PRISMAdirect

Administration guide

Product and order editor

Copyright and Trademarks

Copyright

Language

Original instructions are in English.

Trademarks

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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

Introduction

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

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].

Introduction

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

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

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

Chapter 2

Product items and order items

Visual ticket items

By default, the following ticket items are available:

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

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

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

The item types

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

Icon	Item type	Description
	[Number]	[Number] allows the user to enter a numeric value.
	[Yes/No]	[Yes/No] allows the users to enable or disable an item.
	[Text]	Text items can be single-line or multi line. Single line item allows the user to enter maximum 1 line of text. Multi-line item allows the user to enter more than 1 line of text.
	[Date]	Date items are items where the user can enter a date.
	[Choice]	Choice items are items where the user can select an option from a drop-down list.
	[Lookup]	[Lookup] items retrieve their values from a data source. The values are displayed in a drop-down list. **For example**, the data source contains account numbers. The [Lookup] item connects to the data source and retrieves the available set of account numbers. The account numbers are then displayed in the drop-down list of the [Lookup] item. The user can select a account number as value for the [Lookup] item. The value of the [Lookup] item is added to the job ticket as plain text. NOTE The lookup items for an LDAP server cannot be used when uniFLOW is enabled.
	[Dynamic]	The values of the ticket items used in the dynamic item will be filled in in the job ticket.

Item types

Add or edit an item

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

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

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

Additional actions	Description
Sort the items	1. Click the column header to apply ascending sorting or descending sorting. You can use the sorting mechanism to group the items and products on their type. Or you can sort the items and products alphabetically.
Delete an item	You can delete ticket items from the [Product items] and the [Order items]. 1. Select the item that you want to delete. Some items, [Author] and [User ID] for example, are predefined and connected to system files. These items can not be deleted. When you select such an item, the [Delete] button is disabled. 2. Click the delete icon to delete an item. 3. Confirm that you want to delete the item. If the ticket item is added to one or more views or products, you must confirm that you want to delete this item. Then the item will be deleted from all views and products.

1. Select the workspace where you want to create the new item: [Product items] or [Order items].
2. Click [Add].
3. Define the item name. You can use the characters: 'a. - z.', 'A. - Z.', '0. - 9.', '_' . Spaces are not allowed. The name must be unique.
   The item name must not exceed 128 characters. The accounting information cannot be collected if the job ticket definition contains an item with a name longer than 128 characters.
4. Define the item type.
5. Define the [Captions]. The caption is the displayed name of the item. You can use the characters: 'a. - z.', 'A. - Z.', '0. - 9.', '_' . Spaces are allowed for the caption.
   The default language for the item is displayed in the top of section [Captions]. You can define a caption for each language. See procedure *Manage the languages* on page 32 if you want to add or remove a language for an item.
   - You can define the tooltip in the text field on the right. The text field for the tooltip is colored yellow. You can define a tooltip for each language.
6. Define the [Configuration].
   In this dialog, you define the values for the item. The values for the item are available in the ticket definition.
   - It is recommended that you assign a neutral default value to the item: None, No, 0, False, [empty string].

Item type	Description
[Number]	[Number] items are items that allow the user to enter a numeric value. • [Number of decimals:] When the user types more decimals than defined, the number is rounded according to the defined number of decimals.
[Yes/No]	[Yes/No] items are items that allow the user to enable or disable an item. You can define the default value for the item. A checkmark in the checkbox means that the default value is 'Yes'. An empty checkbox means that the default value is 'No'. You can define custom captions for the 'Yes' and 'No' values. For example, 'True' and 'False'. For each caption, you can define the tooltip in the text field on the right. The text field for the tooltip is colored yellow. ['Undefined' caption:] Option [Default value:] is overruled when you define a caption for this option. The user must always select a value for this item. No default value is offered to the user.
[Text]	[Text] items are items that allow the user to type text. Text items can be single-line or multiple lines. An item like [Remarks] is typically a multiple lines item. You can type a text that is displayed as the default string in the job ticket. If the user is allowed to edit the text item, the user can change the default string. You can specify the maximum number of characters that the user can enter. You can define a mask for the text. The mask is compared to the entered text. When the pattern matches, the text is valid. The mask must be a regex (regular expression). NOTE To inform the user about the mask, you can put information about the mask in the tooltip of the item.
[Date]	[Date] items are items that allow the user to enter a date. The [The default date is today plus offset:] option allows you to define when an action must be performed. The action is related to the job. When you enter '0' today's date is displayed when the item is used. When you enter another number, that number is added to today's date. The resulting date is displayed, but the user can change the date. The syntax of notation [1.00:00:00] means **days.hours:minutes:seconds.** The maximum values for the first and the last valid date relative to the default date are -4700 to 4700 days. You can select which days of the week are allowed for the new item of type [Date]. Use option [Not allowed days:] to specify, for example, public holidays. **Example** For example, for item [Delivery date] the following values are defined: • [The default date is today plus offset:] 1.00:00:00 • [First valid date relative to the default date:] 0.00:00:00 • [Last valid date relative to the default date:] 4.00:00:00 • [Allowed days:] Monday to Friday The job will be submitted on Thursday, June 15. The default delivery date becomes Friday, June 16. The job is allowed to be delivered at the earliest on Friday, June 16. And at the latest on Thursday, June 22.

Item type	Description
[Choice]	[Choice] items are items that allow the user to select an option from a drop-down list. Click the '+' icon to add a new option to the choice item. 1. Define the option name. You can use the characters: 'a. - z.', 'A. - Z.', '0. - 9.', '_' . Spaces are not allowed. The name must be unique. 2. Define the option caption. The option caption is the displayed name of the option. The default language for the option is displayed in the top. You can use the characters: 'a. - z.', 'A. - Z.', '0. - 9.', '_' . Spaces are allowed for the caption. You can define a caption for each language. 3. You can define the tooltip in the text field on the right. The text field for the tooltip is colored yellow. 4. Click [Browse] to add a custom image to an option of a choice item. If the image path is empty, the custom image of the option is removed. Click the pencil icon to edit an option. The icon appears when you hover the mouse pointer over an option. You cannot change the option name of an existing option. Use the 'Up' and 'Down' buttons to change the order of choice items. Select the default option for the choice item from the drop-down list. NOTE All visual ticket items are choice items. You cannot add or remove choices for most of the visual ticket items. Only for NewCoverMedia and Media can you change the available choice items. Select edit or import the media catalog (*Import the media catalog* on page 49).
[Dynamic]	The values of the ticket items used in the dynamic item will be filled in in the job ticket. You can use the order items and product items as variables for a dynamic item. Drag and drop each variable into the text field at the desired position. You can also type fixed text. • Create the dynamic items in the [Product items] workspace. • Add the dynamic items to the job ticket. You cannot add dynamic items to the order ticket.

Item type	Description
[Lookup] item using an ODBC driver	Ticket items of type "Lookup" using an ODBC driver use a query to read information from a data source. You can add that information to an order. 1. Create and configure an ODBC driver, see *Accessing a data source using a lookup item and an ODBC driver* on page 20. 2. Select [ODBC driver]. 3. Type the name of the ODBC driver. This is the exact name that you defined in "Data Source Name", or "Name" for a SQL data source, for the ODBC driver. 4. For a SQL data source or a MS Access data source: • Type the "User name" and the "Password" of the user account with access rights to the database. NOTE The "User name" and "Password" of the lookup item overwrite the "Login ID" and "Password" of the ODBC driver, see step 6 of procedure "ODBC driver for a SQL data source". For example, if you leave the "User name" and "Password" empty, the user account tries to login with empty credentials. For a TXT or CSV data source, or an Excel data source: • Leave the "User name" and the "Password" empty. 5. Create a SQL query to retrieve information from the data source. A valid query must take into account if the selected database is case sensitive for correct data retrieval. You can type $ in the query to display a list of profile items. You can use these profile items in the query. For example, the query is: *SELECT F3 FROM ODBC_data_source.txt* This query returns all values of column “F3” of data source “ODBC_data_source.txt” to the lookup item “ODBC lookup”. **Examples of queries:** • SQL Driver: **SELECT Column FROM Database.Table** • Microsoft Access Driver: **SELECT Column FROM Table** • Microsoft Excel Driver: **SELECT Account FROM [Sheet1$] WHERE User LIKE '$LastName$’** • Microsoft Txt Driver: **SELECT F2 FROM test.txt** 6. Type a value for "Other". The lookup item returns the value of "Other" when the query returns no value. 7. Save the changes. 8. Select "Products" and add the lookup item to one of more products. 9. Publish the changes. NOTE The first 999 values returned by the query are available in the drop-down list.

<table>
<tr><th>Item type</th><th>Description</th></tr>
<tr><td>[Lookup] item for an LDAP server</td><td>NOTE
The lookup items for an LDAP server cannot be used when uniFLOW is enabled.

Ticket items of type "Lookup" for an LDAP server retrieve data of a user from an LDAP server. You can add that information to an order. You can find an example of a lookup item for an LDAP server below this table.
1. Select [LDAP server].
2. Select an LDAP server from the drop-down list.
The drop-down list contains all LDAP servers used to retrieve user data, see [Configuration] - [System] - [Connectivity] - [LDAP server] - [Authentication & user data].
3. Type the LDAP attribute from which you want to retrieve the data. You can define one LDAP attribute per lookup item.
4. Define a separator. The LDAP attributes can contain multiple values. Therefore, you have to define a separator to read each separate value correctly.
One of the configuration items for an LDAP server is a separator. 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. To check which separator is used by the LDAP server, do:
  1. Click [Configuration] - [System] - [Connectivity] - [LDAP server] - [LDAP servers].
  2. Check setting [Separator for multi-valued attributes:].
5. [Selection criteria]
The selection criteria define for which user the data from the LDAP attribute will be retrieved. The selection criteria cannot be empty. You have to search for at least one user. The criteria can contain multiple placeholders and constant values. These must be separated by commas. You can type $ in the query to display a list of profile items. You can use these profile items in the query.
When you use the lookup item:
Firstly, the placeholders are replaced with their actual value. For example, $UserId$ is replaced with the user name of the logged-in user.
Now, a list of comma separated users is obtained. The users are evaluated in the specified order. The lookup item retrieves the data from the LDAP attribute for the first valid user in the comma separated list. When no valid user is found, the criteria return the default value of the lookup item, see the next step.
6. Type a value for "Other". The lookup item returns the value of "Other" when the criteria return no value.
7. Save the changes.
8. Select "Products" and add the lookup item to one of more products.
9. Publish the changes.</td></tr>
</table>

7. Enable option [Log item] if the item must be visible in the log file.
8. Click [Save].
9. Click the [Publish] icon in the tab of workspace [Product and order editor] or [Web store editor].
   Publishing the changes to the PRISMAdirect server could take some time. The status bar indicates the progress.

Example of a lookup item for an LDAP server

The LDAP server contains the following users: u1, u2, u3, u4, u5. These users have access to the following cost centers:

- u1: c1, c2, c3
- u2: c4
- u3: c2, c4
- u4: c1, c3
- u5: <none>

The cost centers are stored in the [LDAP attribute] "CostCenters".

[Selection criteria]: $OnBehalfUserId$, $UserId$, u2

1. You are logged in as "u1" and you submit a job on behalf of "u3". The lookup item returns: c2, c4.
2. You are logged in as "u1" and you submit a job on behalf of "u5". The value for the CostCenters attribute is empty for "u5", so the selection criteria then evaluate the next value. The next value is the logged in user "u1". The lookup item returns: c1, c2, c3.
3. You are not logged in as an LDAP user and you submit a job on behalf of "u5". The value for the CostCenters attribute is empty for both users, so the selection criteria then evaluate the next value. The next value is user "u2". The lookup item returns: c4.
4. When the selection criteria cannot find a valid user, the selection criteria return the default value of the lookup item as defined in "Other".

Accessing a data source using a lookup item and an ODBC driver

Introduction

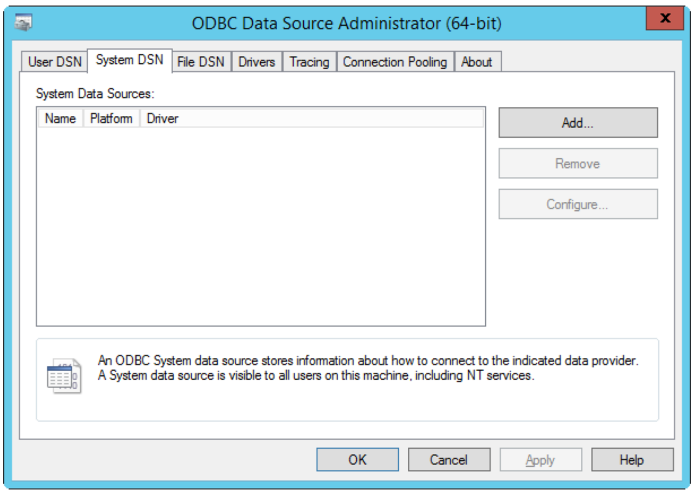
An ODBC driver is an interface to a data source. The data source can be a database (SQL / MS Access) or a file (Excel / txt / csv). Ticket items of type "Lookup" use the driver and a query to read information from the data source and add that information to an order.

ODBC cannot be used from a remote computer. In a distributed system, the user must:
- Create and configure the ODBC driver on the web servers in the distributed system. The name of the ODBC driver must be the same on each computer.
- The data source must be identical on the web servers in the distributed system.

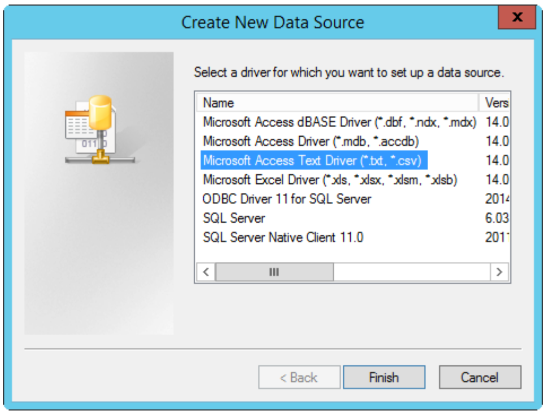
Determine the bit version of the application for which you want to create an ODBC driver. A 64-bit Windows operating system has two `odbcad32.exe` files:
- `%SystemRoot%\system32\odbcad32.exe` for 64-bit applications
- `%SystemRoot%\SysWOW64\odbcad32.exe` for 32-bit applications, including 32-bit applications that run on 64-bit operating systems.

Create and configure an ODBC driver for a TXT or CSV data source

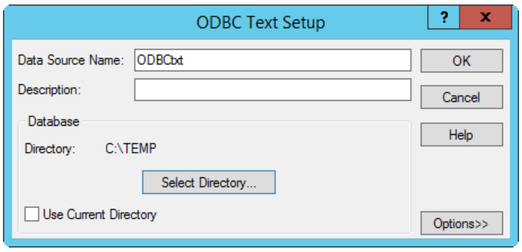
1. Create a TXT or CSV file. The data in the file must be comma-separated. For example:
```
1,Chai,10 boxes x 20 bags,$18.00,False
2,Chang,24 - 12 oz bottles,$19.00,False
3,Aniseed,12 - 550 ml bottles,$10.00,False
4,Chef Anton's Cajun Seasoning,48 - 6 oz jars,$22.00,False
5,Chef Anton's Gumbo Mix,36 boxes,$21.35,True
```
2. Open the Search dialog of Windows and type "ODBC".
3. Select the "ODBC Data Sources (64-bit)".
4. Click the "System DSN" tab and click "Add...".
When you create a "System DSN", the data source is local to the computer but can be accessed by all users.



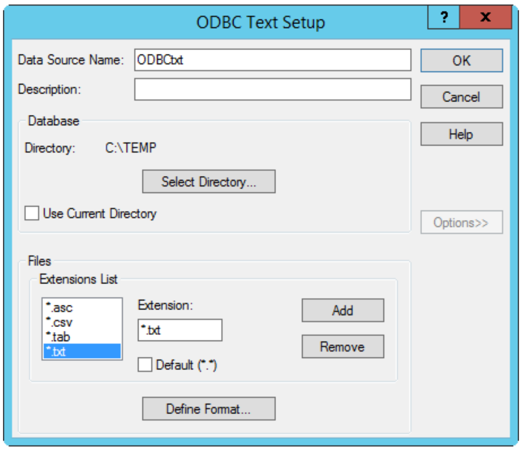
5. Select "Microsoft Text Driver (*.txt; *.csv)" and click "Finish".



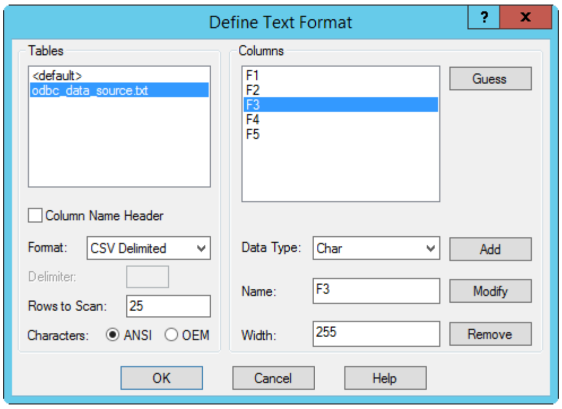
6. Type a name for the data source in option "Data Source Name".



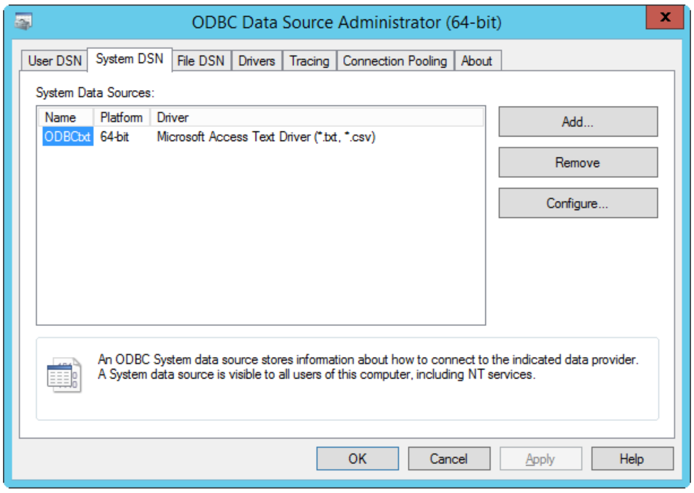
7. Deselect option "Use Current Directory".
8. Click "Select Directory" and browse to the directory that contains the TXT or CSV file that you want to use as data source. Close the "Select Directory" dialog.
9. Click "Options>>" and select the correct extension for the file.



10. Click "Define Format...".
11. Select the file that you want to use as data source. Do this in section "Tables".



12. If your file uses a delimiter other than a comma, you have to configure option "Format" and "Delimiter".
13. Click "Guess" in section "Columns".
    The wizard creates columns according to the data structure in the TXT or CSV file.
14. For each column, check the value for option "Data Type". Select "Char" for columns containing text, select "Integer" for columns with numbers, etc.
    Optionally, you can rename the column headers using option "Name". You can use the column names in the query of a ticket item of type "Lookup" in PRISMAdirect. The lookup item uses the ODBC driver and a query to read information from the data source.
15. Click OK and OK.



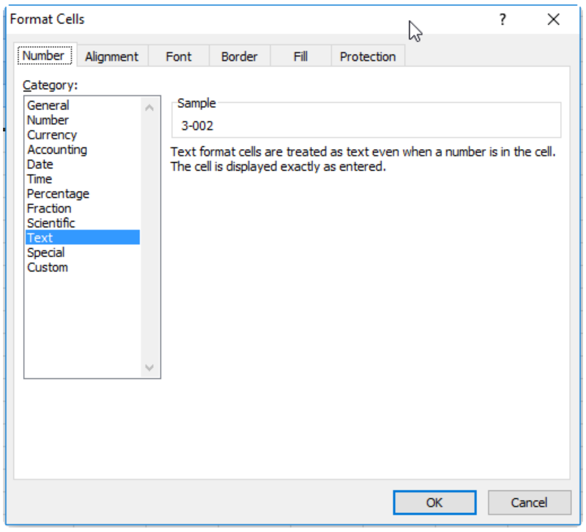
16. The ODBC driver is now configured. Close the dialog.
17. Continue with procedure "Create and use a lookup item in PRISMAdirect". You can find this procedure in the bottom of this article. You have to create a lookup item to read information from the data source using the ODBC driver and a query.

Create and configure an ODBC driver for an Excel data source

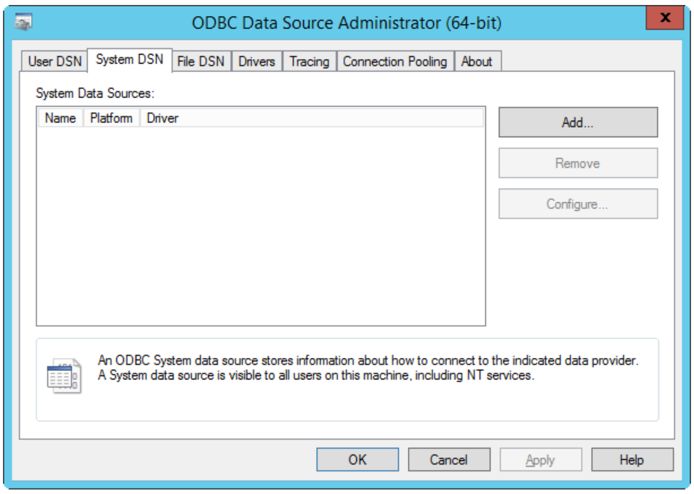
1. Create an Excel file. The data in the file must be available in a table. You can use the column names in the query of a ticket item of type "Lookup" in PRISMAdirect. The lookup item uses the ODBC driver and a query to read information from the data source.
   For example:

	A	B
1	User	Account
2	wu1	1-001
3	wu1	1-002
4	wu1	1-003
5	wu1	1-004
6	wu1	1-005
7	wu2	2-001
8	wu2	2-002
9	wu2	2-003
10	wu2	2-004
11	dPrintroomu	3-001
12	dPrintroomu	3-002

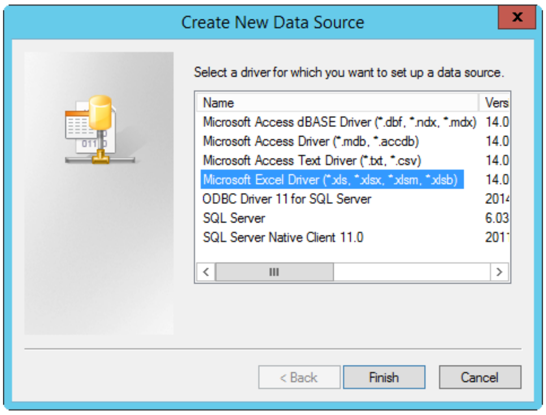
2. Select all cells in the table—including the headers—and set the cell format to "Text".



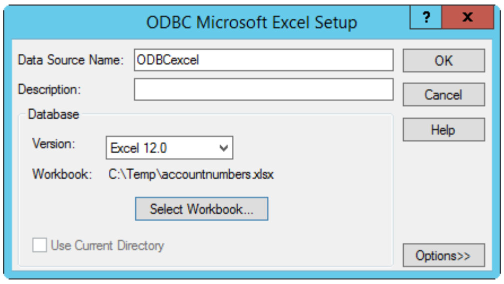
3. Open the Search dialog of Windows and type "ODBC".
4. Select the "ODBC Data Sources (64-bit)".
5. Click the "System DSN" tab and click "Add...".
   When you create a "System DSN", the data source is local to the computer but can be accessed by all users.



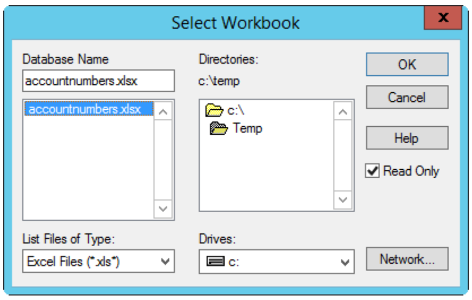
6. Select "Microsoft Excel Driver (*.xls, *.xlsx, *.xlsm, *.xlsb)" and click "Finish".



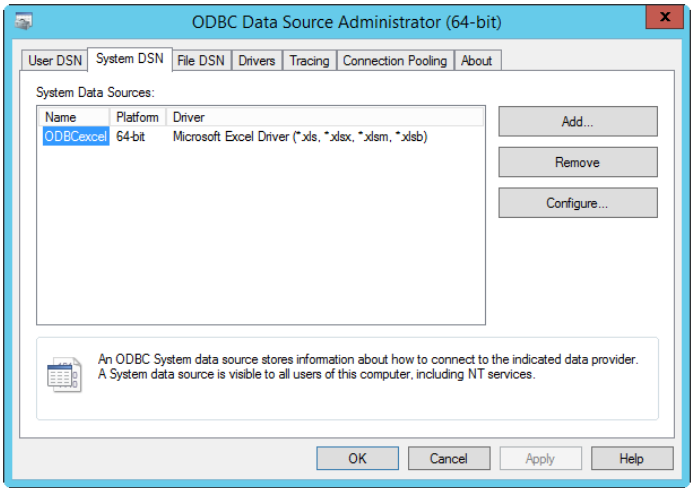
7. Type a name for the data source in option "Data Source Name".



8. If required, select the Excel version.
9. Click "Select Workbook..." and browse to the directory that contains the Excel file.
10. Select the Excel file that you want to use as data source. Do this in section "Database Name".



11. Click OK and OK.



12. The ODBC driver is now configured. Close the dialog.
13. Continue with procedure "Create and use a lookup item in PRISMAdirect". You can find this procedure in the bottom of this article. You have to create a lookup item to read information from the data source using the ODBC driver and a query.

ODBC driver for a SQL data source

Check the login account for the SQL server of the customer

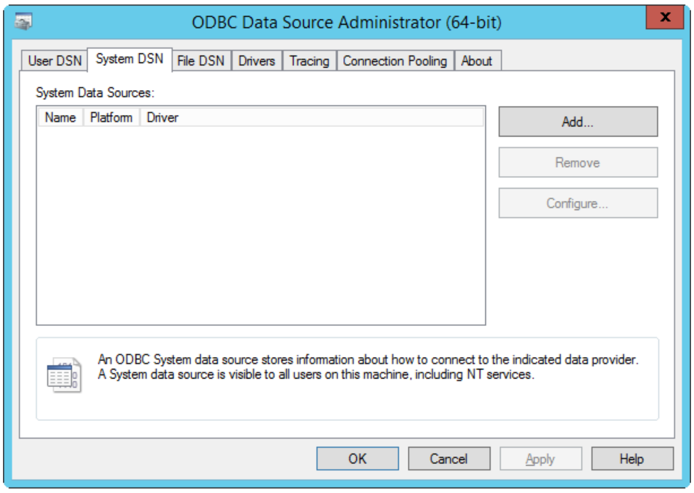
When you configure the ODBC driver, you have to select an authentication type. The authentication type depends on the location of the SQL server:
- Local SQL server => SQL authentication (recommended)
- Remote SQL server inside the domain => Windows authentication (recommended)
- SQL server outside the domain => SQL authentication (mandatory)

For the selected authentication, a login account with the correct credentials must exist for the SQL server. Else, the ODBC driver cannot connect to the SQL server.

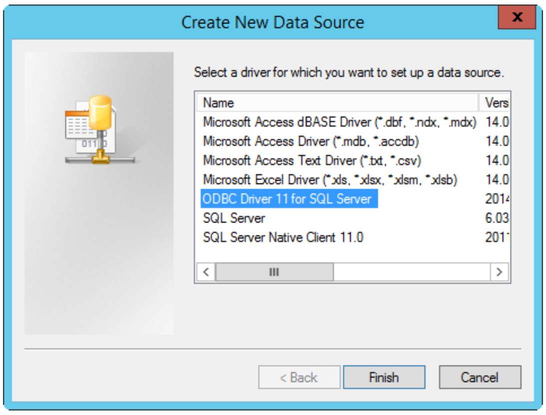
You have to check that a valid login account exists.

For example, you can use:
- Account “<domain>\<Windows user>” when Windows authentication is selected.
- Account “sa” when SQL authentication is selected for a local SQL server.

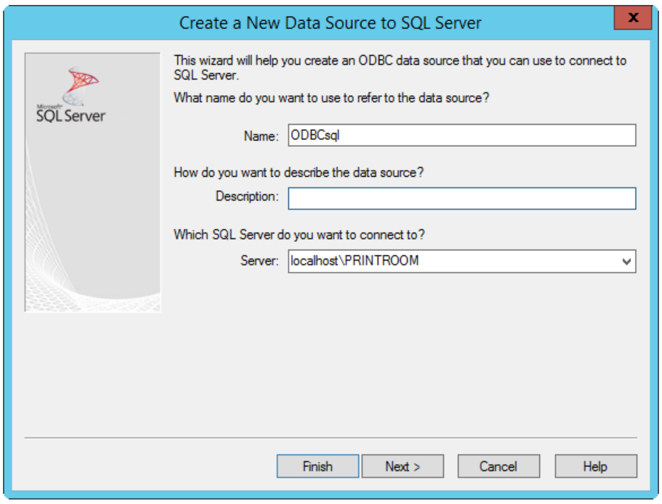
Create and configure an ODBC driver for a SQL data source
1. Open the Search dialog of Windows and type "ODBC".
2. Select the "ODBC Data Sources (64-bit)".
3. Click the "System DSN" tab and click "Add...".
   When you create a "System DSN", the data source is local to the computer but can be accessed by all users.



4. Select "ODBC Driver 11 for SQL Server" and click "Finish".



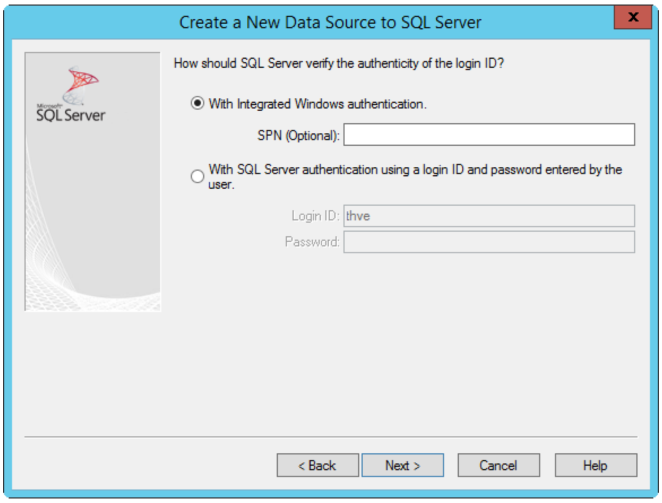
5. Type a name for the data source in option "Name", select the SQL server that you want to connect to and click "Next".



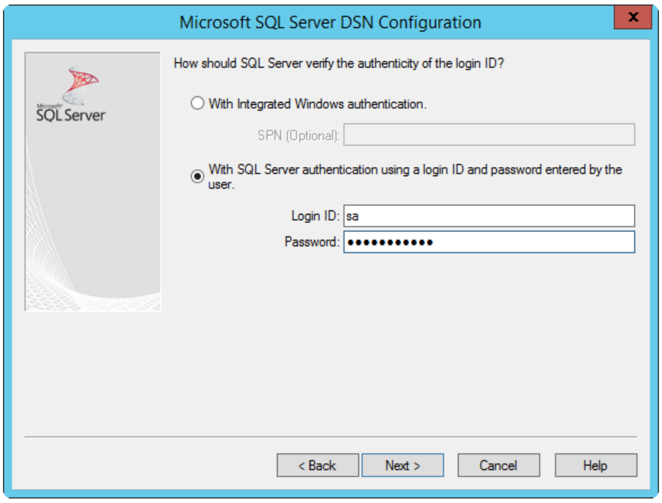
6. Select the authentication type. The authentication type depends on the location of the SQL server:
   - Local SQL server => SQL authentication (recommended)

- Remote SQL server inside the domain => Windows authentication (recommended)
- SQL server outside the domain => SQL authentication (mandatory)

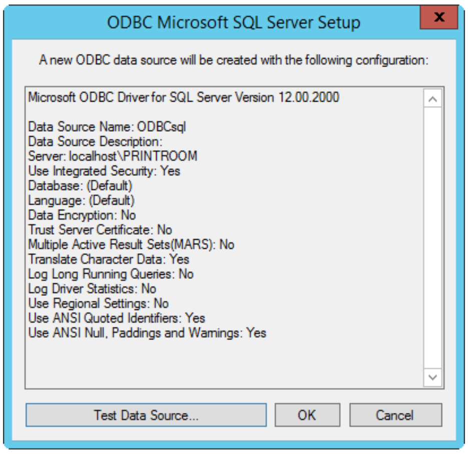
In case of Integrated Windows authentication, leave option “SPN (Optional)” empty:



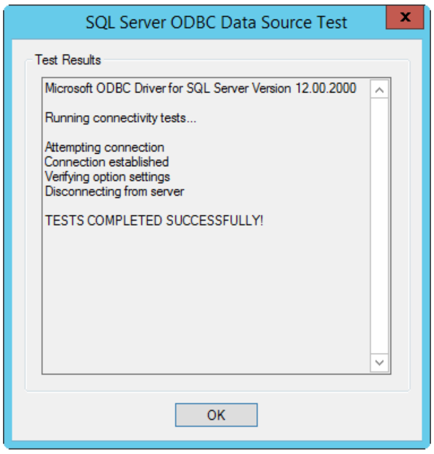
In case of SQL Server authentication, type the "Login ID" and the "Password":



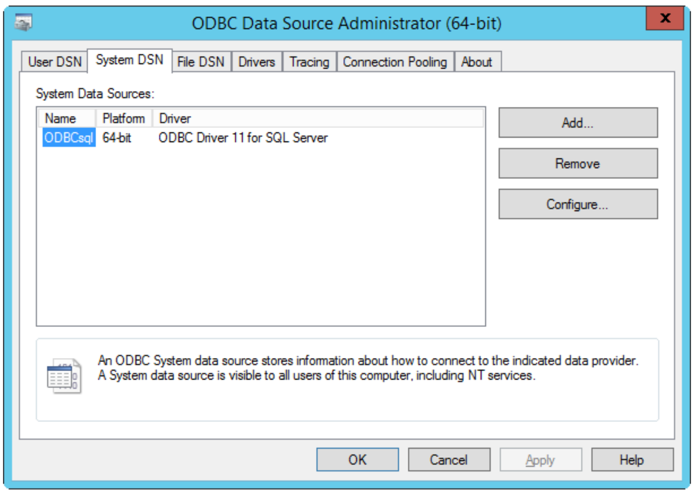
7. Click "Next", click "Next" again, and then click "Finish".
8. Click "Test Data Source..." to test the connection to the data source.



9. Click OK when the connection is successful.



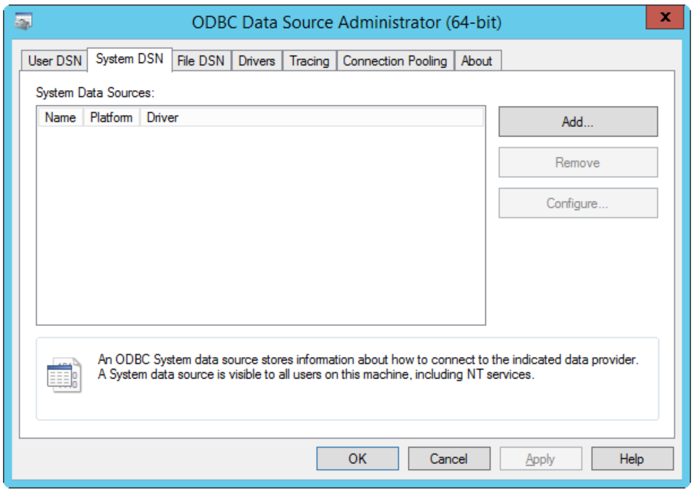
10. Click OK.
The ODBC driver is now configured. Close the dialog.



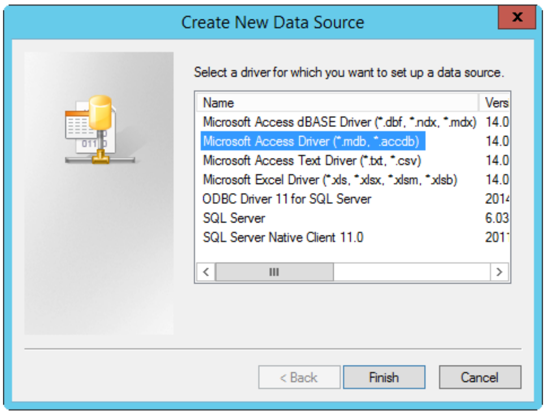
11. Continue with procedure "Create and use a lookup item in PRISMAdirect". You can find this procedure in the bottom of this article. You have to create a lookup item to read information from the data source using the ODBC driver and a query.

Create and configure an ODBC driver for a MS Access data source

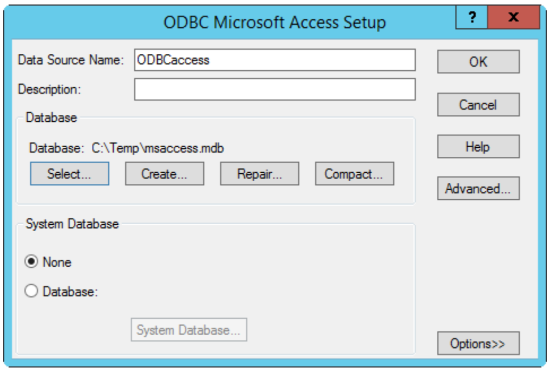
1. Open the Search dialog of Windows and type "ODBC".
2. Select the "ODBC Data Sources (64-bit)".
3. Click the "System DSN" tab and click "Add...".
   When you create a "System DSN", the data source is local to the computer but can be accessed by all users.



4. Select "Microsoft Access Driver (*.mdb, *.accdb)" and click "Finish".

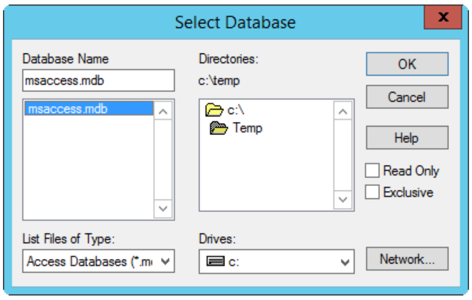


5. Type a name for the data source in option "Data Source Name".

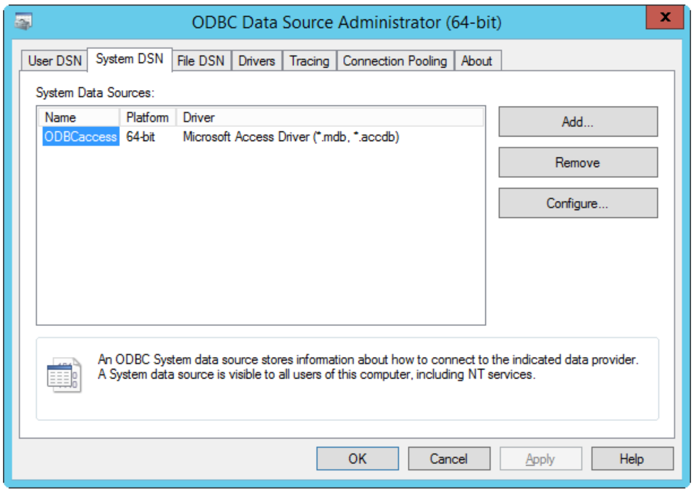


6. Click "Select..." and browse to the directory that contains the database file.

7. Select the database file in section "Database Name" and click OK.



8. Click OK and OK.



9. The ODBC driver is now configured. Close the dialog.
10. Continue with procedure "Create and use a lookup item in PRISMAdirect". You can find this procedure in the bottom of this article. You have to create a lookup item to read information from the data source using the ODBC driver and a query.

Create and use a lookup item in PRISMAdirect

Ticket items of type "Lookup" use an ODBC driver and a query to read information from a data source. You can add that information to an order.

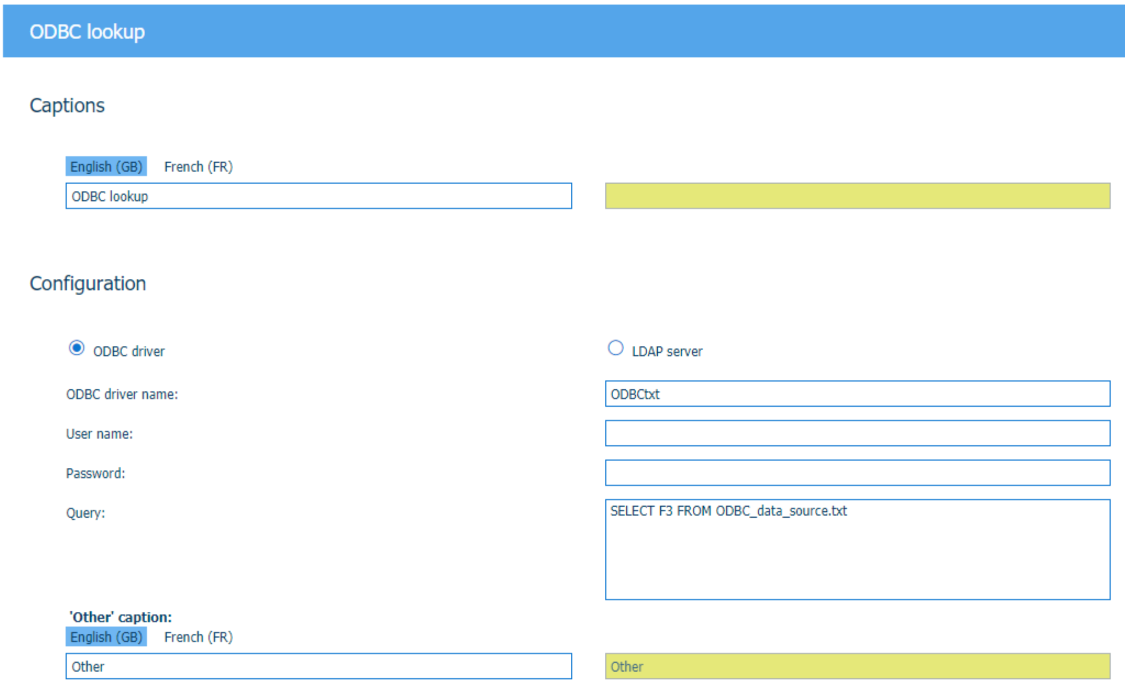
1. Open the "Product & order editor" workspace of PRISMAdirect.
2. Select "Product items" and click "Add".
3. Type a name for the new item and select "Lookup" for the item type.
4. Type the name of the ODBC driver. This is the exact name that you defined in "Data Source Name", or "Name" for a SQL data source.
5. For a SQL data source or a MS Access data source:
   - Type the "User name" and the "Password" of the user account with access rights to the database.

     NOTE
     The "User name" and "Password" of the lookup item overwrite the "Login ID" and "Password" of the ODBC driver, see step 6 of procedure "ODBC driver for a SQL data source". For example, if you leave the "User name" and "Password" empty, the user account tries to login with empty credentials.

   For a TXT or CSV data source, or an Excel data source:

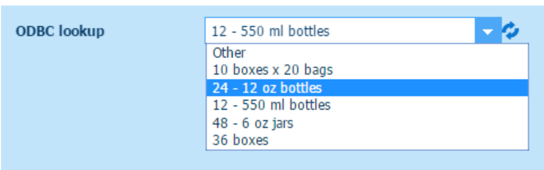
- Leave the "User name" and the "Password" empty.

6. Create a SQL query to retrieve information from the data source. A valid query must take into account if the selected database is case sensitive for correct data retrieval.
   In this example, the query is: *SELECT F3 FROM ODBC_data_source.txt*
   This query returns all values of column “F3” of data source “ODBC_data_source.txt” to the lookup item “ODBC lookup”.
   You can type $ in the query to display a list of profile items. You can use these profile items in the query.
   Examples of queries:
   - SQL Driver: **SELECT Column FROM Database.Table**
   - Microsoft Access Driver: **SELECT Column FROM Table**
   - Microsoft Excel Driver: **SELECT Account FROM [Sheet1$] WHERE User LIKE '$LastName$'**
   - Microsoft Txt Driver: **SELECT F2 FROM test.txt**



7. Save the changes.
8. Select "Products" and add the lookup item to one of more products.
9. Publish the changes.

When you create an order, you can select a value from the data source for the lookup item:



NOTE
The first 999 values returned by the query are available in the drop-down list.

Manage the languages

When you add additional languages, these languages become available for each ticket item. For each item, you can define a caption and tooltip per language.

1. Click [Options] - [Add language].
2. Select the languages you want to add. Deselect the languages you want to remove.
3. Click [OK].
   The languages are added for all items. For each item, you can define a caption and tooltip per language.

Chapter 3
Products

Default products

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

The product *Stationery (default)* is available in the [Product and order editor] only. This product is used only to support jobs that have been created with a product of type "Stationery" that does not exist anymore. You cannot set another "Stationery" type product as the default stationery product.

The product *VDP (default)* is available in the [Product and order editor] only. This product is used only to support jobs that have been created with a VDP product which no longer exists. A VDP product is a product that contains [VDP data]. You cannot set another VDP product as the default VDP product.

The product *Bundle (default)* is available in the [Product and order editor] only. This product is used only to support jobs that have been created with a product of type "Bundle" that does not exist anymore. You cannot set another product of type "Bundle" as the default stationery product.

Create and edit a product

Each job is created using a product. You can create the products. For each product, you can:
- Define the layout of the job.
- Define which ticket items will be available to the customer and to the print room operator. The customer and the print room operator use the ticket items to configure the job.
- Define which ticket items will be available on the job ticket.

Additional actions	Description
Sort the products	1. Click the column header to apply ascending sorting or descending sorting. You can use the sorting mechanism to group the items and products on their type. Or you can sort the items and products alphabetically.
Delete a product	It is not possible to delete the default generic product. It is not possible to delete a product being part of a bundle already assigned to a web shop. 1. Select the product. 2. Click the [Delete] icon. If the product is added to one or more shop windows, you must confirm that you want to delete this product. Then the product will be removed from the shop windows too. The product is not deleted from orders that are present in the web shop.
Copy a product	You can create a new product by making a copy of an existing product. 1. Select the product. 2. Click the [Copy product] icon. 3. Define the name and caption. The caption is the displayed name of the product. The information is displayed to the user. You cannot change the product type. 4. Click [Save]. A new product is created. 5. Edit the caption and other settings if needed.

Create a new product

- To create a product, click [Product and order editor] - [Products] - [New product].

Select the product type.

You cannot change the product type after you have created the product.

Product type	Description
[Document with binding]	There are constraints for certain settings to the document. For example, the [Folding] setting is not allowed for a document with binding.
[Flyer]	There are constraints for certain settings to the document. For example, the [Binding] setting is not allowed for a flyer.
[Business cards]	A product that allows a user to order business cards. There are constraints for certain settings to the document. For example, the [Binding] setting is not allowed for a flyer.

Product type	Description
[Generic print product]	A product with no constraints and no visualization of the settings. A default generic product is available. The default generic product is used to create new jobs, import old jobs created with the generic product, or import jobs created with a product that no longer exists.
[Stationery]	A product that allows a user to order a stationery product. For example: a USB stick. The product is not printable. You can add some settings. For example: memory size for USB sticks.
[Wide format]	A product that allows a user to order large format artwork. NOTE In the [Configuration] workspace, the system administrator has to create a connection to ONYX to enable printing on a wide format printer. The following items must be used for the wide format product: [Wide format media], [Requested print width] and [Requested print height]. Initially, the [Wide format media] item is empty. You have to import the ONYX media catalog to fill this item, see *Import the ONYX media catalog* on page 50. After import, the [Wide format media] item contains all available wide format printers. For each wide format printer, the available media and [Media print mode] are listed. [Requested print width] and [Requested print height]: The user fills in the print width and height for the order. The requested print width and print height are sent to ONYX.
[Kit]	A product consisting of some other products, treated as a whole. The content is limited to [Stationery], [Fixed document] and early-bound [VDP document]. When you add a VDP product to a bundle: • If you select “data source”, the application will use the number of rows in the data source file to compute the quantity, if the setting “Calculate copies/sets/quantity in bundle jobs based on number of rows in the data source file” is active. If the setting is not active, number of rows is considered to be 1, ignoring the number of rows in the data source file. The total number of jobs inside an order that contains both bundles and independent jobs will be calculated as follows: count all jobs, excluding the bundles from the sum. For example, for an order that contains 1 independent job and 1 bundles job containing 2 jobs, the total number of jobs at the order level will be 3. The price for a bundle, can be defined as a fixed amount, or calculated automatically using a formula. Either way, you can apply a discount after defining the bundle. Limitation for orders of this type: • When trying to [Print] a bundle, only the contained jobs of .PDF type will be printed. When a bundle structure is updated (add a new product or delete an existing product), the preexisting orders created with that bundle are not affected. A default generic predefined bundle is available. The default generic bundle is used to replace any bundle that has the definition deleted.

General product settings

1. Define the product name. You can use the characters: 'a. - z.', 'A. - Z.', '0. - 9.', '_' . Spaces are not allowed. The name must be unique.
   You cannot change the product name after you create the product.
2. Define the caption and give some information about this product. The caption is the displayed name of the product in the web store. The information is displayed to the customer in the promotion box in the web store. The promotion box is optional. It allows the customer to browse through the available products and their description. You can add the promotion box to the web store in the [Theme editor] workspace.
3. [Tax code:]
   Assign a tax code to the product. 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.
4. Define the image for this product. If the image path is empty, the custom image of the product is used.
   - Click [Browse] to add a thumbnail for the product in the pane [General product settings]. The recommended size for this image is: 142 x 133 pixels.
   - For stationary products, you can add an additional image in the pane [Detailed product settings]. This image is used in the preview of the product. The recommended size for this image is: 360 x 340 pixels.
     The thumbnail for the product is also used as the preview image for stationary products if no preview image has been selected. If a preview image is selected, it will not be overwritten by the thumbnail image.
   - For products with a fixed document, you can use the first page of the document as image. Click [Use first page as product image] in the [Detailed product settings] pane. When the fixed document changes, you have to click this button again to update the image.

   When you select an image that is bigger than the recommended size, the image will be resized to fit.
5. [Show 'Add to basket' button]
   This option appears when you assign a fixed document or a link to a file to a product. You can do this in the [Detailed product settings] pane. To enable this functionality for a product of the [VDP document] type, the [VDP document] has to be [Fixed document] and the [Data source] has to be [Manual input].
   Enable this option to add the [Add to basket] button to the product in the web store. When the customer clicks this button, the product is added to the basket immediately. In this case, the product will use the job ticket as defined in the [Detailed product settings].

   NOTE
   Same behavior is valid for bundles containing a [VDP document].

Detailed product settings

1. Click the pane [Detailed product settings].
2. The [Files] section in view [Web store]
   A product of type *stationery* cannot contain files.
   A product of type *business cards* only uses VDP data.

Options	Description
[File source]	Enable one or more file sources. When you enable file hosting services, the users can add files from the hosting service—the "cloud"—to their job. For example, Dropbox

Options	Description
[Fixed document]	Assign a fixed document to the product. For example: a biology book. The customer cannot remove the document nor can the customer add other files to the job. The operator can page program the fixed document. The operator can remove the fixed document and can add other files to the job when you enable the [Allow the operator to change the files of jobs] option. You can enable this option in workspace [Configuration]. A watermark is applied to the pages of the document in the [Preview]. Configure how the document is displayed in the preview: • The complete document. • The first 10% of the pages of the document with a maximum of 10 pages. • [Number of pages] The preview shows the entered number of pages of the document.

Options	Description
VDP	Select the [VDP document]. • [File source] Enable one or more file sources. The customer can select a VDP document from the file sources. • [Fixed document] Assign a fixed VDP document to the product. You can select a VDP document from the file system. The customer cannot remove the VDP document. The operator can page program the VDP document. The operator can remove the fixed VDP document and can add other files to the job when you enable the [Allow the operator to change the files of jobs] option. You can enable option [Allow the operator to change the files of jobs] in workspace [Configuration]. NOTE The document must contain VDP data, else the document cannot be added to the product.
	Select the [Data source]. • [File source] Enable one or more file sources. The customer can select a data source from the file sources. • [Define info] The dialog contains the required structure of the data source after a VDP document is added to the product. You can add additional information. The information in this dialog is available for the customer and the operator. The [Define info] option is not available when you select the [Manual input] option. • [Manual input] The dialog displays the required structure of the data source for the VDP document. You can map order items and job items to each variable data field. The customer can change the variable data for each field in the web shop. The operator can change the variable data in the [Order processing] workspace. • [Number of rows in the preview in the web store:] The preview in the web shop shows the entered number of variable data documents.

Options	Description
[Link]	Enable option [Link] in section [Files]. • Link to folder When you assign a link to a folder, the customer must select one file from the folder before submitting the order. • Link to file When you assign a link to a file, the file is added to the order automatically when the customer submits the order. • Link to latest modified file in folder When you assign a link to a folder and you enable option [Always use the latest modified file]: The most recently changed file from the linked folder is added to the order automatically when the customer submits the order. The most recently changed file is the file with the latest "Data modified" in the folder. 1. 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. 2. Click [OK]. The option [Use first page as product image] is available when you link to a file or link to the latest modified file in a folder. The product image is not automatically updated when the linked file is replaced. Click [Use first page as product image] to update the product image and save the product. Configure how the document is displayed in the preview: • The complete document. • The first 10% of the pages of the document with a maximum of 10 pages. • [Number of pages] The preview shows the entered number of pages of the document. The settings in this dialog are part of the procedure to configure linking to a file or folder. For the complete procedure, see the help file of the [Configuration] workspace.

3. To add an item to a view, select the item in the items list and drag the item to a group or subgroup of the view.
   The ticket items in the item list are defined in workspace [Product items]. You can use these items to define each product. A ticket item can be placed in one or more views. The views indicate what is visible for the operator and for the customer of the web shop. The following views are available for each product:

View	Description
Web shop	You can configure which file types and ticket items are available to the customer of the web shop. Also, you can select which price estimation formula must be used for jobs created with this product. Click the icons directly next to [Web store] to copy its items and settings to: • [Print room] The ticket items that must be available for the print room operator. • [Web store - printed ticket] This is the job ticket for the customer.

View	Description
Print room	You can configure which file types and ticket items are available to the print room operator. Also, you can select which quotation formula must be used for jobs created with this product. You can also configure the automation templates. The automation templates assigned to the product will be applied automatically when the job arrives on the server. Click the icons directly next to [Print room] to copy its items and settings to: • [Web store] The ticket items that must be available for the customer. • [Print room - printed ticket] This is the job ticket for the print room operator.
Web shop - printed ticket	Define which ticket items will be available on the job ticket for the customer.
Print room - printed ticket	Define which ticket items will be available on the job ticket for the print room operator.

4. The [Automation templates] section in view [Print room]
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 automation templates assigned to the product will be applied automatically when the job arrives on the server.
    - 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].

    NOTE
    Automation templates are available when PRISMAprepare and the *PRISMAdirect Web Bootstrap* are installed, and option [Automation templates] is enabled in workspace [Configuration].

5. The [Pricing] section
Select the [Price estimation formula] and the [Quotation formula] for the product. 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.
You can define the price settings for and assign formulas to:

Location	Description
Product	Click [Product and order editor] and select a product. Here you can define the [Price estimation] and [Quotation] for each product.
User groups	Click [Order processing] - [User management] - [User groups] - [User group settings]. Here you can define the [Price estimation] and [Quotation] for each user group.
Each web shop	Click [Order processing] - [Web store] - <web shop> - [Pricing]. Here you can define the [Price estimation] and [Quotation] for each web shop.

The jobs created with a product will use the following price settings and formulas:
1. If a formula is assigned to the product, then this formula is used.
2. Otherwise, the formula and price settings assigned to the user group are used.

3. If no formulas are assigned to the product or user group, then the formulas and price settings assigned to the web shop are used.

6. The [Remarks] section
   Allow the user to enter remarks for the print room operator.
7. The [Layout] section
   Select the layout settings available for the customer. A number of items have a checkbox in the top left corner. Use the checkbox of the items to enable or disable the items. When you enable an item, the item is visible for the user. Click an item to edit the item.
   Visual ticket items and choice items
   Visual ticket items and choice items are allowed in the [Layout] pane, but not more than 14 items. Visual ticket items have effect on the preview. For example, if media is set to green then the media is displayed as green in the preview. The choice items do not affect the preview. You can add non-visual and non-choice items to the [More ticket items] section.
   Fixed layout items
   The [Fixed layout settings] pane contains items which define the layout. You can define the value for each item only in the product. The value cannot be change by a user or operator. The items in this pane are not visible for the user or the operator. Only those visual ticket items are allowed that are valid for the type of product. By default, each product contains some visual ticket items that are not editable. These settings define the product. For example, the [Binding] option is set to none for a flyer. These settings cannot be changed or deleted.
   Example
   For example, the [Layout] pane contains option [Binding]. The [Fixed layout settings] pane contains the [Orientation and binding edge] option with its value set to [Landscape, top edge binding]. The product will always generate a landscape document with top edge binding. The user can only select a value for the [Binding] option, for example [Wire-O-Bind].
8. Click [Update] to save the changes to the product.
9. Click the [Publish] icon in the tab of workspace [Product and order editor] or [Web store editor].
   Publishing the changes to the PRISMAdirect server could take some time. The status bar indicates the progress.

Overview

The pane [Overview] offers you an overview of the used ticket items in the product and the print ticket.

Use custom values for an item in a product

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

1. Select a product.
2. Click [Detailed product settings].
3. Select one of the available views.
   The view [Web store] is selected by default in pane [Detailed product settings].
4. Click the item to view its values.
5. Enable the [Use custom value] option. Now, you can edit the value of the item in section [Configuration].
   - You can define custom values for the item in section [Configuration]. The custom values cannot exceed the item values as defined in the workspace [Product items]. For example, if the job ticket item has a maximum value of 5, the setting at product level must be 5 or lower.
   - You can use all values of the item or a subset of the values.
   - You can change the default value.
     It is recommended that you assign a neutral default value to the item: None, No, 0, False, [empty string].
6. Define the [Captions]. The caption is the displayed name of the item. You can use the characters: 'a. - z.', 'A. - Z.', '0. - 9.', '_' . Spaces are allowed for the caption.
   The default language for the item is displayed in the top of section [Captions]. You can define a caption for each language. See procedure *Manage the languages* on page 32 if you want to add or remove a language for an item.
   - You can define the tooltip in the text field on the right. The text field for the tooltip is colored yellow. You can define a tooltip for each language.
7. [Custom settings]
   Define the permission to the item value of the ticket item:

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

8. Click [OK].
   The custom values are defined for the selected view for the selected product.
9. Click [Update] to save the changes to the product.
10. Click the [Publish] icon in the tab of workspace [Product and order editor] or [Web store editor].
    Publishing the changes to the PRISMAdirect server could take some time. The status bar indicates the progress.

Print the ticket of a product

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

1. Select the product.
2. Select the [Detailed product settings].
3. Select the view [Web store - printed ticket] or [Print room - printed ticket].
4. Click [Print ticket].
5. Select the printer.
6. Click [OK].

Chapter 4
Order form

Create the order form

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

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

Chapter 5

Import and export

Export the items, products and order form

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

1. Click [Options] - [Export].
   The current configuration is saved to disk as a ZIP-file.
   The Internet browser you use determines where the configuration file is saved. Most browsers save a file to the Downloads folder in your User profile folder on your computer. For many browsers, for example, Chrome, you can press CTRL+J to view your recent downloads.

Import the items, products and order form

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

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

If you want to import individual products only, you can use the menu entry [Import Products] This will let you select the ones that are not already present in the current setup. The products will be imported with all the missing items that are available in their views.

1. Click [Options] - [Import].
2. Browse to the configuration file. The configuration file is a ZIP-file.
3. Click [Open].
4. Click [OK].
   The items, products and order form are imported from the configuration file.

Import the media catalog

You can import the media catalog file directly from one or more printers, from PRISMAprepare, or from an XML file.

1. Click [Options] - [Import media catalog].
2. Enable one of the following options:

Option	Description
Import from printers	You can only import the media catalog from printers driven by a PRISMAsync Print Server or by a Fiery Print Server. 1. The printer must be switched on during the import of the media catalog. 2. Select one or more printers. PRISMAdirect imports the media catalog of these printers. The administrator configures which printers are available to you.
Import from PRISMAprepare	1. Click [OK] An *.oed file is downloaded and stored in the [Downloads] folder on your computer. The downloaded file is available in the bottom-left of the browser window. 2. Click the file. The PRISMAdirect Web Bootstrap imports the media catalog. NOTE PRISMAprepare and the PRISMAdirect Web Bootstrap must be installed on a local system.
Import from file	For example, you can import the media catalog of a fully configured installation of PRISMAdirect. 1. Click the [Browse] button. 2. Browse to the media catalog file. The media catalog file is an XML file. 3. Click [Open].

3. [Replace the existing media catalog]
   - Enabled
     Replace the media catalog of PRISMAdirect with the imported media catalog.
     Media that is being used by one or more products can be deleted when you replace the media catalog. Any deleted media is automatically removed from the concerning products.
   - Disabled
     Merge the imported media catalog with the media catalog of PRISMAdirect. Imported media cannot replace already existing media in the media catalog.
     It is recommended to select this option when you import the media catalogs of more than one printer.
4. Click [OK]
   The [Media] item contains the media catalog for the document.
   The [Cover media] item contains the media catalog for the covers.

Restore the media catalog

You can always restore the default media catalog. Click [Options] - [Restore default media catalog].

Import the ONYX media catalog

You can import the media catalog for wide format media directly from ONYX.

1. Click [Options] - [Import ONYX media catalog].
2. Select one or more ONYX connections. PRISMAdirect imports the media catalog of these ONYX connections.
   By default, the ONYX media catalog of PRISMAdirect is replaced with the imported media catalog.
   Media that is being used by one or more products can be deleted when you replace the media catalog. Any deleted media is automatically removed from the concerning products.

   NOTE
   In the [Configuration] workspace, the system administrator has to create a connection to ONYX to enable printing on a wide format printer. The ONYX media catalog becomes available when at least one connection to ONYX is configured.
3. Click [OK]
   The [Wide format media] item contains the media catalog for wide format media.

Reload the configuration

You can reload the last published configuration of the [Product and order editor] stored on the PRISMAdirect server.

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

1. Click [Options] - [Reload].
   The last published configuration stored on the PRISMAdirect server overwrites the current items, products and order form.

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