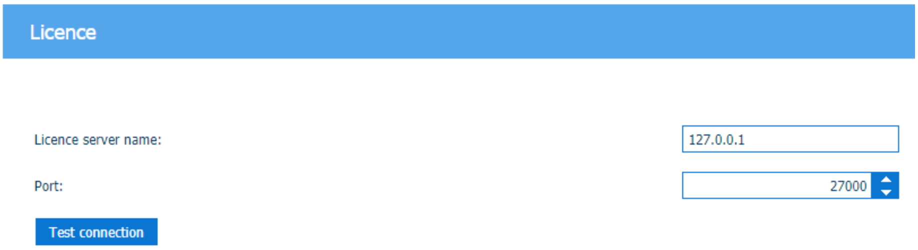
PRISMAdirect: check the IP address or name of the FLS

The FLS name can be a network name or an IP address. To check the name of the FLS, do:

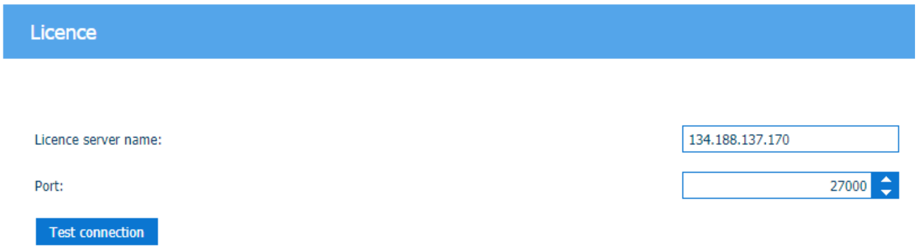
1. Open the [Configuration] workspace.
2. Click [System] and select [License].

- **Local Floating License Server**
  The FLS and the licensed application are installed on the same computer. Use the following FLS name:
  1. 127.0.0.1
     This is the IP address of the local host.

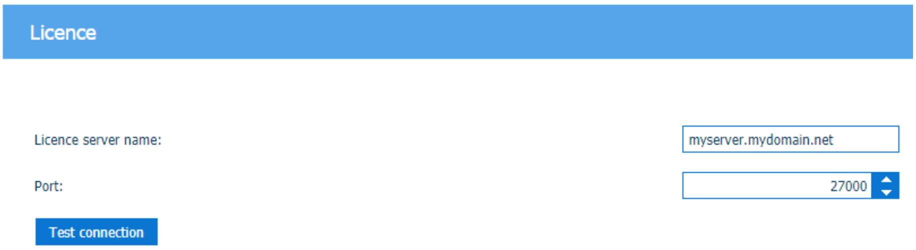
  Do not use: "localhost", the Fully Qualified Domain Name (FQDN) or a short DNS name.



- **Remote Floating License Server**
  The FLS and the licensed application are installed on different computers. Use the following FLS name:
  1. The fixed IP address
     It is recommended to use the fixed IP address of the FLS.
     - **Troubleshooting**
       If the connection is lost while you use a fixed IP address for the FLS:
       Check whether the IP address of the FLS has changed. Update the IP address in the licensed application. The following screenshot uses 134.188.137.170 as IP address. You have to use the actual IP address of your FLS.



2. The Fully Qualified Domain Name (FQDN), for example, *myserver.mydomain.net*.
   Use the FQDN if the FLS does not have a fixed IP address. For example, the DHCP server assigns a dynamic IP address to the FLS.
   - **Troubleshooting**
     If the licensed application using an FQDN cannot connect to the FLS:
     The DNS server must know the FLS else the FLS cannot receive the dynamically generated IP address from the DHCP server. This DNS server must also be known by the licensed application.
     Ping the FQDN to check if it is already resolved by the DNS server.



Do not use: a short DNS name, for example, *myserver*. When using a short DNS name, the licensed application must try all known domain names to find or fail to find the FLS.

Chapter 4
Web store

Introduction

The [Web store] 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 store editor] is added with its own name to [Web store]. You have to configure each web shop separately.

Configure the general settings

[Enable anonymous access]

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

[Show add all to basket]

Each web shop can choose to activate the one-click addition of groups of products to the basket.

Only products with a fixed document can be grouped together. For such a group, as long as all products product items that have the setting "[Add to basket]" enabled, the group can inherit the setting.

1. Click [Web store] - <web shop> - [General settings].
2. [Show add all to basket]:
   - **Enabled**
     The web shop will display [Add all to basket] for product groups that qualify.
   - **Disabled**
     The feature [Add all to basket] is not present on the web shop.
3. Click [Save].

Terms and Conditions enforcement per web shop

Each web shop can choose to activate user acceptance of the Terms and Conditions. If this function is enabled, all its customers will have to accept these terms. The date and time of the customer agreeing to the terms and conditions will be kept.

[Enforce the Terms and Conditions]

1. Set the desired behavior regarding Terms and Conditions.
   - **Enabled**
     The customer will be presented with the Terms and Conditions text upon their first login. The date and time of accepting this agreement is recorded and can be seen in the [User settings].
   - **Disabled**
     The customer will be able to directly access the web shop after the login.
2. Provide the [Terms and conditions content:]
   You can set the text for the Terms and Conditions agreement in this box. When this text is changed, all users will be prompted to read and accept them on their first login to the web store.
3. Click [Save].

Allow self-registration per web shop

This section is part of the procedure to configure the self-registration workflow. For the complete procedure, see *Configure the self-registration workflow* on page 41.

- Configure if users are allowed to create an account for a web shop via self-registration.
- Configure if each account is activated automatically or manually.

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

Configure the permissions for customers

Option [Allow the customer to change the language] is part of the procedure to configure the languages for PRISMAdirect and the web shops. For the complete procedure, see *Configure the languages* on page 42.

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

Configure closed dates per web shop

Introduction

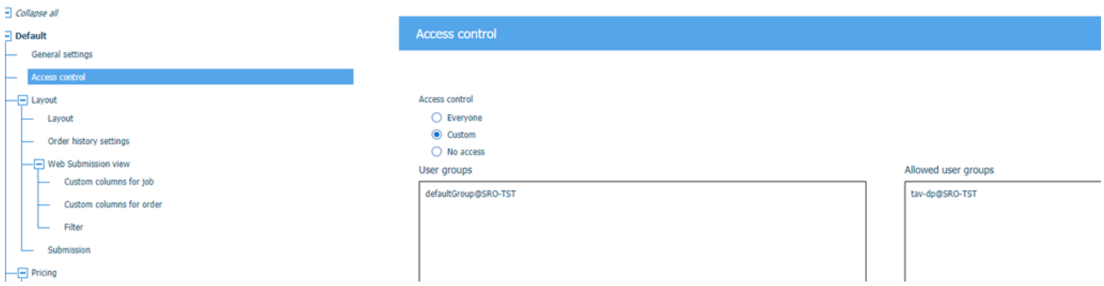
Each web shop can configure certain exceptions to the availability of the date fields in the jobs and orders. For instance, for a holiday, or planned maintenance. You can configure this dates at web shop level, or you can apply them to all existing web shops.

Procedure

1. Add an exception date.
   Use the calendar to pick the exact date.
2. Select [Repeat yearly] if you want the date to repeat every year.
3. Click [Add date]
4. Click [Apply to all web shops] if you want the date to be added to all web shops.
5. Use the mouse to drag the desired fields from the [Available date ticket items] to the [Selected ticket items:].
6. Click [Save]. From now on, the customers will not be able to set any of the selected items to the dates set as exceptions.

Configure the access control per web shop

1. Click [Web store] - <web shop> - [Access control].
2. Configure the access of users per web shop.
    - Everyone
      All users have access to the web shop.
    - Custom
      Only the users in the allowed user groups have access to the web shop. Drag and drop one or more user groups into section [Allowed user groups].



    - No access
      You can select this option to make the web shop inaccessible. For example, while you are building or maintaining the web shop.
3. Click [Save].

Layout

Configure the layout

You have to configure the layout of each web shop. You can select the language of the logon page, the theme, etc.

Configure the layout settings

The setting [Login instructions:] is part of the procedure to configure the languages for PRISMAdirect and the web shops. For the complete procedure, see *Configure the languages* on page 42.

1. Click [Web store] - <web shop> - [Layout] - [Layout].
2. Select the language for the logon page of the web shop from the drop-down list.
3. Select the theme for the web shop from the drop-down list.
   You can create and edit the themes in workspace [Theme editor].
4. Select the layout of the products:
   - List
     The products are displayed as a horizontal list in the web shop.
   - Thumbnail
     The products are displayed both next to each other and below each other.
5. Type the login instructions in the selected language.
6. Enable the [Enable 'Download' page] option.
   The [Downloads] link becomes available in the web shop. You can publish documents for the customer in the web shop.
   1. The temporary folder on the server contains folder "DownloadPage". For the location of the temporary folder, see *Define the path for the temporary folder* on page 153.
      For example: C:\Windows\Temp\PRISMAdirect\DownloadPage
   2. Copy the files that you want to publish in the web shop in this folder.
      The files are available for the customer when the customer clicks [Information] - [Downloads].
7. Click [Save].

Configure the order history settings

When you enable the order history, a list becomes available for the customer in the web shop. This list contains the canceled and finalized orders.

1. Click [Web store] - <web shop> - [Layout] - [Order history settings].
2. Enable [Show order history].
3. Click [Save].

Web store view

Configure the custom columns for orders and jobs

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

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

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

Configure the custom columns

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

Create a filter

You can create filters to determine which orders are visible for a user. A filter shows the jobs and orders that match the required filter criteria. The filter hides all other jobs and orders.

You can create and configure the filters in the following locations in workspace [Configuration]:

1. [Web store]
   The filter determines which orders are visible for a customer. You can create filters for each separate web store.
2. [Order processing]
   The filters determine which orders and jobs are visible for order managers and operators in the [Order processing] workspace. See *Manage the filters* on page 207.
   You can configure if order managers and operators are allowed to create their own filters in the [Order processing] console. See *Configure the filters* on page 66.

This topic describes how you can create and configure one or more filters for the web shop.

Create a filter

1. Use one or more items for the filter.
   1. Click [Web store] - <web shop> - [Layout] - [Web store view] - [Filter].
   2. Select an item in the list. The following items are available for the filter:
      - All order items and job items, including the custom items, available in the [Product and order editor] workspace.
      - All items used for internal administration, for example, [Communication state], [Accepted by], [Assigned to], etc.

Additional actions	Description
Sort the items	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.

   3. Enable the [Use in filter] option.
      An item is marked with a funnel icon when the item is added to the filter.
   4. Configure the values for the item.
2. Define which logical operator must be used when the filter contains two or more items.
   - By default, the 'AND' operator is used when you add more than one item to the filter. Jobs and orders become visible when all filter criteria are met.
   - When you enable option [Allow the OR operator in the filter], the 'OR' operator is used when you add more than one item to the filter. Jobs and orders become visible when at least one filter criteria is met.
3. [All jobs of the order must meet the filter criteria]
   An order and its jobs are only displayed when the filter criteria are met for all jobs.
   For example, the filter contains the following criterion for the jobs: [Communication state] = [Printed]. Now, the order is only shown in the [Order view] when all of its jobs have been printed.
4. Click [Save].

Configure the submission settings

The settings in this dialog are related to file submission.

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

     You can customise this setting for one or more user groups. See: [User management] - [User groups] - [User group settings]. The custom settings overrule the web shop settings for the user group. The custom settings are used in all web shops for the corresponding user group.
   - [Excluded File Types (Allow all file types, except)]
     - Use this option only if you want to exclude certain file types.
     - You can type in the excluded types of digital documents (for example EXE, AVI, MP3, ...). Use a comma to separate the custom document types.

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

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

Pricing

Manage cost centers per web shop

You can manage the budgets for users and user groups. You have to create one or more cost centers for each web shop. You have to assign a budget to each cost center. Then, you can assign one or more users and user groups to each cost center. For the assigned users the prices of their orders are deducted from the budget. You can set a maximum price for an order for each user or user group. An approver has to accept or reject the order when the price exceeds the maximum price. Accept or reject only applies to the price of an entire order. An approver cannot accept or reject the prices of the separate jobs in an order.

NOTE
When the payment workflow is enabled, then the budget management workflow is disabled.

Alternatively, you can setup an interface between the PRISMAdirect server and the uniFLOW server. The uniFLOW server then manages the cost centers and the price approval workflow. See *Setup the uniFLOW interface* on page 30

The settings in this dialog are part of the procedure to configure the budget management workflow. For the complete procedure, see *Configure the budget management workflow* on page 54.

Budget: available, reserved, and spent

You can change the available budget and you can reset the spent budget. The reserved budget is a step in the approval workflow and can therefore not be reset or changed.

- Available budget:
  The total budget available for the users of the web site.
- Spent budget:
  The amount spent so far by all users of the concerning cost center. You can reset the spent budget per cost centre manually.
- Reserved budget:
  A user has submitted an order costing $10,-. The approver must accept or reject the price of the order. While waiting for accept or rejection, the $10,- is added to the reserved budget.
  - When the order is accepted, the $10,- moves to the spent budget.
  - When the order is rejected, the $10,- moves to the available budget.

Create one or more cost centers per web shop

1. Click [Web store] - <web shop> - [Pricing] - [Cost centers].
2. Click [New cost center] to create the top level cost center.
   Click the plus icon to add a cost center.
3. Type a name and description for the cost center.
   You can use the characters: 'a - z', 'A - Z', '0 - 9', '_' . Spaces are allowed for the name.
4. Define the email address of the approver for this cost center. Use a semicolon to separate multiple email addresses.
   The approver receives an email when the spent budget exceeds the specified threshold.
5. Define the available budget for the cost center.
6. [Send warning at threshold [%]:]
   Define a percentage of the available budget. The approver receives an email when the spent budget exceeds the specified threshold. The approver can increase or decrease the available budget, or reset the spent budget.
   You can edit the email message, see [Order processing] - [Workflow configuration] - [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.
   When multiple cost centers are assigned to a web shop, you can select the default cost center for that web shop. Customers can select any of the cost centers of the web shop.
9. Click [Save].

Manage the cost centers per web shop

Additional actions	Description
Reset the spent budget	1. Click the pencil icon. The icon appears when you hover the mouse pointer over a cost center. 2. Click [Reset spent budget]. The spent budget of the cost center is reset to zero.
Edit a cost center	Click the pencil icon. The icon appears when you hover the mouse pointer over a cost center.
Delete a cost center	Click the delete icon. The icon appears when you hover the mouse pointer over a cost center.
Import cost centers	Click the import icon. The icon appears when you hover the mouse pointer over a cost center. The imported cost centers are added to the existing cost centers. You cannot save the imported cost centers, when you have imported an existing cost center.
Export cost centers	Click the export icon. The icon appears when you hover the mouse pointer over a cost center. You can click the export icon of: • Top level cost center: all cost centers are exported. • Any other cost center: the selected cost center and the cost centers it contains are exported. By default, the XML file is stored in the "Downloads" folder on the server of PRISMAdirect.
Sort the cost centers	Click the sort icon to apply ascending sorting or descending sorting. You can also use mouse drag and drop to reorder the cost centers.

Configure the default maximum price of an order per web shop

You can manage the budgets for users and user groups. You have to create one or more cost centers for each web shop. You have to assign a budget to each cost center. Then, you can assign one or more users and user groups to each cost center. For the assigned users the prices of their orders are deducted from the budget. You can set a maximum price for an order for each user or user group. An approver has to accept or reject the order when the price exceeds the maximum price. Accept or reject only applies to the price of an entire order. An approver cannot accept or reject the prices of the separate jobs in an order.

NOTE
When the payment workflow is enabled, then the budget management workflow is disabled.

Alternatively, you can setup an interface between the PRISMAdirect server and the uniFLOW server. The uniFLOW server then manages the cost centers and the price approval workflow. See *Setup the uniFLOW interface* on page 30

The settings in this dialog are part of the procedure to configure the budget management workflow. For the complete procedure, see *Configure the budget management workflow* on page 54.

Configure the default maximum price of an order per web shop

1. Click [Web store] - <web shop> - [Pricing] - [Price approval workflow].
2. Click [New level].
3. Define the maximum price of an order for the current level. You can type a value in the spinbox.
4. Define the email address of the approver for the current level. Use a semicolon to separate multiple email addresses.
   The approver receives an email when the order price exceeds the maximum price for the current level. The approver of the current level must approve or reject the order. If the price exceeds the maximum price of the next level, an approver of that level must also approve or reject the order.

   NOTE
   The approver for level 1 can forward the approval form to the approver for level 2.
5. Click button [New level] to define a maximum price for the new level. The maximum price of the new level must be higher than the maximum price of the previous level.
6. [Allow an approver to accept on behalf of higher level approvers]
   When you enable this option, each approver can always accept or reject an order, regardless of the price.
7. Click [Save].

Configure custom prices per web shop

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

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

Optionally, configure custom prices per web shop

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

Configure the default price estimation settings per web shop

The settings in this dialog are part of the following procedures:

- Configuration of the price estimation workflow. For the complete procedure, see *Configure the price estimation workflow* on page 58.
- Configuration of the tax services workflow. For the complete procedure, see *Configure the tax services workflow* on page 38.

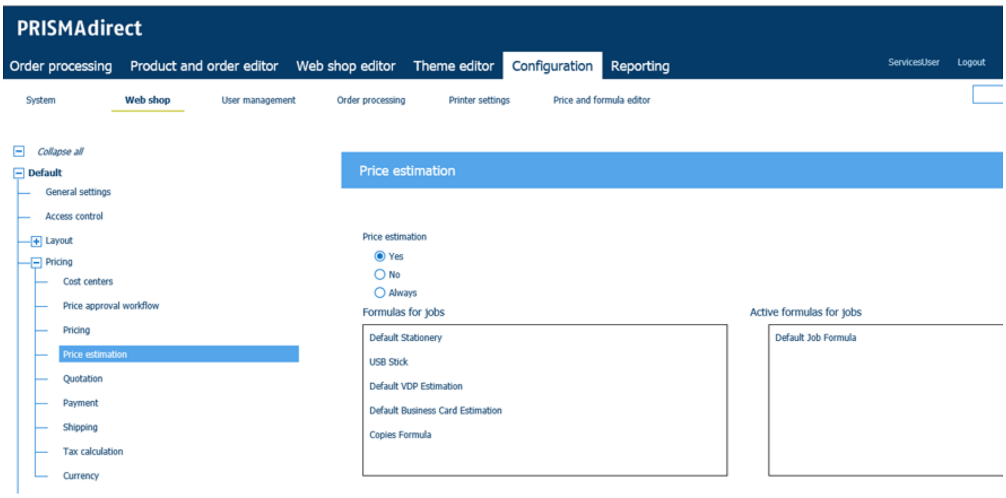
The jobs created with a product will use the following price settings and formulas:

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

Configure the default price estimation settings per web shop

1. Click [Web store] - <web shop> - [Pricing] - [Price estimation].
2. You can define the default price estimation settings for the selected web shop.

Setting	Value
[Price estimation]	• [Yes] The option [Price estimation] is available in the web shop. A customer is always presented with an estimation of the job cost. • [No] The option [Price estimation] is not available in the web shop. A customer is never presented with an estimation of the job cost. • [Always] A customer is always presented with an estimation of the job cost. The customer cannot submit the job until the cost of the job is estimated.
[Formulas for price estimation]	Drag and drop the available formulas to the active formulas. Do this for both the jobs and the orders.



3. Click [Save].

Configure the default quotation settings per web shop

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

The setting [Price estimation] is part of the price estimation workflow. For the complete procedure, see *Configure the price estimation workflow* on page 58.

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

Configure the quotation settings per web shop

1. Click [Web store] - <web shop> - [Pricing] - [Quotation].
2. You can define the default quotation settings for the selected web shop.

Setting	Value
[Quotation]	• [Yes] Option [Quotation] is available in the web shop. A customer can request a quotation. • [No] Option [Quotation] is not available in the web shop. A customer cannot request a quotation. • [Always] A customer is always presented with a quotation. The customer cannot disable the request to calculate a quotation.
[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 is 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.
[Formula for order:]	You have to select a formula to calculate the quotations of the orders.

3. Click [Save].

Enable payment per web shop

The settings in this dialog are part of the procedure to configure the payment workflow. For the complete procedure, see *Configure the payment workflow* on page 18.

Enable shipping per web shop

The settings in this dialog are part of the procedure to configure the shipping workflow. For the complete procedure, see *Configure the shipping workflow* on page 34.

Enable tax services per web shop

The settings in this dialog are part of the procedure to configure the tax services workflow. For the complete procedure, see *Configure the tax services workflow* on page 38.

Set the currency

You can set a different currency for each web shop.

1. Click [Web store] - <web shop> - [Pricing] - [Currency].
2. [Use default currency]
   - Enabled
     Check that the default currency is set.
     Click [Price and formula editor] - [Currency].
   - Disabled
     Set a custom currency for the web shop.
3. Select a currency from the drop-down list.
   Amounts are displayed with the selected currency code from the drop-down list or you can define a custom currency sign.
   - [Currency sign]
     Enable the checkbox and type the currency symbol. You can type text or use an ALT code, for example, `ALT 0128` for the euro symbol.
4. Click [Save].

Enable and configure the preflight rules per web shop

A preflight operation is a quality check of your document.

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. If enabled, the automatic preflight operation is applied when a customer submits an order. The automatic preflight operation allows you to fix the violations according to the configured rules or cancel the operation with that document. A preflight report and an annotated file are generated. The preflight report shows a summary of the problems that have been found. The annotated file shows the complete document with the location of any found problems and fixes. The manual preflight operation automatically fixes the violations according to the configured rules. Some problems are detected by the preflight operation, but cannot be fixed automatically. It is recommended that you fix these problems manually before you print the job.

Enable and configure the preflight rules per web shop

1. Click [Web store] - <web shop> - [Preflight].
2. Enable the rules that you want to use in column [Enabled].
3. Click on the bar of the rule that you want to configure. If the bar expands, you can configure the rule. If the bar does not expand, you can only enable or disable the rule.
   You can configure some rules to detect and fix a violation. Other rules can only be configured to detect a violation. These violations can only be solved in the corresponding PDF file by the customer or the operator.
4. Define the [Severity] of each rule.
   - [Warning]
     A violation of the rule is detected. You can ignore the warning.
   - [Error]
     A violation of the rule is detected. The violation of the rule must be fixed.
5. You can define a timeout.
   When the timeout value is exceeded, the preflight operation is canceled.
6. [Enable automatic preflight]
   When you enable this option, the application preflights each PDF file that the customer adds to an order in the web shop. When the customer adds a non-PDF file, then the file must be converted to PDF first before the preflight operation can start.
7. Click [Save].

Select the active languages for the web shop

The settings in this dialog are part of the procedure to configure the languages for PRISMAdirect and the web shops. For the complete procedure, see *Configure the languages* on page 42.

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

Contact information

Type the origin address per web shop

You ship your packages from the origin address. When you have multiple web shops, you have to type an origin address for each separate web shop.

The origin address is part of the following procedures:
- Configuration of the shipping workflow. For the complete procedure, see *Configure the shipping workflow* on page 34.
- Configuration of the tax services workflow. For the complete procedure, see *Configure the tax services workflow* on page 38.

Type the origin address per web shop

1. Click [Web store] - <web shop> - [Contact information] - [Origin address].
2. [Use default origin address]
   - Enabled
     The web shop uses the default origin address. See: [System] - [Connectivity] - [Origin address].
   - Disabled
     Type the origin address for your web shop. When you have multiple web shops, you have to type an origin address for each separate web shop.
     The address will not be validated in this dialog. The address will be validated when:
     - The operator requests a shipment in the [Order processing] workspace. The selected shipment provider returns an error message if any of the values are incorrect.
     - The operator or customer creates an order while tax services workflow is enabled. The tax service returns an error message if any of the values are incorrect.

     For example, the zip code is incorrect or the shipment provider is not active in the specified country.
3. Click [Save].

Type the contact information settings

The contact information used in the [About] link in the web shop. Customers can contact the person with questions, etc.

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

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

3. Click [Save].

Chapter 5
User management

Users

Manage the users

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

- [Windows user] for an automatically created user that is authenticated via Windows authentication.
- [LDAP user] for an automatically created user that is authenticated via custom authentication.
- [Web user] for users created in this dialog.
- [Web user] for self-registered users with an active account. See *Activate self-registered users* on page 190.

Additional actions	Description
View how a user account is created	Click [User management] - [Users] - [User settings]. See column [Registration method]: • [Self-registration] The customer has created a user account via self-registration. • [CAS] The customer has created a user account via a CAS server. • [ADFS] The customer has created a user account via an ADFS server. • Shibboleth The customer has created a user account via a Shibboleth server. • <No value> The user account is managed by an LDAP server, or the user account is created in PRISMAdirect.

1. Click [User management] - [Users] - [User settings].
2. Click the plus icon to add a user.
   Click the pencil icon to edit the user.
   Click the X icon to delete the user, and confirm:
   No: the selected user(s) will be deleted, but the data will remain.
   Yes the selected user(s) and their data will be deleted. All information related to the user will no longer be available: Orders, profile settings, accounting details. This operation is not reversible and will fail with a warning if any of the users have orders in any state except canceled or finalized. You cannot delete the ServicesUser.
3. Define the user name. The user name must be unique. The following characters are not allowed in a username: @";:<>|?/*[],=+
   The [User name] cannot be changed when you edit the user.
4. Define the [Role] of the user.
   - [Services]
     The users in the [Services] group have the highest rights. These users can access:
     - [Order processing]. Both the [Order view] and the [Job view].
     - [Product and order editor]
     - [Web store editor]
     - [Theme editor]
     - [Configuration]
     - [Reporting]

  - Web shops
- [Order managers]
  The users in the [Order managers] group can access:
  - [Order processing]. Both the [Order view] and the [Job view].
  - [Product and order editor]
- [Operators]
  The users in the [Operators] group can access the [Job view] of the [Order processing].
- [Customers]
  The users in the [Customers] group can access the web shops.

5. Define the [Password] for this user. You can also change the existing password of a user. The password must be different from the user name. Use the following rules to define a strong password:
   - The password must have at least 8 characters.
   - The password must use both upper case and lower case characters.
   - The password must contain at least one number.
   - The password must be different from the user name.

   Confirm the password.
   Click [Reset password] to change the existing password of a user.
   [Force user to change the password at first login]
   - Enabled
     The user will be forced to change the defined password upon first login. This is set by default.
   - Disabled
     The user will be able to use the defined password.
6. You can add a user to one or more user groups. However, you cannot add users to user groups that are managed by an LDAP server. User groups managed by an LDAP server are grayed out.
   When a user is added to multiple user groups:
   - You have to select a default user group for the user. The budget of the default user group is used for this user.
   - You have assigned a role to each user group. Each role has associated rights. The rights for the user groups are merged for the user.
7. [Allow only the use of filters created by the system administrator]
   You can configure if order managers and operators are allowed to create their own filters in the [Order processing] console.
   - Enabled
     The order manager and operator cannot create any filters. They can only use the filters created by the system administrator.
   - Disabled
     The order manager and operator can create filters in the [Order processing] workspace.

   This option is not available for users with role: [Customers].
8. Click [Save].

Edit the profile settings

You can map the [Profile settings] of the customer to job ticket items. When the customer submits a job, the job ticket items automatically receive the data from the [Profile settings]. The available profile attributes are fixed and cannot be changed.

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

[User profile]

1. Click [User management] - [Users] - [User profile].
2. Enable the profile settings that you want to use. The profile settings are available in the left-hand side of the dialog.
3. Assign each profile attribute to a job ticket item.
   Click the drop-down list and select a job ticket item. The ticket item receives the value of the profile attribute when the customer creates a job.
4. Click [Save].

Manage user security

Manage user security

You can manage options on how to deal with multiple failed login attempts.

If any user fails to log in for a number of consecutive tries, you can automatically block the account. Furthermore, you can force the user to wait a certain period of time before trying to log in again.

Blocking and unblocking the account will trigger an email message. The content of each message is configurable in [Order processing] - [Workflow configuration] - [Email templates] - [User account blocked - administrator], [User account blocked - user], and [User account unblocked]

[User profile]

1. Click [User management] - [Users] - [Users security settings].
2. [Enable block account functionality].
   - Enabled
     The user accounts will be blocked after a certain number of failed login attempts. This is set by default.
   - Disabled
     There is no check for repeated failed login attempts.
3. [Block user account after number of failed attempts:]
   Set the number of failed login attempts before the user account is blocked. Default value: 3. Maximum accepted value: 10.
4. [Automatically unlock account after [hours]:]
   Set the number of hours for the blocked account to be unblocked automatically. Default value: 24. Maximum accepted value: 72.
5. [Delay after a failed login [seconds]*:]
   Set the number of seconds of delay before allowing the user to try a new login attempt. Default value: 0 (functionality not enabled). Maximum value: 600.
6. Click [Save].

Blocking and unblocking do not apply to LDAP accounts.

Activate self-registered users

You can activate or deactivate any self-registered user accounts.

The settings in this dialog are part of the procedure to configure the self-registration workflow. For the complete procedure, see *Configure the self-registration workflow* on page 41.

Activate self-registered users manually

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

Import users from an LDAP server or uniFLOW server

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.

1. Click [User management] - [Users] - [Import from LDAP server].
2. Click on a server to view the available users.
   To view the available user groups, go to [User management] - [User groups] - [Import from LDAP server].
3. Select which users you want to import.
4. Click [Save] to import the users.
5. You can configure a number of settings for the imported users.
   Click [User management] - [Users] - [User settings].

Assign a cost centre to a user

You can manage the budgets for users and user groups. You have to create one or more cost centers for each web shop. You have to assign a budget to each cost center. Then, you can assign one or more users and user groups to each cost center. For the assigned users the prices of their orders are deducted from the budget. You can set a maximum price for an order for each user or user group. An approver has to accept or reject the order when the price exceeds the maximum price. Accept or reject only applies to the price of an entire order. An approver cannot accept or reject the prices of the separate jobs in an order.

NOTE
When the payment workflow is enabled, then the budget management workflow is disabled.

Alternatively, you can setup an interface between the PRISMAdirect server and the uniFLOW server. The uniFLOW server then manages the cost centers and the price approval workflow. See *Setup the uniFLOW interface* on page 30

The settings in this dialog are part of the procedure to configure the budget management workflow. For the complete procedure, see *Configure the budget management workflow* on page 54.

Assign a cost centre to a user

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

Configure the maximum price of an order for the users per web shop

You have to create one or more cost centers for each web shop. Then, you can configure the maximum price of an order for the users and user groups per web shop. These custom settings overwrite the default maximum price of an order per web shop.

The settings in this dialog are part of the procedure to configure the budget management workflow. For the complete procedure, see *Configure the budget management workflow* on page 54.

Configure the maximum price of an order for the users per web shop

1. Click [User management] - [Users] - [Price approval workflow] - <web shop>.
2. Select a user.
3. Click [New level].
4. Define the maximum price of an order for the current level. You can type a value in the spinbox.
5. Define the email address of the approver for the current level. Use a semicolon to separate multiple email addresses.
   The approver receives an email when the order price exceeds the maximum price for the current level. The approver of the current level must approve or reject the order. If the price exceeds the maximum price of the next level, an approver of that level must also approve or reject the order.

   NOTE
   The approver for level 1 can forward the approval form to the approver for level 2.
6. Click button [New level] to define a maximum price for the new level. The maximum price of the new level must be higher than the maximum price of the previous level.
7. [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.
8. Click [Save].

User groups

Add or edit a user group

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

1. Click [User management] - [User groups] - [User group settings].
2. Click the plus icon to add a user group. A new user group is created.
   Click the pencil icon to edit the user group.
3. Define the user group name. The name must be unique.
   The following characters are not allowed in a user group name: @";:<>|?/*[],=+
   The [User group name] cannot be changed when you edit the user group.
4. Define the [Role] of the users in the group.
   - [Services]
     The users in the [Services] group have the highest rights. These users can access:
     - [Order processing]. Both the [Order view] and the [Job view].
     - [Product and order editor]
     - [Web store editor]
     - [Theme editor]
     - [Configuration]
     - [Reporting]
     - Web shops
   - [Order managers]
     The users in the [Order managers] group can access:
     - [Order processing]. Both the [Order view] and the [Job view].
     - [Product and order editor]
   - [Operators]
     The users in the [Operators] group can access the [Job view] of the [Order processing].
   - [Customers]
     The users in the [Customers] group can access the web shops.
5. You can customize a number of web shops settings for each user group.
   - [Allowed file types] versus [Excluded File Types (Allow all file types, except)]
     - Web shop
       Use the settings for [Allowed file types]/[Excluded File Types (Allow all file types, except)] as defined in dialog [Submission] in [Web store].
     - 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.
       - Use custom settings for [Excluded File Types (Allow all file types, except)] 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.
   - [Price estimation]
     - Web shop
       The user group uses the price estimation settings as defined for each web shop.
     - Custom
       You can define custom price estimation settings for each web shop for the concerning user group.

Setting	Value
[Enabled]	• [Yes] The option [Price estimation] is available in the web shop. A customer is always presented with an estimation of the job cost. • [No] The option [Price estimation] is not available in the web shop. A customer is never presented with an estimation of the job cost. • [Always] A customer is always presented with an estimation of the job cost. The customer cannot submit the job until the cost of the job is estimated.
[Select formulas]	Drag and drop the available formulas to the active formulas. Do this for both the jobs and the orders.

The setting [Price estimation] is part of the price estimation workflow. For the complete procedure, see *Configure the price estimation workflow* on page 58.

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

- [Quotation]
  - Web shop
    The user group uses the quotation settings as defined for each web shop.
  - Custom
    You can define custom quotation settings for each web shop for the concerning user group.

Setting	Value
[Enabled]	• [Yes] Option [Quotation] is available in the web shop. A customer can request a quotation. • [No] Option [Quotation] is not available in the web shop. A customer cannot request a quotation. • [Always] A customer is always presented with a quotation. The customer cannot disable the request to calculate a quotation.
[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 is 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.

Setting	Value
[Formula for order:]	You have to select a formula to calculate the quotations of the orders.

The setting [Quotation] is part of the price estimation workflow. For the complete procedure, see *Configure the quotation workflow* on page 61.

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

- [Copyright administration]
  - Web shop
    Use the settings for [Copyright administration] as defined in dialog [Submission] in [Web store].
  - 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.
- [Allow the customer to change the language]
  - Web shop
    The user group uses the value of setting [Allow the customer to change the language] as defined for the web shop.
  - Custom = Yes
    Customers that are part of the concerning user group are allowed to change the language of each web shop. More than one language must be active, see procedure *Configure the languages* on page 42.
  - Custom = No
    Customers that are part of the concerning user group are not allowed to change the language of each web shop.
- [Custom columns]
  - Web shop
    Use the settings for [Custom columns] as defined in dialog [Custom columns] for jobs and orders in [Web store].
  - 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.
- [Enable 'Download' page]
  - Web shop
    Use the settings for [Enable 'Download' page] as defined in dialog [Layout] in [Web store].
  - 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.
- [File hosting service]
  - Global settings
    The user group uses the settings of the file hosting services as defined for PRISMAdirect.
  - Custom = Yes

File hosting services are enabled for each web shop for the concerning user group. The file hosting services must be configured, see procedure *Configure the file hosting services, for example, Dropbox* on page 23.
- Custom = No
  File hosting services are disabled for each web shop for the concerning user group.

- [Enable payment]
  - Web shop
    The user group uses the value of setting [Enable payment] as defined for the web shop.
  - Custom = Yes
    Payment is enabled for each web shop for the concerning user group. The payment providers must be configured, see procedure *Configure the payment workflow* on page 18.
  - Custom = No
    Payment is disabled for each web shop for the concerning user group.

- [Enable shipping]
  - Web shop
    The user group uses the value of setting [Enable shipping] as defined for the web shop.
  - Custom = Yes
    Shipping is enabled for each web shop for the concerning user group. The shipping providers must be configured, see procedure *Configure the shipping workflow* on page 34.
  - Custom = No
    Shipping is disabled for each web shop for the concerning user group.

- [Enable automatic preflight]
  - Web shop
    The user group uses the value of setting [Enable automatic preflight] as defined for the web shop.
  - Custom = Yes
    Automatic preflight is enabled for each web shop for the concerning user group. You have to configure the preflight rules, see procedure *Configure the preflight workflow* on page 44.
  - Custom = No
    Automatic preflight is disabled for each web shop for the concerning user group.

6. Click [Save].

Import user groups from an LDAP server or uniFLOW server

You can import user groups from an LDAP server or uniFLOW server. By default, the users in the user group receive the role [Customers]. After import of the user group, you can:
- Change the role of the users in the user group
- Customize a number of web shops settings for the user group

1. Click [User management] - [User groups] - [Import from LDAP server].
2. Click on a server to view the available user groups.
   To view the available users, go to [User management] - [Users] - [Import from LDAP server].
3. Select which user groups you want to import.
4. Click [Save] to import the user groups.
5. You can configure a number of settings for the imported user groups. For example, to change the role of the users in the user group.
   Click [User management] - [User groups] - [User group settings].

Assign a cost center to a user group

You can manage the budgets for users and user groups. You have to create one or more cost centers for each web shop. You have to assign a budget to each cost center. Then, you can assign one or more users and user groups to each cost center. For the assigned users the prices of their orders are deducted from the budget. You can set a maximum price for an order for each user or user group. An approver has to accept or reject the order when the price exceeds the maximum price. Accept or reject only applies to the price of an entire order. An approver cannot accept or reject the prices of the separate jobs in an order.

NOTE
When the payment workflow is enabled, then the budget management workflow is disabled.

Alternatively, you can setup an interface between the PRISMAdirect server and the uniFLOW server. The uniFLOW server then manages the cost centers and the price approval workflow. See *Setup the uniFLOW interface* on page 30

The settings in this dialog are part of the procedure to configure the budget management workflow. For the complete procedure, see *Configure the budget management workflow* on page 54.

Assign a cost center to a user group

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

Configure the maximum price of an order for the user groups per web shop

You have to create one or more cost centers for each web shop. Then, you can configure the maximum price of an order for the users and user groups per web shop. These custom settings overwrite the default maximum price of an order per web shop.

The settings in this dialog are part of the procedure to configure the budget management workflow. For the complete procedure, see *Configure the budget management workflow* on page 54.

Configure the maximum price of an order for the user groups per web shop

1. Click [User management] - [User groups] - [Price approval workflow] - <web shop>.
2. Select a user group.
3. Click [New level].
4. Define the maximum price of an order for the current level. You can type a value in the spinbox.
5. Define the email address of the approver for the current level. Use a semicolon to separate multiple email addresses.
   The approver receives an email when the order price exceeds the maximum price for the current level. The approver of the current level must approve or reject the order. If the price exceeds the maximum price of the next level, an approver of that level must also approve or reject the order.

   NOTE
   The approver for level 1 can forward the approval form to the approver for level 2.
6. Click button [New level] to define a maximum price for the new level. The maximum price of the new level must be higher than the maximum price of the previous level.
7. [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.
8. Click [Save].

Manage the user roles

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

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

1. Click [User management] - [User roles].
2. Click [New role].
   You can also click the copy icon to copy an existing role. The icon appears when you hover the mouse pointer over the existing role.
3. Type the name for the user role.
   By default, all rights are enable for the new role.
4. Enable or disable access to workspaces and dialogs for the role.
   You have to disable [Order view] first, before you can disable [Job view].
5. Click [Save].
6. You can assign the user role to a user or user group. See *Manage the users* on page 186 and *Add or edit a user group* on page 194

Manage the open sessions

Introduction

The [Open sessions] is a list with all the PRISMAdirect users connected to the application at any given time. The list does not contain the web users.

The registered users with rights in [Configuration]→[User management]→[User roles] have access to this functionality.

1. Click [Configuration]→[User management]→[Open sessions]
2. Select one of the entries in the list
3. Click the [Disconnect user] button to terminate the connection of the selected user
4. The user will be logged off and will be redirected back to the login page, with the message "[You have been logged out by the system administrator!]".

NOTE
If one user is connected to the system using more than once, all the sessions will be terminated.

Chapter 6

Order processing

General settings

Configure the general settings

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

1. Click [Order processing] - [General settings] - [General settings].
2. You can configure the following settings:
   - [Allow the operator to change the files of jobs]
     Enable this option to allow the operator to change the files of submitted jobs.
     When this option is enabled, the operator can:
     - 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.
     - Add or remove files from the jobs.
     - Edit a non-PDF file.

     The customers must be confident that the files are printed exactly as these were submitted. When you enable this option, there is no guarantee that the submitted files will remain unchanged before the job is printed.
   - [Allow the operator to change the ticket items for page programmed jobs.]
     By default, a number of ticket items are locked for page programmed jobs. Enable this option to unlock these ticket items. Now, the operator and the order manager can change the values of these ticket items even for page programmed jobs.
     The operator or order manager can change the values of these ticket items for accounting purposes or to change the quotation. Any changed values of the unlocked ticket items are not used for printing the page programmed job.
   - [Allow the order manager to change the orders]
     Enable this option to allow the order manager to change the submitted orders. The order manager can add or remove jobs from the orders.
     The order manager should change an order only after a request from the customer.
   - [Always add the OrderID to the email subject]
     It is recommended to add the OrderID to the subject of each email which is sent from the application. Add the OrderID for easy identification of the job.
     This setting is part of the following procedure: *Integrate Office 365 and Microsoft Outlook with PRISMAdirect* on page 82.
   - [Overview of warnings]
     It is recommended that the operator solves any warning(s) before the operator submits the order. 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.
   - [Allow the order manager to assign jobs from imported orders to operators]
     Imported orders can contain multiple jobs. Enable this option to allow the order manager to assign the jobs to different operators.
   - [Get notifications when a new order is received]
     The operator and the order manager get notifications when a new order is received. The notifications are
     - A ringing sound, and
     - The browser tab displays the number of new orders.

- [Current job number]
  This option contains the job number of the last job. You can define any job number with a maximum value of 999999999.
  The next submitted or imported job receives job number: [Current job number] + 1.
- [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 or imported order receives order number: [Current order number:] + 1.

3. Click [Save].

Trace level

Set the trace level for the [Order processing] workspace:

- [Debug]
  The [Debug] trace level provides the most detailed log information.
  The [Debug] trace level can impact the performance of the application.
- [Error]
  The errors are logged.
- [Info]
  The errors and information messages are logged

Configure the general VDP settings

The setting in this dialog is part of the procedure to configure the VDP workflow. For the complete procedure, see *Configure the VDP workflow* on page 52.

Configure the preview settings for a variable data document

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

Manage the filters

You can create filters to determine which orders are visible for a user. A filter shows the jobs and orders that match the required filter criteria. The filter hides all other jobs and orders.

You can create and configure the filters in the following locations in workspace [Configuration]:
1. [Web store]
   The filter determines which orders are visible for a customer. You can create filters for each separate web store. See *Create a filter* on page 168.
2. [Order processing]
   The filters determine which orders and jobs are visible for order managers and operators in the [Order processing] workspace.
   You can configure if order managers and operators are allowed to create their own filters in the [Order processing] console. See *Configure the filters* on page 66.

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

Additional actions	Description
Edit a filter	Click the pencil icon. The icon appears when you hover the mouse pointer over a filter.
Delete a filter	Click the delete icon. The icon appears when you hover the mouse pointer over a filter.

Create a filter

1. Click [Order processing] - [Manage filters]. Then select:
   - [Filters for orders]
     Create a filter for the [Order view] of the [Configuration] workspace.
   - [Filters for jobs]
     Create a filter for the [Job view] of the [Configuration] workspace.
2. Click the plus icon to add a filter.
3. Assign the filter.
   - Assign a filter for orders to an order manager. You can manage the order managers in [Order processing] - [Workflow configuration] - [General settings] - [Assign orders to].
   - Assign a filter for jobs to an operator. You can manage the operators in [Order processing] - [Workflow configuration] - [General settings] - [Assign jobs to].
4. Type a name and description for the filter. The name must be unique.
5. Use one or more items for the filter.
   1. Select an item in the list. The following items are available for the filter:
      - All order items and job items, including the custom items, available in the [Product and order editor] workspace.
      - All items used for internal administration, for example, [Communication state], [Accepted by], [Assigned to], etc.

Additional actions	Description
Sort the items	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.

   2. Enable the [Use in filter] option.
      An item is marked with a funnel icon when the item is added to the filter.

   3. Configure the values for the item.
6. Define which logical operator must be used when the filter contains two or more items.
   - By default, the 'AND' operator is used when you add more than one item to the filter. Jobs and orders become visible when all filter criteria are met.
   - When you enable option [Allow the OR operator in the filter], the 'OR' operator is used when you add more than one item to the filter. Jobs and orders become visible when at least one filter criteria is met.
7. [All jobs of the order must meet the filter criteria]
   An order and its jobs are only displayed when the filter criteria are met for all jobs.
   For example, the filter contains the following criterion for the jobs: [Communication state] = [Printed]. Now, the order is only shown in the [Order view] when all of its jobs have been printed.
8. Click [Save].

Manage the automation templates

In PRISMAprepare, you can create automation templates and export them to file. Then, you can import the automation templates from the file to PRISMAdirect.

The settings in this dialog are part of the procedure to configure the workflow for automation templates. For the complete procedure, see *Configure the workflow for automation templates* on page 64.

Import automation templates

Additional actions	Description
Delete an automation template	Click the delete icon. The icon appears when you hover the mouse pointer over an automation template. You cannot delete an automation template when the template is assigned to one or more products. Click on the automation template to view to which products the automation template is assigned to.

1. Click [Order processing] - [Manage automation templates].
2. You can import automation templates to PRISMAdirect.
   - [Import templates]
     Select one or more automation templates and click [Open]. The file type of an automation template is *.MRSCRIPT.
   - [Import archive]
     Browse to the ZIP file that contains the automation templates and click [Open].
3. Select how you want to import the automation templates.
   - [Merge with the existing templates]
     Any automation template that does not yet exist in PRISMAdirect is added to PRISMAdirect.
   - [Replace the existing templates]
     The application deletes the automation templates available in PRISMAdirect. Then, the new templates are imported.
4. Click [OK].

Enable and configure the preflight rules for the [Order processing] console

A preflight operation is a quality check of your document.

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. If enabled, the automatic preflight operation is applied when a customer submits an order. The automatic preflight operation allows you to fix the violations according to the configured rules or cancel the operation with that document. A preflight report and an annotated file are generated. The preflight report shows a summary of the problems that have been found. The annotated file shows the complete document with the location of any found problems and fixes. The manual preflight operation automatically fixes the violations according to the configured rules. Some problems are detected by the preflight operation, but cannot be fixed automatically. It is recommended that you fix these problems manually before you print the job.

Enable and configure the preflight rules for the [Order processing] console

The settings in this dialog are part of the procedure to configure the preflight workflow. For the complete procedure, see *Configure the preflight workflow* on page 44.

1. Click [Order processing] - [Preflight].
2. Enable the rules that you want to use in column [Enabled].
3. Click on the bar of the rule that you want to configure. If the bar expands, you can configure the rule. If the bar does not expand, you can only enable or disable the rule.
   You can configure some rules to detect and fix a violation. Other rules can only be configured to detect a violation. These violations can only be solved in the corresponding PDF file by the customer or the operator.
4. Define the [Severity] of each rule.
   - [Warning]
     A violation of the rule is detected. You can ignore the warning.
   - [Error]
     A violation of the rule is detected. The violation of the rule must be fixed.
5. You can define a timeout.
   When the timeout value is exceeded, the preflight operation is canceled.
6. Click [Save].

Workflow configuration

Manage operators and order managers

You can create and manage operators and order managers.
- You can assign orders to order managers in the [Order view] of the [Configuration] workspace.
- You can assign jobs to operators in the [Job view] of the [Configuration] workspace.

In this way, you can divide the workload between several people.

Additional actions	Description
Edit an operator or order manager	Click the pencil icon. The icon appears when you hover the mouse pointer over an operator or order manager.
Configure email notifications for the operator or order manager	Click the checkbox to toggle the setting. The checkbox appears when you click the row of users to have the entry expanded.
Delete an operator or order manager	Click the delete icon. The icon appears when you hover the mouse pointer over an operator or order manager. You cannot delete an operator or order manager when a job or order is assigned to this user. In this dialog, you cannot delete a user when the user was created in [User management] - [Users] - [User settings].

Create an operator or order manager

1. To manage the order managers, click: [Order processing] - [Workflow configuration] - [General settings] - [Assign orders to].
   To manage the operators, click: [Order processing] - [Workflow configuration] - [General settings] - [Assign jobs to].
2. Click the plus icon to create an operator or order manager.
3. Type a name. You can use the characters: 'a - z', 'A - Z', '0 - 9', '_' . Spaces are allowed.
4. Check the setting [Send an email to the operator] to have the operator or order manager receive a mail.

   NOTE
   This assumes the user already has a valid email address configured in the profile. If this is not the case, you will receive an error message.

5. Click [Save].

Manage the categories

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

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

You cannot edit or delete the predefined categories.

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

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

Configure the actions at an order state change

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.

The settings in this dialog are part of the procedure to configure the email workflow. For the complete procedure, see *Configure the email workflow* on page 46.

1. Click [Order processing] - [Workflow configuration] - [General settings].
2. Select any of the order states.
   - Print job ticket when...
     Enable this option when you want to print the ticket when the order changes into the concerning state.

   - Enable option [Send email] when you want to send an email when the order changes into the concerning state. You can select several options for sending an email:
     - [Always]
       The email message for the concerning order state change is always send to the customer.
     - [When requested by customer]
       The email message for the concerning order state change is only sent to the customer when the customer has requested this.
     - [Send an email to the customer]
       The email message for the concerning order state change is always send to the customer.
     - [Send an email to the operators]
       The email message for the concerning order state change is always send to the operator.

   - [Allow to edit the email message before sending]
     Default email messages have been created for the order state changes that trigger sending an email. When you enable this option:
     - At a particular order state change, the concerning default email message opens.
     - The operator can change the email message.
     - The operator has to manually send the email message.

     When you disable this option, any default email message is sent automatically.
     Most, but not all, triggers contain option [Allow to edit the email message before sending].

   - [Send email to Cc addresses]
     Enable option [Send email to Cc addresses] to add a carbon copy address to the email sent. You can define multiple email addresses. Use a semicolon to separate the email addresses.

   - [Move to category]
     Define to which category you want to move the order when the order state changes into the concerning state.

   - [Assign jobs to]
     Define to which operator you want to assign the jobs of the order when the order state changes into the concerning state.

   - [Assign orders to]
     Define to which order manager you want to assign the order when the order state changes into the concerning state.
3. Click [Save].

Configure the other settings

This dialog contains settings that are part of two separate procedures:

- [Allow operator to attach files when sending email]
  This setting is part of the procedure to configure the email workflow. For the complete procedure, see *Configure the email workflow* on page 46.
- [Automation templates]
  This setting is part of the procedure to configure the workflow for automation templates. For the complete procedure, see *Configure the workflow for automation templates* on page 64.

1. Click [Order processing] - [Workflow configuration] - [General settings] - [Other settings].
2. Define the print settings for the ticket.
   A ticket is inserted as a banner page before the job.
3. [Allow operator to attach files when sending email]
   You can define the email templates in section [Email templates]. In that section, you can define which files will be attached to the emails by default. When you enable this option, the operator is allowed to attach additional files to the email messages to the customer.
4. [Automation templates]
   The automation templates become available in the [Product and order editor] workspace. You can assign one or more templates to a product.
   When you disable this option, any automation templates assigned to one or more products are removed from the products.
5. Click [Save].

Configure the reminders

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. For workspace [Order processing]:

- It is recommended that you add the columns [Creation date] and [Delivery date] as order information to the list of orders.
- Add the same columns as job information to the list of jobs.

In this way, the operator can see the creation date of the job and the requested delivery date in one view.

1. Click [Order processing] - [Workflow configuration] - [User management] - [Reminders].
2. Select [Set a reminder] if you want to be reminded about jobs that are nearly due.
3. Click [New reminder].
4. 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.
5. You can select the colour for the job to signal the concerning reminder.
6. Click [Save].

Configure the email templates

You can create default email messages for the customers, approvers, etc. The emails can be sent at various stages while processing an order. Emails can also be sent at certain stages of a workflow, for example, budget control.

This dialog contains settings that are part of two separate procedures:

- The settings in this dialog are part of the procedure to configure the email workflow. For the complete procedure, see *Configure the email workflow* on page 46.
- [Attach the preflight report]
  This setting is part of the procedure to configure the preflight workflow. For the complete procedure, see *Configure the preflight workflow* on page 44.

Create default email messages

1. Click [Order processing] - [Workflow configuration] - [Email templates].
2. Select the email template that you want to configure.
3. Click a language to configure the email message in that language. The available languages are displayed just above the subject field. The available languages are equal to the active languages for PRISMAdirect. See: [System] - [Active languages for system].
4. Create the email message.
   - Type the text. Use the icons to use different font types, font color, text alignment, etc.
   - You can add images, for example, your company logo.
   - You can use the order items and product items as variables. Drag and drop the variable into the message at the desired position. A variable is enclosed by '%' symbols. You can also type fixed text in the label.
     You can use the product items only for jobs. Drag and drop the layout item [Job information (per job)] into the email message to create a job specific text box.
   - You can include a hyperlink to the order in your email. Drag and drop [Hyperlink to order] into the message. When the customer clicks the hyperlink, a web page opens that contains the concerning order.

   Click [Revert to default] to use the default email message again. Your changes will be discarded.
5. You can configure which files are automatically attached to the email message.
   - Select option [Attach the document] to attach the final PDF document to the email message.
   - Select the [Attach the tickets] 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.

   The operator can attach additional files to an email message when the [Allow operator to attach files when sending email] option is enabled. See procedure *Configure the email workflow* on page 46.
6. Click [Preview email] to check your email message.
7. Click [Save].
8. Repeat these steps for all email templates.

Ticket mappings

Use job ticket settings in printer driver

You can use the values in the job ticket directly in the corresponding settings in the printer driver. All available printers that support the [Printer mappings] will be available in the section [Printer mappings].

You can use job ticket items of type: [Choice], [Yes/No], [Text] and [Number].

You can use the values of the job ticket in:
- [All printers]
  The values of the job ticket are used in all printer drivers.
- To specific printers
  The values of the job ticket are used in a specific printer driver. The job ticket settings for a specific printer driver overwrite the use of these settings for all printers.
  You can use the values of the job ticket differently in different printer drivers.

Example

You can map a job ticket item to multiple printer settings in the printer driver. For example, you select value 'Internal report' for job ticket item 'Document type'. Then, you map 'Internal report' to the printer settings 'Duplex = On' and 'Staple = Off'. When a user specifies the 'Document' type as 'Internal report', the document will be printed duplex and without a staple.

Map the job ticket items

1. Click [Order processing] - [Ticket mappings] - [Printer mappings].
2. Select if you want to use the job ticket settings in:
   - [All printers]
   - A specific printer
3. Select a [Job ticket item].
   The possible values for this [Job ticket item] and the [Printer parameters] are displayed.
   At least one printer that supports [Printer mappings] must be installed to see items in the [Printer parameters].
4. Select one of the values and select the corresponding printer parameter.
5. Repeat above steps for each job ticket item that you want to use in the printer driver.
6. Click [Save].

Use job tickets settings in document

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

You can use job ticket items of type: [Choice], [Yes/No], [Text] and [Number].

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

Map the job ticket items

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

Configure the printed ticket

1. Click [Order processing] - [Print options for ticket].
2. Define the font settings for the ticket. You can use different font types, font sizes, etc for each group of items.
   - [Ticket title settings]
     Define how the title of the job ticket must be printed.
   - [Group item settings]
     Define how the group items of the job ticket must be printed.
   - [Item settings]
     Define how the job ticket items must be printed.
3. Select on which media the ticket must be printed.
   - Media: select the type of media to print the ticket on.
   - Media size: select the size of the ticket.
4. Enable the [Print logo in ticket] option to print the logo in the job ticket.

   NOTE
   If both options [Print logo in ticket] and [Print barcode in ticket] are active, the logo is placed below the barcode.

   1. Click button [Browse] to select an image.
      The allowed image file types are: .bmp, .jpg, .gif, .png.
      Click [Clear] to remove a selected image.
   2. Select the position for the logo from the drop-down list.
   3. [Scale logo to page size]
      You can scale the logo to the page size. Enable the [Keep ratio] option to use the same relation between width and height for the logo as for the page size. You have to define the width [%] for the image.
5. Enable option [Print barcode in ticket] to print the barcode in the job ticket.
   If this option is enabled, at least one of the values for the generated barcode has to be valid.
   1. Select the barcode type (1D or 2D).
   2. Select the barcode format.
   3. Drag [Order items] into the job or order barcode value field.
   4. Drag [Product items] into the job barcode value field.
   5. Enable option [Show label on generated barcode] to have the value printed below the barcode in human-readable format.
   6. Enable option [Change barcode size] to override the default size and specify the exact size.
6. Use the [Preview] to check the correctness of the settings.

   NOTE
   Some barcode formats have strict rules for encoding data. In case of an error, the barcode will be replaced by an error message in the preview.

7. Click [Save].

Chapter 7
Printer settings

Manage the printers for the application

Discover a new printer

You can use the printer discovery tool to easily add printers to PRISMAdirect. The newly added printer is not automatically available in PRISMAdirect. You have to close and open PRISMAdirect to load the printer in the application.

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.

[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.

1. Open workspace [Configuration].
2. Select [Printer settings].
3. Click the [Discover] button to launch the [Printer discovery tool].
4. Check which network your printers reside on and select the relevant option to discover your printers. In this example, your printers are on your local network.

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.

[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.

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.

Scan process properties

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:

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

Settings SNMP V1

You can define the following settings when you select 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.

Settings SNMP V3

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 Windows printer name if the printer is already defined in the local Windows system, otherwise the model name is used as the printer name.
[Printer model]	The printer model.
[Status]	The printer configuration status. The following status can be shown: • [New] The printer is not yet available on the local system. • [Not configured] The printer is available on the local system but the printer is not yet configured for PRISMAdirect. • [Configured] The printer is available on the local system and the printer is configured for PRISMAdirect. • [Not responding] The printer is available on the local system and the printer can be configured for PRISMAdirect. However, the printer is not responding. • [Invalid configuration] The printer is available on the local system. However, the printer is configured for another printer model or another version of the print server. • [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 its version.

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 adding 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

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

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

Manage the general settings

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

Printer image

You can change the printer image:

1. Click the printer image.
2. Select a printer image from the pre-defined list of images or upload your own image. Images of type GIF, JPG, and PNG are supported.
3. Click OK.

Preferences

- [Available for printing]
  Enable this option to make the printer available in the application.
- [Enable the driver settings button]
  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]
  A print job for variable data documents can be very large. You can set a maximum number of sheets per job to limit the size of a print job. Now, the application will cut the large print job into a number of smaller print jobs. Every smaller print job will not contain more than the specified maximum number of sheets.
  The minimum value for this setting is 400 sheets.
  For example, a print job contains 4000 variable data documents. Each variable data document contains 10 pages that are printed on 5 sheets. You set a maximum of 400 sheets. The application now sends 50 smaller print jobs to the printer instead of one large print job.

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:]

- Click the plus icon to add a website for the printer. The format for a URL is "http://<website>" or "https://<website>".
- PRISMAsync Remote Manager
  When you add a new printer driven by a PRISMAsync Print Server, the URL of its PRISMAsync Remote Manager is automatically added to the available websites for the printer.
  The URL of the PRISMAsync Remote Manager is not automatically added for already available printers.

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

Manage the printer configuration

Introduction

The print queues of the printer are listed in section [Destination]. The print queues are printer dependent. In addition to the default print queues, DocBoxes and virtual printers can be defined on the print server. DocBoxes can be defined on the PRISMAsync Print Server. Virtual printers can be defined on the Fiery Print Server. DocBoxes and virtual printers are print queues that apply specific settings to print jobs that are sent to them. For example, specific color options are applied to each job that is sent to the queue. You have to import these queues from the print server before you can make them available to the operator.

You can enable one or more print queues for the operator. The operator can find the print queues in the [Print] dialog.

Finishers that are possibly available to the printer are listed in section [Finishers]. You have to select which finishers are actually available to the printer. The selected finishers and their output locations become available to the operator in the [Print] dialog.

Manage the print queues

1. Click [Printer settings] - [Printers] and select an available printer. Click [Printer configuration].
2. Select the print queues that you want to enable for the operator. When you enable more than one queue, you have to select a default queue from the drop-down list.
   - Click [Import DocBoxes] or [Import virtual printers] to import specific print queues from the print server. You can enable one or more of these specific print queues for the operator.

Manage the finishers for the printer

1. Click [Printer settings] - [Printers] and select an available printer. Click [Printer configuration].
2. Click [Get printer configuration] to retrieve the latest configuration of the printer. This button is only available for printers that support this option.
3. Select which finishers are actually available to the printer.
   - When you select more than one finisher, you have to select a default finisher from the drop-down list.
   - You can select the default output location for unused cyclic media from the drop-down list. Any unused cyclic media, such as tab media, is deposited in this output location.
4. Click [Save].

Manage the connection settings

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.

1. Click [Printer settings] and select an available printer. Click and [Edit] select the [Connection] tab.
2. Define the [Printer connection] settings:

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

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

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

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

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

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

Settings SNMP V1

You can define the following settings when you select 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.

Settings SNMP V3

4. Click [OK].

Add or edit a printer cluster

You can group printers into printer clusters. You can use the printer cluster for load balancing. Load balancing is based on print speed. The goal is to split the workload in such a way that all printers within the cluster are ready at the same time with their part of the job. For example, the cluster contains two printers. Printer A is twice as fast as printer B. When you send 60 copies of a job to the printer cluster, then printer A prints 40 copies and printer B prints 20 copies.

Load balancing is also applied to variable data documents. Variable data documents are split based on records. One record is equal to one applied row of the data source. When the user provides manual input, the manual input is considered to be one row of a data source.

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

   Drag and drop active printers to the available printers to remove printers from the cluster.
6. Click [Save].

Application settings

Add a color strip

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

1. Click [Printer settings] - [Application settings] - [Color strips].
2. Click the plus icon.
3. Browse to the color strip that you want to add. You can select one or more color strips.
   The supported file types are: *.eps, *.pdf, *.tif and *.tiff.
4. Click [Open].
   The added color strip is enabled by default. You can disable the color strip by deselecting the checkbox.

Add an imposition template

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

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

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

Chapter 8
Price and formula editor

Select a formula manager

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

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

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

Use the prices and formulas from the Excel sheet

Where is it

When you have upgraded from PRISMAaccess to PRISMAdirect, you can choose to keep using the formula manager of PRISMAaccess. The formula manager uses the default functionality of Microsoft Excel. The formula manager allows you to change the cost calculation rules of the system. You can configure the default formulas. You can also create new formulas.

1. Click [Price and formula editor] - [General settings].
2. [Use the prices and formulas from the Excel sheet]
   Enable this setting to use the formula manager, i.e. the Excel sheet, of PRISMAaccess.

The worksheets

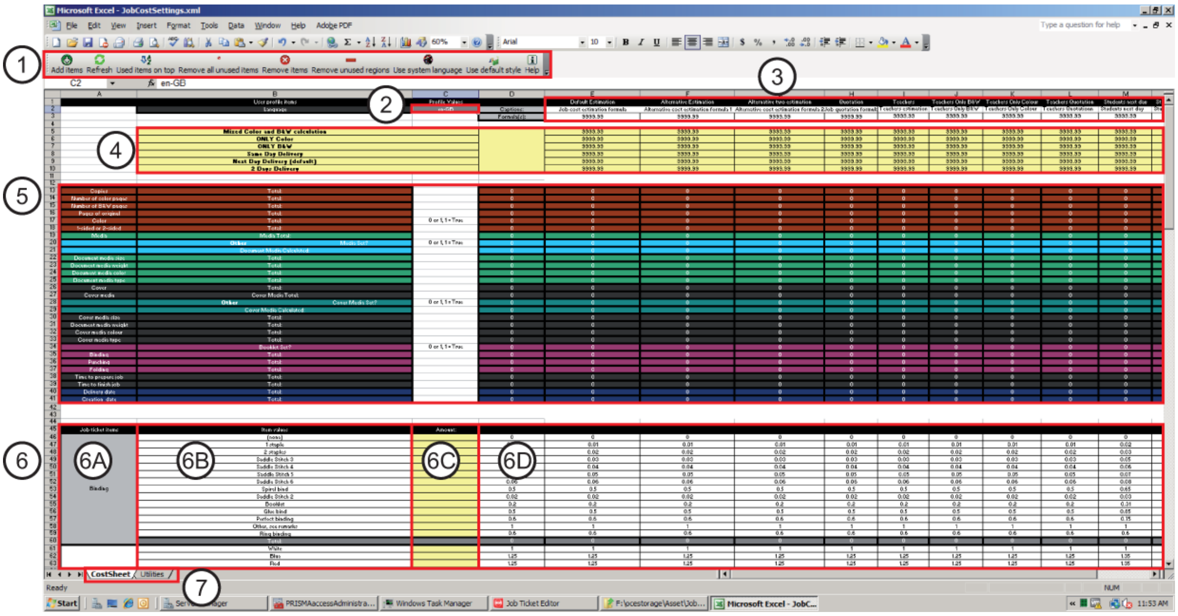
By default, a number of formulas are available. You can define custom formulas in the columns next to the default formulas up to and including column Z. Each column can contain one formula. Each column contains all information for one formula:

- The name and the calculated result of the formula.
  The result of the formula is shown in row 3.
- The calculation for the formula.
  The formula can use one of the default calculations, or a custom calculation.
- The calculation collects its values from the concerning column in the result table.
- The result table collects the values for all job ticket items from the concerning column in the job ticket table.
- The job ticket table receives its values from the current job ticket definition.

NOTE
It is recommended that you do not remove the default formulas.

Worksheet "CostSheet"

The layout of the formula manager in worksheet "CostSheet"

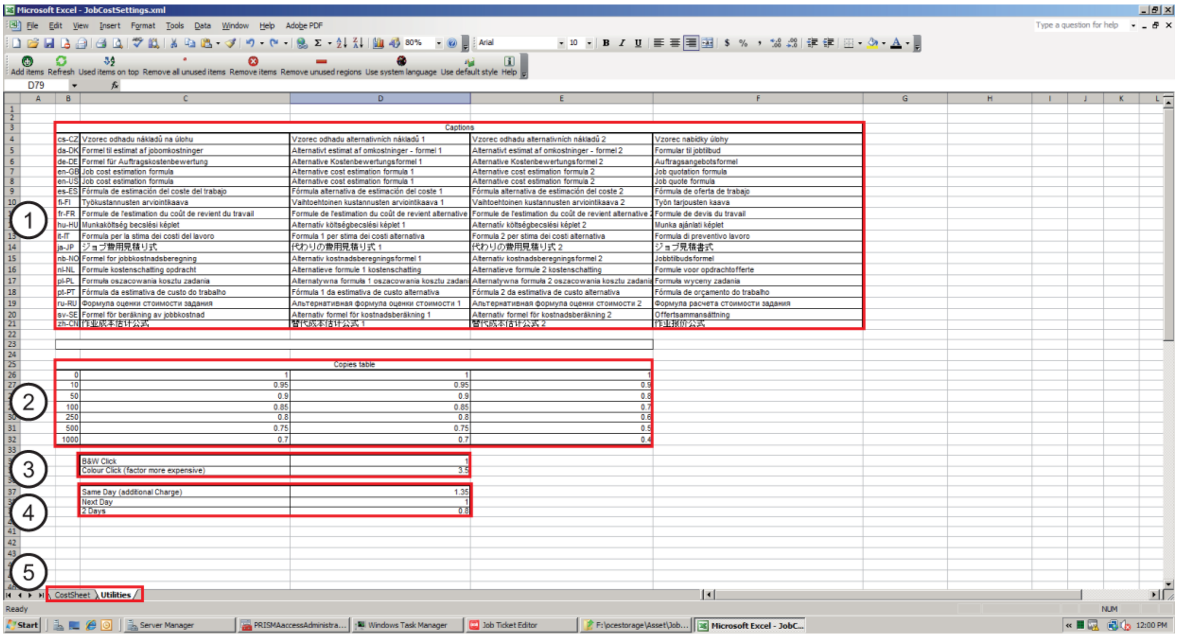


Frame	Description
1	The toolbar of the formula manager.
2	Select the language for the formulas in cell C2. Use one of the abbreviations from table [Captions] in worksheet "Utilities". The translated names for the formulas in the "CostSheet" worksheet are taken from the [Captions] table in the "Utilities" worksheet. The translated names of the formulas are shown in row 2 below the original formula name that is shown in row 1. • The formula names in row 1 are displayed in the [Configuration]. • The formula names in row 2 are displayed in the web shop.
3	**The formulas** By default, a number of formulas are available. You can define custom formulas in the columns next to the default formulas up to and including column Z. Each column can contain one formula. The formula can use one of the default calculations, or a custom calculation. The result of the formula is shown in row 3.
4	**The calculations** Default calculations are available. You can also create a custom calculation. For each formula, you must select one calculation. The calculation collects its values from the concerning column in the result table.
5	**The result table** The result table collects the values for all job ticket items from the concerning column in the job ticket table. For example, a document can contain several types of media. The total cost for all types of media is calculated in the job ticket table. The total cost is added to the concerning cell in row [Media] in the result table. The calculation collects its values from the concerning column in the result table.
6	**The job ticket table**

Frame	Description
6A	[Job ticket items] The list of [Job ticket items] is taken from the current job ticket definition. You can use these ticket items in your formulas. Column [Job ticket items] is column A of the worksheet "CostSheet".
6B	[Item values] The possible values of each job ticket item. For example, the job ticket item [Punching] can have the values [(none)], [2 holes], [4 holes], [23 holes] or [Other]. Column [Item values] is column B of the worksheet "CostSheet".
6C	[Amount] The amount - or the value - which is defined by the customer for each job ticket item. For example, the customer selected value [23 holes] for job ticket item [Punching]. The column [Amount] receives its values directly from the job ticket items of the submitted job tickets. Column [Amount] is column C of the worksheet "CostSheet".
6D	**The pricing columns** Each column can contain one formula. Each formula has a dedicated pricing column. Define the price for each [Item value] of each job ticket item in the pricing columns. The value in column [Amount] is multiplied with the price in the pricing column. The result is the total price for the concerning [Item value] of a job ticket item.
7	The default worksheets.

Worksheet "Utilities"

The layout of the formula manager in worksheet "Utilities"



Frame	Description
1	**The [Captions] table** The translated names for the formulas in the "CostSheet" worksheet are taken from the [Captions] table in the "Utilities" worksheet. The [Captions] can be modified for each language and the changes will show up in the web store. NOTE The [Captions] table is defined as a Named Range. The name of the Named Range is [CostCaptions]. Use the VLOOKUP function to use the values in the Named Range in a formula. Named Ranges and the VLOOKUP function are described in the Microsoft Excel help file.
2	**The [Copies table]** The reduction of the price for a certain amount of copies is taken from the [Copies table] in worksheet "Utilities". The first column (column B) represents the number of copies and the rest represent the actual values (reductions) for the different situations. NOTE The [Copies table] is defined as a Named Range. The name of the Named Range is [CopiesTable]. Use the VLOOKUP function to use the values in the Named Range in a formula. Named Ranges and the VLOOKUP function are described in the Microsoft Excel help file.
3	**The [Color] table** Color pages are more expensive than black & white pages. Create an absolute cell reference to use the values from this table. For example: Utilities!$D$35.

Frame	Description
4	**The delivery time table** Same day delivery of the job is more expensive than a delivery after one or more days. Create an absolute cell reference to use the values from this table. For example: Utilities!$D$37.
5	The default worksheets.

The toolbar buttons

[Add items]

If you want to add [Job ticket items] to the CostSheet and automatically use the proper calculation settings. Use this procedure.

If the required [Job ticket items] are not available close the Formula manager. Open the [Product and order editor] to create the required [Job ticket items].

1. Click [Add items].
   The [Add items] dialog will open. The dialog contains all [Job ticket items] that are not available in the job ticket table.
2. Select the [Job ticket items] you want to add to the CostSheet.
   You can select the items one by one via the check boxes or Select all / deselect all. You can also type part of the name in the search box in order to ease your search for a specific item.
3. Click OK to add the items to the CostSheet.
   The selected items are added at the bottom of the job ticket table.
4. For each new [Job ticket item] and [Item value]:
   1. Define the multiplier for the [Job ticket item] and its [Item values] in the first pricing column.
   2. Select all cells of the new [Job ticket item] in the first pricing column, including the cell in row [Total:]. Copy the selected cells to all other pricing columns.
   3. Add the new [Job ticket item] to the result table.
      Copy one of the available rows. Type the name of the [Job ticket item] in the cell of column A in the result table.
   4. Create a cell reference from the result table to the cell in row [Total:] in the job ticket table. Create the cell reference in the same column as the first pricing column.
      - Create a relative reference to collect the value of the cell in row [Total:] in the job ticket table. For example: =D79. A relative reference is usually used for [Item type:] [Number]
      - Create an absolute reference to collect a value from column [Amount]. For example: =$C$84. An absolute reference is usually used for [Item type:] [Yes/No], [Date] or [Text].
5. Select the cell with the cell reference in the result table. Copy the selected cell to all other columns in the result table.
6. You can use the cells from the result table in the calculations.

[Refresh]

The job ticket definition can be changed in the [Product and order editor]. Click the [Refresh] button to update the [Item values] of the [Job ticket items] in the job ticket table.

Click the [Add items] button to add new [Job ticket items] to the job ticket table.

1. Click [Refresh].
   The [Item values] of the [Job ticket items] in the job ticket table are updated.
   A row is added to the job ticket table for each new [Item value]. A row is removed from the job ticket table for each deleted [Item value]. The names are updated for any renamed [Item values].
2. For each new [Item value]:
   Define the multiplier in all pricing columns. The cell for each new [Item value] is automatically added to the formula for the total cost of the [Job ticket item].

[Used items on top]

If you want to sort [Job ticket items] from the CostSheet without disturbing the proper calculation settings. Use this procedure.

1. Click [Used items on top].
   The usage of an item is calculated with the following formula: number of values in the item * number of appearances in the formulas.
   The list of [Job ticket items] will be sorted from top to bottom in a descending order relative to the usage of each item.
   If you have 2 [Job ticket items] that appear in 2 formulas then the one with more values will appear in the list above the second item.

[Remove all unused items]

If you want to remove unused [Job ticket items] from the CostSheet without disturbing the proper calculation settings. Use this procedure.

Unused [Job ticket items] are the [Job ticket items] that are not used in any formulas.

1. Click [Remove all unused items].
   The unused items are removed from the job ticket table.
2. For each removed [Job ticket item]:
   1. Remove the [Job ticket item] from the result table.

[Remove items]

If you want to remove [Job ticket items] from the CostSheet without disturbing the proper calculation settings. Use this procedure.

1. Click [Remove items].
   The [Remove items] dialog will open. The dialog contains all [Job ticket items] that are available in the job ticket table.
2. Select the [Job ticket items] you want to remove from the CostSheet. You can select the [Job ticket items] one by one via the check boxes or select all / deselect all.
3. Click OK to remove the [Job ticket items] from the CostSheet.
   The [Job ticket items] are removed from the job ticket table.
4. For each removed [Job ticket item]:
   1. Remove the cells of the result table from the calculations that used the [Job ticket item].
   2. Remove the [Job ticket item] from the result table.

[Remove unused regions]

The job ticket definition can be changed in the [Product and order editor]. If you want to remove [Job ticket items] that are no longer in the definition you can use this procedure.

1. Click [Remove unused regions].
   All [Job ticket items] that are not in the definition will be removed from theCostSheet .
2. For each removed [Job ticket item]:
   1. Remove the cells of the result table from the calculations that used the [Job ticket item].
   2. Remove the [Job ticket item] from the result table.

[Use system language]

You can automatically translate the following parts of the formula manager into the installation language of Microsoft Excel:

- The [Job ticket items] and default headers in the job ticket table.
- The buttons of the formula manager.

The installation language of Microsoft Excel must be one of the 18 languages that are supported by PRISMAdirect. See the first column of table [Captions] in worksheet "Utilities" for the abbreviations of the supported languages.

NOTE
The installation language of Microsoft Excel is only used for the formula manager.

1. Click [Use system language].
   The following parts of the formula manager are automatically translated into the installation language of Microsoft Excel:
   - The [Job ticket items] and default headers in the job ticket table.
   - The buttons of the formula manager.

[Use default style]

The factory default can be applied to the job ticket table in worksheet CostSheet. All custom changes to the job ticket table are lost.

1. Click [Use default style].
   The factory default is applied to the job ticket table in worksheet CostSheet. All custom changes to the job ticket table are lost.
   - The names of the [Job ticket items] and the default headers are restored.
   - The color of the cells and the color of the text are set to the factory default.

Working with the formulas

Check the [Job ticket items]

The required [Job ticket items] must be available before you can create or configure a formula.

1. Check that all required [Job ticket items] are available in the job ticket table. If the required [Job ticket items] are not available see : *Add items* on page 241
2. Check that all required values of the [Job ticket items] are available in column [Item values]. Column [Item values] is column B of the worksheet "CostSheet". If the required values are not available, do sub-step a:
    1. Close the Formula manager. Open the [Product and order editor] to create the required [Item values].

Create a formula

By default, a number of formulas are available. You can define custom formulas in the columns next to the default formulas up to and including column Z. Each column can contain one formula. Each column contains all information for one formula:
- The name and the calculated result of the formula.
  The result of the formula is shown in row 3.
- The calculation for the formula.
  The formula can use one of the default calculations, or a custom calculation.
- The calculation collects its values from the concerning column in the result table.
- The result table collects the values for all job ticket items from the concerning column in the job ticket table.
- The job ticket table receives its values from the current job ticket definition.

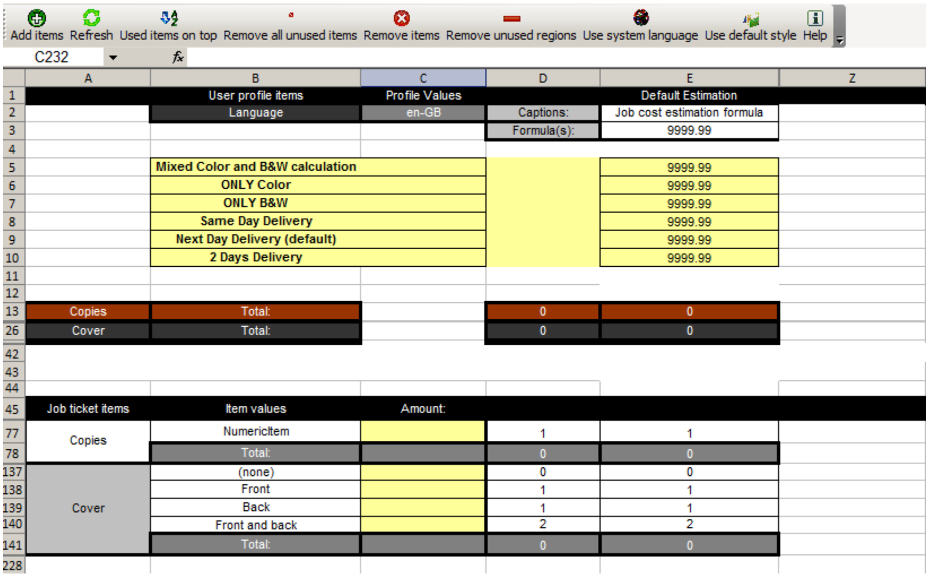
NOTE
It is recommended that you do not remove the default formulas.

Before you begin

The required [Job ticket items] for the new formula must be available.

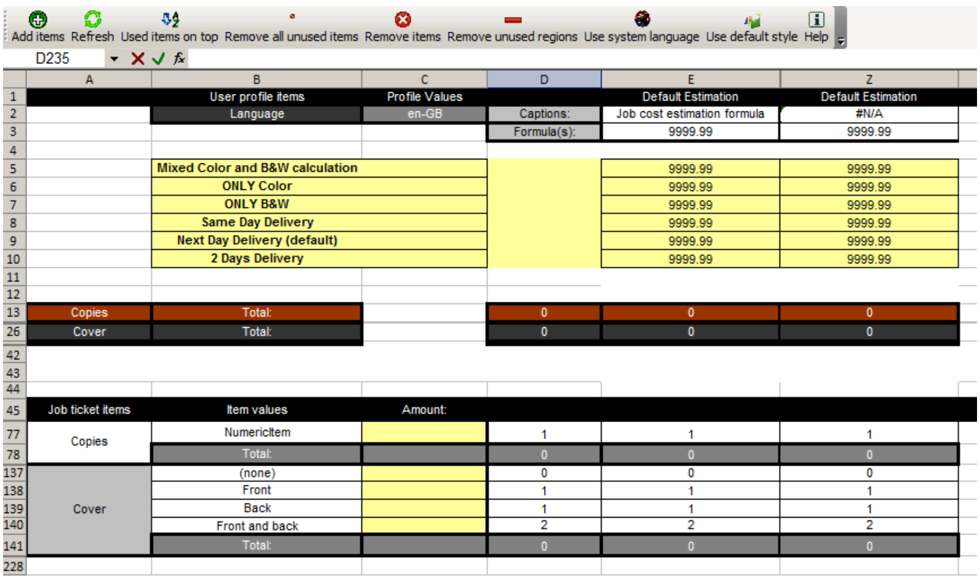
When to do

In this procedure a complete new formula is created in column Z of the worksheet "CostSheet". The new formula is based on two [Job ticket items]: [Copies] and [Cover]. In this example, the data of the formula in column E is used as starting point for the formula in column Z.



Procedure

1. Fill column Z with data from an existing formula. In this example, the data of the formula in column E is used as starting point for the formula in column Z.
    1. Click the column label "E" to select all cells of column E.
    2. To copy the selected cells, click "Edit - Copy", or press CTRL+C.
    3. Click the column label "Z".
    4. Click "Edit - Paste", or press CTRL+V.
       The formulas and formatting of column E are copied into column Z. The cell references are automatically adjusted.



2. Define the name of the new formula in cell Z1. In this example: "Job cost".
   The formula names in row 1 are displayed in the [Product and order editor].

3. Define the name of the new formula in cell Z2. In this example: "Job cost".
   The formula names in row 2 are displayed in the web shop.
4. Define the price for the [Item values] of the [Job ticket items] in column Z.
   Optionally, you can define a custom name for the new pricing column. In this example: "Job cost".

Job cost
1
0
0
0.75
0.75
1.5
0

5. Check the formulas for [Copies] and [Cover] in the job ticket table. The formulas must use the values from column [Amount] and the values from the new pricing column "Job cost". The [Amount] column receives its values directly from the submitted job tickets. The value in column [Amount] is multiplied with the price in the pricing column. The total price of a job ticket item is the sum of the prices of its [Item values].
   1. Collect the price of [Copies] in cell Z78: =$C77*Z77.
   2. Collect the prices for all [Item values] of [Cover] in cell Z141: =$C137*Z137+$C138*Z138+ $C139*Z139+$C140*Z140.

Z141 | fx =$C137*Z137+$C138*Z138+$C139*Z139+$C140*Z140

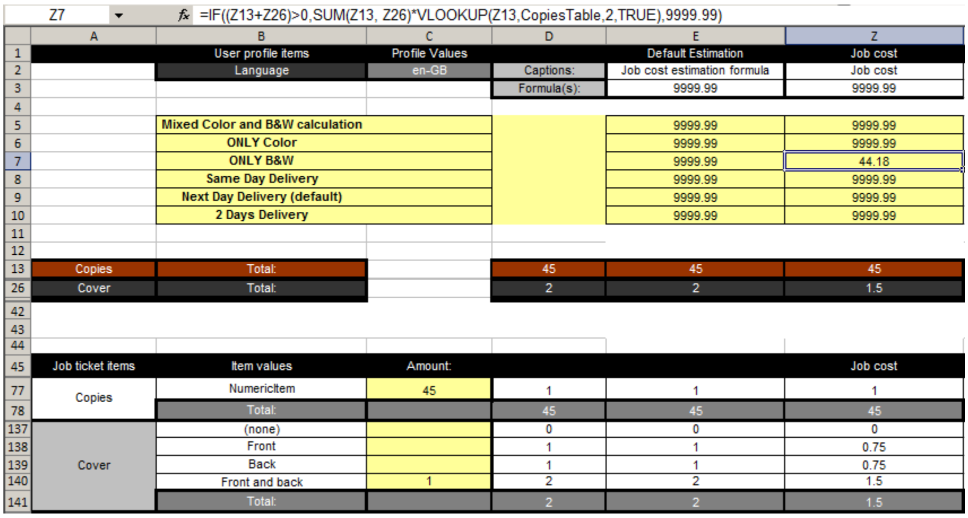
	A	B	C	D	E	Z
45	Job ticket items	Item values	Amount:			Job cost
77	Copies	NumericItem		1	1	1
78		Total:		0	0	0
137	Cover	(none)		0	0	0
138		Front		1	1	0.75
139		Back		1	1	0.75
140		Front and back		2	2	1.5
141		Total:		0	0	0

6. Collect the prices for all [Item values] in the result table.
   The result table collects the values for all job ticket items from the concerning column in the job ticket table.
   1. Collect the price of [Copies] in cell Z13: =Z78.
   2. Collect the price of [Cover] in cell Z26: =Z141.
7. In this example, create a new calculation in cell Z7 of row 7: ONLY B&W. Add up the prices for [Copies] and [Cover].
   It is recommended to use the IF function for each new calculation: **=IF (logical_test, value_if_true, value_if_false)**. If the **logical_test** is true, the job cost is calculated. Else, the calculation returns a default value. In this example: 9999.99.

   NOTE
   You can use the functions of most categories in Microsoft Office Excel to create a calculation. You cannot use the functions of category "Database".

   1. Add up the prices of [Copies] and [Cover] in cell Z7: =IF((Z13+Z26)>0,SUM(Z13, Z26),9999.99).
   2. If required, you can reduce the total price when the customer orders a certain amount of [Copies]: =IF((Z13+Z26)>0,SUM(Z13, Z26)*VLOOKUP(Z13,CopiesTable,2,TRUE),9999.99).
      The reduction of the price for a certain amount of [Copies] is taken from the [Copies table] in the "Utilities" worksheet.

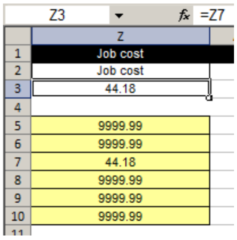
NOTE
The formula syntax and usage of the VLOOKUP function is described in the Microsoft Excel help file.



Z7 | =IF((Z13+Z26)>0,SUM(Z13, Z26)*VLOOKUP(Z13,CopiesTable,2,TRUE),9999.99)

	A	B	C	D	E	Z
1		User profile items	Profile Values		Default Estimation	Job cost
2		Language	en-GB	Captions:	Job cost estimation formula	Job cost
3				Formula(s):	9999.99	9999.99
4						
5		Mixed Color and B&W calculation			9999.99	9999.99
6		ONLY Color			9999.99	9999.99
7		ONLY B&W			9999.99	44.18
8		Same Day Delivery			9999.99	9999.99
9		Next Day Delivery (default)			9999.99	9999.99
10		2 Days Delivery			9999.99	9999.99
11						
12						
13	Copies	Total:		45	45	45
26	Cover	Total:		2	2	1.5
42						
43						
44						
45	Job ticket items	Item values	Amount:			Job cost
77	Copies	NumericItem	45	1	1	1
78		Total:		45	45	45
137	Cover	(none)		0	0	0
138		Front		1	1	0.75
139		Back		1	1	0.75
140		Front and back	1	2	2	1.5
141		Total:		2	2	1.5

8. Collect the result for the formula in cell Z3: =Z7.
   The value in Z3 is returned to the customer.



Z3 | =Z7

	Z
1	Job cost
2	Job cost
3	44.18
4	
5	9999.99
6	9999.99
7	44.18
8	9999.99
9	9999.99
10	9999.99

After you finish

You must test each new formula for correctness.

Test a formula

You can create and configure new formulas in the Formula manager. You must test each new formula for correctness.

When to do

A new formula is created in column Z. The new formula is based on two [Job ticket items]: [Copies] and [Cover]. In this procedure, the new formula is tested for correctness.

Procedure

1. Check that the new pricing column uses the values from column [Amount].
   1. Click cell Z78.
   2. Click "Trace Precedents" from the Excel menu.
      The usage of the "Trace Precedents" function is described in the Microsoft Excel help file.

3. Check that the value from column [Amount] is used for [Copies].
1. Click cell Z141.
2. Click "Trace Precedents" from the Excel menu.
3. Check that the values from column [Amount] are used for [Cover].

Job ticket items	Item values	Amount:			Job cost
Copies	NumericItem	45	1	1	1
	Total:		45	45	45
Cover	(none)		0	0	0
	Front		1	1	0.75
	Back		1	1	0.75
	Front and back	1	2	2	1.5
	Total:		2	2	1.5

2. Check that the result table uses the correct values for all job ticket items from the concerning column in the job ticket table.
   1. Click cell Z13.
   2. Click "Trace Precedents" from the Excel menu.
   3. Check that the result table uses the correct value for [Copies].
   1. Click cell Z26.
   2. Click "Trace Precedents" from the Excel menu.
   3. Check that the result table uses the correct value for [Cover].

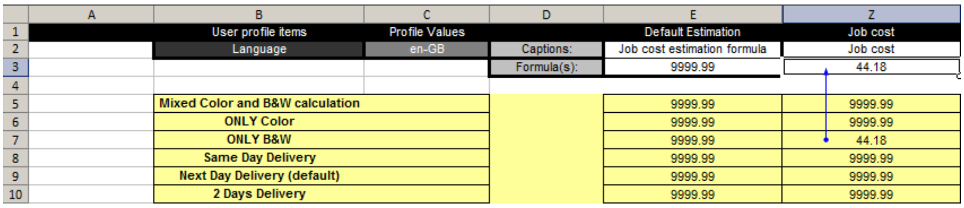
13	Copies	Total:		45	45	45
26	Cover	Total:		2	2	1.5
42						
43						
44						
45	Job ticket items	Item values	Amount:			Job cost
77	Copies	NumericItem	45	1	1	1
78		Total:		45	45	45
137	Cover	(none)		0	0	0
138		Front		1	1	0.75
139		Back		1	1	0.75
140		Front and back	1	2	2	1.5
141		Total:		2	2	1.5

3. Check that the calculation uses the correct values from the result table.
   1. Click cell Z7.
   2. Click "Trace Precedents" from the Excel menu.
   3. Check that the calculation uses the correct values for [Copies] and [Cover].

	A	B	C	D	E	Z
1		User profile items	Profile Values		Default Estimation	Job cost
2		Language	en-GB	Captions:	Job cost estimation formula	Job cost
3				Formula(s):	9999.99	44.18
4						
5		Mixed Color and B&W calculation			9999.99	9999.99
6		ONLY Color			9999.99	9999.99
7		ONLY B&W			9999.99	44.18
8		Same Day Delivery			9999.99	9999.99
9		Next Day Delivery (default)			9999.99	9999.99
10		2 Days Delivery			9999.99	9999.99
11						
12						
13	Copies	Total:		45	45	45
26	Cover	Total:		2	2	1.5

4. Check that the formula uses the correct calculation.

1. Click cell Z3.
2. Click "Trace Precedents" from the Excel menu.
3. Check that the formula uses the correct calculation.



	A	B	C	D	E	Z
1		User profile items	Profile Values		Default Estimation	Job cost
2		Language	en-GB	Captions:	Job cost estimation formula	Job cost
3				Formula(s):	9999.99	44.18
4						
5		Mixed Color and B&W calculation			9999.99	9999.99
6		ONLY Color			9999.99	9999.99
7		ONLY B&W			9999.99	44.18
8		Same Day Delivery			9999.99	9999.99
9		Next Day Delivery (default)			9999.99	9999.99
10		2 Days Delivery			9999.99	9999.99

Pricing

Configure the system-wide prices

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

This topic describes how you can configure the system-wide prices.

The settings in the *Prices for ...* dialogs are part of the procedure to configure the email workflow. For the complete procedure, see *Configure the prices for media, printing, and finishing* on page 57.

Configure the prices for media, printing and finishing items

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

Configure the prices for choice items

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

Configure the prices for stationery products

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

Formulas

Create the formulas

Formulas for jobs and orders

You have to configure the prices for media, printing and finishing options. You can configure the prices for choice items that you want to use in formulas. When you have configured the prices, you can create formulas for jobs and for orders. You can create one or more constants. You can use the constants in the formulas. You can configure discounts for everyone or for specific user groups. You can use the discounts in combination with the formulas.

- [Formulas for jobs]
  You create a formula by adding formula parts. By default, the first formula part for jobs is InitialCost.
  - InitialCost = ((prices for document media * number of document sheets) + (prices for media * number of cover sheets) + (prices for printing * number of pages) + prices for finishing) * number of copies
    The number of covers depends on the value of CoverPlace: 0 for none, 1 for front or back, 2 for front and back.

    NOTE
    Some ticket items (like 1-sided/2-sided, booklet) impact the actual number of pages and sheets used in the formula. For instance, printing 2-sided will turn N pages into N/2 sheets.

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

  A formula for orders is applied to orders. Each order can contain multiple jobs. Each job can use a different type of media than any other job in the order.

Formulas for shipping

The shipping formulas calculate the postage & packing. The shorter the delivery time, the higher the postage. You have to create the shipping formulas based on agreements with each shipping provider. Note that the actual postage is calculated when the operator clicks [Dispatch] in the [Order processing] workspace.

- [Shipping formulas for orders]
  Create a formula for each delivery time that you offer to the customers. The customer can select a delivery time in the web shop. The calculated postage & packing is displayed to the customer. The calculated price is a contract between the customer and the web shop. You can create one or more shipping formulas for each web shop.

1. Click [Price and formula editor] - [Formulas] and select:
   - [Formulas for jobs], or
   - [Formulas for orders], or
   - [Shipping formulas for orders]
2. Click [Add].
3. Define a name. The name must be unique.
   You can use the characters: 'a - z', 'A - Z', '0 - 9', '_' . Spaces are allowed.

4. Click a language to type the caption in that language. The available languages are displayed just above the text field.
5. Click [New part of formula].
   By default, the first formula part for jobs is InitialCost.
   1. Select the type of the formula part.
      - [Addition]
        The result of this formula part is added to the result of the previous formula part.
      - [Subtraction]
        The result of this formula part is subtracted from the result of the previous formula part.
      - [Exit]
        The result of this formula part will halt the execution of the formula. The calculated result until the exit statement is returned for the formula.
   2. Define a name. The name must be unique.
      You can use the characters: 'a - z', 'A - Z', '0 - 9', '_' . Spaces are allowed.
   3. Define the result of the formula part in field [Value].
      You can only use variables that return a numerical value. Drag the variables in the field [Value]. For more information concerning the variable types, see *Variables of type "Choice"* on page 252.
   4. Select how you want to use the value of the formula part in option [Use expression as:].
      - [Value]
        The result of this formula part is added to or subtracted from the result of the previous formula part as a value.
      - [Percentage]
        The result of this formula part is added to or subtracted from the result of the previous formula part as a percentage.
   5. Create the condition for the expression in field [Condition:]. You can use all variables and operators in the condition. The value of this formula part is used when the condition is met. The value of this formula part is always used when you do not create a condition.
      For more information concerning the variable types, see *Variables of type "Choice"* on page 252.
6. You can repeat step 5 to add additional formula parts to the formula.
7. You can drag each formula part to the correct position in [Parts of formula]. The formula parts are executed in the given order starting with the first formula part.
8. Click [Save].
   The formula becomes available for the user groups, web shops and the products.
9. Do the same for:
   - [Formulas for jobs], or
   - [Formulas for orders], or
   - [Shipping formulas for orders]

Variables of type "Choice"

A number of variable types are available when you create a formula part. You can use a variable of type [Choice] as follows:

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

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

Overview of the variable types and examples of their usage

Icon	Variable type	Where used + example of usage
$	Number result This variable or constant contains a numerical value. Or the result of this variable is a numerical value. NOTE You have to configure the prices for media, printing, and finishing, see *Configure the system-wide prices* on page 250.MediaPricing, PrintingPricing, FinishingPricing and StationeryPricing receive their values from these dialogs.	Field [Value] • PrintingPricing • CoverMediaColor.cost Field [Condition:] • PrintingPricing == 8 • CoverMediaColor.cost < 5
	Text This variable contains the name of the product used to create the job.	Field [Condition:] • ProductName == "Flyer"
user	Text This variable contains a user name.	Field [Condition:] • User == "User 1"
user group	Text This variable contains a user group name.	Field [Condition:] • User group == "User group 1"
	[Date] This variable contains a date.	Field [Condition:] • FinalizedDate < CreationDate + 5
	[Choice] This variable contains the option of a choice item that is valid for the job.	Field [Condition:] • DocumentMediaColor == "Red"
	[Number] This variable contains a numerical value.	Field [Value] • Pages Field [Condition:] • Pages > 150
	[Text] This variable contains text.	Field [Condition:] • FinalizedBy == "Operator"

Icon	Variable type	Where used + example of usage
	[Yes/No] The result of this variable is a boo- lean.	Field [Condition:] • IsJobCostApproved

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

Example for the way the print settings impact pricing

Job setup

Job formula: [MediaPricing] + [PrintingPricing]

Media price for a normal page is *0.5*.

Media price for a cover page is *1*.

Price for printing per page:
- [2-sided]: *3*
- [1-sided]: *2*

Document has *618* pages.

[MediaPricing] = [NormalMediaPrice] + [CoverMediaPrice] = [Number of Normal Media Sheets] x [MediaPrice] + [Number of Cover Media Sheets] x [Cover Media Price]

[PrintingPricing] = [Cost per page (made by the combination between media size, printing on one side or both and media: color or B&W)] x [Number of Pages]

Remarks:
1. Number of sheets is always rounded up.
2. Covers have print front cover and print back cover. These options will affect the pricing as follows (considering that cover is set to [Front and back]):

- [Front and back] for both: [2-sided] (ignoring the [1-sided] or [2-sided] option) and 1 sheet used.
- [Front] for [Print front cover] and [Back] for [Print back cover]: [1-sided] (ignoring the [1-sided] or [2-sided] option) and 1 sheet used. Also if it is booklet then only one page of the cover sheet will be printed.
- [Front] for [Print front cover] and [Front] for [Print back cover], or [Back] for [Print front cover] and [Back] for [Print back cover] : [2-sided] (ignoring the [1-sided] or [2-sided] option) and 1 sheet used.

Scenario one:

Settings:
- [1-sided or 2-sided:][2-sided]
- [Cover:][Front and back]
- [Print front cover]: [Front and back]
- [Print back cover]: [Front and back]

Resulting price is: **2009.5**
1. Printing price is: 2-sided printing price per page x number of pages = 3 x 618 = 1854
2. Media price is: cost for cover media + cost for normal media
   1. Cost for cover media is: number of cover media sheets x cover media price = 2 x 1 = 2
   2. Cost for normal media is: number of media sheets x media price = 307 x 0.5 = 153.5

Scenario two:

Settings:
- [1-sided or 2-sided:][2-sided]
- [Cover:][Front]
- [Print front cover]: [Front and back]
- [Print back cover]: [Front and back]

Resulting price is: **2009**
1. Printing price is: 2-sided printing price per page x number of pages = 3 x 618 = 1854

2. Media price is: cost for cover media + cost for normal media
   1. Cost for cover media is: number of cover media sheets x cover media price = 1 x 1 = 1
   2. Cost for normal media is: number of media sheets x media price = 308 x 0.5 = 154

Scenario three:

Settings:
- [1-sided or 2-sided:][2-sided]
- [Cover:] [Front and back]
- [Print front cover]: [Front and back]
- [Print back cover]: [Front and back]
- [Booklet:][Yes]
- [Orientation and binding edge:] [Landscape, left edge binding]

Resulting price is: **1008**
1. Printing price is: 2-sided printing price per page x number of pages = 3 x 310 = 930
2. Media price is: cost for cover media + cost for normal media
   1. Cost for cover media is: number of cover media sheets x cover media price = 1 x 1 = 1
   2. Cost for normal media is: number of media sheets x media price = 154 x 0.5 = 77

Scenario four:

Settings:
- [1-sided or 2-sided:] [2-sided]
- [Cover:] [Front]
- [Print front cover]: [Front and back]
- [Print back cover]: [Front and back]
- [Booklet:] [Booklet]
- [Orientation and binding edge:] [Landscape, left edge binding]
- [Booklet:] [Yes]

Resulting price is: **1008**
1. Printing price is: 2-sided printing price per page x number of pages = 3 x 310 = 930
2. Media price is: cost for cover media + cost for normal media
   1. Cost for cover media is: number of cover media sheets x cover media price = 1 x 1 = 1
   2. Cost for normal media is: number of media sheets x media price = 154(rounded up from 153.5) x 0.5 = 77

Scenario five:

Settings:
- [1-sided or 2-sided:] [1-sided]
- [Cover:] [Front and back]
- [Print front cover]: [Front and back]
- [Print back cover]: [Front and back]
- [Binding:] [Booklet]
- [Orientation and binding edge:] [Landscape, left edge binding]
- [Booklet:] [Yes]

Resulting price is: **1388.5**
1. Printing price is: [1-sided] printing price per page x number of pages + [2-sided] printing price per page x number of pages = 2 x 614 + 3 x 2 = 1228 + 6 = 1234
2. Media price is: cost for cover media + cost for normal media
   1. Cost for cover media is: number of cover media sheets x cover media price = 1 x 1 = 1
   2. Cost for normal media is: number of media sheets x media price = 307 x 0.5 = 153.5

Scenario six:

Settings:
- [1-sided or 2-sided:] [1-sided]
- [Cover:][Front and back]
- [Print front cover]: [Front]
- [Print back cover]: [Front]
- [Binding:] [Booklet]
- [Orientation and binding edge:] [Landscape, left edge binding]
- [Booklet:] [Yes]

Resulting price is: **1393**
1. Printing price is: [1-sided] printing price per page x number of pages + [2-sided] printing price per page x number of pages = 2 x 616 + 3 x 2 = 1238
2. Media price is: cost for cover media + cost for normal media
    1. Cost for cover media is: number of cover media sheets x cover media price = 1 x 1 = 1
    2. Cost for normal media is: number of media sheets x media price = 307 x 0.5 = 154

Scenario seven:

Settings:
- [1-sided or 2-sided:] [1-sided]
- [Cover]: [Front and back]
- [Print front cover]: [Front]
- [Print back cover]: [Back]
- [Binding:] [Booklet]
- [Orientation and binding edge:] [Landscape, left edge binding]
- [Booklet:] [Yes]

Resulting price is: **1389**
1. Printing price is: [1-sided] printing price per page x number of pages = 2 x 617 (only one page of the cover sheet is printed) = 1234
2. Media price is: cost for cover media + cost for normal media
    1. Cost for cover media is: number of cover media sheets x cover media price = 1 x 1 = 1
    2. Cost for normal media is: number of media sheets x media price = 307 x 0.5 = 154

Test the formulas

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

Before you begin

There are two ways to test each formula:

1. You create specific orders for each formula. You use these orders in this dialogue. The system applies a formula based on the data inside the order. You can see which formula was applied in the detailed test result.
2. You can also assign the formula that you want to test directly to a product or to a web shop. You have to create specific orders to test the formula. See *Configure the default price estimation settings per web shop* on page 174 and *Configure the default quotation settings per web shop* on page 175

Test the formula

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

Apply a discount

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

To change the currency for the discounts, click [Product and order editor] - [Currency].

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

Create a constant

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

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

Configure the currency settings

1. Click [Price and formula editor] - [Currency].
2. Select a currency from the drop-down list.
   Amounts are displayed with the selected currency code from the drop-down list or you can define a custom currency sign.
   - [Currency sign]
     Enable the checkbox and type the currency symbol. You can type text or use an ALT code, for example, `ALT 0128` for the euro symbol.
3. Define the location of the currency sign:
   - [Before the amount]
   - [After the amount]
4. Configure the allowed number of decimals for the job cost.
5. Click [Save].

Backup and restore

You can import and export the settings of the [Price and formula editor]. The backup file contains all formulas, prices, discounts, etc. Then, you can use the exported settings to configure another installation of PRISMAdirect. You can use the export file on any computer.

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

Backup

1. Click [Price and formula editor] - [Backup and restore].
2. Click [Export].
   The exported file is stored in the [Downloads] folder.

Restore

1. Click [Price and formula editor] - [Backup and restore].
2. Click [Import].
3. Browse to the folder where the backup file is located.
4. Click [Open].
   All settings of the [Price and formula editor] are being restored.

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