Administration

Version: 7.6.0.8

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Administration

After you have installed Skyline, you will be able to upload a document, have it converted automatically to a high quality PDF, place an order to have it printed and download the order. However, Skyline is extremely configurable and the aims of this section is to take you through all the steps required to get Skyline to work for you.

Configuration should only be carried out after the base installation of Skyline has been completed. During Installation the following should have been installed and functionality tested.

- Documents can be uploaded to each Skyline Portal.
- (Optional) Documents can be uploaded using the Skyline Driver to each Skyline portal.
- The shopping basket work-flow works; documents can be ordered on each Skyline portal.
- Documents are being received by the Skyline PrintStations.
- Documents can be viewed and printed from each Skyline PrintStation.
- Skyline ProductManager connects to its requisite portal and functions correctly.

For the purposes of this document it is assumed you are logged in as a Skyline user with Administrator and Manager rights. The examples in this manual assume that all configuration changes will only be applied to one portal. It is possible to make configuration changes that affect all Skyline portals if logged in with Host rights.

You can print a hard copy of a manual by clicking Administration which opens a PDF copy of the manual. You can then download or print the document.

The Default Settings

Once Skyline has been successful installed you can only log in to the HTTP:// local host website with the default setting, as given below. **It is recommended that the default passwords are changed**.

The http://localhost website is only available to users logged in to the web server. It cannot be accessed remotely. A new portal will be created for users to access.

1. Log in as a Host administrator with the following username and password.
   Username: skylinehost
   Password: SkylineH0$t (The password is case sensitive: Skyline H zero dollar t)

2. Log in as an Portal administrator with the following username and password.
   Username: admin
   Password: Admin123

3. Log in to the http:// local host portal as a normal user by clicking on the Register as a New User link on the home page and following the registration procedure. User accounts can also be created by the administrator and log in details emailed to the user. For more information, see the section on Creating & Managing Users 9 .

The username skylinehost has full "Host" administration privileges. The only way to recover this password if you forget it is to:

- Change the skylinehost email address to your email address and configure Skyline to send out emails correctly so that you can reset the password.

- Promote another user to also have host admin privileges, before you forget your password.

WARNING:
There is no hidden user account, password or back-door that can be used to recover the skylinehost password if it is lost. If you forget the skylinehost password and have not promoted another user to Host, the account will be permanently locked out.

To change the skylinehost email address:

1. Log in with the default username and password.

2. Click the **Preferences** link at the top of the page.

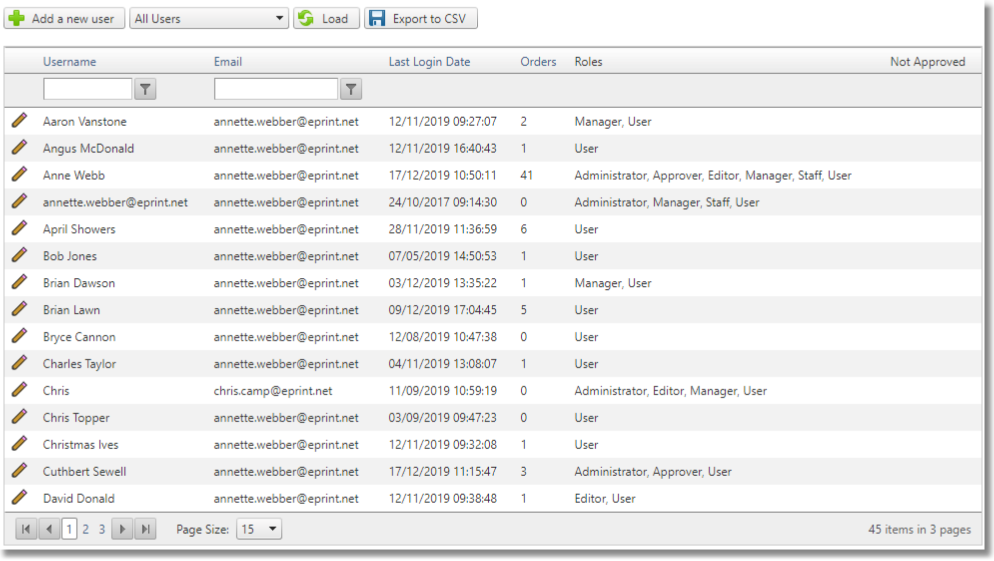
3. Click the **Email** link on the preferences screen.

4. Enter the new email address and confirm the email address.

5. Click **Update Email Address**.

Creating & Managing Users

There is no limit to the number of users that can be created in a Skyline portal. The number of users that can work simultaneously depends on the web server and SQL server hardware but Skyline was designed to handle up to 10,000 concurrent users. If users log in using their corporate user name and password (LDAP authentication) they are automatically added the first time that they log in to Skyline. This means that you will not be able to add any users and Add a new user will not be available when you view the list of users. All other functionality is still available.



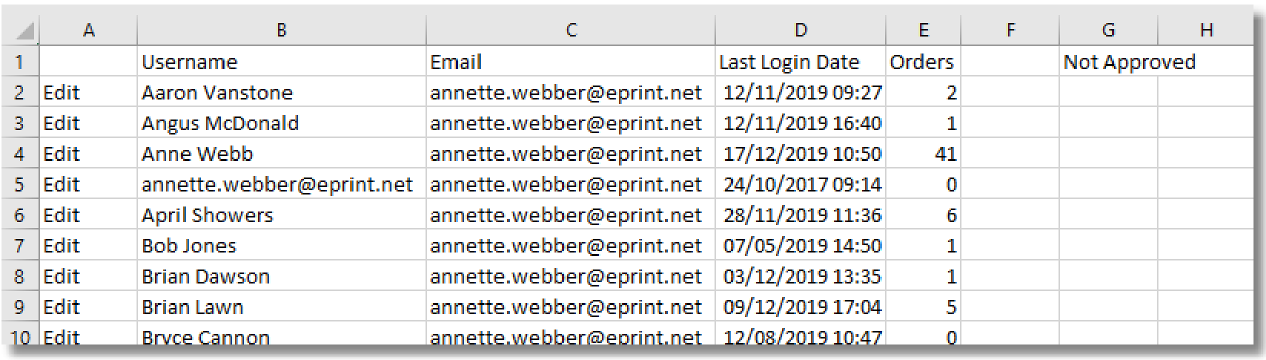
Add a new user | All Users | Load | Export to CSV

	Username	Email	Last Login Date	Orders	Roles	Not Approved
	Aaron Vanstone	annette.webber@eprint.net	12/11/2019 09:27:07	2	Manager, User	
	Angus McDonald	annette.webber@eprint.net	12/11/2019 16:40:43	1	User	
	Anne Webb	annette.webber@eprint.net	17/12/2019 10:50:11	41	Administrator, Approver, Editor, Manager, Staff, User	
	annette.webber@eprint.net	annette.webber@eprint.net	24/10/2017 09:14:30	0	Administrator, Manager, Staff, User	
	April Showers	annette.webber@eprint.net	28/11/2019 11:36:59	6	User	
	Bob Jones	annette.webber@eprint.net	07/05/2019 14:50:53	1	User	
	Brian Dawson	annette.webber@eprint.net	03/12/2019 13:35:22	1	Manager, User	
	Brian Lawn	annette.webber@eprint.net	09/12/2019 17:04:45	5	User	
	Bryce Cannon	annette.webber@eprint.net	12/08/2019 10:47:38	0	User	
	Charles Taylor	annette.webber@eprint.net	04/11/2019 13:08:07	1	User	
	Chris	chris.camp@eprint.net	11/09/2019 10:59:19	0	Administrator, Editor, Manager, User	
	Chris Topper	annette.webber@eprint.net	03/09/2019 09:47:23	0	User	
	Christmas Ives	annette.webber@eprint.net	12/11/2019 09:32:08	1	User	
	Cuthbert Sewell	annette.webber@eprint.net	17/12/2019 11:15:47	3	Administrator, Approver, User	
	David Donald	annette.webber@eprint.net	12/11/2019 09:38:48	1	Editor, User	

1 2 3 Page Size: 15 — 45 items in 3 pages

Example of the users on a portal.

All the user details listed can be exported as a CSV file and then viewed in Excel or some similar program. Simply view the complete list or a filtered list and then click Export to CSV.



	A	B	C	D	E	F	G	H
1		Username	Email	Last Login Date	Orders		Not Approved	
2	Edit	Aaron Vanstone	annette.webber@eprint.net	12/11/2019 09:27	2			
3	Edit	Angus McDonald	annette.webber@eprint.net	12/11/2019 16:40	1			
4	Edit	Anne Webb	annette.webber@eprint.net	17/12/2019 10:50	41			
5	Edit	annette.webber@eprint.net	annette.webber@eprint.net	24/10/2017 09:14	0			
6	Edit	April Showers	annette.webber@eprint.net	28/11/2019 11:36	6			
7	Edit	Bob Jones	annette.webber@eprint.net	07/05/2019 14:50	1			
8	Edit	Brian Dawson	annette.webber@eprint.net	03/12/2019 13:35	1			
9	Edit	Brian Lawn	annette.webber@eprint.net	09/12/2019 17:04	5			
10	Edit	Bryce Cannon	annette.webber@eprint.net	12/08/2019 10:47	0			

Example of exported data in Excel

Adding Users

Skyline is set up for Database authentication where User Names and Passwords are stored in the database SkylineMembership. Initially there will be no users on the system. Users can add themselves to this database if the option Registration - Show Register new user[29] is enabled on the log in page or user accounts can be created by a Skyline administrator.

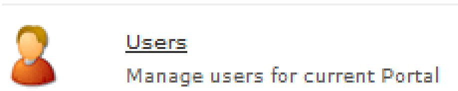
Notes:

- If users log in using their corporate user name and password (LDAP authentication) they are automatically added the first time that they log in to Skyline. The Add a new user will not be available when you view the list of users.
- When a user is created the password criteria are not applied so care must be taken that any password supplied do comply with your password rule. When the user changes their password the rules are applied to their entry.
- It is recommended that the portal configuration Registration - New Users Must Be Approved[15] is turned off if you are going to be adding a lot of users. If it is turned on you will have to activate each account after it has been approved.

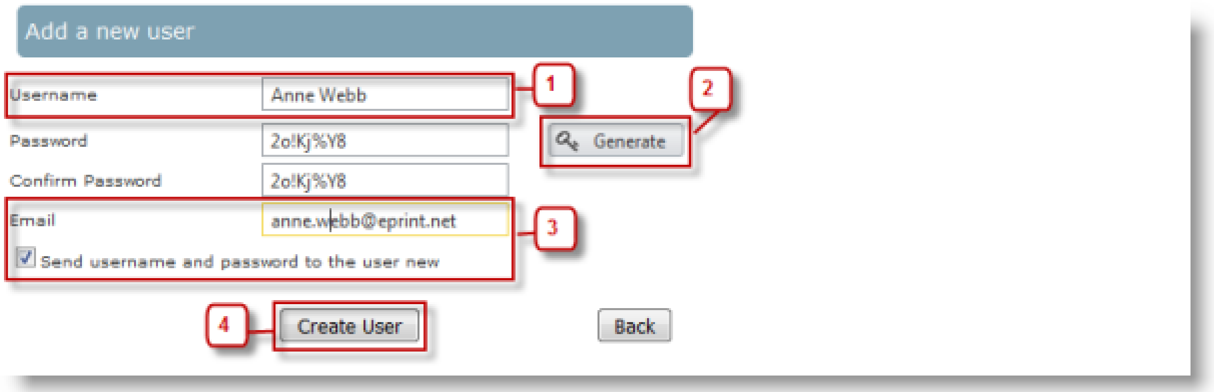
When you have created a new user it will be assigned the role of User. You can assign multiple roles to the user if they require access to specific features.

To add users to the current portal:

1. Log in with Administrator rights and go to **Admin**.
2. In the Users section click **Users**.



3. Click Add a new user
4. Enter the user's details in the Register fields.

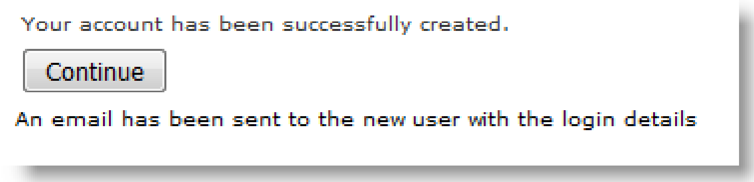


1. Enter the user's name.
2. Click Generate. The password will be automatically generated.
   When a password is generated the password criteria are not applied. When the user changes their password the rules are applied to their entry.

3. Enter the user's email address. Tick the option **Send username and password to the user new**.

4. Click Create User. The new account will be created. The new user will receive an email containing the details of their account.

5. You will see the message "Your account has been successfully created". Click **Continue** to finish the process. An email will be sent to the user if the option was selected.

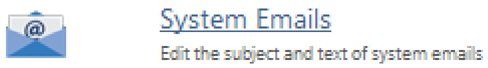


6. You can now add another new user or return to the Admin home page.

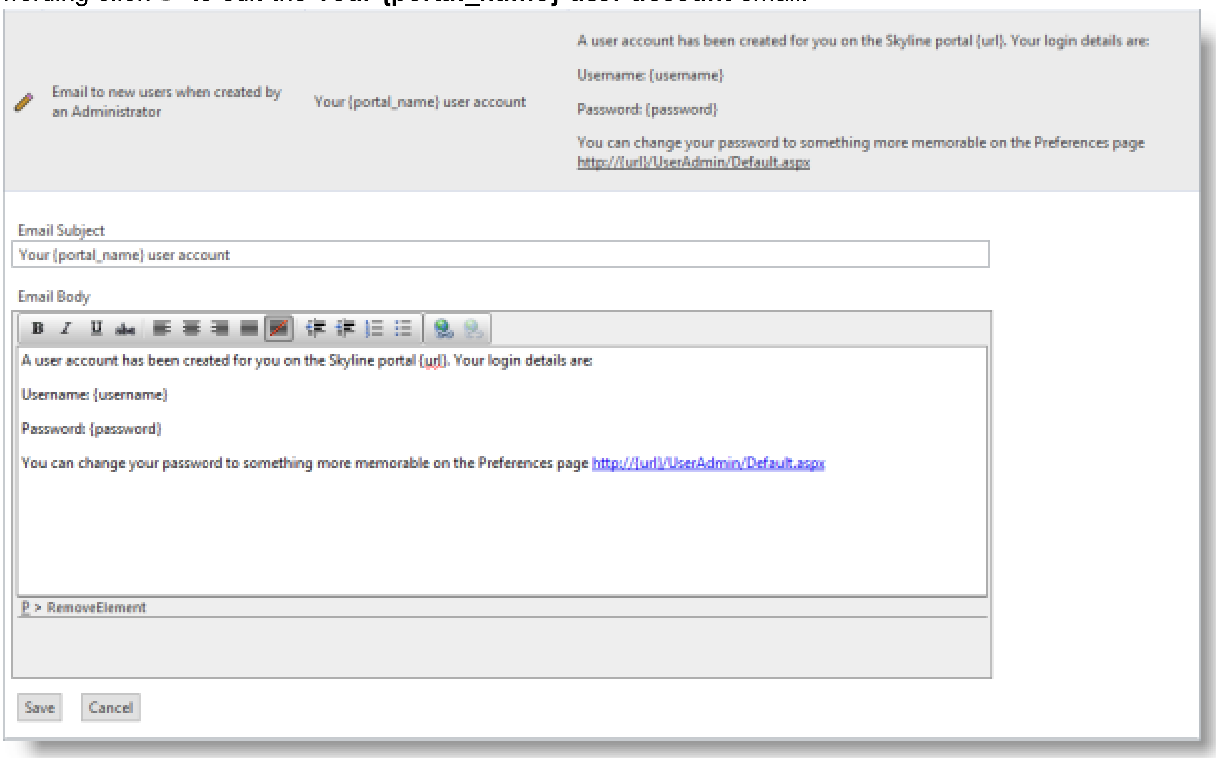
The wording of the "Your {portal_name} user account" email can be amended.

To amend the email:

1. Log in with Administrator rights and go to Admin. In the configuration section click **System Emails**.



2. The wording in an email sent to a user when a new account is created can be amended. To amend the wording click to edit the **Your {portal_name} user account** email.

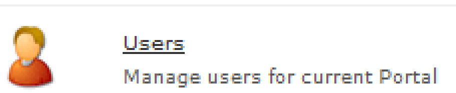


When new users have been added they need to be activated. The icon indicates that the user's account is not active. To make the account active approval has to be granted by removing the selection of Not Approved.

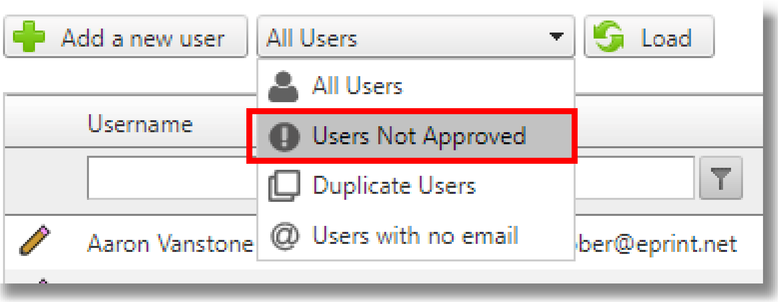
To activate a new account:

1. Log in with Administrator rights and go to **Admin**.

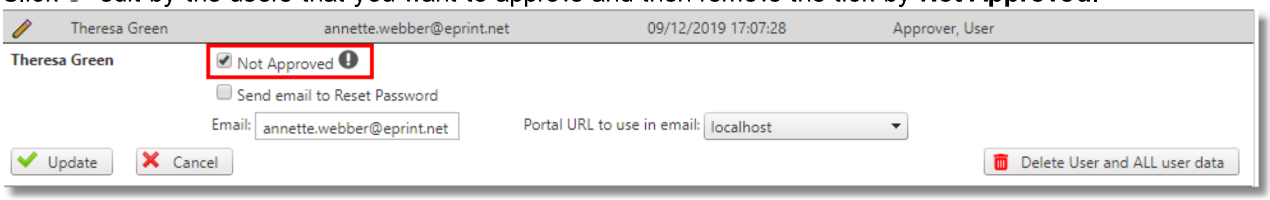
2. In the Users section click **Users**.



3. Load all users that are not approved.



4. Click edit by the users that you want to approve and then remove the tick by **Not Approved**.

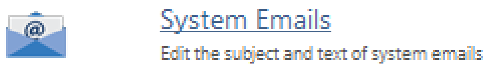


5. Click **Update**. An email will be sent to the new user stating that their Skyline account has been activated.

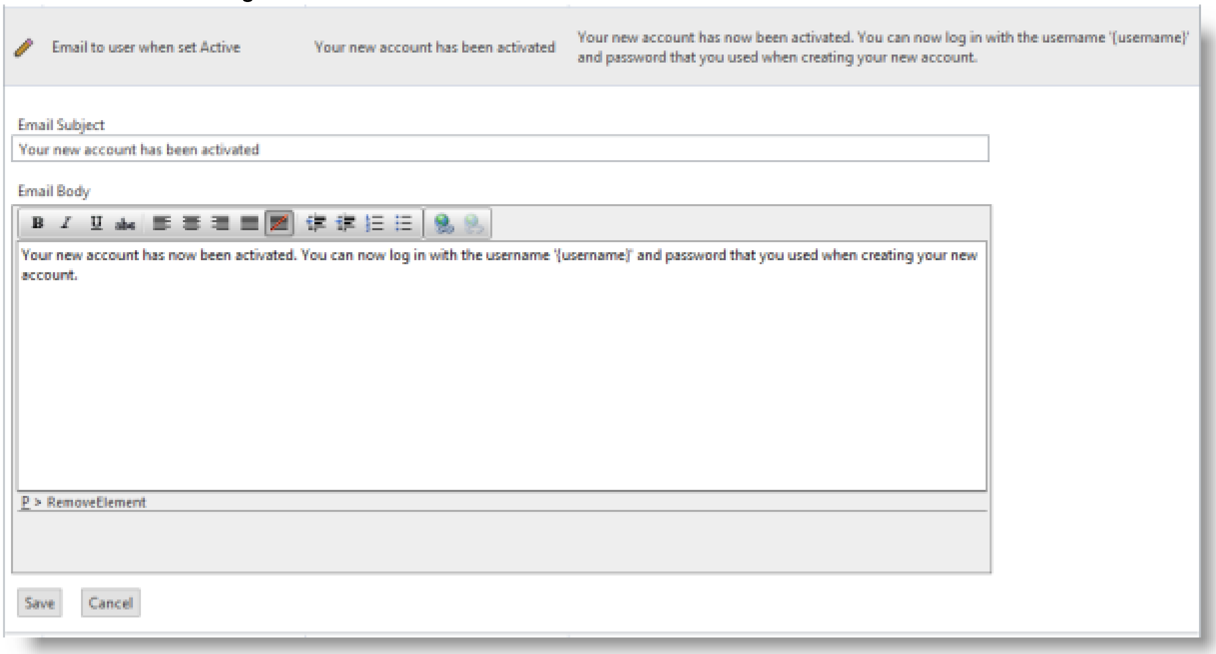
The wording of the email sent to notify new users that their account has been activated can be changed.

To amend the email:

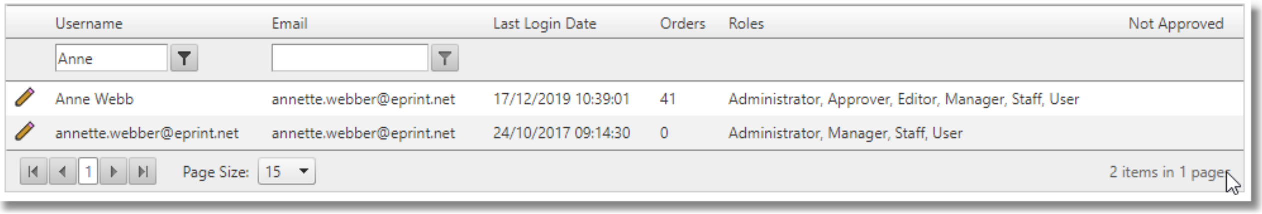
1. Log in with Administrator rights and go to Admin. In the configuration section click system Emails.



2. To amend the wording click to edit the **Your new account has been activated** email.

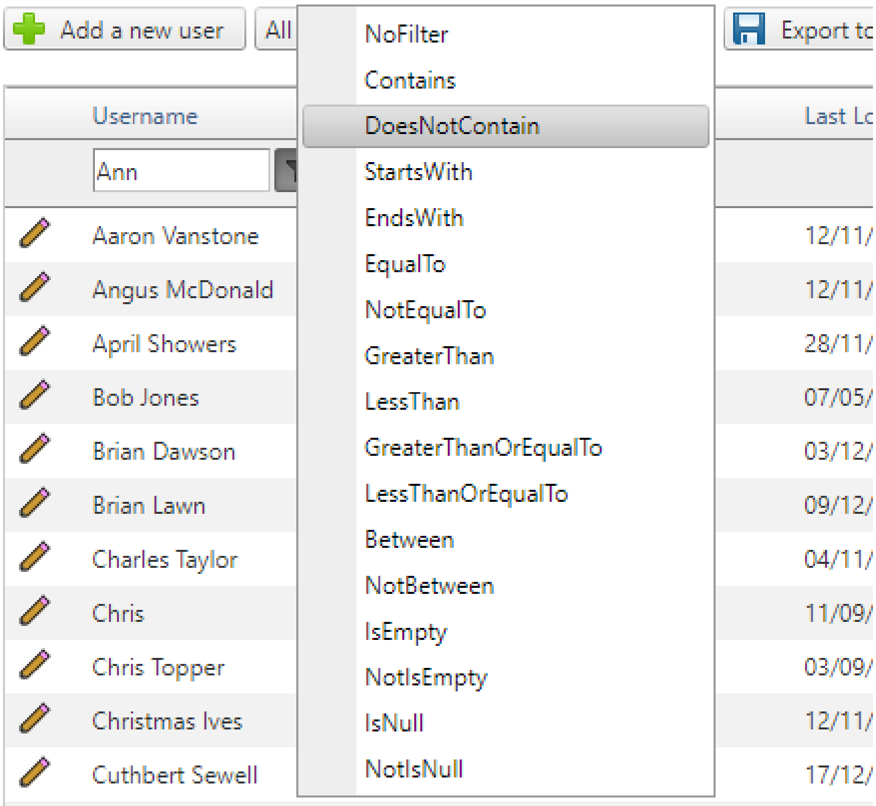


Searching for Users



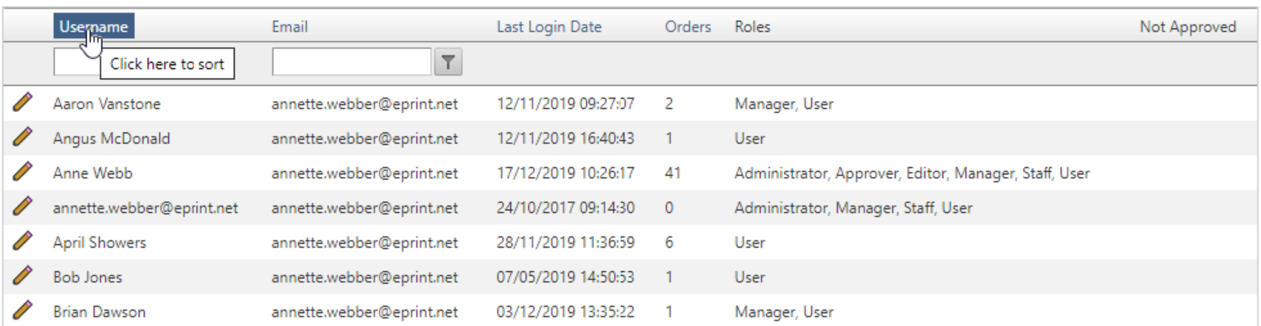
Results of a search

If you have a lot of users you can use the search facility to locate the required user. You can search by their user name or their email address. Simply enter part of their name or email address and press . Select the sort criteria you require and all entries that contain the specified details will be listed.



Examples of the available search criteria

You can also sort the listing by Username, Email, Last Login Date and Orders by clicking on the heading.



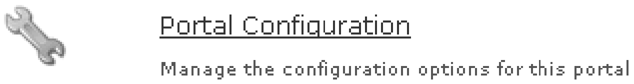
Enabling Self Registration

When user authentication is not set to LDAP, you can allow users to register themselves and when their registration has been approved they are able to log into Skyline.

To enable self registration:

1. Log in with Administrator rights and go to **Admin**.

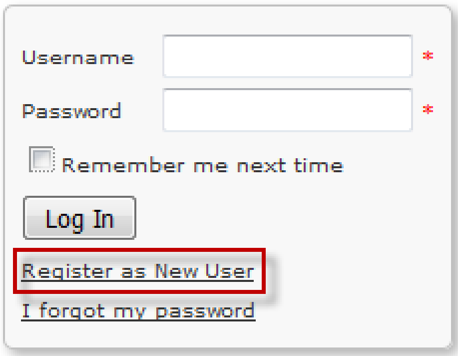
2. In the Portals section click **Portal Configuration**.



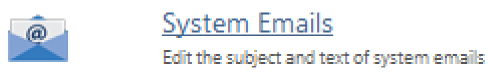
3. Make sure that the following configurations are set:

    1. **Registration - New Users Must Be Approved should be True**
    It is recommended that this option is set to true so that users need to be approved before they can gain access to the Skyline website. If this option is set to False anyone will be able to create an account.

    2. **Registration - Show Register new user link should be True**
    This will put a link on the login page



4. In the Configuration section click **System Emails**.



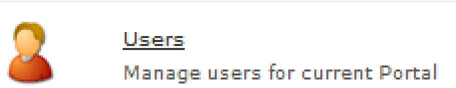
5. A list of the system generated emails is shown. Review the 'Email to user when set Inactive after registration' & the 'Email to Administrator when a new user set Inactive'. Amend as necessary.

When new users have registered they need to be activated. To make the account active approval has to be granted by removing the selection of Not Approved.

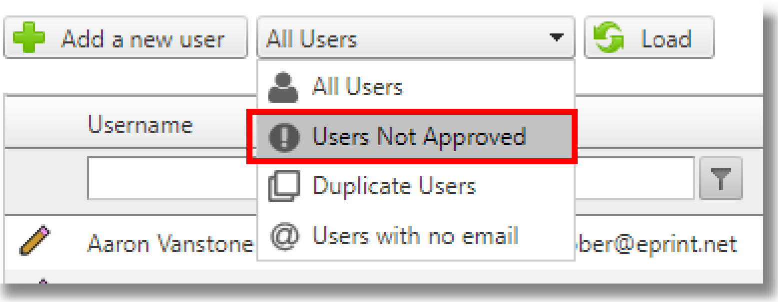
To activate a new account:

1. Log in with Administrator rights and go to **Admin**.

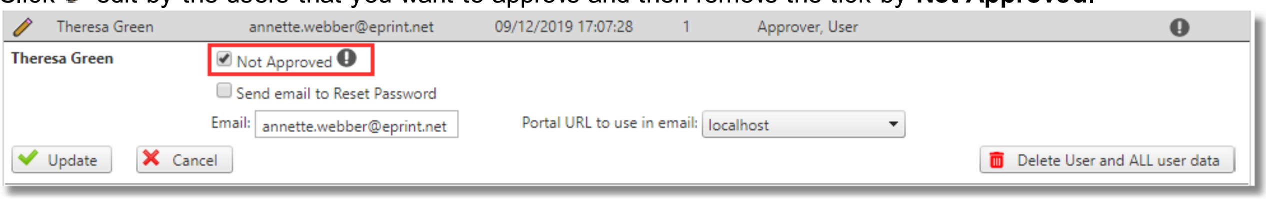
2. In the Users section click **Users**.



3. Load all users that are not approved.



4. Click edit by the users that you want to approve and then remove the tick by **Not Approved**.

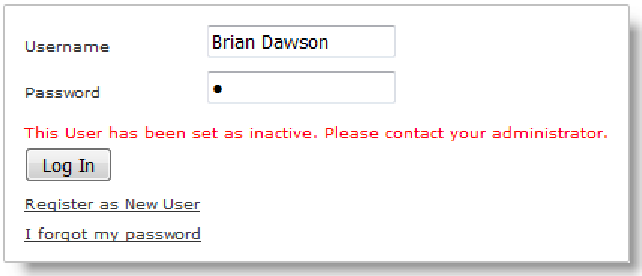


5. Click **Update**. An email will be sent to the new user stating that their Skyline account has been activated.

Suspending Users

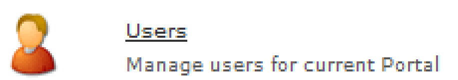
There may be occasions that you will need to suspend user accounts. When a user is suspended their account is disabled and marked as not approved. This means that they can no longer log into Skyline to place any new orders. Any orders that they have placed and that have been processed will still appear in any reports that are run.

If a user tries to log into Skyline when their account has been suspended they receive a message stating that "This User has been set as inactive. Please contact your administrator".

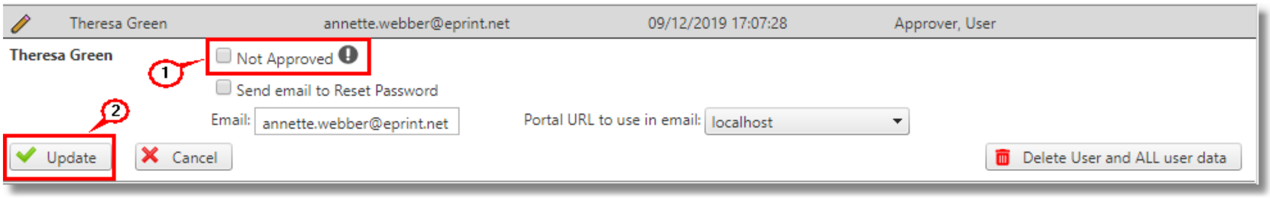


To suspend a selected user account:

1. Log in with Administrator rights and go to **Admin**.
2. In the Users section click **Users**.

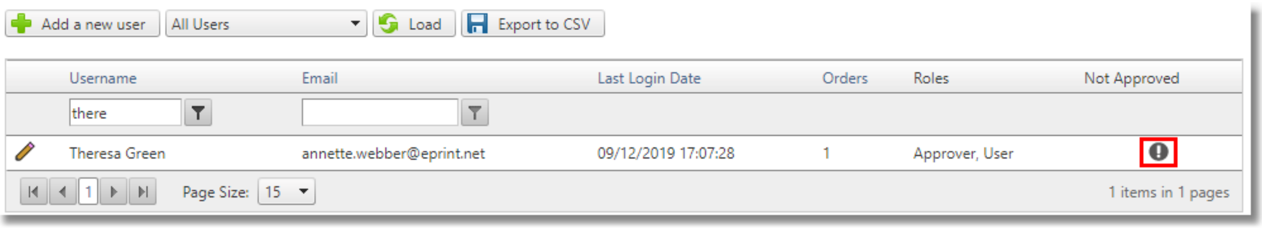


3. All the users are listed. Click to edit the user that you want to suspend.
4. In the example Theresa Green was selected.



   1. Select **Not Approved** .
   2. Click Update.

5. The selected user will be marked as Not Approved as indicated in the example.



Deleting Users

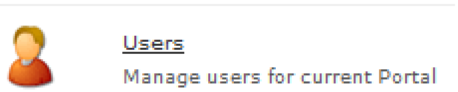
There may be occasions that you will need to remove the users completely. For more information on removing specific roles for a user please see the section on Removing User Roles[25] or on suspending user accounts see Suspending Users[17] . When a user is deleted any orders that they have placed are removed from the PrintStation when the program is next refreshed.

If the user being deleted has the role Approver assigned to them please ensure that any orders that are awaiting approval are completed or assigned to another approver. If a user is removed and they are a level 2 approver the orders will be lost.

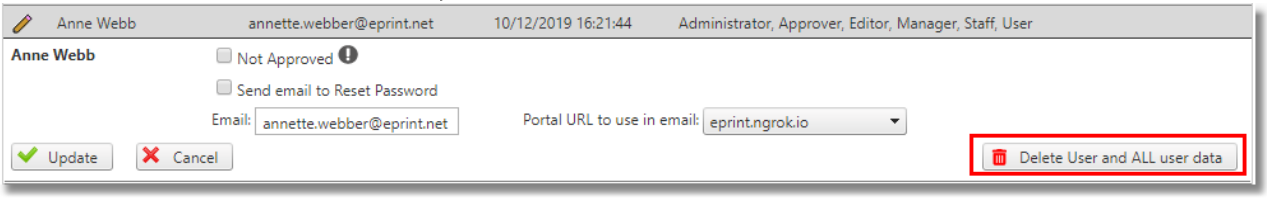
To remove a selected user:

1. Log in with **Administrator** rights and go to **Admin**.

2. In the Users section click **Users**.



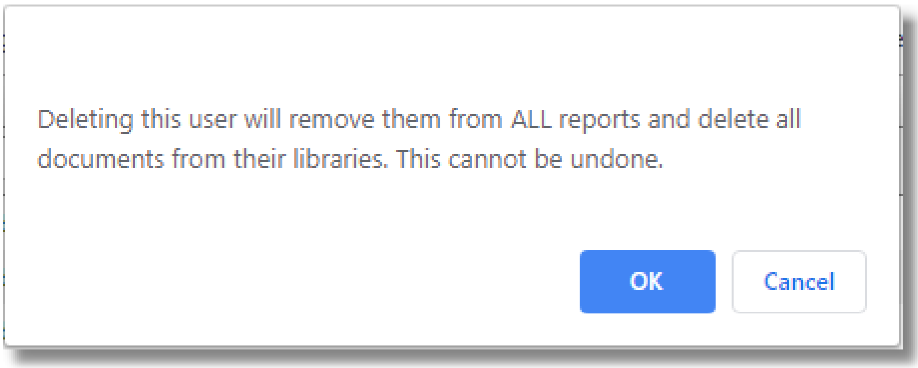
3. Select the user in the list. In the example Anne Webb has been selected.



   1. Click 

.

   2. You will be asked to confirm that you want to delete all the selected users. Click **OK** to continue with the deletion.



4. The selected user is deleted.

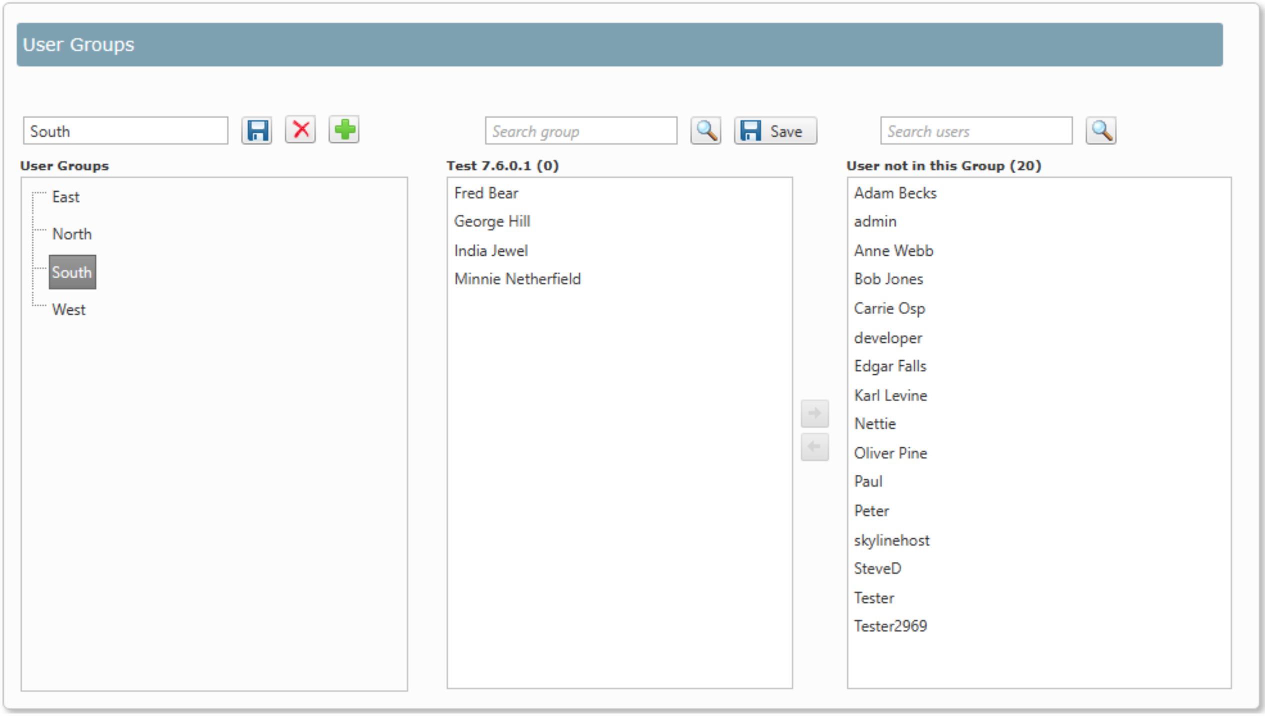
Creating User Groups

Groups can be created and then users can be added to the group. Currently user groups are only used with Skyline Forms.

To create a User Group:

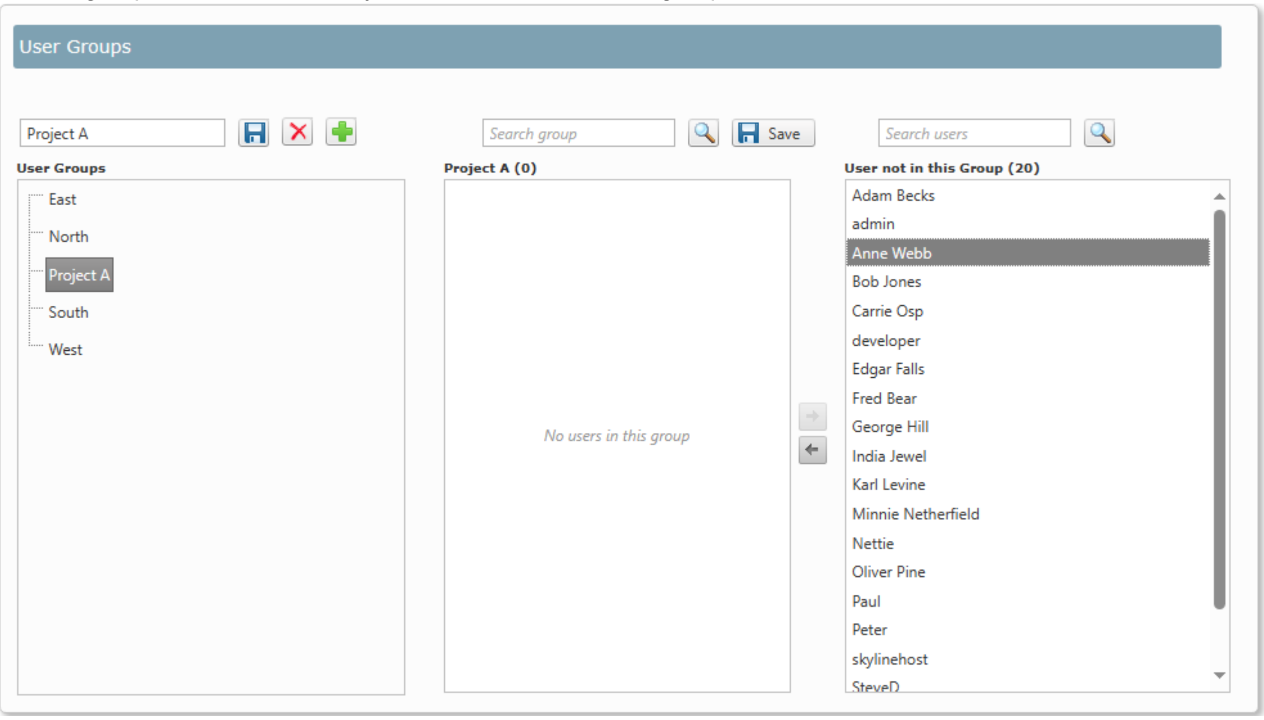
1. Log in with Administrator rights and go to **Admin**.
2. In the **Users** section click **User Groups**.

3. The User Group Window opens.



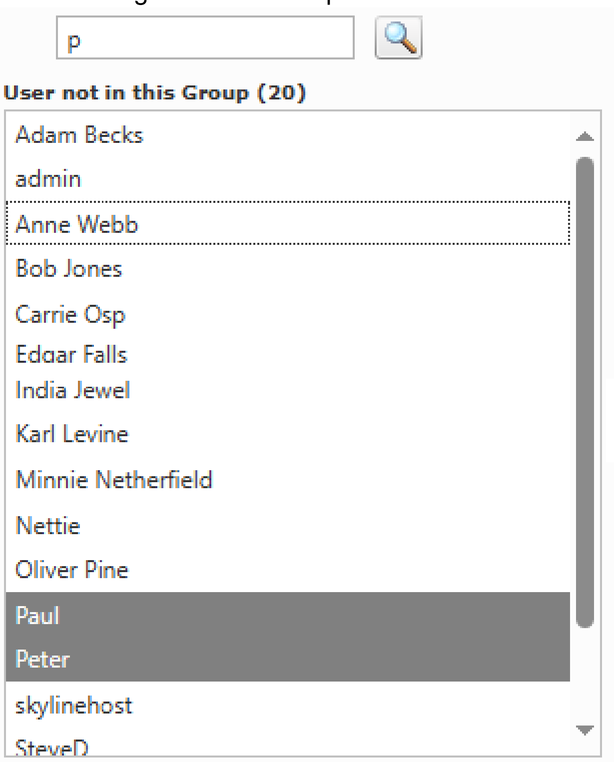
1) Enter a new group name then click to add the name. Add as many groups as you require. The groups will be automatically listed alphabetically.

4. Once a group has been created you can add users to the group.



1) Select the group that you want to add users into. Then select the user in the **User not in this Group** list and click . The user will be added to the group.

- Users can be added to more than one group.
- If you have a lot of users use search to highlight users that start with a specified lower case search string. See the example below.



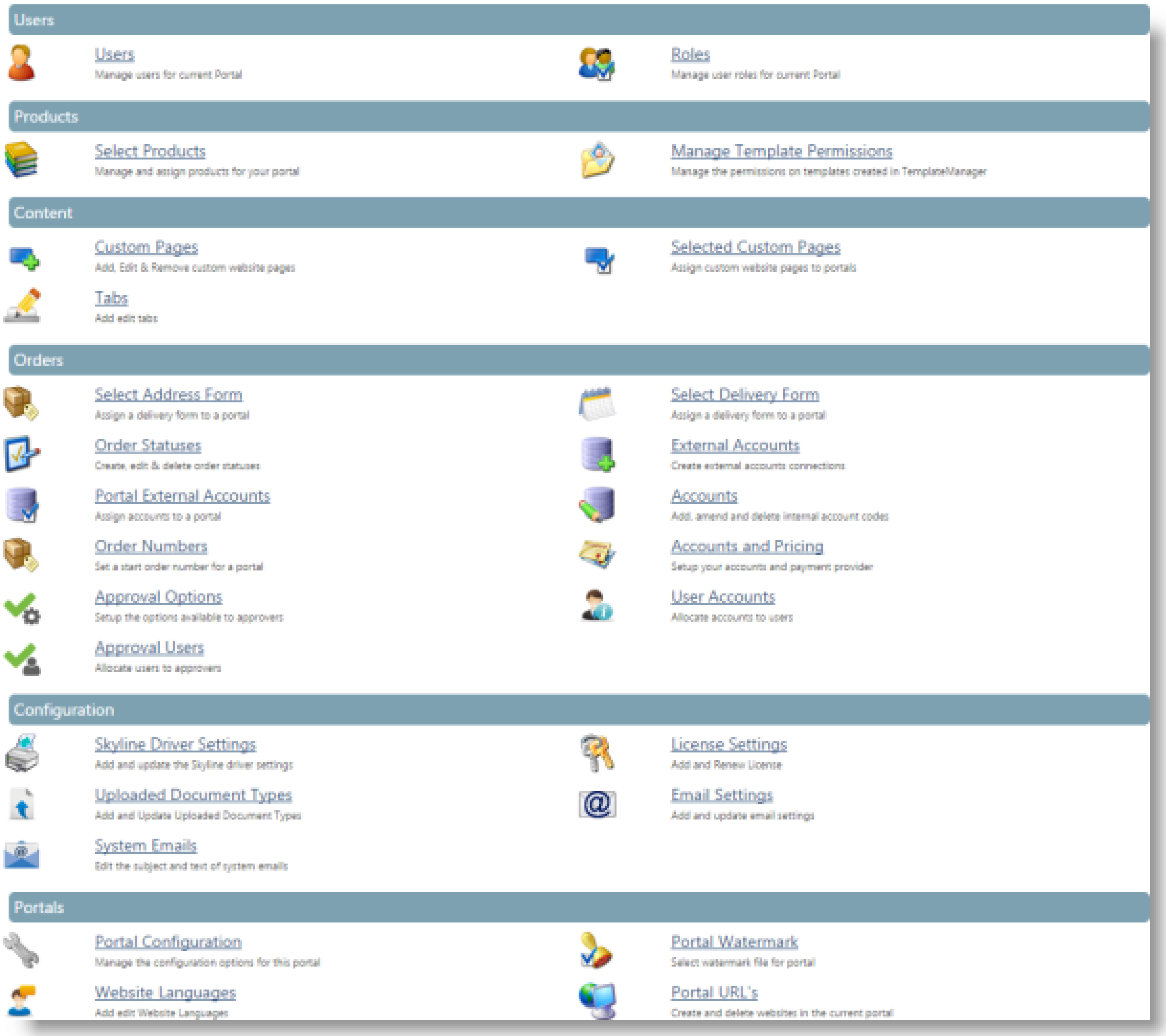
- Click  to save the users to the group.

User Roles

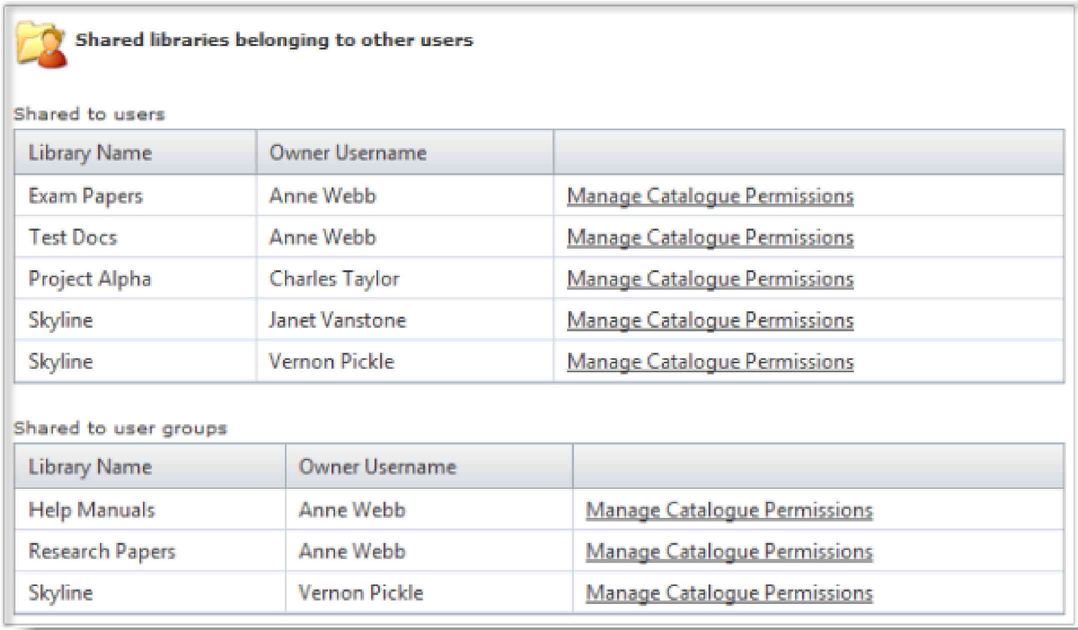
Each user has defined administrative rights, limitations and capabilities. Skyline has six different portal User Roles and each user can be assigned multiple roles. By default every new user is given the role User. The available roles are Administrator 21, Editor 23, Manager 22, Approver 23, Staff 23 and User 22.

There are three main portal roles:

1. **Administrator**
   The role gives access to the Admin page within a Skyline portal. An administrator can configure and administer capabilities of individual Skyline portals. They have full control over the current portal and are able to manage users and products, configure the user interface and portal configuration controls using the Admin link on the website.



Administrators are also able to manage shared libraries from their own library page.


Shared libraries belonging to other users

Shared to users

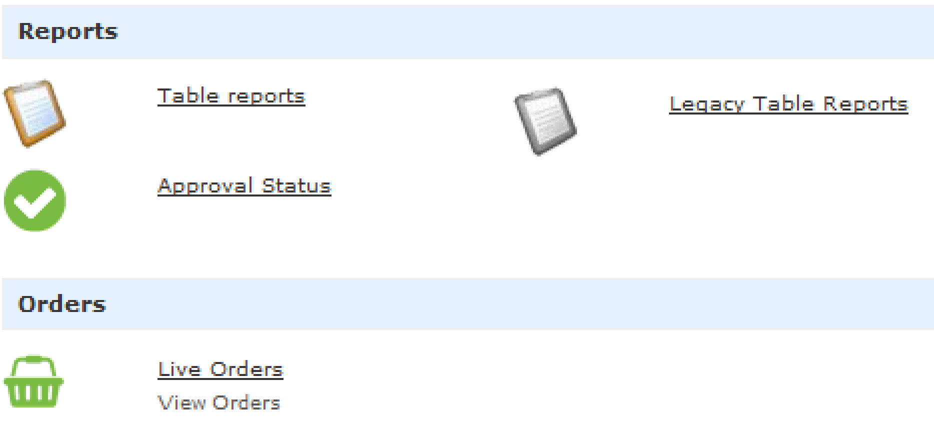
Library Name	Owner Username	
Exam Papers	Anne Webb	Manage Catalogue Permissions
Test Docs	Anne Webb	Manage Catalogue Permissions
Project Alpha	Charles Taylor	Manage Catalogue Permissions
Skyline	Janet Vanstone	Manage Catalogue Permissions
Skyline	Vernon Pickle	Manage Catalogue Permissions

Shared to user groups

Library Name	Owner Username	
Help Manuals	Anne Webb	Manage Catalogue Permissions
Research Papers	Anne Webb	Manage Catalogue Permissions
Skyline	Vernon Pickle	Manage Catalogue Permissions

Additionally the administrator can download and use both the ProductManager and CostManager.

2. **Manager**
The role provides access to the Management page within a Skyline portal. The Manager role also enables a user to download and install PrintStation, ProductManager & CostManager. They will then be able to create & edit products using ProductManager and create & edit pricing using CostManager. They are only able to make changes to pricing and products to the current portal. If global products are being used they will not have access to ProductManager or CostManager.

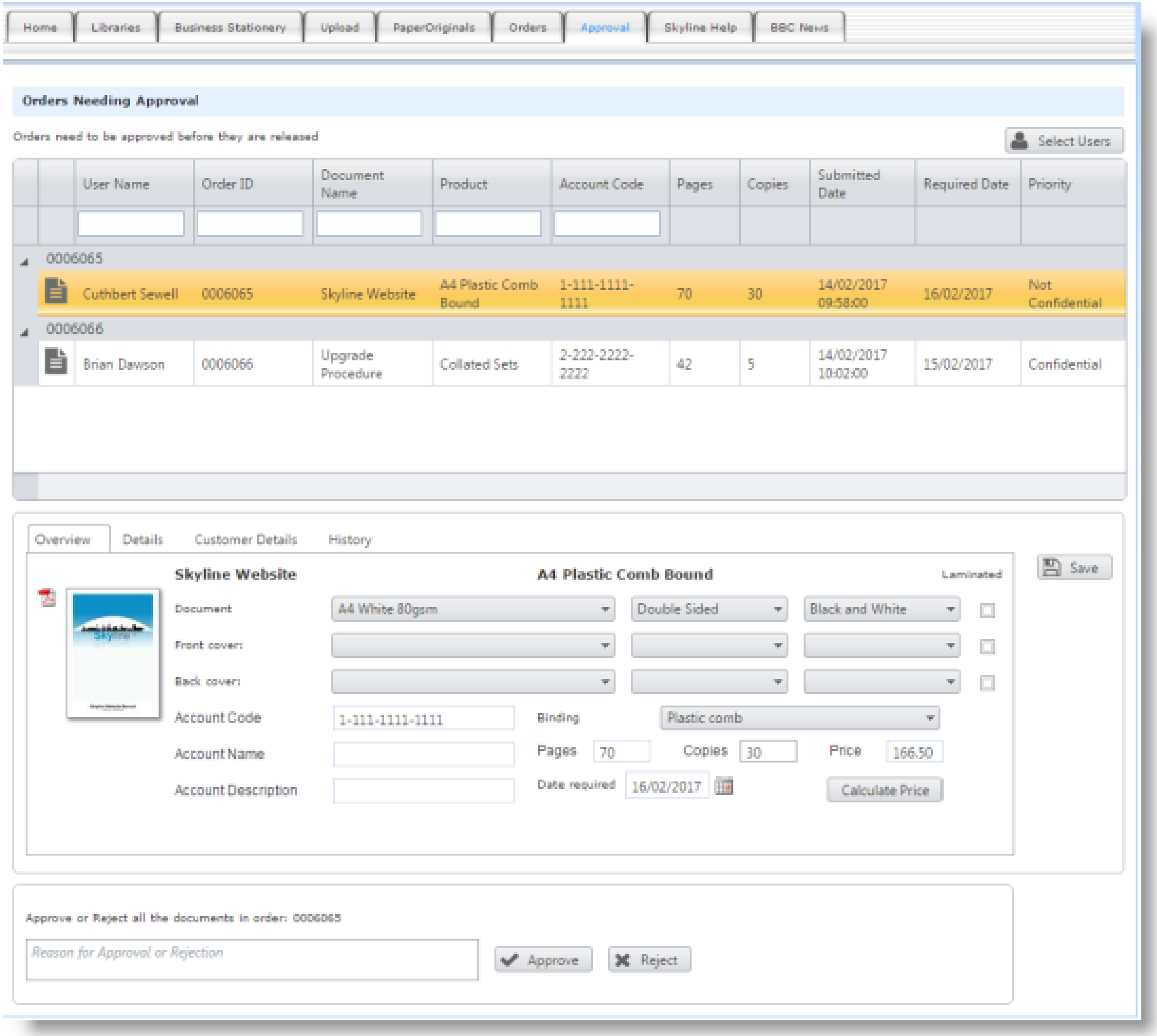


3. **User**
Whenever a Skyline account is created the basic role is automatically assigned to the account. Everyone will have the role and will be able to use the website to submit documents and create & share document libraries. They are also able to download Skyline drivers.

There are four specialised roles which can be assigned to individuals who have special areas of responsibility.

1. **Staff**
   Anyone who is required to log in to a Skyline PrintStation to manage incoming jobs, amend requests, preview documents, keep the customer updated and direct work to output devices requires the role of Staff.

2. **Approver**
   Users who will be approving jobs need to be added to the role Approver. When a user is made an approver, they will not see the Approval tab until they log in again. Once they have logged in again they will be able to view the approval page whether there are any orders to approve or not.



3. **Editor**
   Has access to the Edit function within a Skyline portal. An Editor can change the look and feel of a Skyline portal by changing the wording on a page as well as adding other images. For example the Home page can be changed to share relevant information to all users. They are also able to show an external Web Page on the portal.

4. **Host**
   The **Host** role is assigned to a specific user when Skyline is initially installed and has advanced access to functionality over that of an Administrator. A Host has top level control to globally configure and administer all capabilities of all Skyline portals, or for selected Skyline portals from the primary Skyline portal. A user can only be assigned the role of Host by someone logged in with host privileges.

Assigning User Roles

Each user can have roles assigned allowing them to access and manage areas of Skyline.

If users log in using their corporate user name and password (LDAP authentication) they are automatically added the first time that they log in to Skyline. If a user does not appear in the list they need to log in to Skyline using their corporate name and password before they can be assigned to any roles.

To assign roles for a user:

1. Log in with Administrator rights and go to **Admin**.

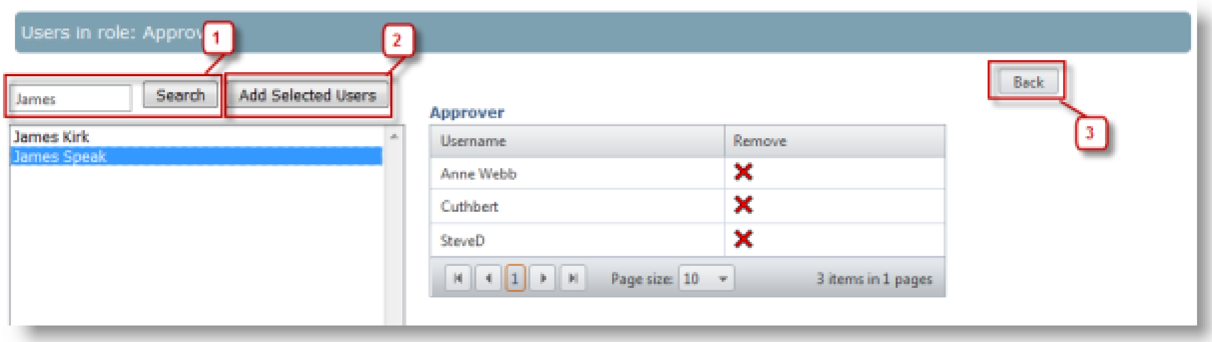
2. In the Users section click **Roles**.

3. A list of all the available roles is shown.

Roles	
Administrator	Manage Users
Approver	Manage Users
Editor	Manage Users
Manager	Manage Users
Staff	Manage Users
User	Manage Users

   1. Click **Manage Users** next to the role that the user is to be added into.

4. The user needs to be selected and then added to the user role.



   1. If you can not see the user's name in the list, enter part of the name in the Staff field and click **Search**. All names that contain your entry will be listed.

   2. Select the user and then click **Add Selected Users** to assign the role to the selected user. The user is added to the list of users that have been assigned the selected role.

   3. Click **Back** to return to the list of roles where you can assign more user roles.

Removing User Roles

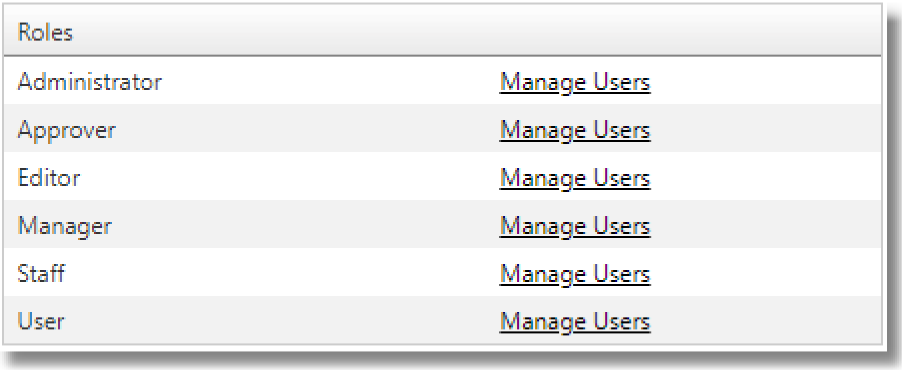
There may be occasions that you will need to amend the roles that users are assigned. For more information on suspending user accounts see Suspending Users 17.

To remove roles from a user:

1. Log in with Administrator rights and go to **Admin**.

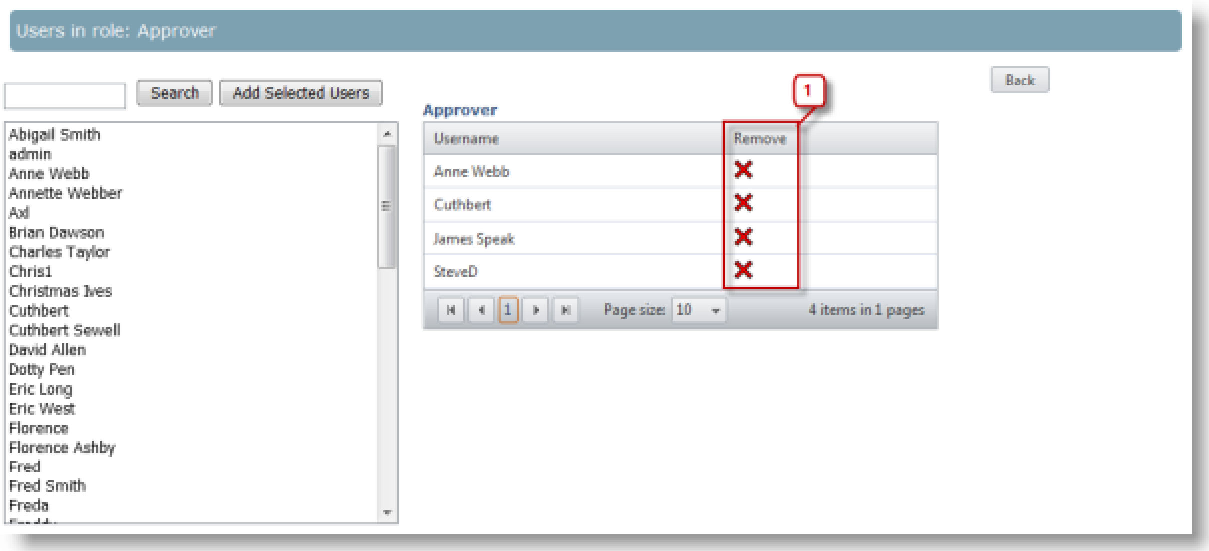
2. In the Users section click **Roles**.

3. A list of all the Roles available is shown.



   1. Click **Manage Users** next to the role that the user is to be removed from.

4. The user needs to be removed from the user role.



   1. Click the ❌ next to the user that you want to remove from the role.

Creating Login Options

By default Skyline is set up for Database authentication where user names and passwords are stored in the database called SkylineMembership. There are several ways that users can be added to the database.

- Users can add themselves to this database if the option Register as New User 29 is enabled on the log in page. If required the registration process can be configured so that user's need to be approved after registration 30 to activate their account.
- User accounts can be created 24 by a Skyline administrator.
- Users log in to Skyline with their existing corporate user name and password 56.

When users log in you can control the options that are available to them. These include:

1. By default an email address has to be entered when a new user self registers or an administrator creates a new user. If you do not want to force the entry of an email address the option can be changed. See the section called email address required 35 for more details.
2. When a user logs in you can choose whether they can select the option that their log in details are remembered the next time that they log in. If the users have dedicated PC's you may wish their log in details to be remembered automatically. The remember me next time option 38 can be configured to be automatically selected, though the user can deselect the option when they log in. If you do not want to give the user the ability to select the option you can hide the remember me option 36.
3. By default users will be able to see the forgotten password link when they attempt to log in. If you do not want your users to be able to retrieve a forgotten password via the log in page, you can remove the link 44.

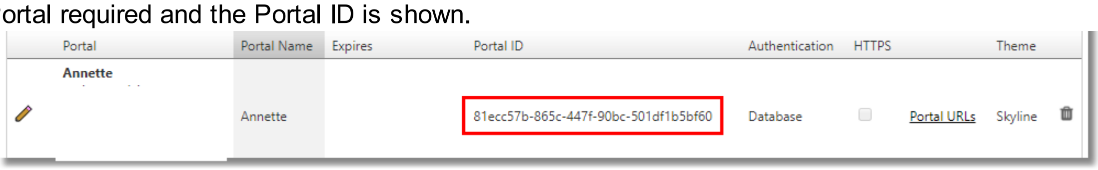
Adding a Website Landing Page

You can add a website landing page to the Skyline website to give users an overview of the services that you are able to provide them. Landing pages can be internal on your Skyline Server or be an external page. You can add your own landing page but there is a default one included with the software. Differently styled landing pages can be added for each of the portals that you have. When users view the Landing page they are able to use the Login link to open the Skyline website.

Example of the Default Landing Page.

Internal web pages are saved on the Skyline server in the ~/home/ folder. If you have more than one portal a folder with the Portal ID is created for each portal in the ~/home/ folder. When users enter their portal URL the corresponding portal folder is checked for a landing page. If the portal folder contains a file called index.html, the users of that portal are redirected to the portal specific pages inside their own home folder. If the portal specific home folder does not contain this file, then users are taken to the common /home/index file.

To view a portal ID log in with Host rights and go to Admin. In the **Portals** section click **Portal**. Find the Portal required and the Portal ID is shown.

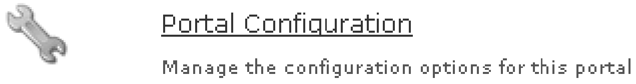


Portal ID of the Portal Annette is highlighted.

To add a landing page:

1. Log in with Administrator rights and go to **Admin**.

2. In the Portals section click **Portal Configuration**.



3. Find **New users - Redirect to external website** in the list.

4. Click to set this option as **True**

5. Click to save the setting.

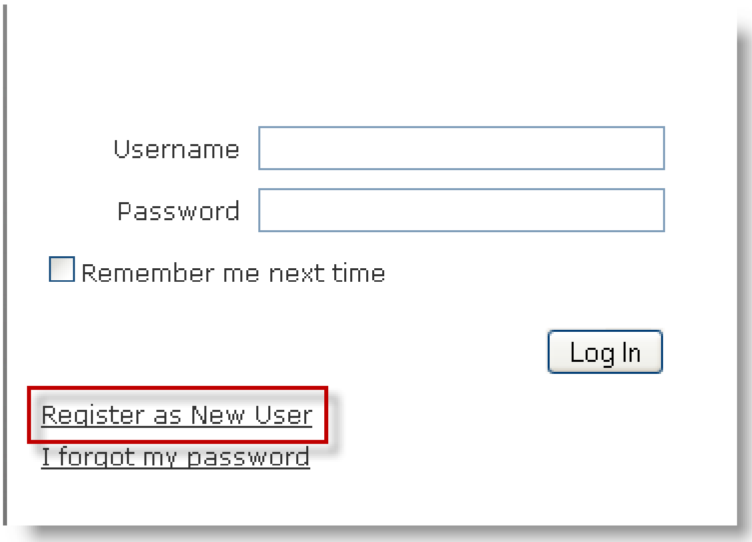
6. Find **New users - Redirection website URL** in the list.

7. Click to set the internal home pages in the Skyline website by setting this value to “~/home/index.html” or any external website URL.

8. Click to save the setting.

Self Registration

Users can add themselves if the option Register as New User is enabled on the log in page. They will be registered with the role of User 21 . By default this option is enabled. If you remove this option user accounts can be created by a Skyline administrator.

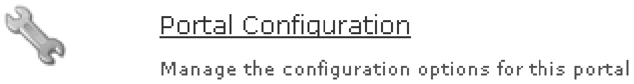


Example Login Window

To enable or disable the Register as New User link:

1. Log in with Administrator rights and go to **Admin**.

2. In the Portals section click **Portal Configuration**.



3. Find **Registration - Show Register new user** link in the list.

   - If the option is set as **True** users will be able to create their own accounts when they log in for the first time.
   - In order to stop self registration this link can be removed from the in page by setting the option to **False**.

4. To amend this option click .

5. Click to save the setting.

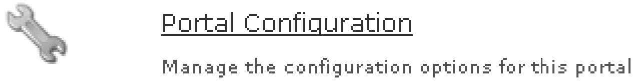
To configure **Registration - Show Register new user link** or **Registration - New Users Must Be Approved** for all portals associated with Skyline use the default configuration option. These options are only available when you are logged in with Host privileges. Any changes to the default configuration will affect **ALL** portals associated with Skyline.

Approving Registration

The system can be configured to require a user to be approved before they can use Skyline after they have registered.

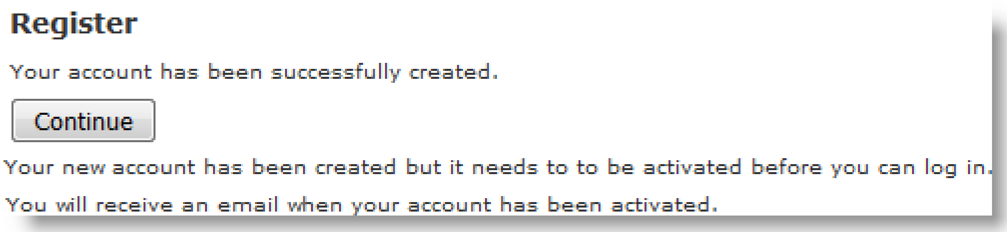
To enable or disable Registration approval:

1. Log in with Administrator rights and go to **Admin**.
2. In the Portals section click **Portal Configuration**.



3. Find **Registration - New Users Must Be Approved** in the list.
    - If the option is set as **True** users will have to be approved after registration then they will be able to create their own accounts when they log in for the first time.
    - Users will be able to create their own accounts when they log in for the first time without being approved when the option is **False**.
4. To amend this option click .
5. Click to save the setting.

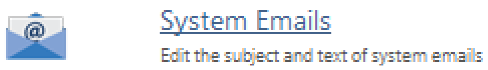
When a new user registers they will see on screen that their account needs to be activated before they are able to log in.



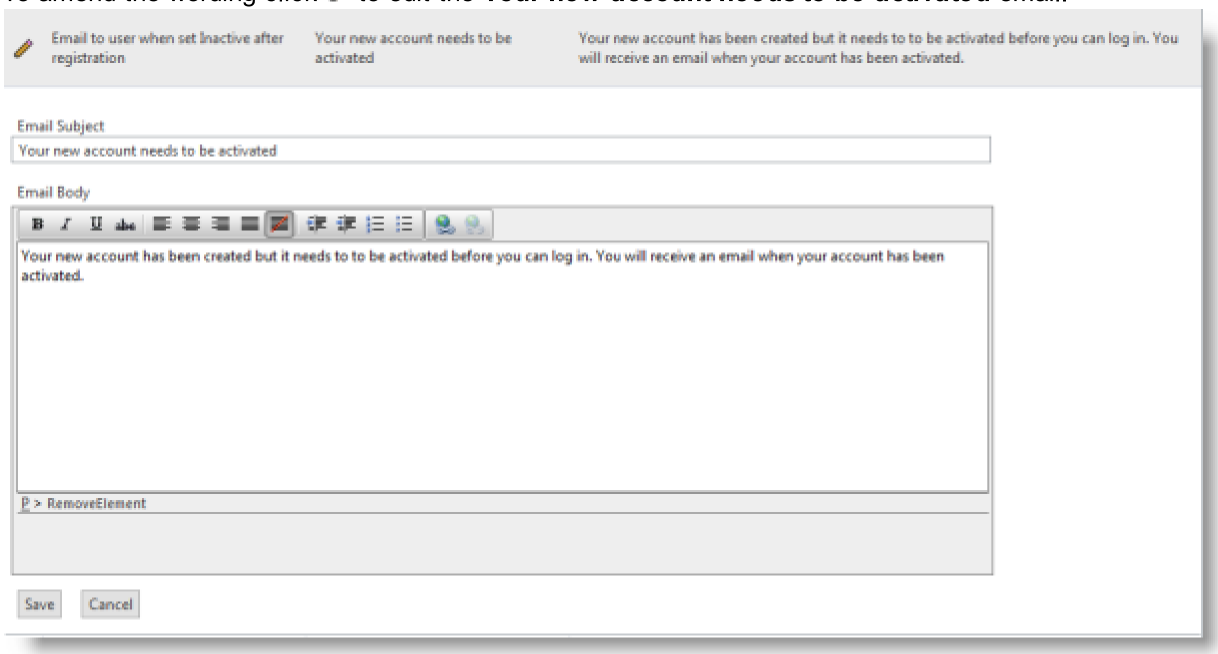
The new user will also receive an email. The wording shown on the screen is the same as in the email.

To amend the email:

1. Log in with Administrator rights and go to **Admin**. In the Configuration section click **System Emails**.



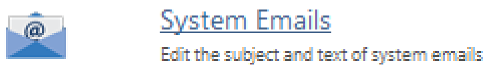
2. To amend the wording click to edit the **Your new account needs to be activated** email.



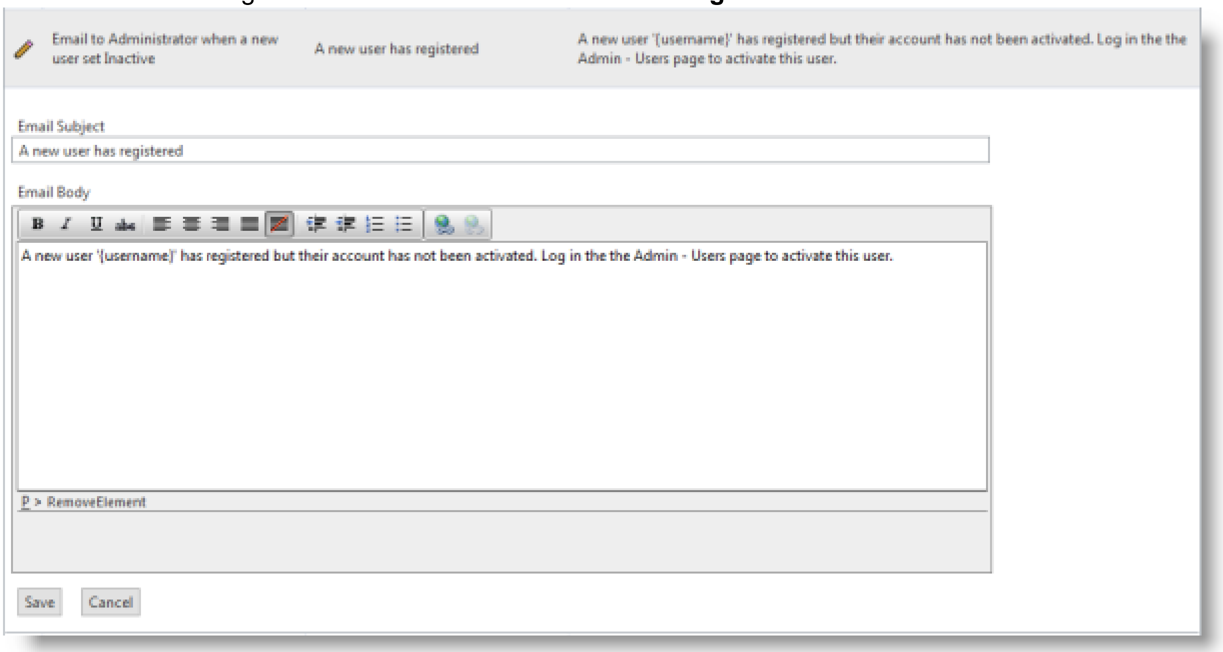
You are notified by email that a new user has registered and needs to be approved if you have the role of Administrator. The wording of the email sent can be changed

To amend the email:

3. Log in with Administrator rights and go to **Admin**. In the Configuration section click **System Emails**.



4. To amend the wording click to edit the **A new user has registered** email.

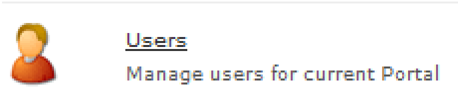


The icon indicates that the user's account is not active. To make the account active approval has to be granted by removing the selection of Not Approved.

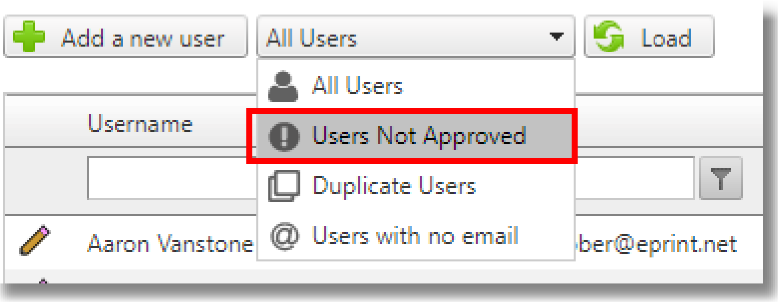
To activate a new account:

1. Log in with Administrator rights and go to **Admin**.

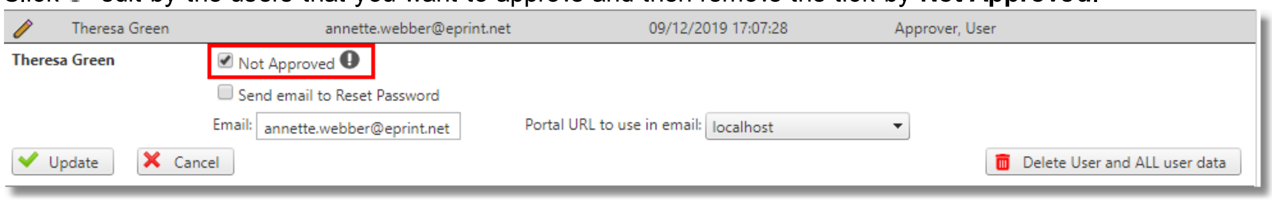
2. In the Users section click **Users**.



3. Load all users that are not approved.



4. Click edit by the users that you want to approve and then remove the tick by **Not Approved**.

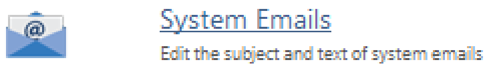


5. Click **Update**. An email will be sent to the new user stating that their Skyline account has been activated.

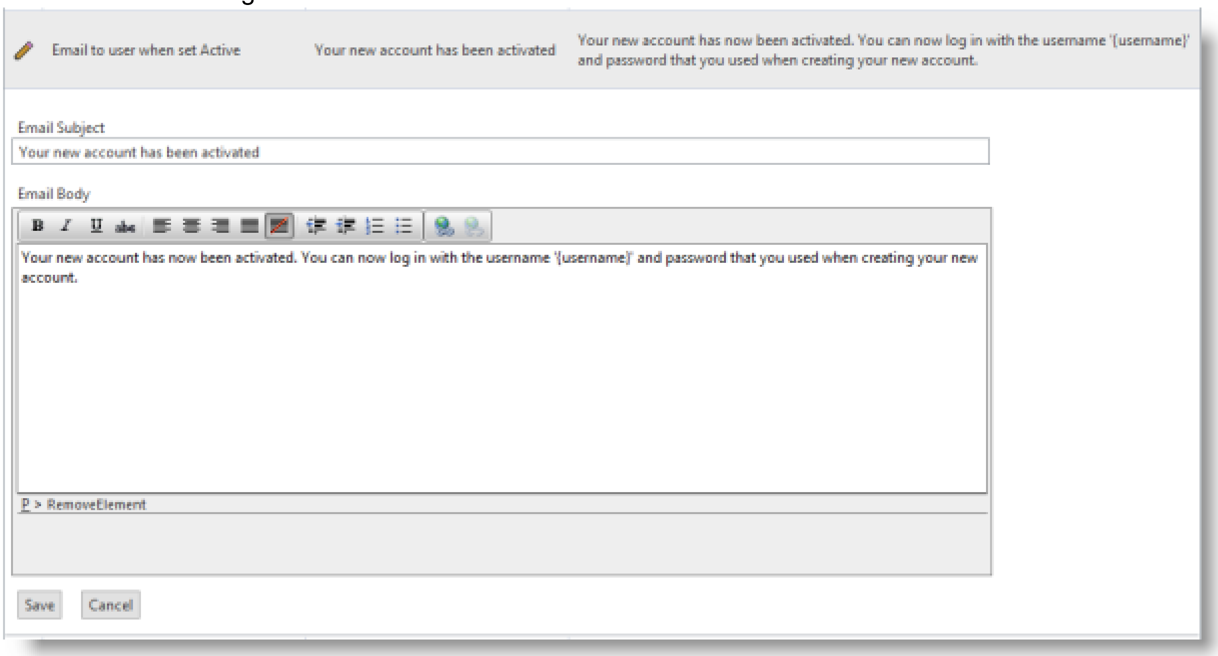
The wording of the email sent to notify new users that their account has been activated can be changed.

To amend the email:

1. Log in with Administrator rights and go to Admin. In the configuration section click system Emails.



2. To amend the wording click to edit the **Your new account has been activated** email.



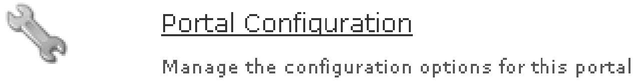
Email Address Required

By default an email address has to be entered when a new user self registers[29] or an administrator creates a new user[10]. If you do not want to force the entry of an email address the option can be changed.

To change the email address requirement:

1. Log in with Administrator rights and go to **Admin**.

2. In the Portals section click **Portal Configuration**.



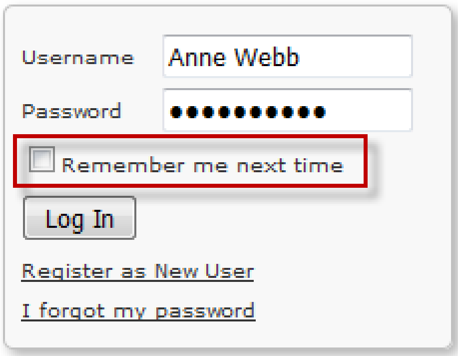
3. Find **Authentication - Require Email** in the list.
   - If the option is set as **True** an email address will have to be entered when the new user account is created.
   - This email requirement can be removed by setting the option to **False**.
4. To amend this option click .
5. Click to save the setting.

To configure **Authentication - Require Email** for all portals associated with Skyline use the default configuration option. These options are only available when you are logged in with Host privileges. Any changes to the default configuration will affect **ALL** portals associated with Skyline.

Remember Me Option Visible

When a user logs into on a Skyline portal they can by default choose to select the option Remember me next time. However this link can be removed from the log in page.

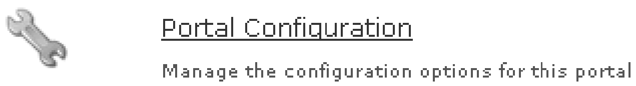
Note: If the option to automatically remember the log in details 38 is selected, the username and password will be remembered the next time that the user opens the Skyline portal even though the link is not visible.



To remove the option Remember me next time from the log in screen:

1. Log in with Administrator rights and go to **Admin**.

2. In the **Portals** section click **Portal Configuration**.



3. Find **Authentication - Remember Me Visible** in the list.
   - If the option is set as **True** the option Remember me next time will be visible when the user logs in.
   - The option Remember me next time will not be available by setting the option to **False**.
4. To amend this option click .
5. Click to save the setting.

To configure **Authentication - Remember Me Visible** for all portals associated with Skyline use the default configuration option. These options are only available when you are logged in with Host privileges. Any changes to the default configuration will affect **ALL** portals associated with Skyline.

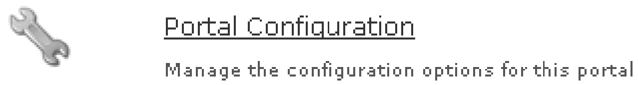
Setting the Login Expiry Cookie Time

You can control how long the Login information is stored when a user logs in and has selected to have their log in details remembered the next time that they log in. The username and password are saved in encrypted form in the login cookie but will expire after the set number of hours.

To set the login expiry cookie time:

1. Log in with Administrator rights and go to **Admin**.

2. In the Portals section click **Portal Configuration**.



3. Find **Authentication - Login Cookie Expiry (hours)** in the list.

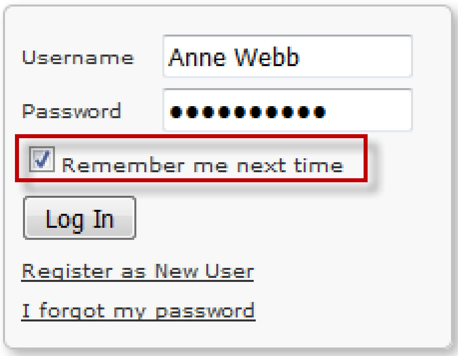
4. To amend this option click . Select the number of hours required from the list (1,2,4,8,24,48,72,168 or 720). **The default setting is for 168 hours (7 days)**.

5. Click to save the setting.

To configure **Authentication - Remember Me Checked** for all portals associated with Skyline use the default configuration option. These options are only available when you are logged in with Host privileges. Any changes to the default configuration will affect **ALL** portals associated with Skyline.

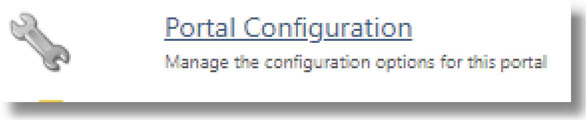
Automatically Remember Login Details

When a user logs in you can choose whether they can select the option that their log in details are remembered the next time that they log in. If the users have dedicated PC's you may wish their log in details to be remembered automatically. The Remember Me Next Time option can be set to be automatically selected, though the user can deselect the option when they log in. If you do not want to give the user the ability to select Remember Me Next Time you can hide the option 36 .



To automatically select the Remember me next time option:

1. Log in with Administrator rights and go to **Admin**.
2. In the Portals section click **Portal Configuration**.

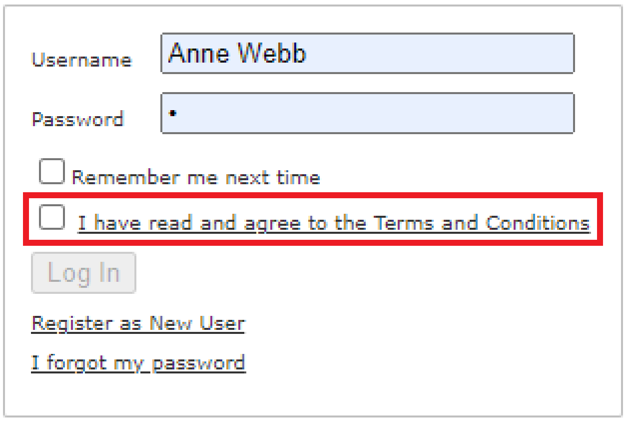


3. Find **Authentication - Remember Me Checked** in the list.
   - If the option is set as **True** an the option Remember me next time will be automatically selected when the user logs in.
   - The option Remember me next time will not be automatically selected by setting the option to **False**.
4. To amend this option click .
5. Click to save the setting.

To configure **Authentication - Remember Me Checked** for all portals associated with Skyline use the default configuration option. These options are only available when you are logged in with Host privileges. Any changes to the default configuration will affect **ALL** portals associated with Skyline.

Adding a Terms & Conditions Requirement

You can add an option to prevent users being able to login until they have accepted your terms and conditions. There is a link to the terms and conditions on the login page as well as a tick box to confirm that they have read the terms and conditions. Log In is not available until the user confirms that they agree to the terms and conditions.



Example of a Login window with the Terms and Conditions option

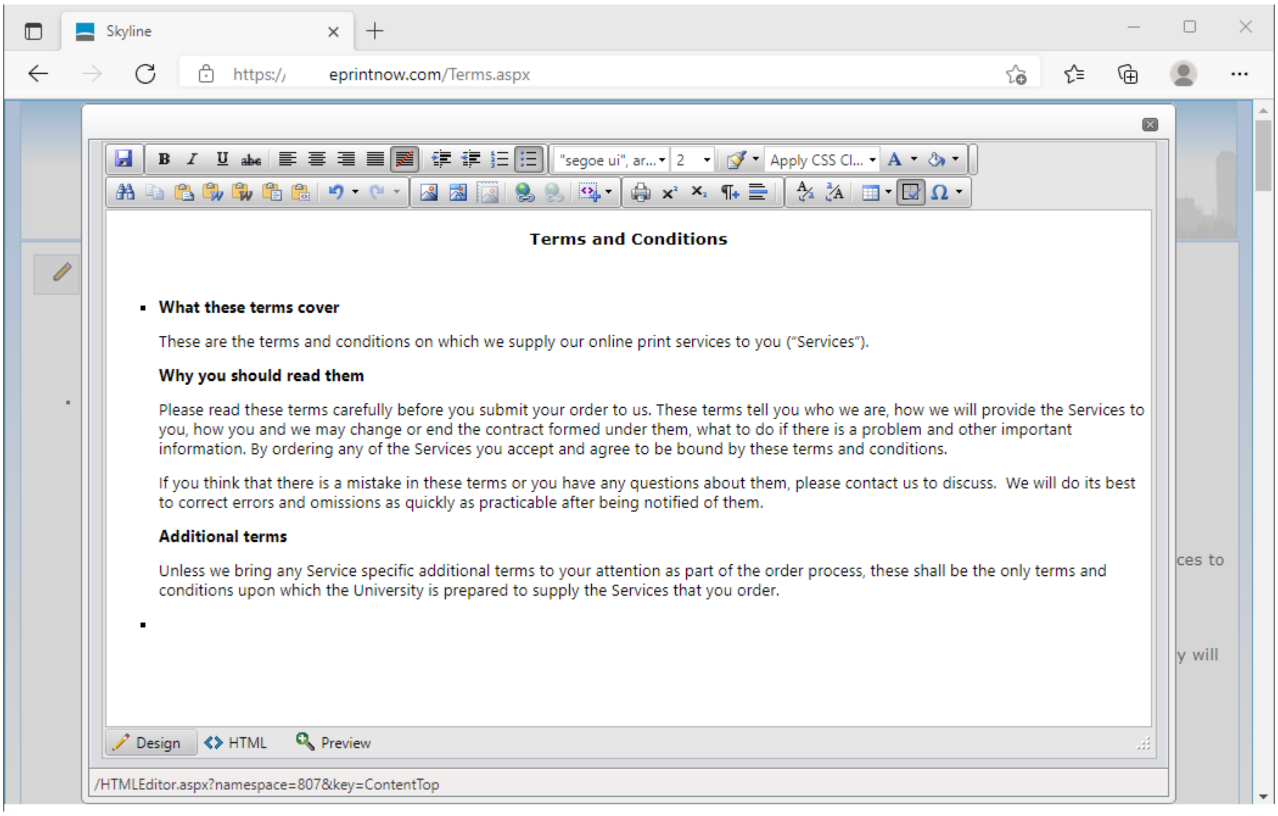
To add the Terms and Conditions option:

1. Login to Skyline with Editor21 rights as well as Administrator rights.

2. Click the **Edit link** to turn Edit on.

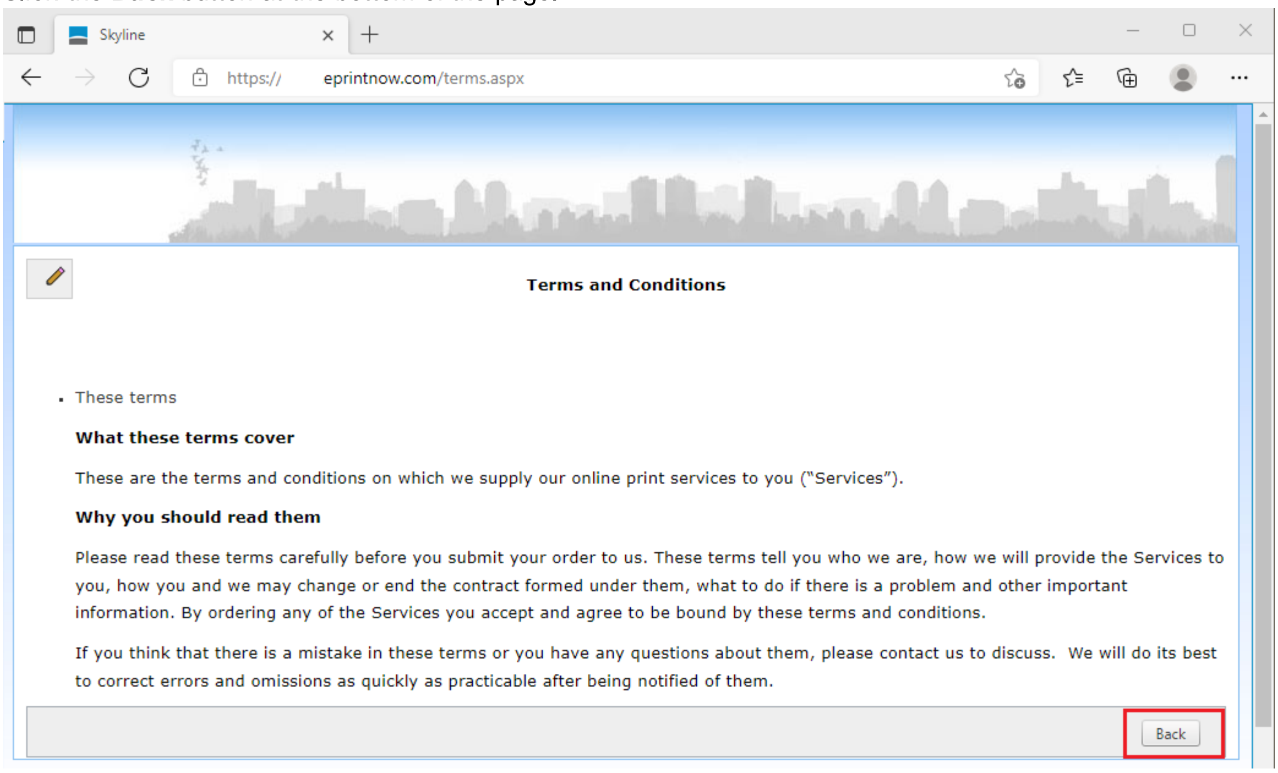
3. To open the Terms web page you need to edit the URL in the address bar from the current page name to the page name **Terms**.
For example, if you are on the home page change 'https://[Your Skyline]/**default.aspx'** to https://[Your Skyline]/**Terms.aspx**. Press enter to view the web page.

4. Click the **Edit** button to open the Editor. You can enter text directly into the editor or copy and past the text from a different source.



5. Click **Save** to save your changes.

6. Click the **Back** button at the bottom of the page.



7. You will be logged out in order to refresh the whole session. Log back into Skyline.

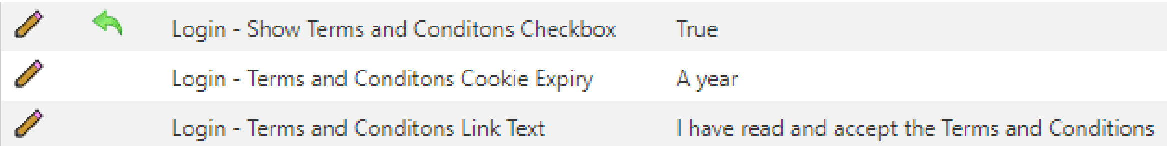
8. Click the **Edit** link to turn editing off.

9. Click the **Admin** Link.

10. In the Portals section click **Portal Configuration**.

11. Amend the following configurations:

   - Change the option **Login - Show Terms and Conditions Checkbox** to True.
   - Amend the option **Login - Terms and Conditions Cookie Expiry** if required.
   - Amend the option **Login - Terms and Conditions Link Text** if required.

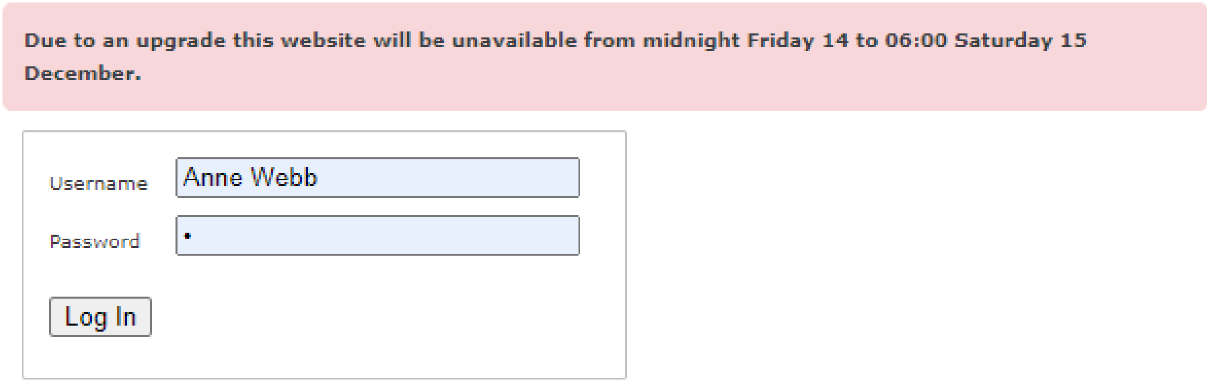


When users log into Skyline they will now need to accept the terms and conditions before they can continue. They will not need to do this every time they login as the cookie will remember their acceptance for the time period that was specified in the 'Login - Terms and Conditions Cookie Expiry' option.

Adding Login Messages

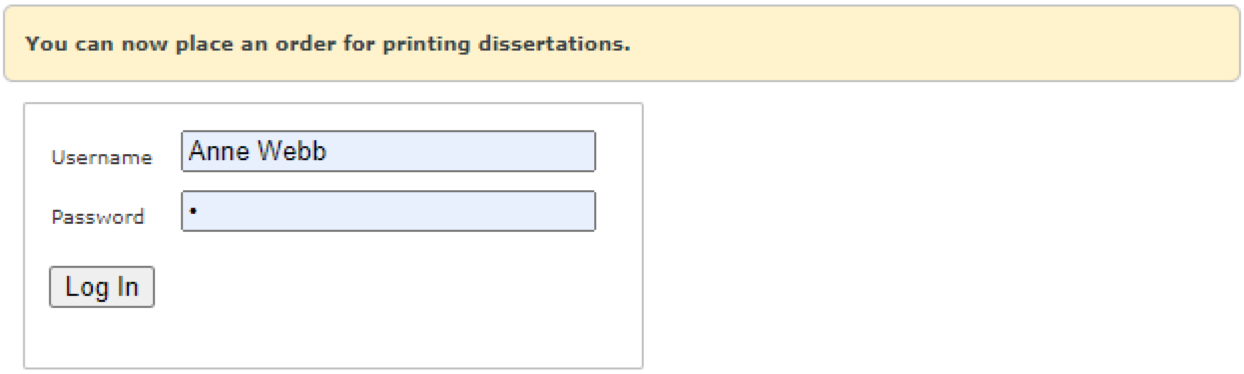
Messages that are shown on the Login page and Home can be added to specific portals or to all portals.

A message to users to notify them of an upgrade which will mean that the service will be unavailable could be added to all portals. The message is displayed on both the Login page and Home page.



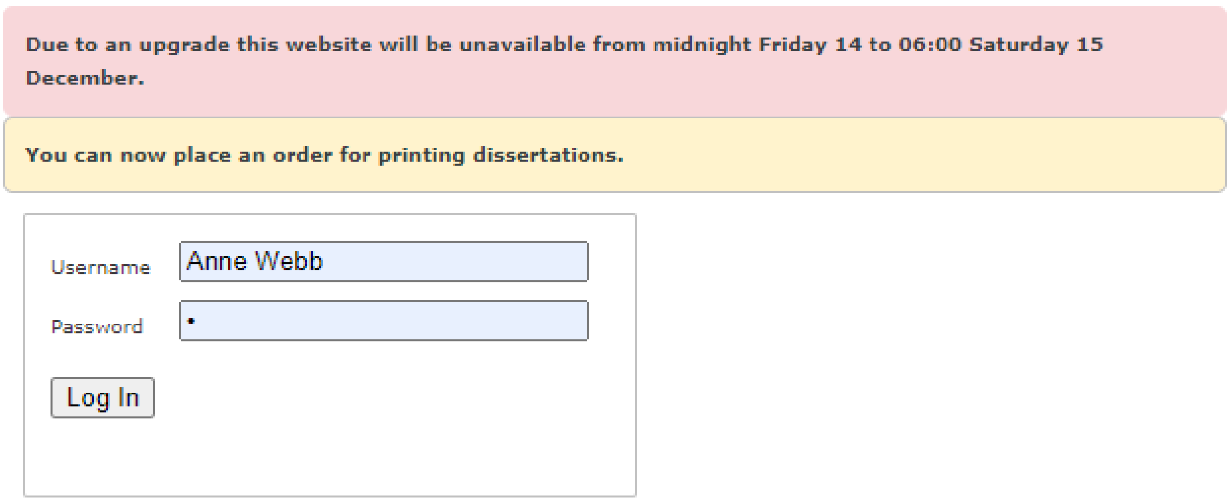
Example of a message which is displayed on all Portals

A portal specific message could be used to let people know about a new product being available or a change to the terms and conditions.



Example of a message which is displayed on a specific Portal

Both portal specific and all portal messages will be displayed at the same time.



Example of both portal specific and all portal messages.

To add a Portal Specific message:

1. Log in with Administrator rights and go to **Admin**.
2. In the Portals section click **Portal Configuration**
3. Amend the following configurations:
    - Enter your text in the option **Login - Message to Users**
    - Change to option **Login - Show Message on Login and Home pages** to **True**

Login - Message to users	You can now place an order for printing dissertations.
Login - Show Message on Login and Home pages	True

When users log into Skyline they will see the message on the login window and after they have logged in on the home page.

To add a message to all portals:

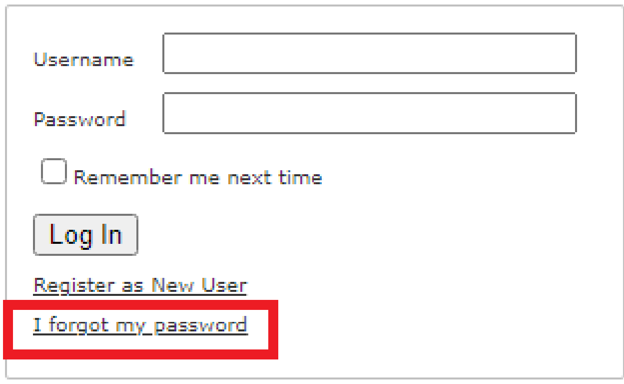
1. Log in with Host rights and go to **Admin**.
2. In the Portals section click **Default Configuration**
3. Amend the following configurations:
    - Enter your text in the option **Login - Host Message to users**
    - Select an expiry date for the message using the option **Login - Host Message expiry date** if required.
    - Change the option **Login - Show Host message** to **True**

Login - Host Message to users	Due to an upgrade this website will be unavailable from midnight Friday 14 to 06:00 Saturday 15 December.
Login - Host Message expiry date	2021-12-16T00:00:00
Login - Show Host Message	True

When users log into Skyline they will see the message on the login window and after they have logged in on the home page.

Hiding the Forgotten Password Link

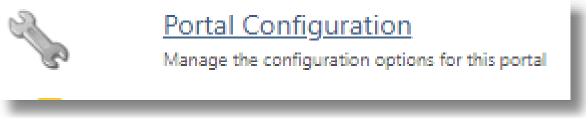
By default users will be able to see the forgotten password link when they attempt to log in. If you do not want your users to be able to retrieve a forgotten password via the log in page, you can remove the link.



To remove the forgotten password link from the log in page:

1. Log in with Administrator rights and go to **Admin**.

1. In the **Portals** section click **Portal Configuration**.



2. Find **Forgotten Password - Show Link** in the list.

- If the option is set as **True** the link "I forgot my password" will be visible when the user logs in.
- The link "I forgot my password" will not be available by setting the option to **False**.

3. To amend this option click .

4. Click to save the setting.

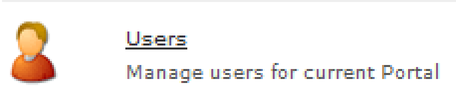
To configure **Forgotten Password - Show Link** for all portals associated with Skyline use the default configuration option. These options are only available when you are logged in with Host privileges. Any changes to the default configuration will affect **ALL** portals associated with Skyline.

Re-setting a Password

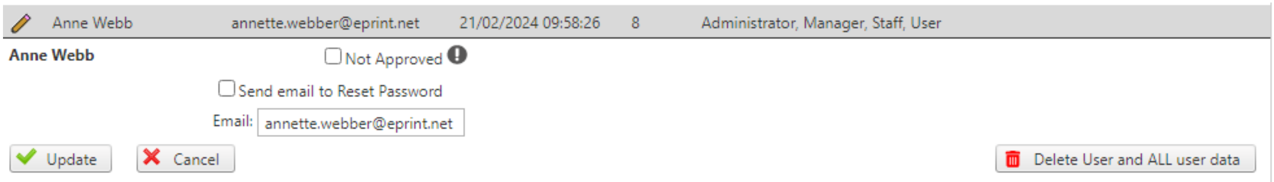
If users have forgotten their password you can re-set their log in. An email is generated to tell the users that they can create a new password.

To reset a user's password:

1. Log in with Administrator rights and go to **Admin**.
2. In the Users section click **Users**.

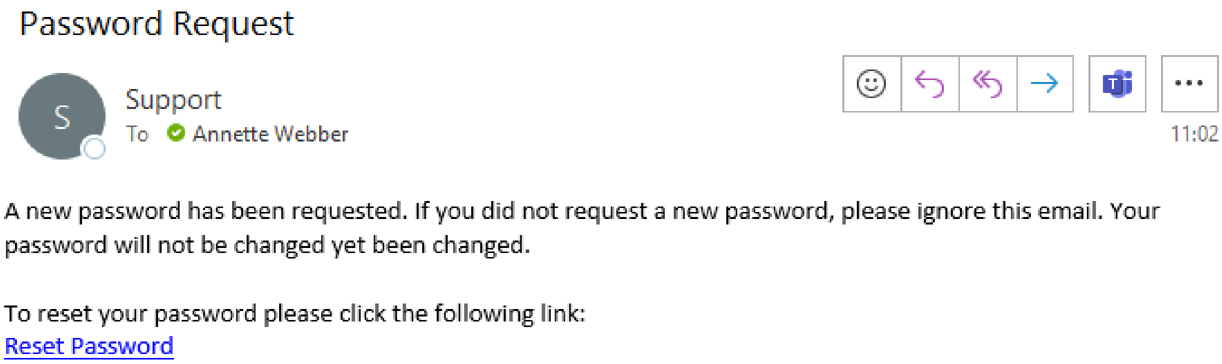


3. All the users are listed. Click next to the user's name to edit their details.
4. The user's details are shown.



   1. Select the option **Send email to Reset Password**.
   2. Click **Update**.

5. An email is sent to the user containing their new automatically generated password.



6. If the user clicks on the Reset Password link they will be able to enter a new password. When they click on the **Change Password** button they will be taken to their Login page and be able to login with their new password.

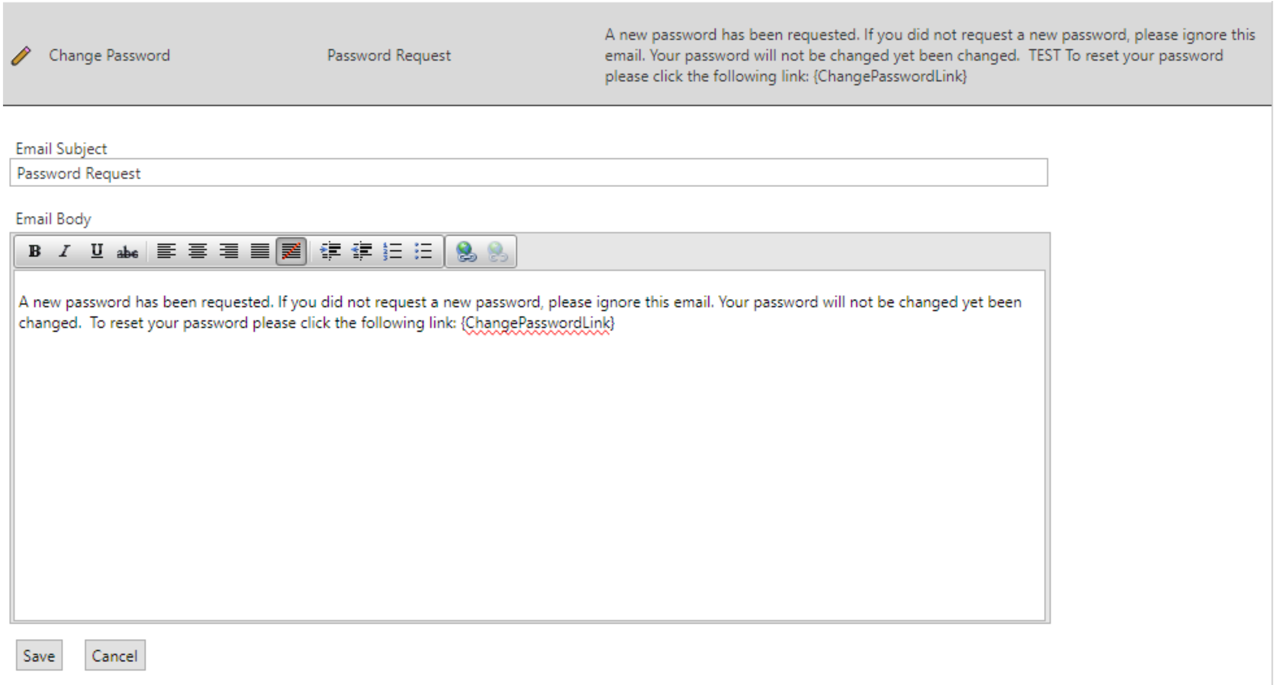
The wording of the Password Request email can be amended.

To amend the email:

1. Log in with Administrator rights and go to Admin. In the configuration section click **System Emails**.

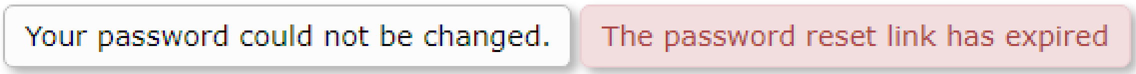
   System Emails
   Edit the subject and text of system emails

2. The wording in an email sent to a user when they request a new password can be amended. To amend the wording click to edit the **Password Request** email.



Password Reset Timeout

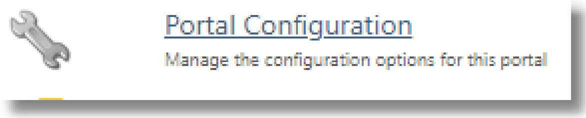
When a new password is requested an email is sent out containing a password reset link. The length of time that the link remains active can be set. If the link is clicked after the expiry time a message is displayed, see the example below.



To set the password reset timeout:

1. Log in with Administrator rights and go to **Admin**.

1. In the **Portals** section click **Portal Configuration**.



2. Find **Password Reset Token Timeout (minutes)** in the list.

3. To amend this option click and select the timeout required.

4. Click to save the setting.

To configure **Password Reset Token Timeout (minutes)** for all portals associated with Skyline use the default configuration option. These options are only available when you are logged in with Host privileges. Any changes to the default configuration will affect **ALL** portals associated with Skyline.

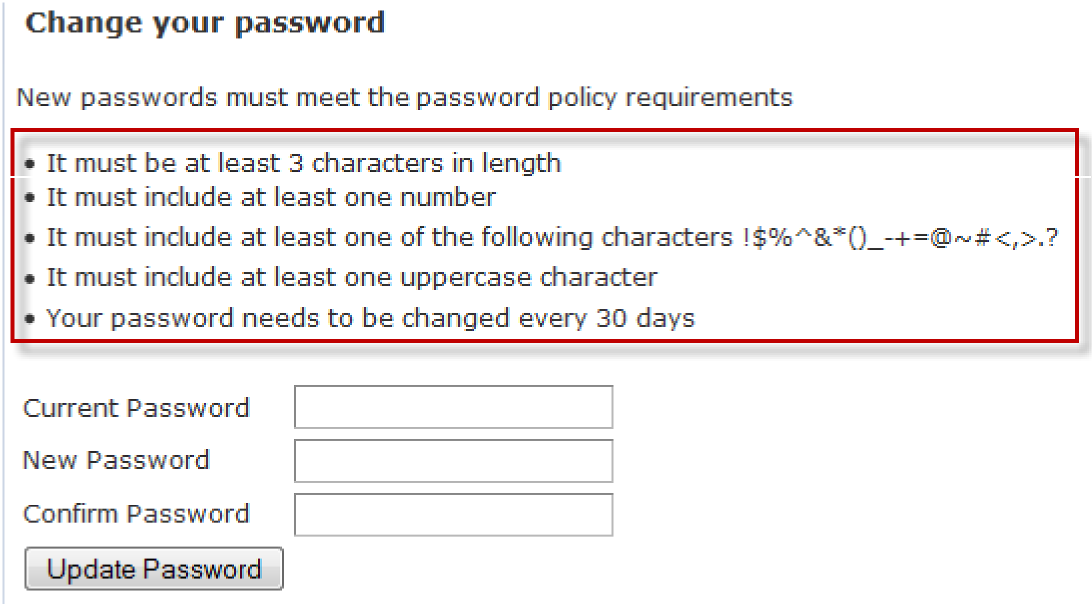
Setting Criteria for Passwords

You can set specific criteria that have to be met when changing a password used to log in to the Skyline website. By setting a strong password access to the Skyline system can be protected. You can specify how long the password will be valid for by setting a number of days until the password will expire 53. There is also a facility to enter a regular expression 54 to set password constraints.

Password criteria can be set so that when a password is changed it has to contain:

- a minimum number of characters 49
- numbers 50
- special characters 51
- upper-case characters 52.

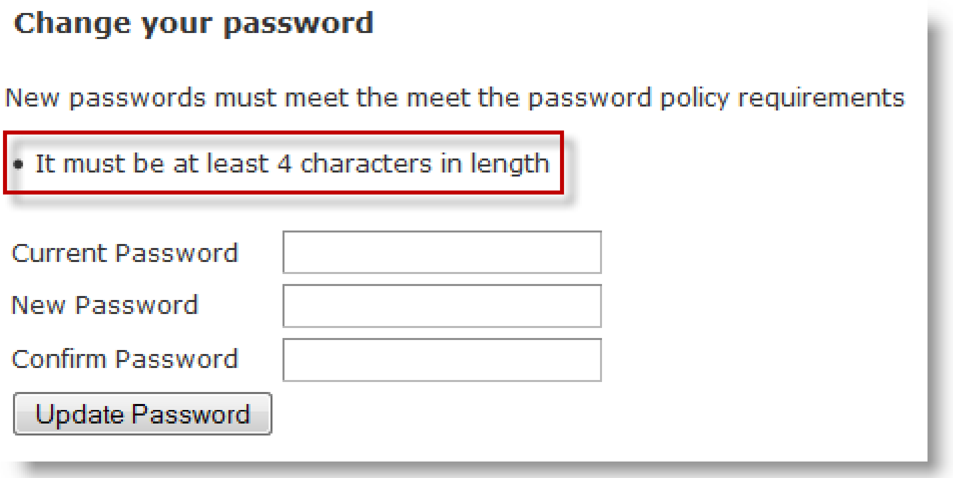
When password criteria are set the requirements are shown when a user changes their password. An example is shown below where there is a specified criteria for each of the options.



When a user is created the password criteria are not applied so care must be taken that any password supplied do comply with your password rule. When the user changes their password the rules are applied to their entry.

Setting a Minimum Password Length

You can specify that password must be of a minimum length. If the criteria has been set & a user tries to change their password but does not enter enough characters an error message will be displayed. The password will not have been changed.



To set a minimum password length:

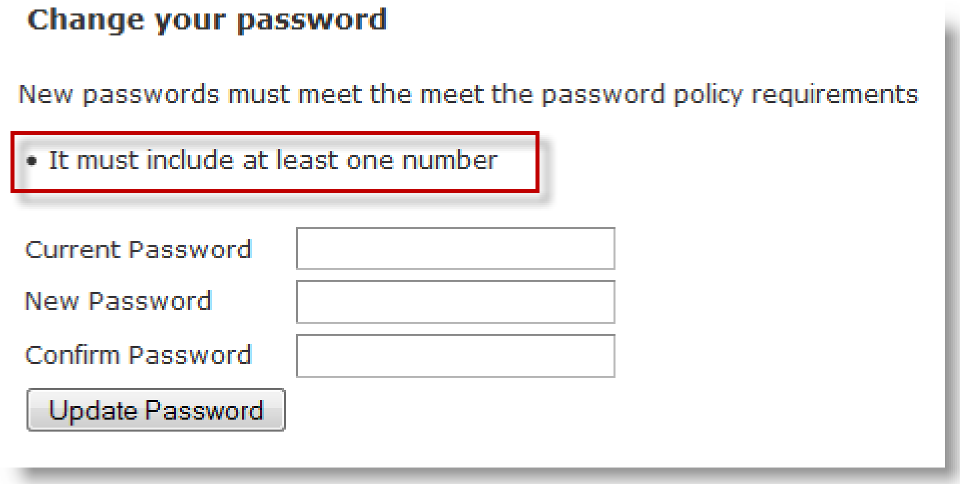
1. Log in with Administrator rights and go to Admin.
2. In the Portals section click Portal Configuration.

3. Find **Password Minimum Number of Characters**.
4. To select a value between 0 and 16 click . If 0 is selected then there is no minimum number of character required in the password.
5. Click  to save the setting.

To configure **Password Minimum Number of Characters** for all portals associated with Skyline use the default configuration option. These options are only available when you are logged in with Host privileges.

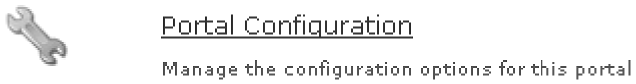
Password Must Contain Numbers

You can specify that password must contain numbers. If the criteria has been set & a user tries to change their password but enters a password that does not include any numbers an error message will be displayed. The password will not have been changed.



To set the criteria that a password must contain numbers:

1. Log in with Administrator rights and go to Admin.
2. In the Portals section click Portal Configuration.

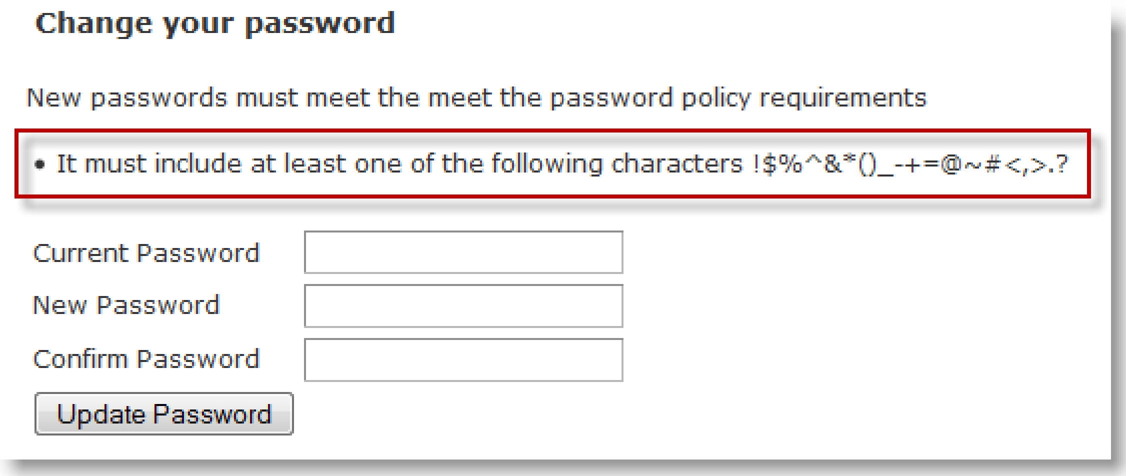


3. Find **Password - Numbers Required**.
4. To select a value between 0 and 8 click . This is the number of characters in the password that must be numbers.
5. Click to save the setting.

To configure **Password - Numbers Required** for all portals associated with Skyline use the default configuration option. These options are only available when you are logged in with Host privileges.

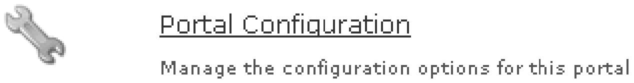
Password Must Contain Special Characters

You can specify that password must contain special characters. If the criteria has been set & a user tries to change their password but the new password that does not include any special characters an error message will be displayed. The password will not have been changed.



To set the criteria that a password must contain special characters:

1. Log in with Administrator rights and go to Admin.
2. In the Portals section click Portal Configuration.

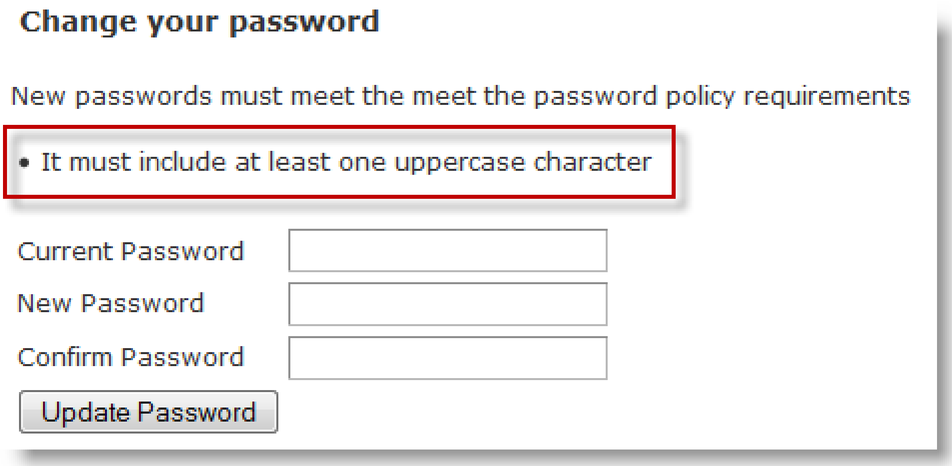


3. Find **Password Special Characters Required**.
4. To select a value between 0 and 8 click . This is the number of characters in the password that must be special characters.
5. Click to save the setting.

To configure **Password Special Characters Required** for all portals associated with Skyline use the default configuration option. These options are only available when you are logged in with Host privileges.

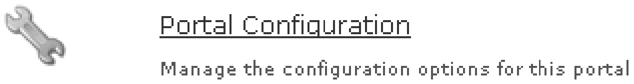
Password Must Contain Capitals

You can specify that password must contain upper case letters. If the criteria has been set & a user tries to change their password but the new password that does not include any capital letters an error message will be displayed. The password will not have been changed.



To set the criteria that a password must contain upper case characters:

1. Log in with Administrator rights and go to Admin.
2. In the Portals section click Portal Configuration.

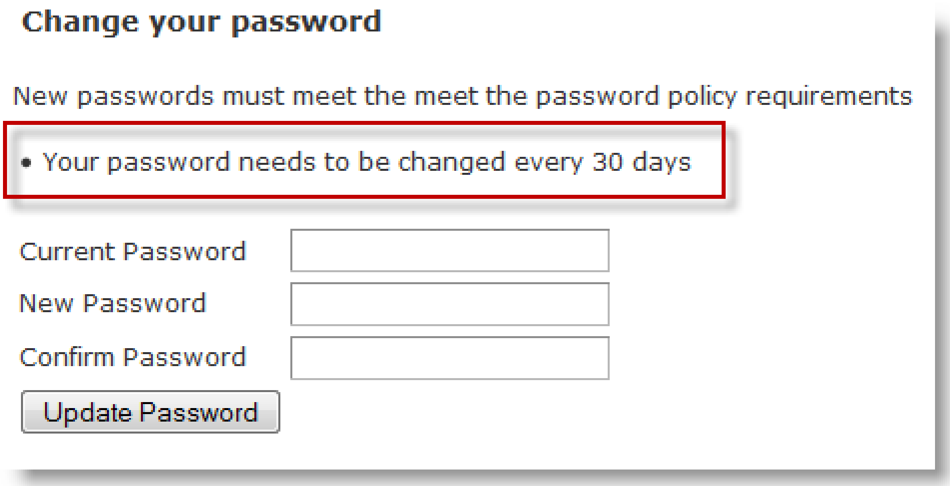


3. Find **Password Uppercase Characters Required**.
4. To select a value between 0 and 8 click . This is the number of characters in the password that must be upper case letters.
5. Click to save the setting.

To configure **Password Uppercase Characters Required** for all portals associated with Skyline use the default configuration option. These options are only available when you are logged in with Host privileges.

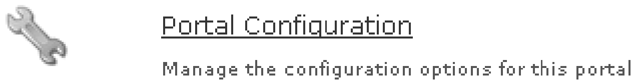
Setting a Password Expiry Date

You can specify that passwords will expire after a number of days. When the user tries to use their password after the specified number of days they are forced to change their password. This is not applied to users assigned the roles of Skyline Host or Administrator,



To set the number of days that a password is valid for:

1. Log in with Administrator rights and go to Admin.
2. In the Portals section click Portal Configuration.



3. Find **Password Expiry Days**.
4. To select a value of 0, 1, 7, 30, 90, 180 or 365 days click . This is the number of days that the password will valid for before the user is forced to change their password.
5. Click to save the setting.

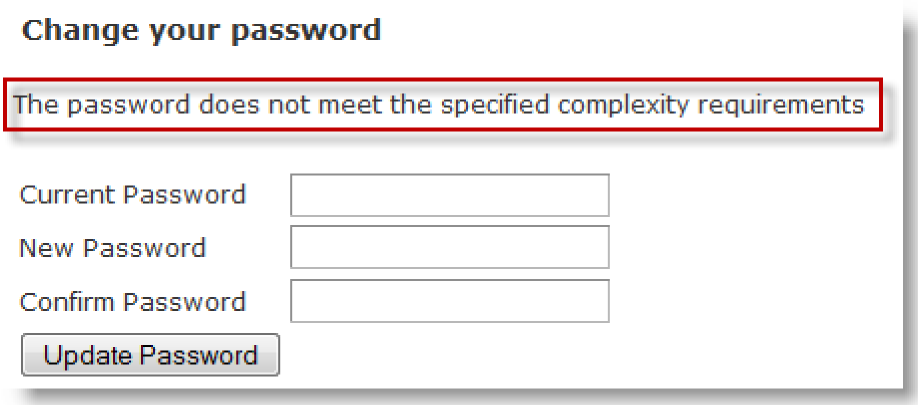
To configure **Password Expiry Days** for all portals associated with Skyline use the default configuration option. These options are only available when you are logged in with Host privileges.

Entering a Password Regular Expression

If a regular expression is entered it will override any other password criteria you have entered. An example of a regular expression is shown below. Further examples can be found on the website http://regexlib.com/Search.aspx?k=password&AspxAutoDetectCookieSupport=1.

Expression:-	^[a-zA-Z]\w{3,14}$
Description:-	The password's first character must be a letter, it must contain at least 4 characters and no more than 15 characters and no characters other than letters, numbers and the underscore may be used

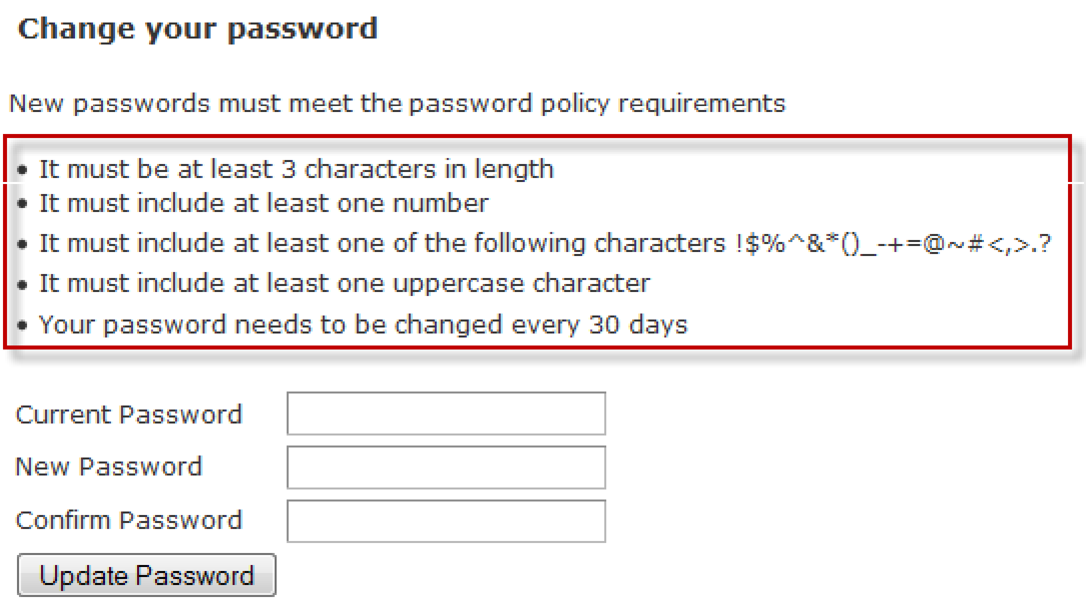
When a regular expression is used to set the password criteria the user is not told of the criteria on the password preferences window. You need to tell users the password criteria set & if a user tries to change their password but enters a password that does not meet the criteria an error message will be displayed. The password will not have been changed.



To enter a password regular expression:

1. Log in with Administrator rights and go to Admin.
2. In the Portals section click Portal Configuration.
   

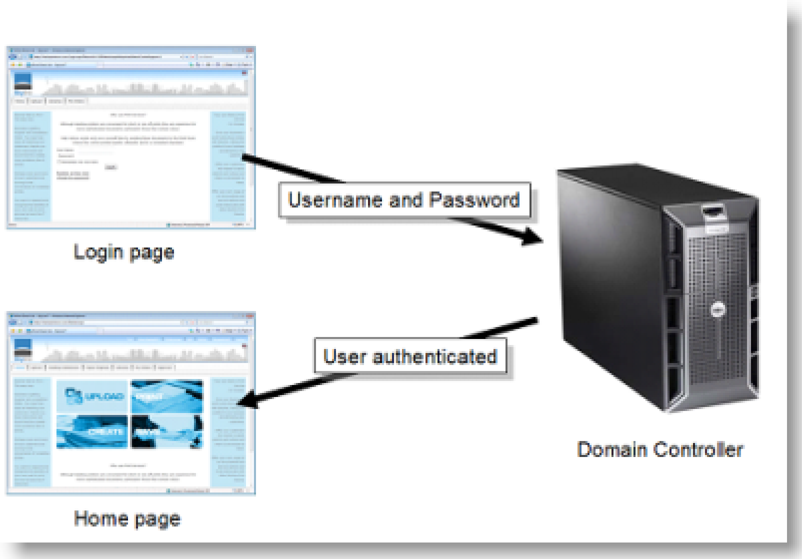
3. Find **Password Regular Expression**.
4. To enter a value click .
5. Click to save the setting.
6. Make sure that all other the password criteria except for password expiry date are set as zero. The criteria will be overridden by the regular expression but the password requirements will be displayed to the user.



To configure **Password Regular Expression** for all portals associated with Skyline use the default configuration option. These options are only available when you are logged in with Host privileges.

Login Using LDAP Authentication

You can set up Skyline to allow users to log in to a portal with their corporate user name and password. A portal can be changed to use the same user names and passwords used when logging into a domain computer. This is known as Single Sign-on, Network authentication or LDAP authentication. You will need a portal exclusively for Network authentication.



When a Skyline Portal is set up to use Single Sign-on (Network authentication), users simply log in into Skyline with their existing domain user name and password. These are not stored at any time on the Skyline server. The user credentials are simply passed on to the network domain controller for validation.

When a new user connects to a portal set for LDAP authentication, a new Skyline account is created for them the first time they log in. New users do not have any administrative rights, so promoting one of the LDAP authenticated users to administrator for example is not possible from the LDAP portal because there is no existing administrator. If you have only purchased one portal and need to authenticate users via LDAP, please contact ePrint Direct who will issue you with a license for a second portal.

Note: User's will only be able to use their LDAP log in with Skyline Website and PrintStation. If you need a user to log in to other Skyline programs please see the section on accessing other Skyline Programs 63.

You can only authenticate to one domain control. This means that if you have 3 portals they all have to be either LDAP or Database.

To configure log in using corporate names you need to:

1. Create LDAP Portal 57.
2. Check error settings 58.
3. Add domain name 59.
4. Test LDAP Settings 60.
5. Configure Network Authentication 62.

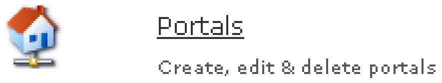
Creating a LDAP Portal

A new portal needs to be created as you need a portal exclusively for Network authentication. If you have only purchased one portal and need to authenticate users via LDAP, please contact ePrint Direct who will issue you with a license for a second portal.

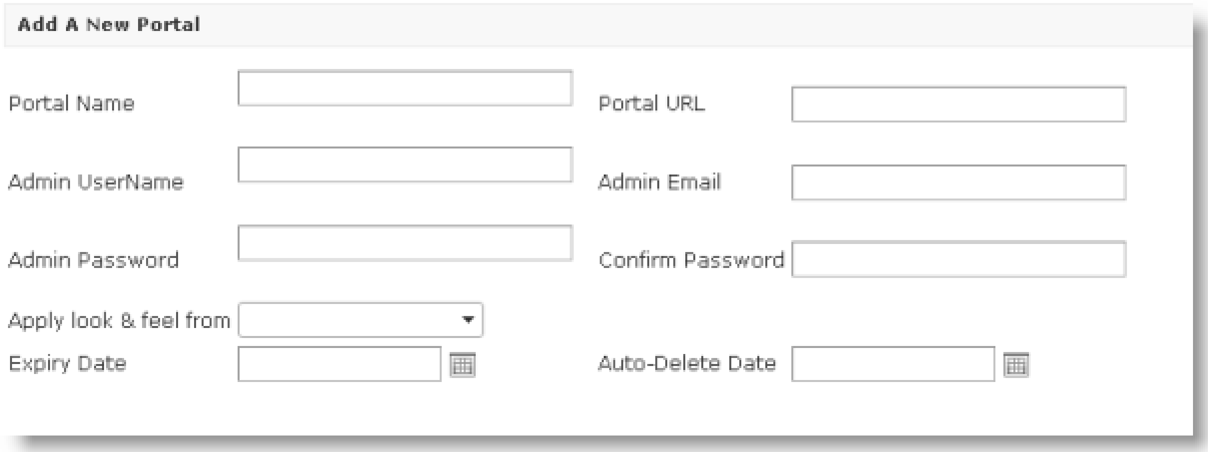
To create a portal to be used for LDAP authentication:

1. Log in to http://localhost with a username that has Host Admin privileges and go to **Admin**.

2. In the Portals section click **Portals**.



3. At the end of the list of existing portals there is an **Add a New Portal** section. Complete the fields with the details of your new portal that will be used for LDAP authentication.



- **Portal Name** - A unique name for this portal e.g. LDAP.
- **Portal URL** - The URL that will be used to access the LDAP portal. The Portal URL is the web address users will enter into their browser to access the Skyline portal. If you have not set up the corporate DNS server with a URL to point to this portal, enter the server's IP address in the URL field.
- **Admin UserName** - Choose a username for a local user with admin rights e.g. admin.
- **Admin Email** - Your email address in case you forget your password.
- **Admin Password** - Choose a strong password that you will remember.
- **Confirm Password** - Retype the strong password.
- **Apply look & feel from** - The new portal will be a copy of an existing portal selected here.
- **Expiry Date** - leave empty.
- **Auto-Delete Date** - leave empty.

4. Click **Submit** when all the required information is entered.

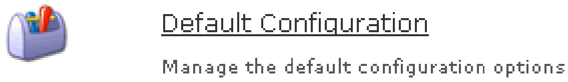
5. Leave the new portal setting as "Database".

Check Error Settings

The portal configuration **Global Errors - Show Friendly Error Messages** needs to be checked that the setting is False. This will mean that if there are any errors found during testing the full error details will be displayed.

To check the error setting:

1. Go to Admin. In the Portals section click Default Configuration.



2. Find the setting **Global Errors - Show Friendly Error Messages** and make sure that it is set to False.

Adding the Domain Name

To change the authentication method used by Skyline, you will need to edit the file web.config on the Skyline server. The file contains settings common to all the portals and in particular it contains the name of the Active Directory domain so that Skyline knows where to authenticate users. The Skyline server must have permission to pass the log in username to the domain controller for authentication. Therefore, the Skyline server needs to be given the location of the domain controller.

To amend the web.config file: connectionUsername

1. Log in to the Skyline server as a local administrator. Locate the web.config file and make a copy before you make any changes.
   The web.config file is found in the root directory of Skyline (C:\Skyline\wwwroot) by default.

2. Open the web.config file in notepad. Double click the file will usually open it.

3. Locate the LDAP connection string You need to enter your domain network name.
   <add name="ADServiceWindows" connectionString="LDAP://eprint.local/OU=eprint,DC=eprint,DC=local" />

4. Replace eprint.local with your own domain name. If the fully qualified domain name (FQDN) is split into several parts, then you should enter the FQDN after LDAP= followed by a separate DC= section for each part. The default port number for doing LDAP Authentication is 389 and this should be added after your domain name. If this is omitted then authentication may be slow.
   For example:

```
<connectionStrings>
   <add name="Skyline" connectionString="data source=.\Skyline;initial catalog=Skyline;persist security info=True;user id=Skyline;password=Skyline" providerName="System.Data.SqlClient" />
   <add name="SkylineMembership" connectionString="data source=.\Skyline;initial catalog=SkylineMembership;user id=Skyline;password=Skyline;packet size=4096; Enlist=false;" providerName="System.Data.SqlClient" />
   <add name="ADServiceWindows" connectionString="LDAP://your.domainname:389/DC=your,DC=domainname" />
 </connectionStrings>
```

   Note: If you use secure LDAP authentication the port number used should be 636.

5. Find the section starting <membership defaultProvider="Database">. There is a line of code that instructs the Skyline server to use the connection string. If this line is commented out, the connection string is ignored. If the line is commented out it will start with the characters "<!--" and end with "-->"; these characters must be removed

```
 <providers>
      <!-- NB. Do not change the names of these providers -->
      <clear />
      <add name="Database" connectionStringName="SkylineMembership" requiresQuestionAndAnswer="false" applicationName="/" type="Eprint.Skyline.Web.Pages.ApplicationProvider" requiresUniqueEmail="false" minRequiredPasswordLength="1" minRequiredNonalphanumericCharacters="0" passwordStrengthRegularExpression="" maxInvalidPasswordAttempts="999" />
      <!--<add name="Network" attributeMapUsername="sAMAccountName" requiresQuestionAndAnswer="false" type="System.Web.Security.ActiveDirectoryMembershipProvider, System.Web, Version=2.0.0.0, Culture=neutral, PublicKeyToken=b03f5f7f11d50a3a" connectionStringName="ADServiceWindows"/>-->
</providers>
```

6. Add a user name and password of an account that has sufficient privileges to user rights to check the list of users on your domain controller.
   <add name="Network" attributeMapUsername="sAMAccountName" requiresQuestionAndAnswer="false" type="System.Web.Security.ActiveDirectoryMembershipProvider, System.Web, Version=2.0.0.0, Culture=neutral, PublicKeyToken=b03f5f7f11d50a3a" connectionStringName="ADServiceWindows" **connectionUsername="username" connectionPassword="password"** />

7. Save the web config file.

Testing the LDAP Settings

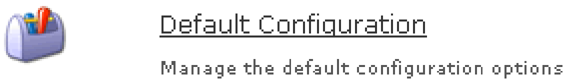
When you have created the LDAP portal and amended the web.config file you are ready to test the settings. Although the connection to the LDAP server has been set in the configuration file web.config, the Skyline portal has not yet been configured to use this setting. If there are any typing errors when the web.config file was amended you will not be able to log in to Skyline and a full error message will be displayed. Rectify the problem then try to log in to Skyline again.

To test the LDAP settings:

1. Log in to http://localhost with a username that has Host Admin privileges and go to Admin.

)

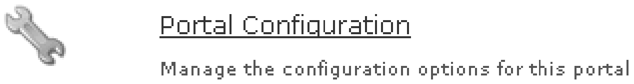
2. In the Portals section click Default Configuration.



3. Find the setting **Global Errors - Show Friendly Error Messages** and set this back to True. This setting hides errors from users.

4. Return to the Admin page.

5. In the Portals section click Portal Configuration



6. Find the setting **Global Errors - Show Friendly Error Messages** and set this back to True. This setting hides errors from users.

7. Browse to the LDAP portal you created. Check that you can log in to the portal with the username and password you defined when you created the portal.

Restrict Access to Skyline

You can restrict access so that only a specific group of uses can access Skyline. To do this you need to change the OU (Organizational unit) to a recognised name. Only accounts in that unit will have access.

If you want to restrict access to Skyline to a group of users, the LDAP connection string can be refined.

To add an OU name:

1. Log in to the Skyline sever as a local administrator. Locate the web.config file and make a copy before you make any changes.
   The web.config file is found in the root directory of Skyline (C:\Skyline\wwwroot) by default.

2. Locate the LDAP connection string You need to add the OU to the connection string. In the example below the LDAP group Staff has been added. Only users belonging to that group will be able to log in to the LDAP portal on Skyline.
   <add name="ADServiceWindows" connectionString="LDAP://your.domainname/
   OU=staff,DC=your,DC=domainname" />

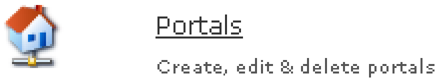
Configuring Network Authentication

The LDAP portal configuration needs to be changed from Database to Network authentication.

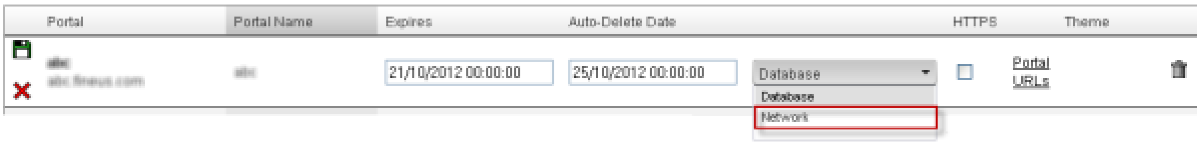
To change the portal authentication:

1. Log in to http://localhost with a username that has Host Admin privileges and go to Admin.

2. In the Portals section click Portals.



3. Click the edit icon on next to the portal you want to configure to LDAP authentication. This open the portal configuration settings.



4. Change Database to Network on the drop down list.

5. Click Save.

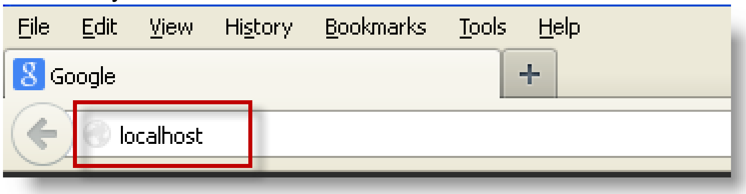
6. Browse to the URL defined when you created the LDAP portal. You should be able to log in with a network username and password. The LDAP setting defined so far will allow any user for the domain to log into Skyline with their network username and password.

LDAP - ProductManager Access

User's will only be able to use their LDAP log in with Skyline Website and PrintStation. Details on how to configure Localhost and then log in to ProductManager is described below.

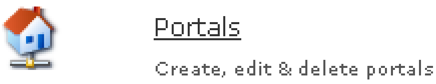
To configure Localhost so that a user can log in to ProductManager:

1. At the Skyline Server enter Localhost in the browser address bar.

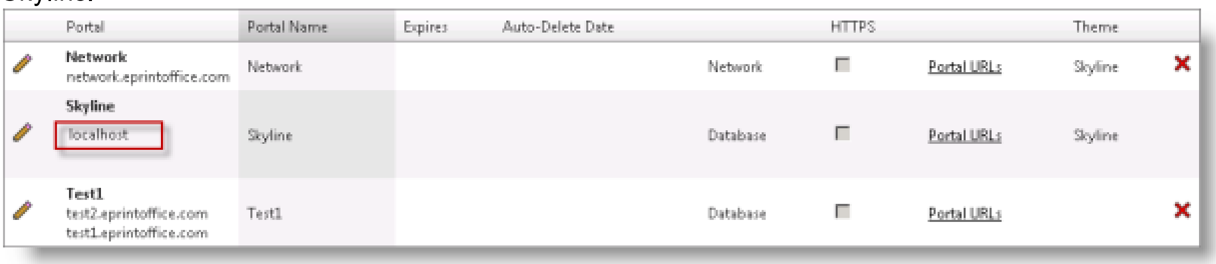


2. The Skyline log in screen opens. Log in with host rights and go to **Admin**.

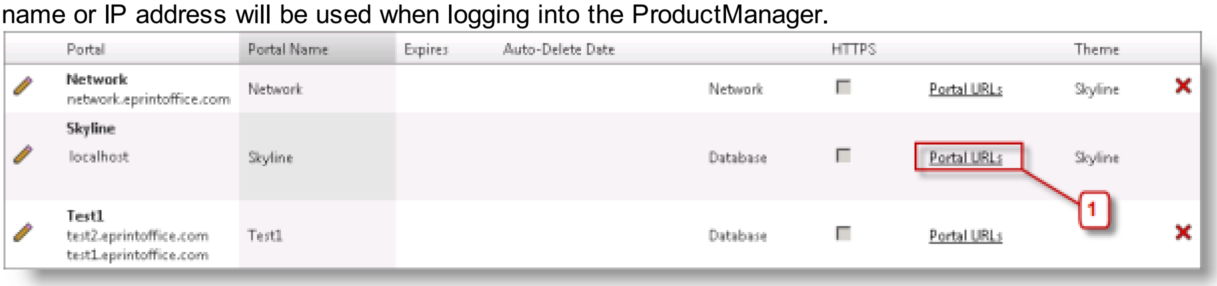
3. In the Portals section click **Portals**



4. Identify the Portal that is associated with the name localhost. In the example below the portal name is Skyline.

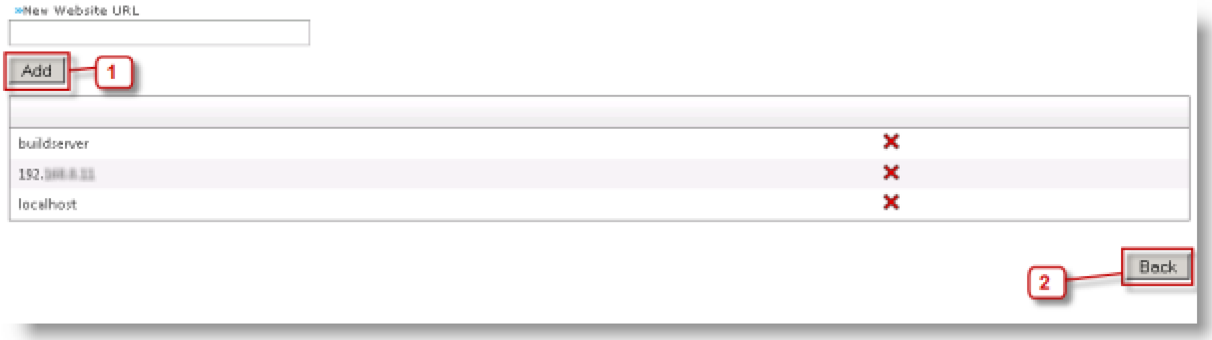


5. The machine name and/or the IP address details need to be added to the portal. Either the machine name or IP address will be used when logging into the ProductManager.



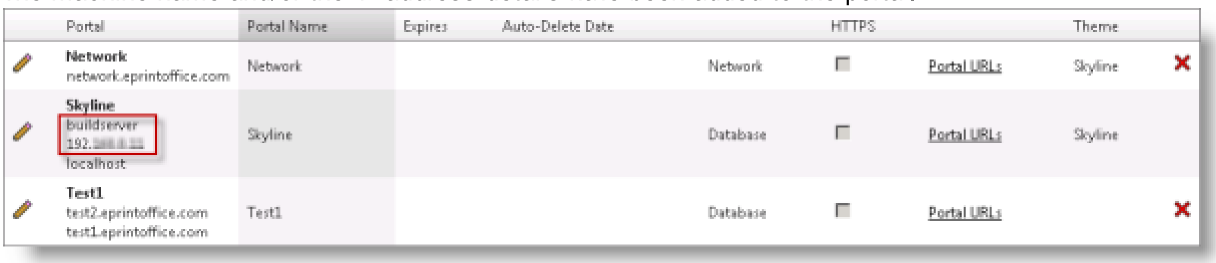
1. Click the **Portals URLs** link.

6. Enter the machine name and/or the portal address.



   1. Click **Add** to enter the machine name or portal URL to the list.
   2. When the details have been entered they are listed. Click **Back** to return to the list of portals.

7. The machine name and/or the IP address details have been added to the portal.

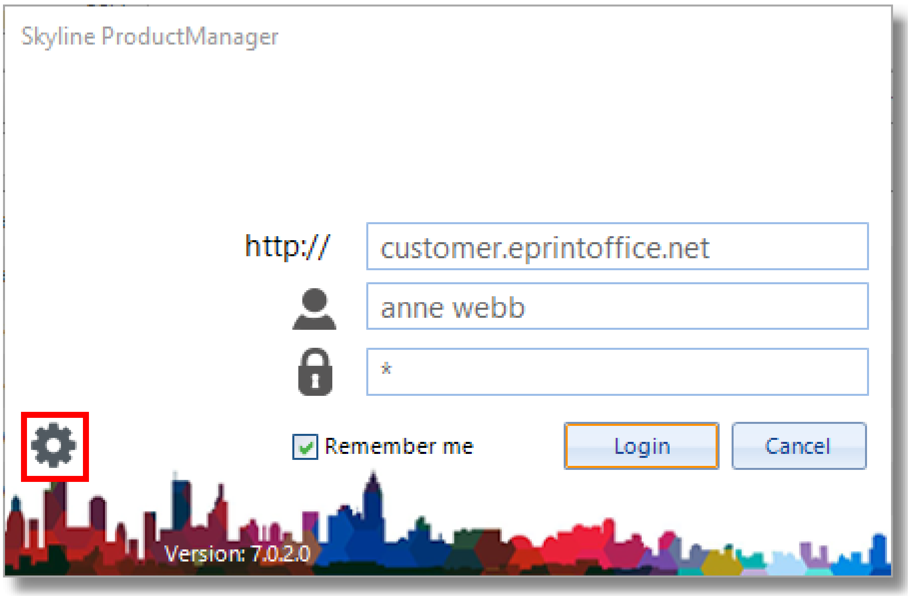


8. Users can now log into ProductManager using either the localhost machine name or IP address from their own computer.

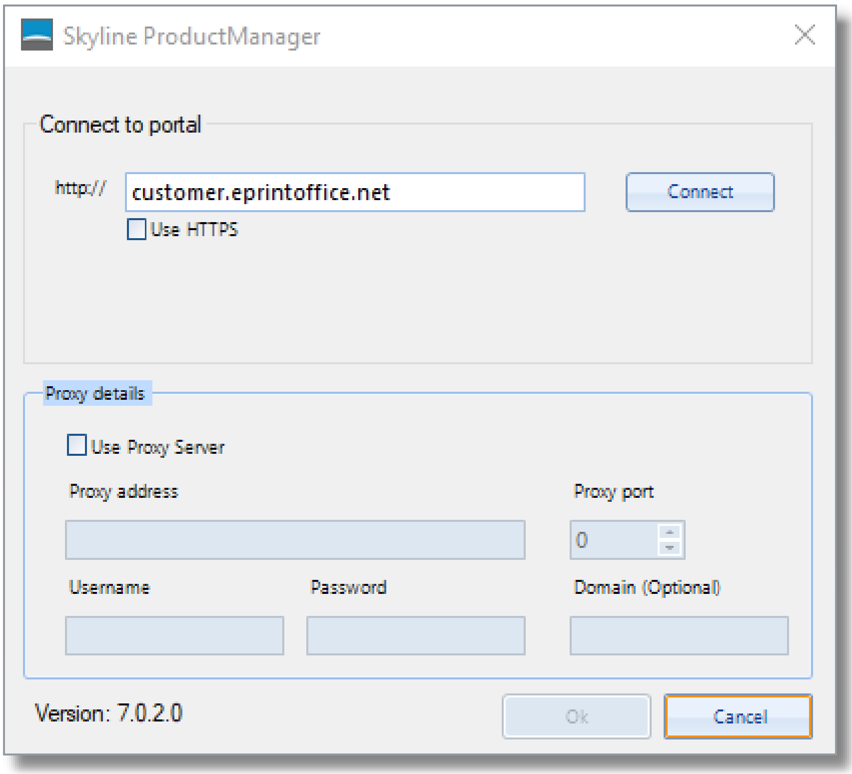
To open ProductManager:

1. Click 

2. The Skyline ProductManager automatically opens with a log in screen. Click to change the portal details.

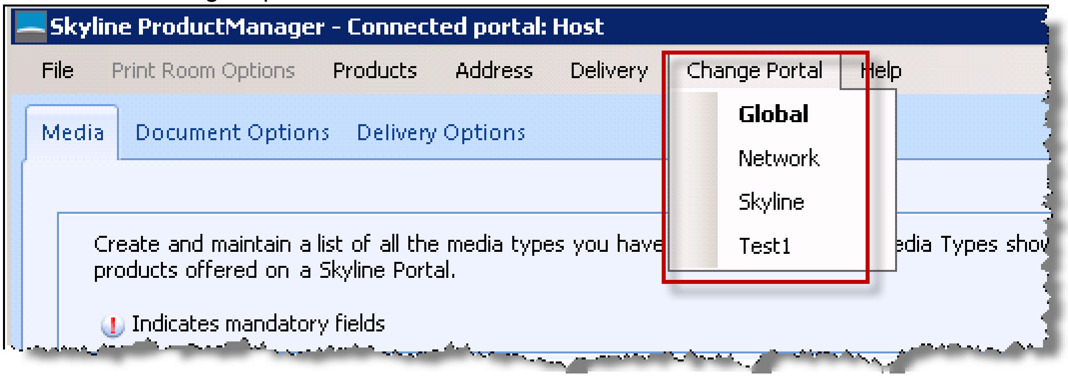


3. The connection details window opens. Enter the localhost machine name or IP address and click **Connect**



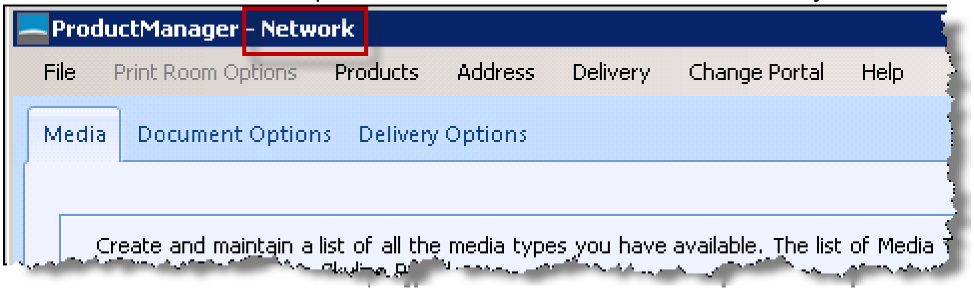
4. Enter the user name **SkylineHost** and password **SkylineH0$t**, then click **Log in**.

5. The ProductManager opens.



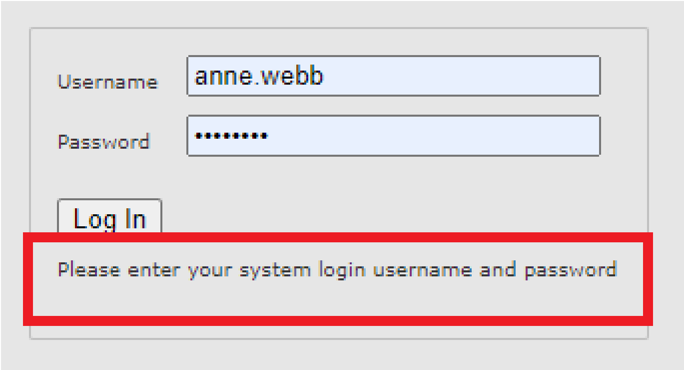
   1. Click **Change Portal** and select the portal that you want to administer.

6. Make sure that the correct portal name is shown in the title bar before you start to amend the products.



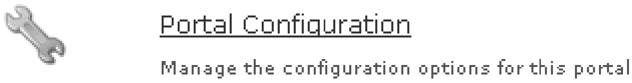
Amending the Log In Message

You can specify the message shown when users view their Login page.



To amend the Login message:

1. Log in with Administrator rights and go to Admin.
2. In the Portals section click Portal Configuration.



3. Find **Login - LDAP login prompt**. The default text is 'Please log in with your company username and password'.
4. Click and amend the default text as required.
5. Click to save the setting.

To configure **Login - LDAP login prompt** for all portals associated with Skyline use the default configuration option. These options are only available when you are logged in with Host privileges.

Customising the User Interface

When users log in to Skyline they will view the Home page so it's important that it is well thought out and easy to understand. It's a great place to publish any special deals or print room features that users may not already be aware of.

The features that are available for your users will depend how you have chosen to setup your portals.

Example Home Web Page

Hiding Menu Tabs

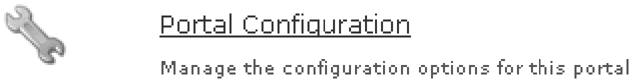
You can select whether the services on your portal are navigable via tabs or not. You may wish to disable tabs to minimize options to users or to change the layout using specific hyper-links in the body of your portal. Tabs enable users to click Home, Libraries or My Orders to view page content. Turning off the tabs will not stop users typing in the specific page URL to gain access to the page (e.g.. http://yourportal/libraries.aspx).

Menu tabs are visible in the above example.

Menu tabs are hidden in the above example.

To Hide/Show Menu Tabs:

1. Log in with Administrator rights and go to **Admin**.
2. In the Portals section click **Portal Configuration**.



3. Find **Look And Feel - Use Menu Tabs** in the list.
   - If the option is set as **True** users will be able to see the menu tabs when they log in.
   - Menu tabs can be hidden by setting the option to **False**.
4. To amend this option click .
5. Click to save the setting.

To configure **Look And Feel - Use Menu Tabs** for all portals associated with Skyline use the default configuration option. These options are only available when you are logged in with Host privileges. Any changes to the default configuration will affect **ALL** portals associated with Skyline.

Hiding just the Products Tab.

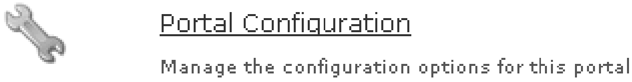
1. Log in with Administrator rights and go to **Admin**.
2. In the Portals section click **Portal Configuration**.
3. Find **Products: Hide the products tab from users** in the list.
   - If the option is set as **True** users will be able to see the Products tab when they log in.
   - The Products tab can be hidden from Users by setting the option to **False**. Administrators and Hosts will be able to view the Products Tab.
6. To amend this option click .
7. Click to save the setting.

Changing the Tab Style

A choice of tab designs are available for display, see the examples 71 listed below.

To change the tab style:

1. Log in with Administrator rights and go to **Admin**.
2. In the Portals section click **Portal Configuration**.



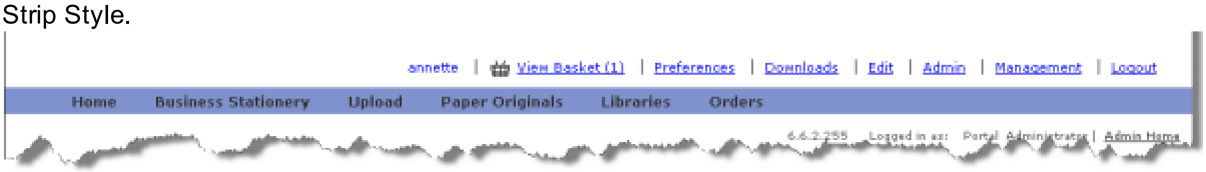
3. Find **Look And Feel - Tab Style** in the list.
    - Select the tab style you require. Examples 71 are shown at the end of this section.
4. To amend this option click .
5. Click  to save the setting.

To configure **Look And Feel - Tab Style** for all portals associated with Skyline use the default configuration option. These options are only available when you are logged in with Host privileges. Any changes to the default configuration will affect **ALL** portals associated with Skyline.

Examples

- Block Style.

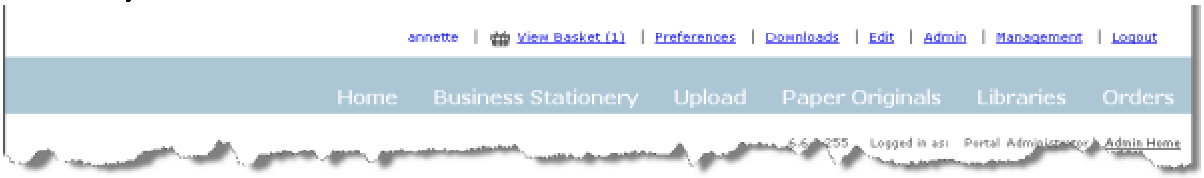
- Strip Style.



- Inbox Style.

- Mac Style.

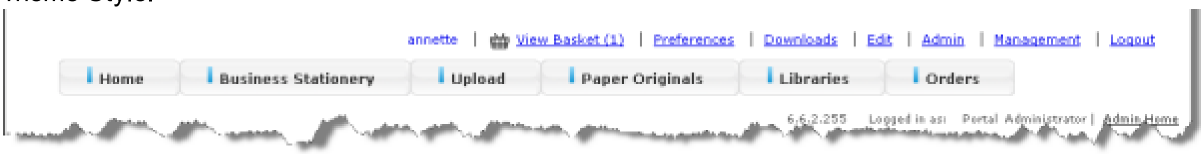
- Custom Style.



- Vista Style.

- Wizard Style.

- Theme Style.



- Default Style.

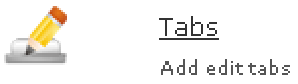
Editing the Tabs

You are able to change the wording that is used on the tabs. For example, you might want to change the tab name 'Orders' to be 'My Orders'. If you use more than one language, select the tab language to be changed.

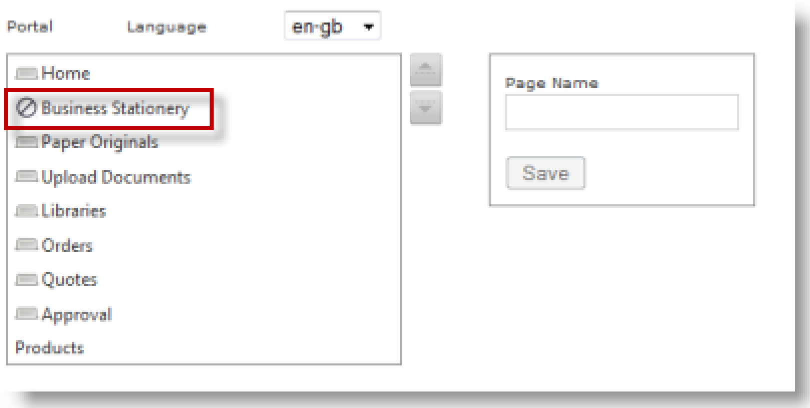
To change the tab names:

1. Log in with Administrator rights and go to **Admin**.

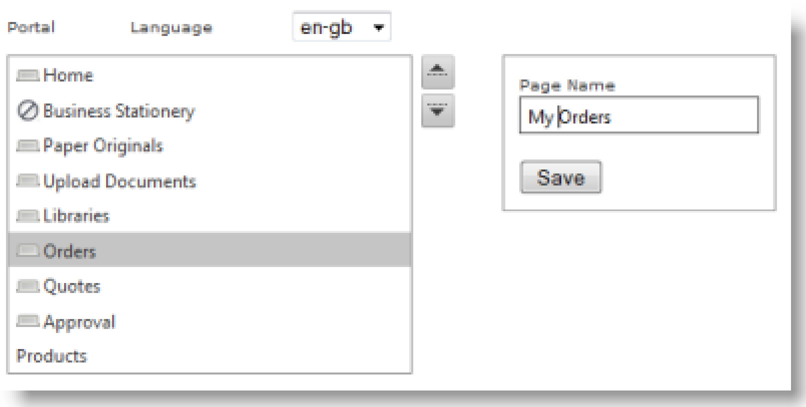
2. In the Content section click **Tabs**.



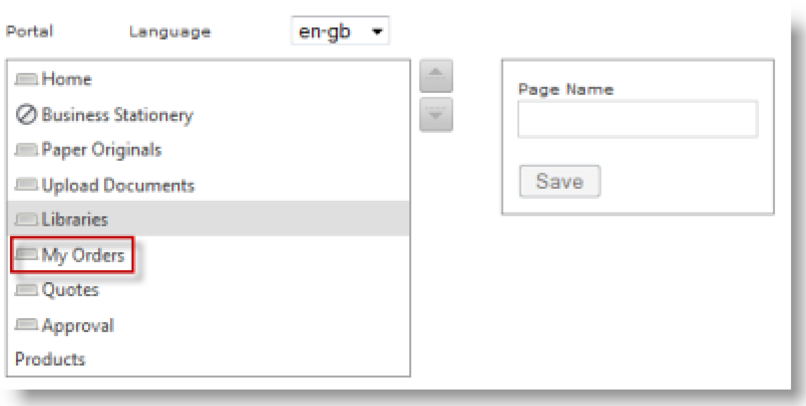
3. A list of the tabs is shown. Tabs which are not available have ⊘ beside the tab name.



4. Select the tab name to be changed. Enter the new name and click **Save**.

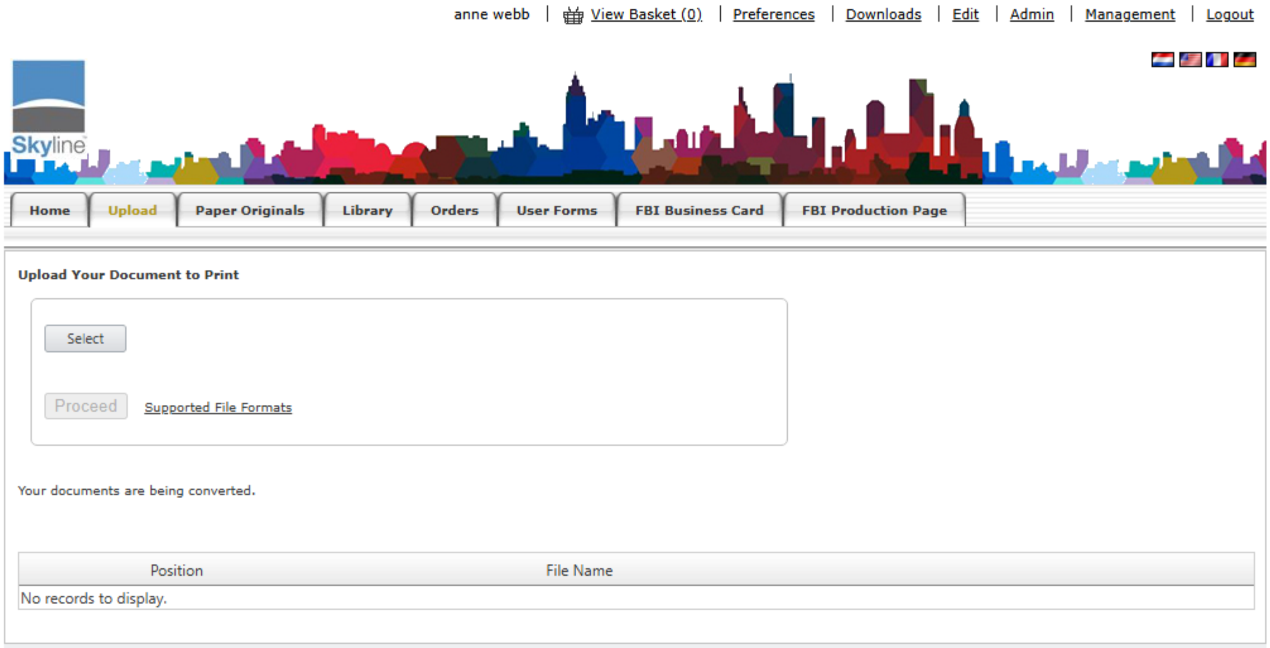


5. The tab name has been changed.



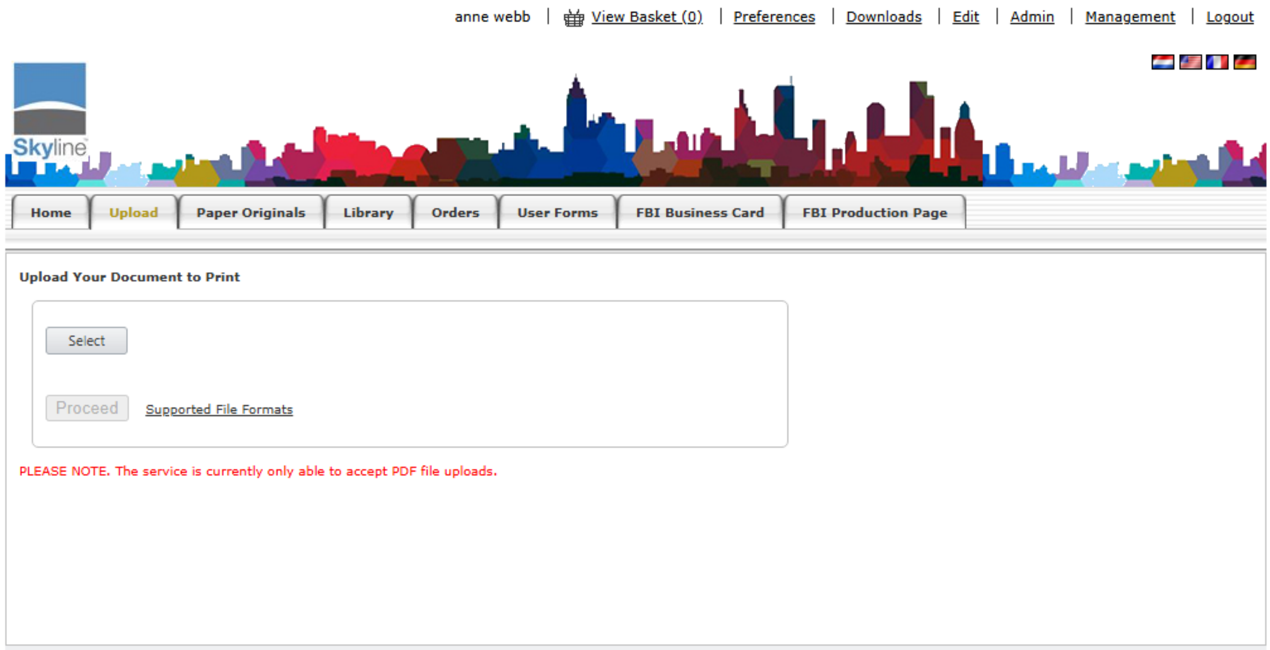
Upload Web Page

The upload page allows users to send jobs to the print room without installing any applications on their PC. Uploads are automatically converted to PDF and a web based job ticket presented for job submission. For details on how to upload a document, see the section on Using Upload.



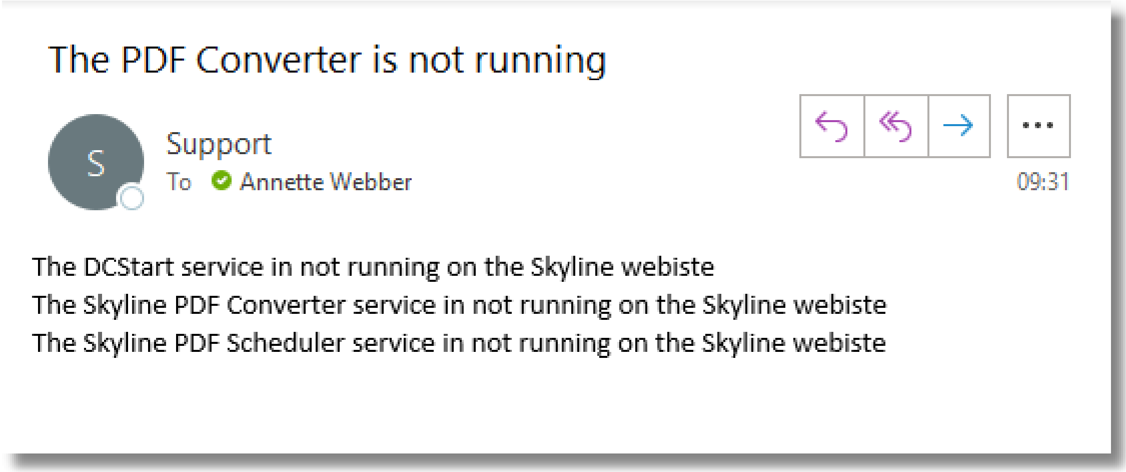
Example Upload Web Page

You might very rarely see a message on the Upload web page stating that the service is currently only able to accept PDF file uploads. This means that the PDF Converter is not running. An email message will have been automatically sent out to all Administrators stating which service is not running so that the relevant service can be re-started.



To re-start a service:

1. Log in to the Skyline web server.
2. Open Windows Services.
3. Start the required services that the email stated was not running. In the example email shown below it tells you that all 3 services need to be re-started.

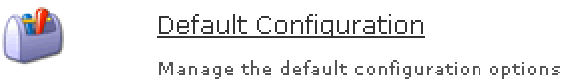


Example email that is automatically sent to the administrator if the PDF Converter fails.

This service is turned on by default. However, there may be a situation when there is no email server connected so you are able to turn this service off.

To stop checking the PDF Converter Service:

1. Sign in with Skyline Host rights.
2. Go to Admin. In the Portals section click Default Configuration.



3. Find the setting **Upload - Check the Status of the PDF Converter services** and make sure that it is set **False**.

Uploaded Document Types

You can manage what document types users are able to upload for automatic conversion to PDF. Uploaded customer documents are automatically converted to high quality print ready PDF's on the Skyline server. In order for this to happen a copy of the customer application must be installed and configured on the Skyline server.

If no document types have been specified for a specific portal, the default configuration is used. If any document types are added for a specific portal, only the portal specific list will be used. You must therefore ensure that you enter all the required file extensions. If this is not done you might find that document types that you used to be able to upload are no longer supported on the portal. For example, you might add the file type XLS to the uploaded document type list for your specific portal but not specify all the other file formats. However, if the file type is not added users are unable to upload documents. When they try to upload the documents other than Excel spreadsheets they see a message similar to the one shown below. If this happens you need to add the missing file formats that can be converted to PDF.

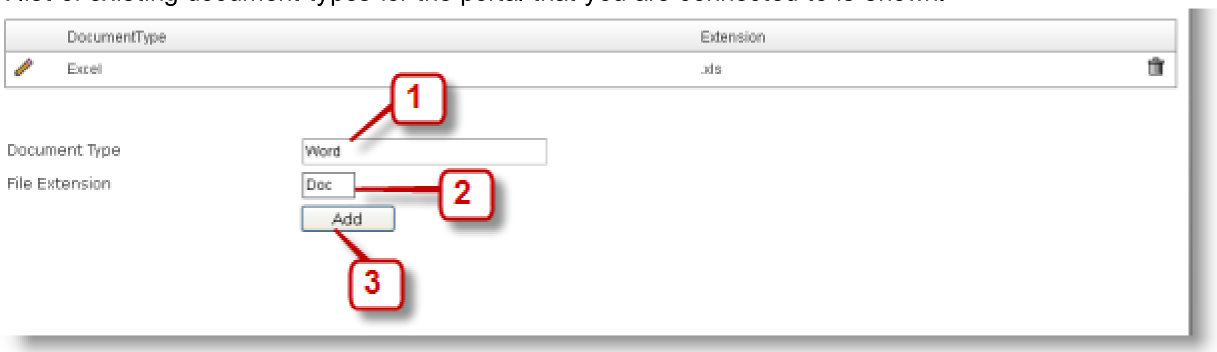
Note: Skyline needs to extract the first page of a PDF to create the first thumbnail. You will be unable to upload a PDF if the security set on the PDF does not allow page extraction. Any documents that need a password to be entered before they can be opened can not be uploaded.

To add a document type for PDF conversion:

1. Log in with Administrator rights and go to **Admin**.

2. In the Configuration section click **Uploaded Document Types**.

3. A list of existing document types for the portal that you are connected to is shown.

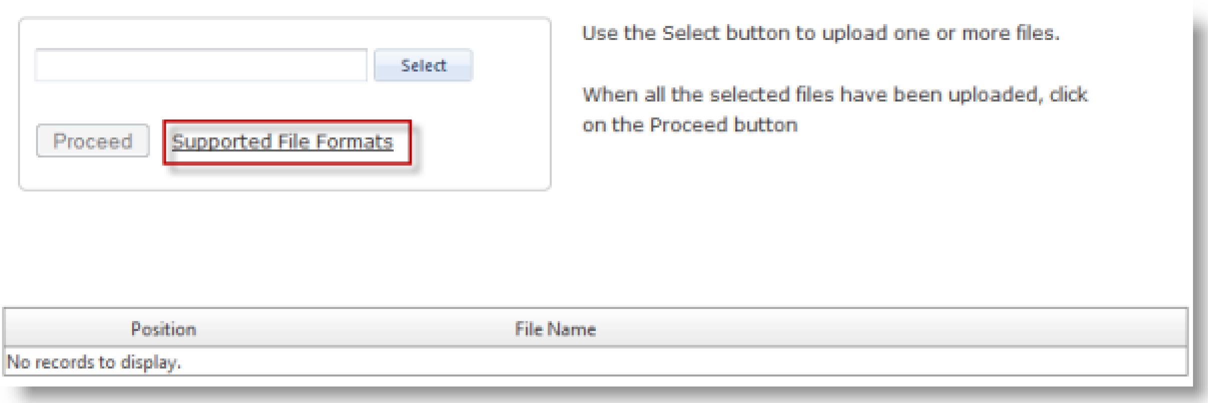


1. Enter the name of the document type to be added.
2. Enter the file extension of the document type. For example, for a Word document you would enter Doc.
3. Click **Add**. The document type is added to the list of supported file formats that can be converted to PDF format.

Note: If you need to delete a document type, click the associated with the document type that you want to remove.

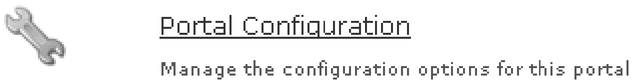
Showing the Supported File Formats Link

By default the option to see the Supported File Formats link on the Upload web page is true.



Upload Web Page with the Supported File Formats Link.

To hide/show the supported file formats link:

1. Log in with Administrator rights and go to **Admin**.
2. In the Portals section click **Portal Configuration**.


3. Find **Upload - Show Supported Formats link** in the list.
   - If the option is set as **True** users will be able to see the Supported File Formats link. This is the default option.
   - The Supported File Formats link can be removed by setting the option to **False**.
4. To amend this option click .
5. Click  to save the setting.

To configure **Upload - Show Supported Formats link** for all portals associated with Skyline use the default configuration option. These options are only available when you are logged in with Host privileges. Any changes to the default configuration will affect **ALL** portals associated with Skyline.

Allow Users to Upload Documents

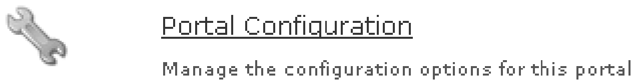
You can set whether users are able to upload documents to a portal or not. It is possible to remove the Upload web page, which stops users from being able to submit documents via the Upload function to a Skyline portal. Users can order business stationery or other documents stored in the library.

If you are signed in with Host or Administrator privileges, you will always see the Upload web page, even if the option is set to false.

To change whether users can upload documents to a portal or not:

1. Log in with Administrator rights and go to **Admin**.

2. In the Portals section click **Portal Configuration**.



3. Find **Upload - Allow users to upload documents** in the list.
   - If the option is set as **True** users will be able to see the Upload web page. This is the default option.
   - The Upload web page can be removed by setting the option to **False**.

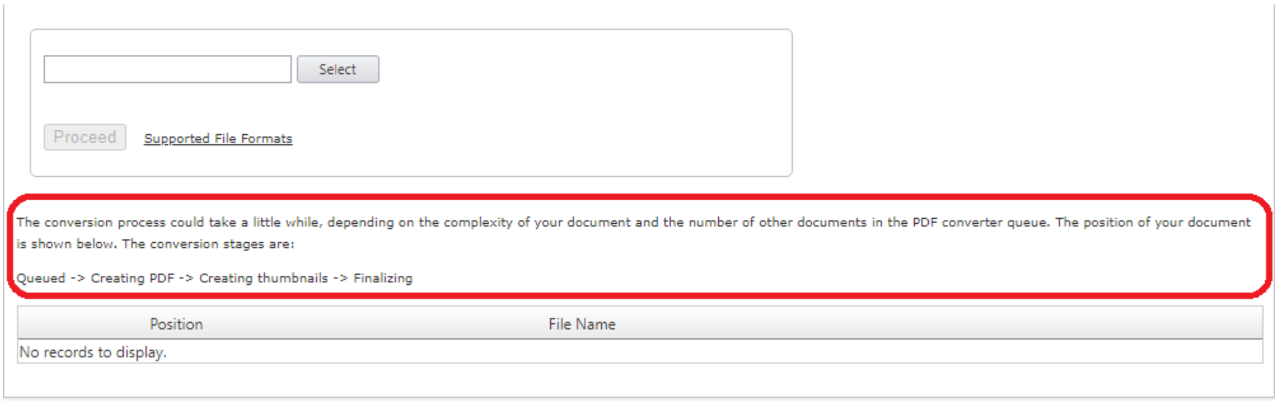
4. To amend this option click .

5. Click to save the setting.

To configure **Upload - Allow users to upload documents** for all portals associated with Skyline use the default configuration option. These options are only available when you are logged in with Host privileges. Any changes to the default configuration will affect **ALL** portals associated with Skyline.

Changing the Upload Message

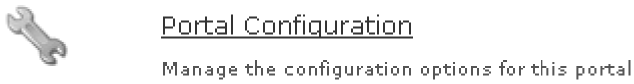
You can use this configuration option to change the message displayed when a PDF is being converted.



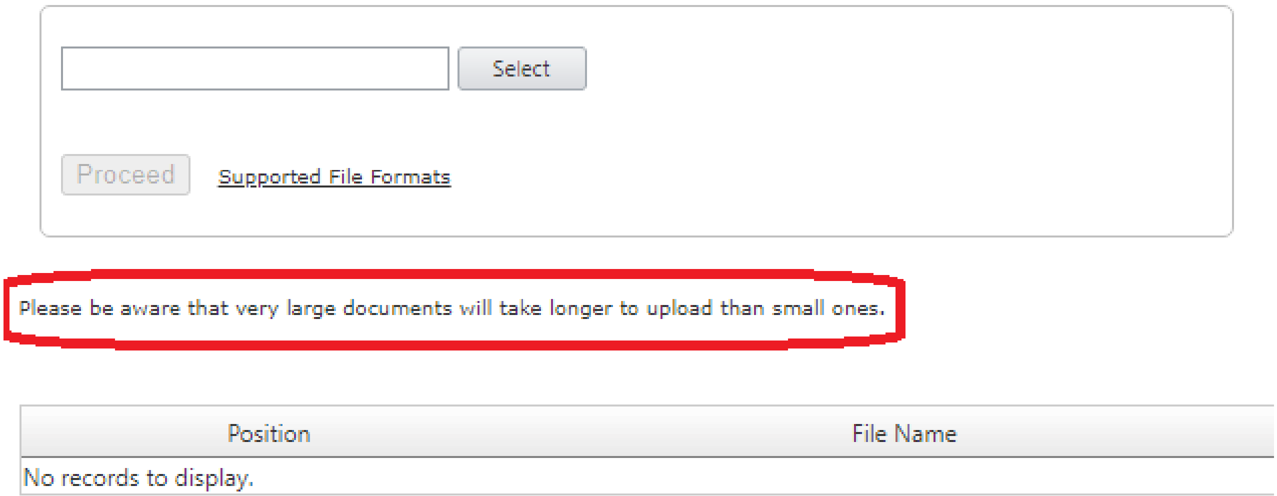
Example of the default Upload message

To change the default conversion message:

1. Log in with Administrator rights and go to **Admin**.
2. In the Portals section click **Portal Configuration**.



3. Find **Upload - Custom PDF Conversion Message** in the list.
4. To amend this option click and enter the required message.
5. Click to save the setting.



Example of an amended message.

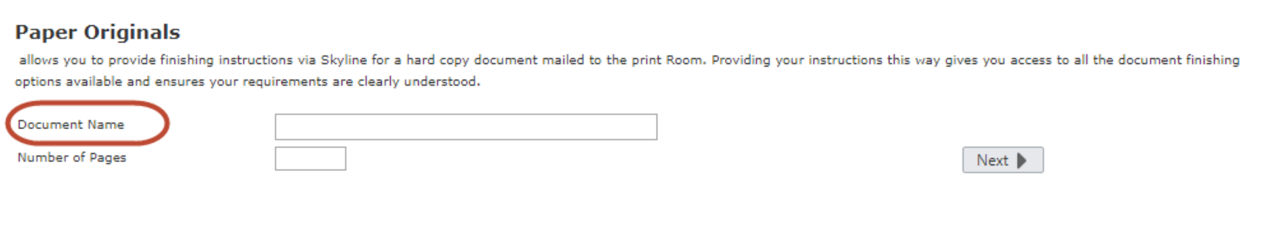
To revert to the original message simply remove the message entered in **Upload - Custom PDF Conversion Message** and save the blank message. The default upload message will be displayed.

Paper Originals Web Page

The Paper Originals web page allows users to submit job tickets with a reference to a physical hard copy or "paper original". You can amend the page by:

- Changing the wording of the Document Name label.
- Amend the wording of the error message that appears when 'Next' is clicked before both fields are completed.
- Prevent users from being able to submit paper original orders.

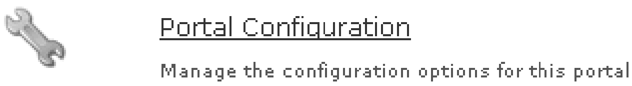
To configure all portals associated with Skyline use the default configuration option. These options are only available when you are logged in with Host privileges. Any changes to the default configuration will affect ALL portals associated with Skyline.



Example showing the label that can be changed

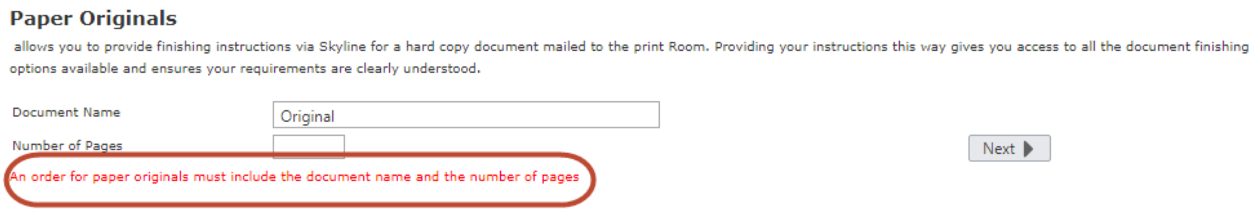
To amend the label for the Document Name:

1. Log in with Administrator rights and go to **Admin**.
2. In the Portals section click **Portal Configuration**.



3. Find **Paper Originals - Document Name Label** in the list.
4. To amend this option click . Change the wording as required
5. Click to save the setting.

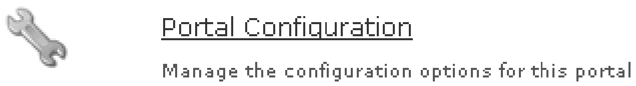
You can amend the wording of the error message that appears when 'Next' is clicked before both fields are completed. An example of the default wording can be seen below.



Example of an error message.

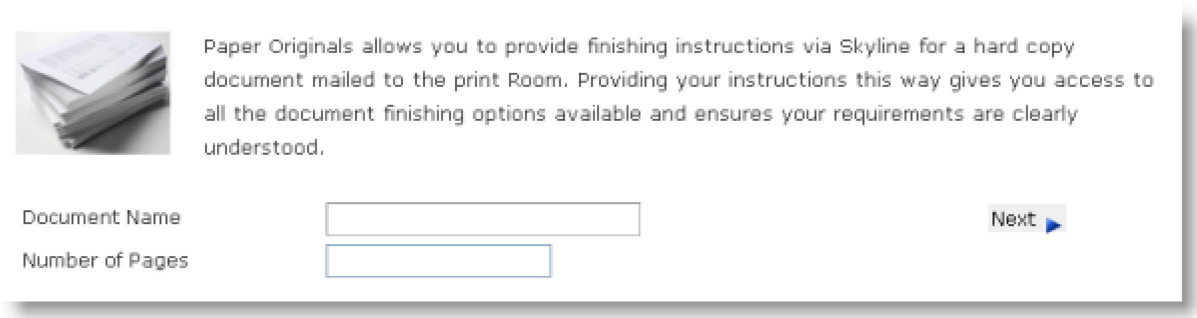
To amend the error message:

1. Log in with Administrator rights and go to **Admin**.
2. In the Portals section click **Portal Configuration**.



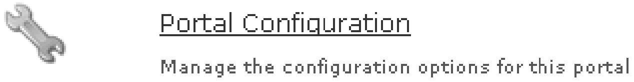
3. Find **Paper Originals - Missing Information Error** in the list.
4. To amend this option click . Change the wording as required
5. Click to save the setting.

If you want to stop users from being able to submit paper originals to Skyline portal you can hide the tab. The example below shows a typical Paper Original web page. For more information on ordering documents with reference to a physical hard copy, see the section on Using Paper Originals.

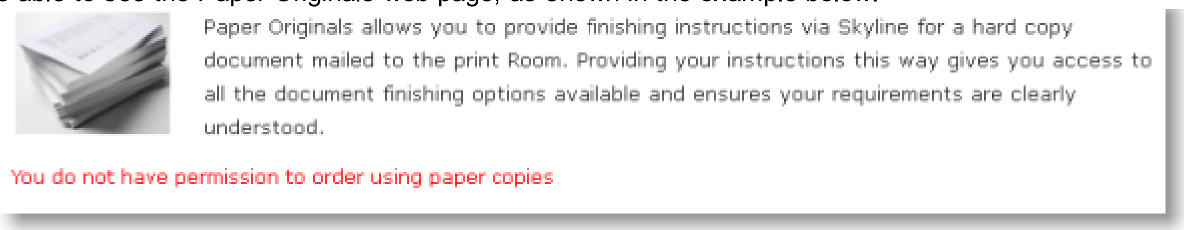


To hide the Paper Originals web page:

1. Log in with Administrator rights and go to **Admin**.
2. In the Portals section click **Portal Configuration**.



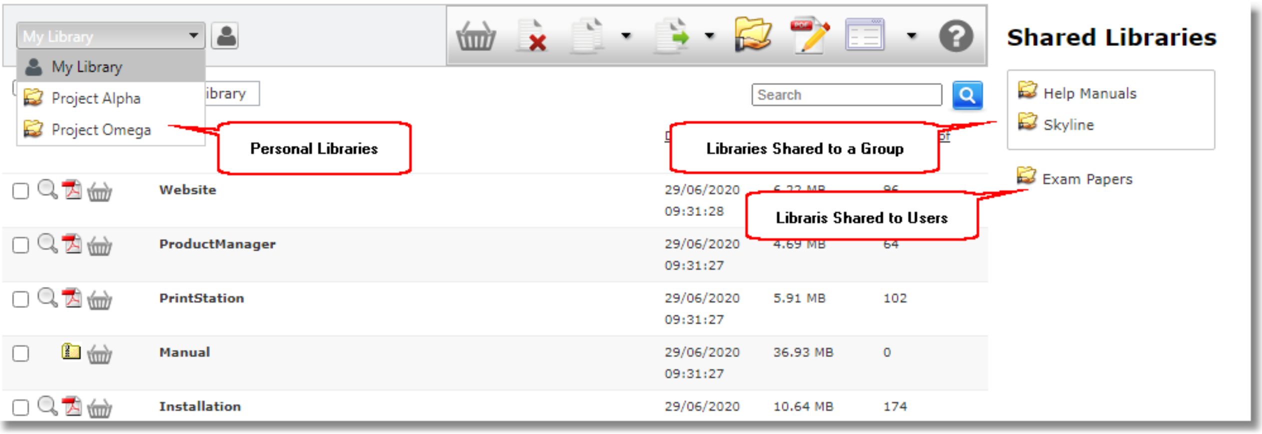
3. Find **Upload - Allow Paper Originals** in the list.
   - If the option is set as **True** users will be able to use the Paper Originals web page.
   - Users will not be able to use the Paper Originals web page by setting the option to **False**. They will be able to see the Paper Originals web page, as shown in the example below.



4. To amend this option click .
5. Click to save the setting.
6. Find **Upload - Show Paper Originals Tab** in the list.
   - If the option is set as **True** users will be able to see the Paper Originals web page.
   - The Paper Originals web page can be hidden by setting the option to **False**.

Libraries Web Page

Libraries store uploaded documents which users can submit for printing.



Example Libraries Web Page

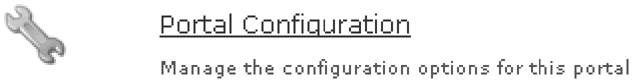
Setting the Default Library View

When a user views their personal document library they can have a choice of views. Setting the default library view will select the setting for a new user when they first view their library. If they select a different view to the default view, they will see their library in the selected view the next time they open it.

Note: Any changes to the default view will only effect new accounts. As soon as a new user selects a view the default library view will not effect their selected view.

To select the default library view:

1. Log in with Administrator rights and go to **Admin**.
2. In the Portals section click **Portal Configuration**.



3. Find **Library - Default View** in the list.
4. To amend this option click . Select the required mode:
   - ListView.
   - DetailsView.
   - ThumbsView.
   - Catalog View
5. Click to save the setting.

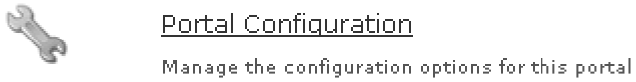
To configure **Library - Default View** for all portals associated with Skyline use the default configuration option. These options are only available when you are logged in with Host privileges. Any changes to the default configuration will affect **ALL** portals associated with Skyline.

Creating Shared Libraries

Users can create shared document libraries in order to be able to share their documents with other specified users. Once documents have been uploaded into their personal library users can move the documents into the required shared library. This setting affects all users of the specific Skyline portal.

To allow users to create shared libraries:

1. Log in with Administrator rights and go to **Admin**.
2. In the Portals section click **Portal Configuration**.

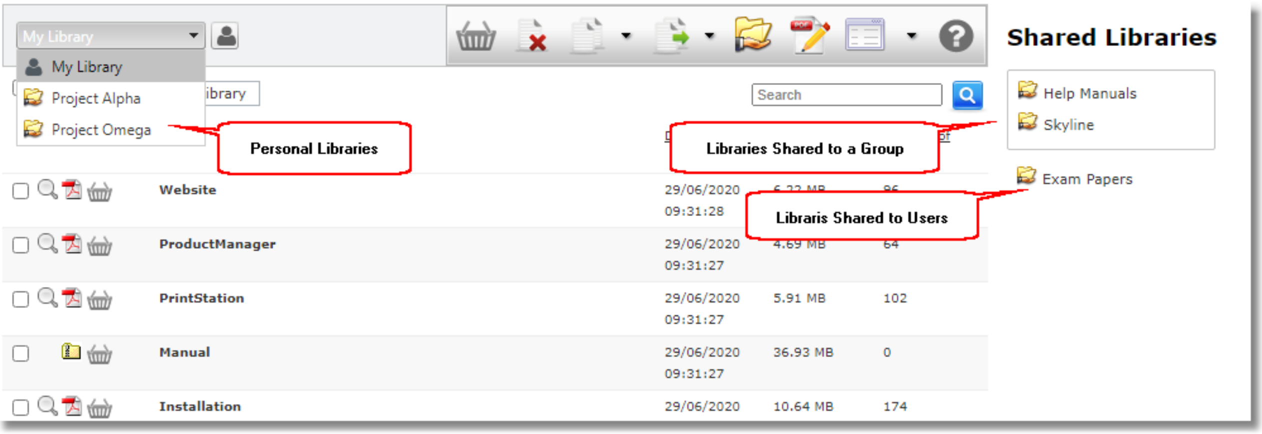


3. Find **Library - Allow Custom Libraries** in the list.
   - Users can have the choice to move documents to their personal library or a shared library by setting the option to **True**.
   - If the option is set as **False** users will only be able to use their personal library.
4. To amend this option click .
5. Click to save the setting.

To configure **Library - Allow Custom Libraries** for all portals associated with Skyline use the default configuration option. These options are only available when you are logged in with Host privileges. Any changes to the default configuration will affect **ALL** portals associated with Skyline.

Showing Shared Libraries

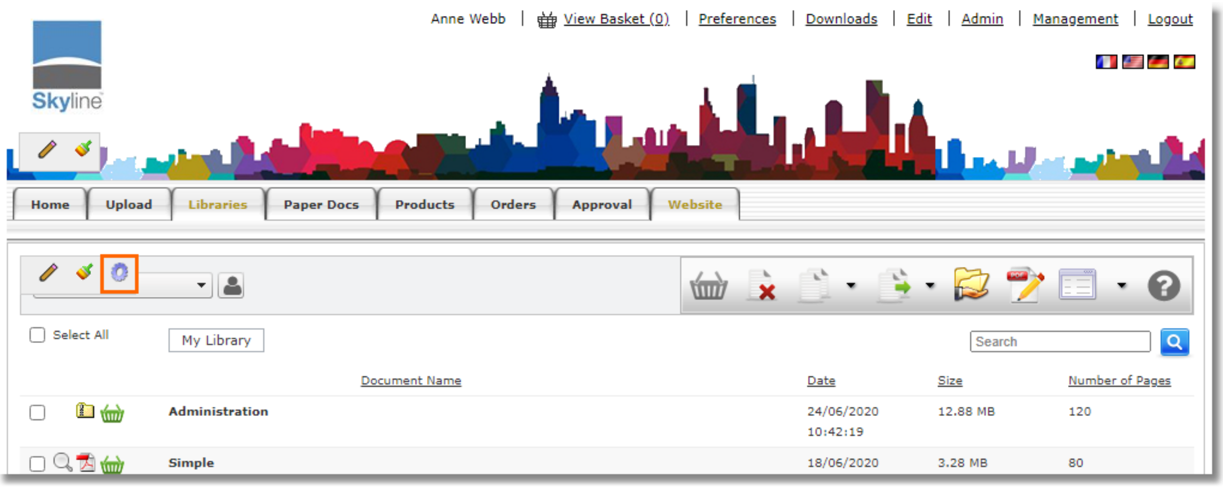
When shared libraries are used the Libraries web page needs to be edited so that the shared libraries are visible.



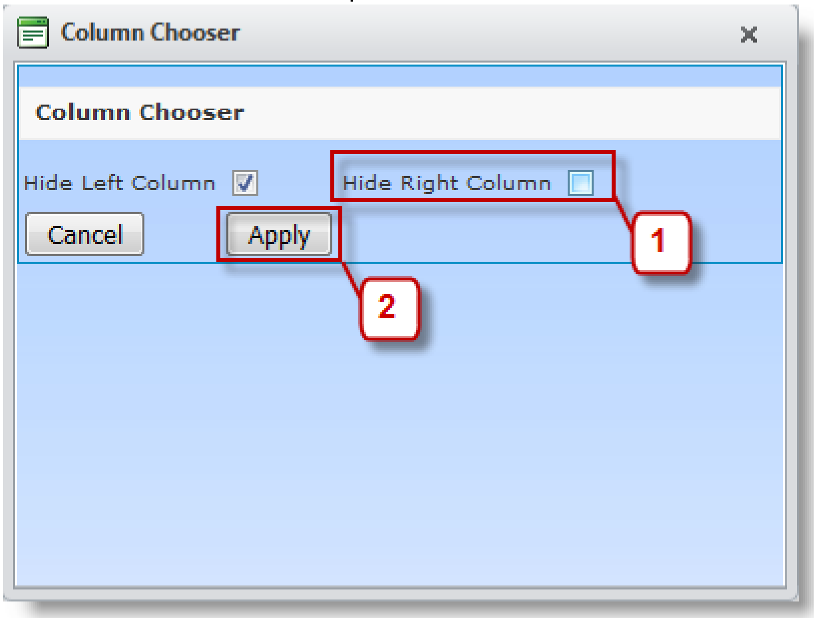
Example Libraries Web Page

To edit the libraries web page:

1. Log in with Editor rights.
2. Select the **Libraries** page and click **Edit**.
3. Floating Edit menu bars appear on the page.
4. Click to open the column chooser window.

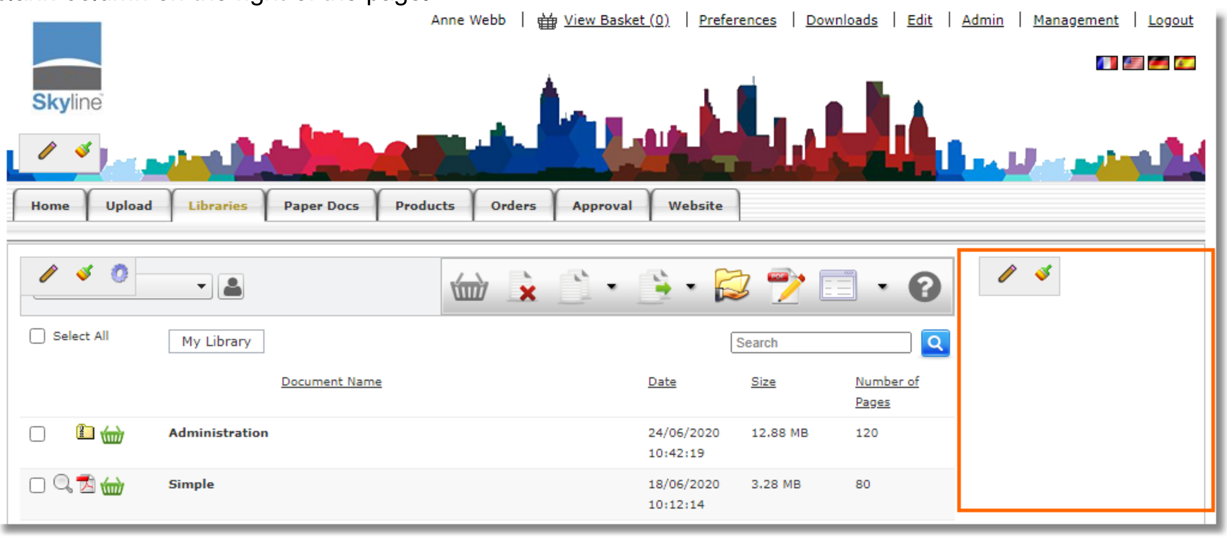


5. The Column Choose window opens

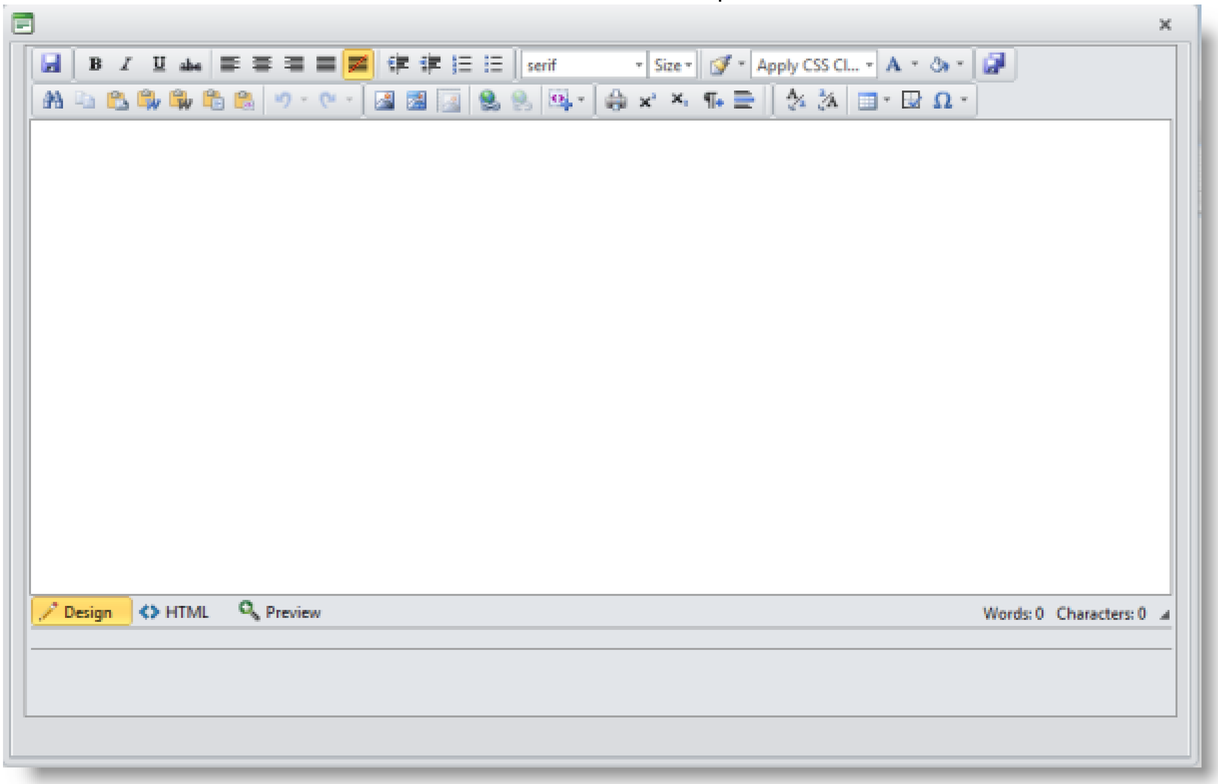


1. Remove the tick by **Hide Right Column**.
2. Click **Apply**.

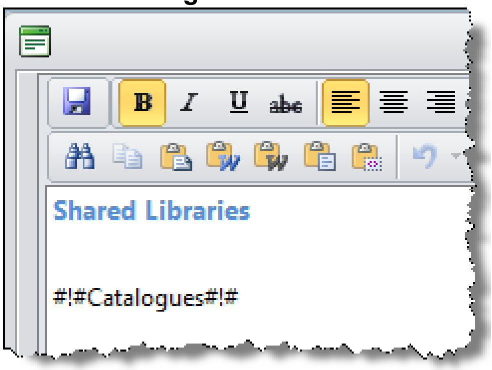
6. Refresh the web page by going to the home page and then returning to the Libraries page. There is a blank column on the right of the page.



7. Click in the blank column to edit the HTML. A blank form opens.



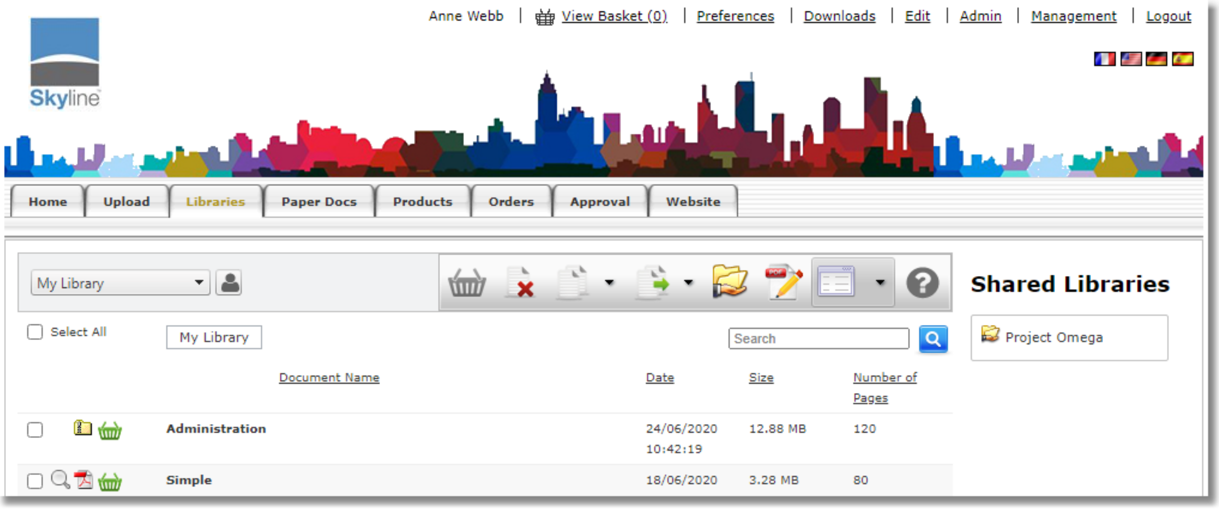
8. Any text an be added in this page and formatted as required. To show the libraries you must enter the code **#!#Catalogues#!#**



9. Click to save your changes.

10. Click **OK** when you see the message **Saved OK**.

11. Refresh the web page by going to the home page and then returning to the Libraries page. Shared libraries will be listed in the right column of the libraries page.



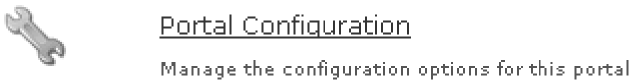
Previewing Documents

Thumbnails of a document can be produced so that the document can be previewed without opening the associated PDF. You can select how many pages of the document can be previewed from a drop down list. To preview a document click the associated with the document.

Note: When Skyline is first installed the default configuration option **Library - Number of Preview Pages** is configured as 20 pages and **Library - Click Thumbnail** is configured as Preview. All portals associated with Skyline will use the Global setting. The number of pages can be left as the default global setting, or changed for each specific portal.

To select the number of pages to preview as thumbnails:

1. Log in with Administrator rights and go to **Admin**.
2. In the Portals section click **Portal Configuration**.

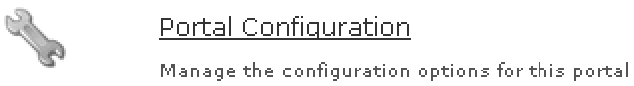


3. Find **Library - Number of Preview Pages** in the list.
4. To amend this option click .
   - Select the number of pages in the document to be shown as thumbnails from the drop down list. The choices are 10, 20, 50 or All pages. The default selection is 20 pages. If the option All Pages is selected there may be a delay in showing all the pages on very long documents.
5. Click to save the setting.

You can also preview the document by clicking the thumbnail associated with the order when the library view is either Thumbnail or Details. You can change the setting **Library - Click Thumbnail** so that want the user will be able to place an order when they click the thumbnail.

To place an order when you click the thumbnail associated with a document within the library:

1. Log in with Administrator rights and go to **Admin**.
2. In the Portals section click **Portal Configuration**.



3. Find **Library - Click Thumbnails** in the list.
   - If the option is set as **Preview** users will preview the document.
   - To allow users to order a document when they click the document thumbnail change the setting option to **Order**.

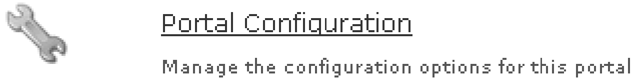
6. To amend this option click .
7. Click to save the setting.

Forcing Preview Before Sending Order

When a user clicks on the shopping basket from a document in their library they can be forced to preview their chosen document before ordering.

To force a user to preview their document:

1. Log in with Administrator rights and go to **Admin**.
2. In the Portals section click **Portal Configuration**.



3. Find **Document - Preview Mandatory** in the list.
    - If the option is set as **True** users will be forced to preview their document.
    - Users are not forced to preview their documents before ordering by setting the option to **False**.
4. To amend this option click .
5. Click to save the setting.

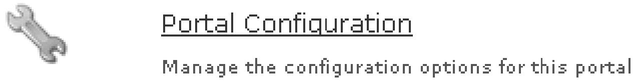
To configure **Document - Preview Mandatory** for all portals associated with Skyline use the default configuration option. These options are only available when you are logged in with Host privileges. Any changes to the default configuration will affect **ALL** portals associated with Skyline.

Downloading PDF's

When a user accesses their document library they can be permitted to download a copy of uploaded documents as a PDF or not. When you view documents in your library you will see a next to the document or a Download button if you can download the document as a PDF.

To change the permission for PDF downloads:

1. Log in with Administrator rights and go to **Admin**.
2. In the Portals section click **Portal Configuration**.



3. Find **Library - Users Can Download PDF** in the list.
    - If the option is set as **True** users will be able to download a PDF.
    - To prevent users downloading a PDF change the setting option to **False**.
4. To amend this option click .
5. Click to save the setting.

To configure **Library - Users Can Download PDF** for all portals associated with Skyline use the default configuration option. These options are only available when you are logged in with Host privileges. Any changes to the default configuration will affect **ALL** portals associated with Skyline.

Hiding the Libraries Web Page

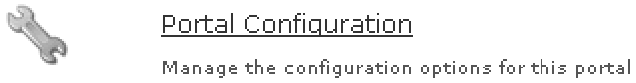
You can choose to remove the Libraries web page for all users of the portal so that they will not have access to a personal document library. By default all users have access to personal libraries so they are able to order or re-order documents from their own document library. When libraries are turned off users can only order documents when they are uploaded.

Note:
If you choose to hide the Libraries web page this will affect all users of the specific Skyline portal. If a user signs in with Administrator or Host rights, the Library web page will always be visible.

To hide the Libraries web page:

1. Log in with Administrator rights and go to **Admin**.

2. In the Portals section click **Portal Configuration**.



3. Find **Library - Allow User Libraries** in the list.
   - If the option is set as **True** users will be able to see the Libraries web page.
   - The Libraries web page can be hidden by setting the option to **False**.
     If you are signed in with Host or Administrator privileges, you will always see the Libraries web page, even if the option is set to false.
4. To amend this option click .
5. Click to save the setting.

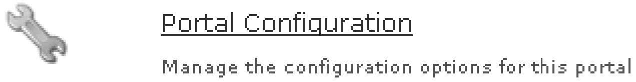
Amending the Help Button

On the Libraries toolbar there is a help button. The button can be configured to link to a web page, a PDF or an email.

To configure the Help button:

1. Log in with Administrator rights and go to **Admin**.

2. In the Portals section click **Portal Configuration**.



3. Find **Help link for Library page** in the list and set the link to show either:

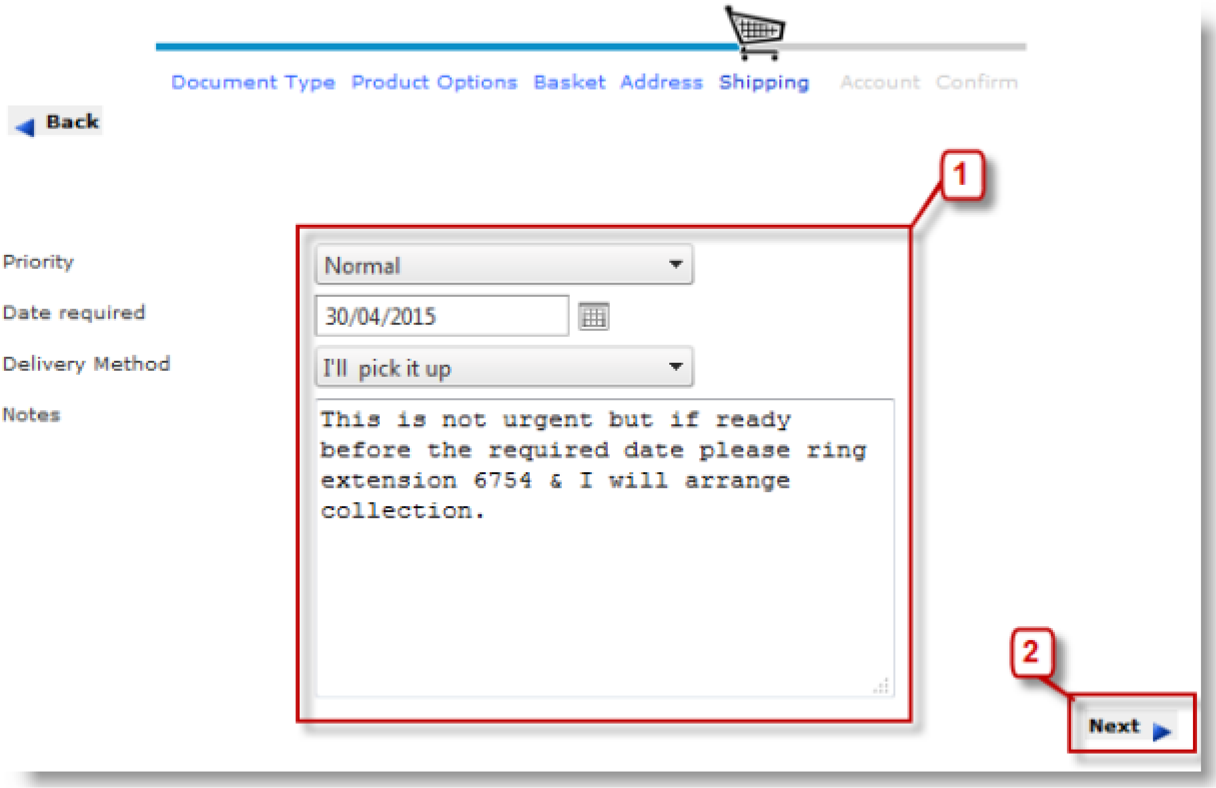
- **Email**: set the link to: mailto:email@example.com?subject=Mail from our Website. This opens the user's default email application with the email address and subject filled in already.
- **Web Page**: set the link to any web page you want to link to e.g. https://help.eprint.net/index.html?orderingdocuments.htm
- **PDF Document**: set the link to the full path to a PDF Document, e.g. https://www.example/attachments/article/650MH896.pdf. This opens the PDF in Chrome, Edge, Firefox and Internet Explorer 11.

4. Click  to save the setting.

Amending Delivery Details

When users place an order they can select the delivery priority and method. By default this page is part of the order process. The layout of this page is a form which is created and managed in ProductManager.

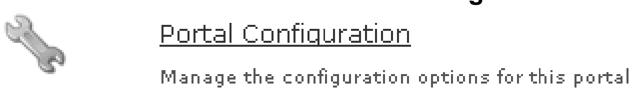
If the Checkout Mode99 is configured to show separate pages you can hide the shipping details web page if the information is not applicable to your organisation. If the Checkout Mode is selected to show combined pages, the delivery details will show even if you set the **Checkout - Show Delivery Priority Page** option to false.



Example Delivery Details Web Page

To hide/show the shipping web page:

1. Log in with Administrator rights and go to **Admin**.
2. In the Portals section click **Portal Configuration**.

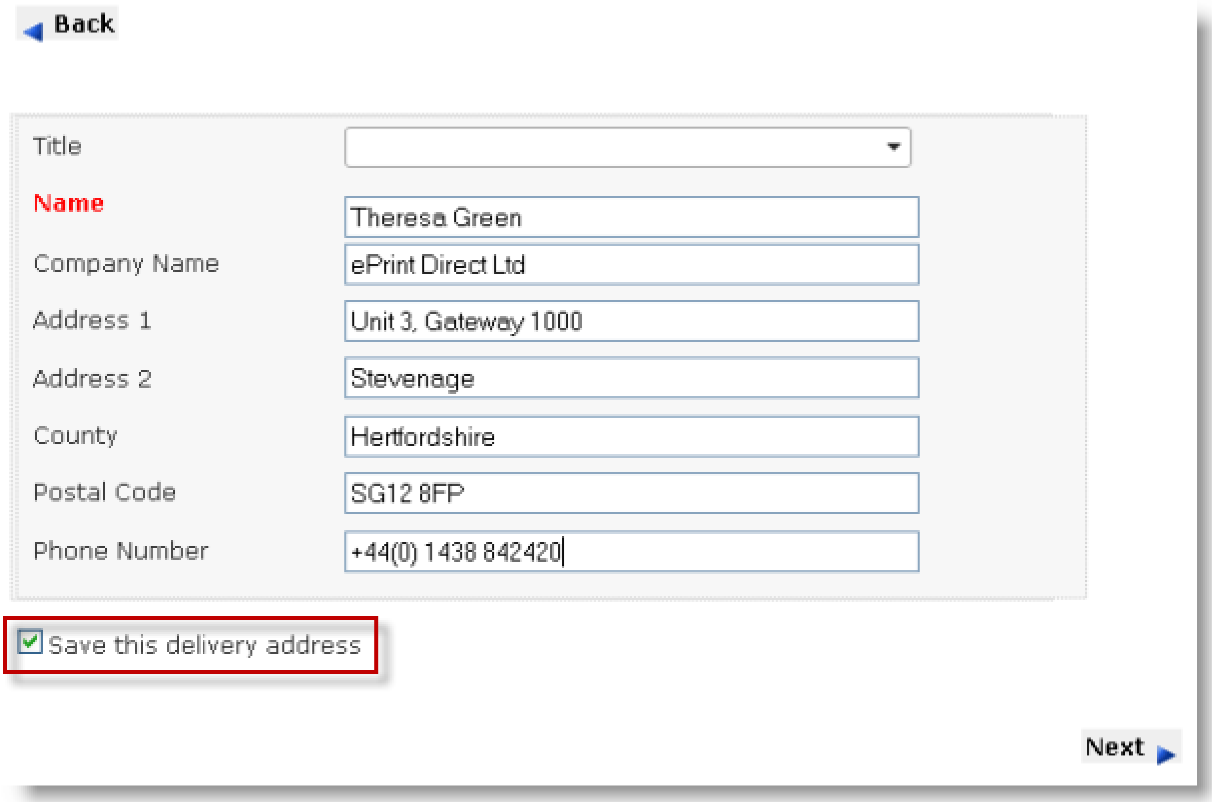


3. Find **Checkout - Show Delivery Priority Page** in the list.
    - If the option is set as **True** users will have access to the shipping web page.
    - The shipping web page can be removed by setting the option to **False**.
4. To amend this option click .
5. Click to save the setting.

To configure **Checkout - Show Delivery Priority Page** for all portals associated with Skyline use the default configuration option. These options are only available when you are logged in with Host privileges. Any changes to the default configuration will affect **ALL** portals associated with Skyline.

Saving the Delivery Address

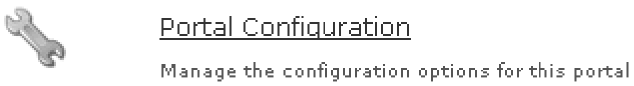
If you do not want users to be able to save their delivery address during the order process the delivery address tick box needs to be removed from the delivery address page. Users can enter their delivery details using the preferences link and changing their address details. Any changes made will be reflected when they place their next order.



Example Delivery Address

To hide/show the save delivery address option:

1. Log in with Administrator rights and go to **Admin**.
2. In the Portals section click **Portal Configuration**.



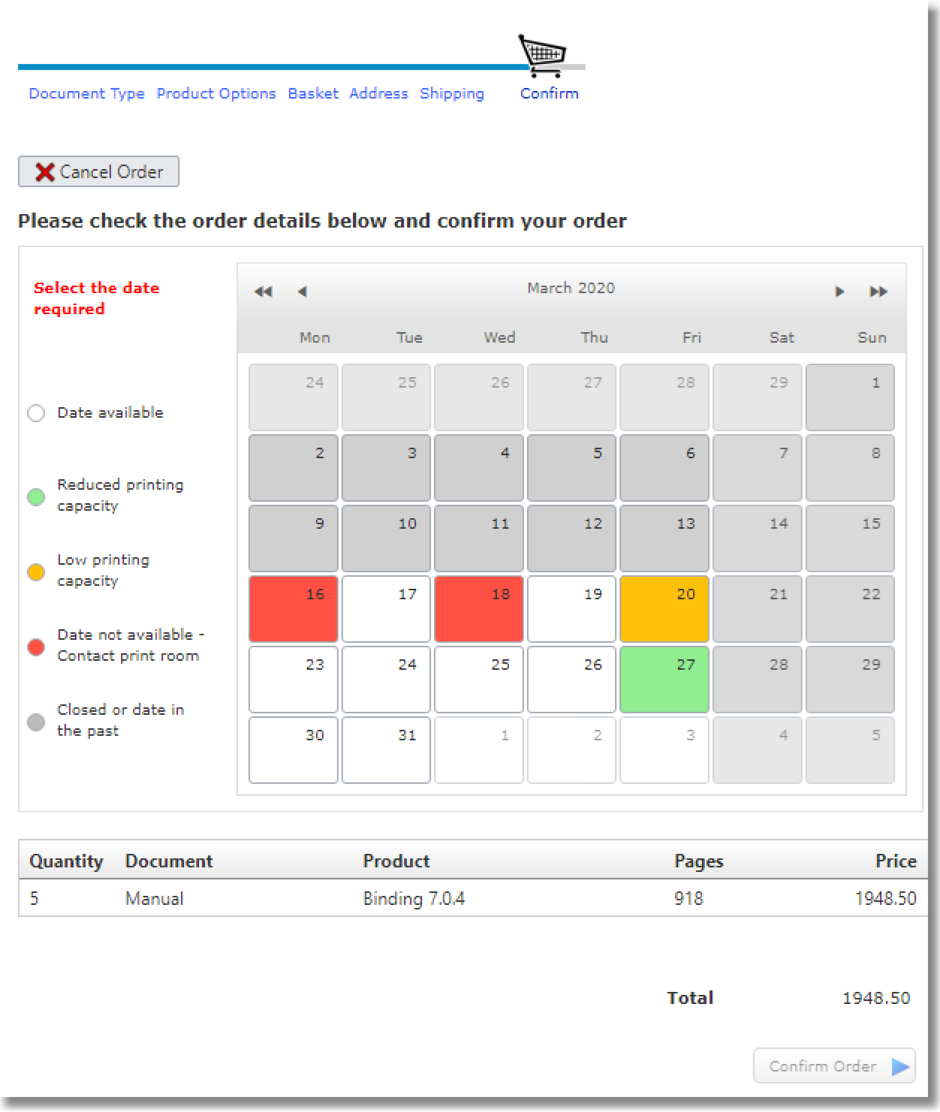
3. Find **Checkout - Save Delivery Address** in the list.
   - If the option is set as **True** users will have the option to save their delivery address.
   - The save delivery address option can be removed by setting the option to **False**.
4. To amend this option click .
5. Click to save the setting.

To configure **Checkout - Save Delivery Address** for all portals associated with Skyline use the default configuration option. These options are only available when you are logged in with Host privileges. Any changes to the default configuration will affect **ALL** portals associated with Skyline.

Controlling Printing Levels using Smart Calendar

The Smart Calendar option enables you to set the maximum number of pages that can be printed by the print room for each day. This means that the print room should not receive more orders than they are able to produce as users are only able to select a delivery date where there is still capacity to produce the order. You are also able to select the days that the print room operates and set a different print level for specific days. This could be especially useful if there is reduced capacity on a specific day due to a printer being serviced or a public holiday approaching.

The Smart Calendar will be displayed to the user when they place their order on the confirmation page.

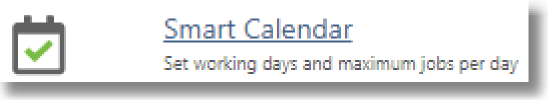


Example showing the Smart Calendar on the Confirmation page. Until a date is selected the order cannot be placed.

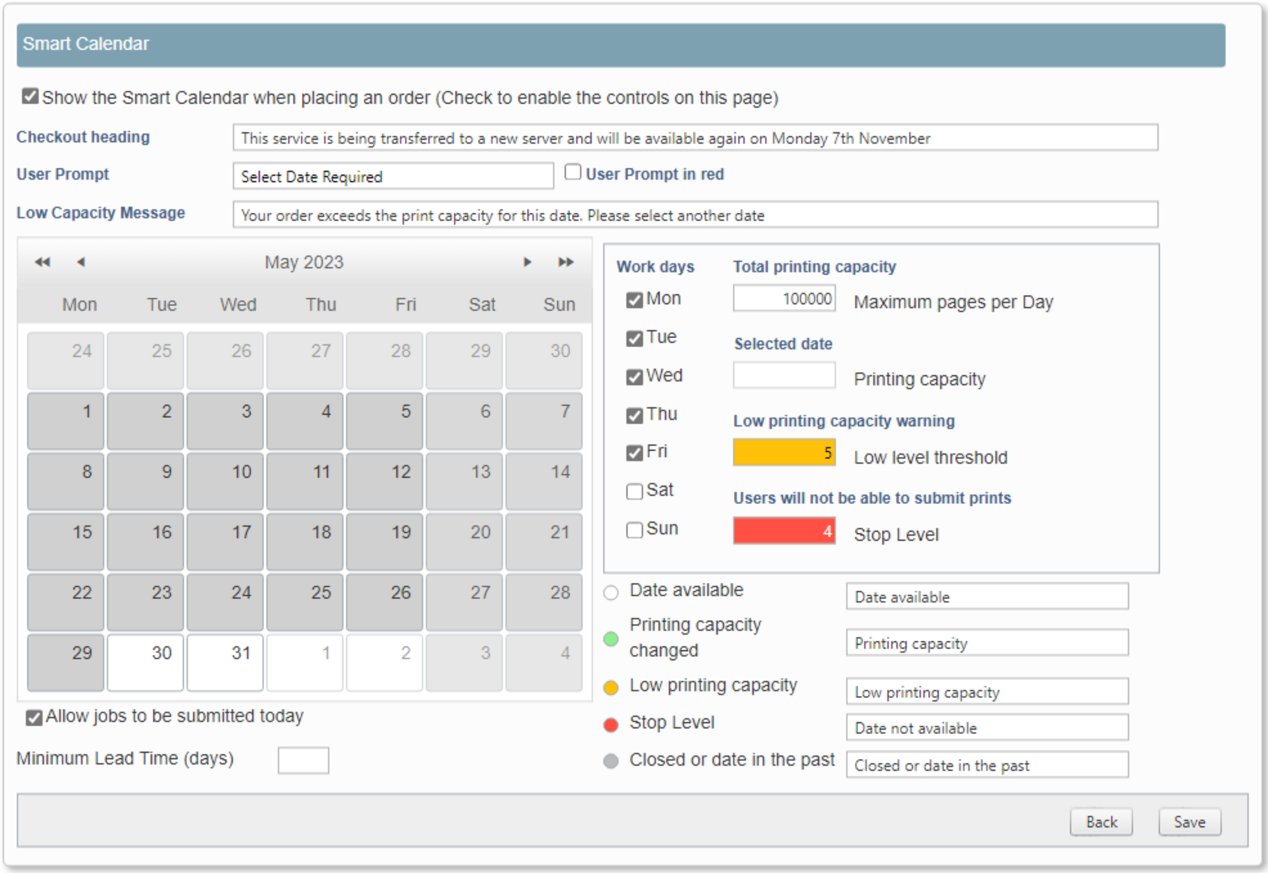
Note: If you are using the Smart Calendar you should not use a calendar in your delivery form created in ProductManager.

To configure the Smart Calendar:

1. Log in with Administrator rights and go to **Admin**.
2. In the Orders section click **Smart calendar**.



3. The Smart Calendar configuration form opens.



1. Select the option to **Show the Smart Calendar when placing an order**. You will now be able to amend the controls on the page.
2. Amend the checkout heading (optional).
3. Amend the **User Prompt** if required and select if you want it to be displayed in red text.
4. Enter a low capacity message.
5. Select the appropriate work days for your print room. By default the option to allow jobs to be submitted for the current date is selected. If you remove the selection users will not be able to place an order which is required on the current day.

6. Enter the Printing Capacity levels as required.

   If you are closed on particular dates, for example for a public holiday, you can prevent orders being placed for delivery on those dates by selecting the date and setting the maximum prints for the day as being Zero. If you set a printing level to zero the date is greyed out and cannot be selected.

   You can enter a value in the stop level if required. This will create a buffer zone in the PrintStation to allow for special orders to be printed if needed.

7. Amend any messages to the user.

8. By default the user is not able to select the date required to be the same as the date that they are placing the order. If this is allowed select the option to **Allow jobs the be submitted today**.

9. Enter the number of lead days required in the field labelled **Minimum Lead Time (days)**. Non work days are not included in the calculation. By setting a 'Minimum Lead Time (Day) you override the option 'Allow Jobs to be Selected Today'.

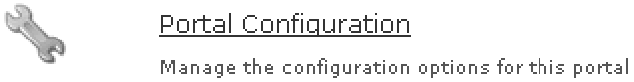
10. When you have completed the form click **Save**.

Combining the Address, Delivery & Account Pages

When you proceed through the ordering process you complete your address details, then on the next page the shipping details and finally enter the account details, if required. You can amend the check out mode to combine the Address and Delivery pages or the Address, Delivery & Account pages.

To change the checkout mode:

1. Log in with Administrator rights and go to **Admin**.
2. In the Portals section click **Portal Configuration**.



3. Find **Checkout Mode** in the list.
   - **Separate pages** - The address, delivery and account pages are shown separately.
   - **Combine Address and Delivery** - The address and delivery pages are combined into one web page. The accounts details are shown on a separate page.
   - **Combine Address Delivery and Accounts** - All three pages are combined into one web page.

   The option to enter a mask for the account number 146 when users manually enter the account code, name or description is also only available when the accounts page is shown separately.

4. To amend this option click .
5. Click to save the setting.

To configure **Checkout Mode** for all portals associated with Skyline use the default configuration option. These options are only available when you are logged in with Host privileges. Any changes to the default configuration will affect **ALL** portals associated with Skyline.

Orders Web Page

The Orders web page displays any orders that have been placed. The view link for an entry in the list will display the complete job ticket for that order. When the initial configuration of the system is implemented the order number format[196] can be configured and the start number specified[195]. If there is a red cross by an order, the order can be deleted. The job statuses can be amended to allow or prevent orders from being deleted[202].

PDF	Job Ticket	Document	Order Number	Order Date	Required Date	Status	Quote	Delete
	View	TUI Iceland	0000111	30/04/2024 14:03		Downloaded		
	View	WorldWide Escorted Tours	0000111	30/04/2024 14:03		Order Placed		
	View	Administration	0000111	30/04/2024 14:03		In Production		
	View	Manual	0000111	30/04/2024 14:03		Order Placed		
	View	NewEngland	0000111	30/04/2024 14:03		Completed		
	View	Word (6 pages) Mono	0000111	30/04/2024 14:03		Downloaded		
	View	Testing Notes for Additional Fields	0000111	30/04/2024 14:03		Printed		

Example Orders Web Page

Modifying the Look & Feel

You can change the way Skyline looks so that it conforms to your companies style. You can also use Skyline to share relevant information to all users, for example any special deals or print room features that users may not already be aware of.

The main ways to change the look and feel of Skyline is to:

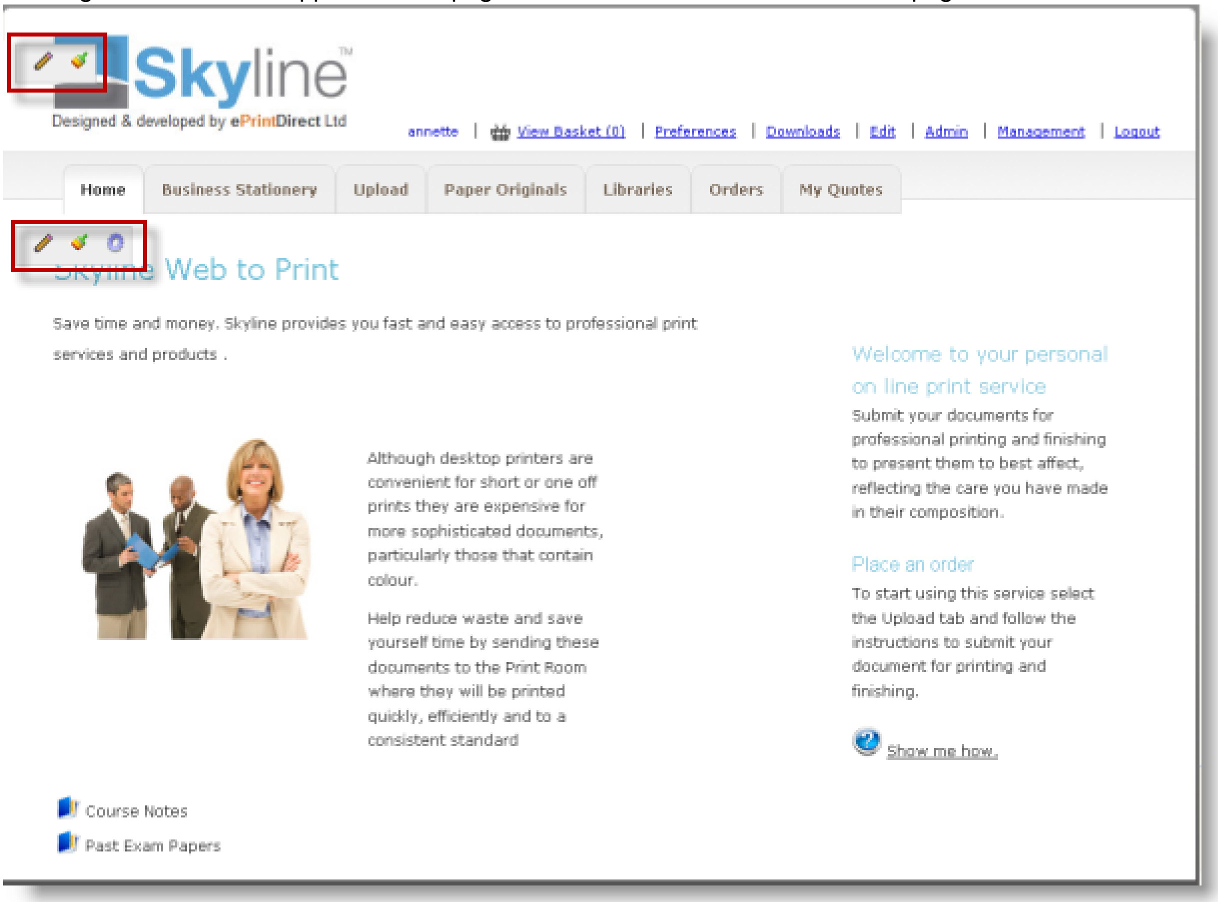
- Change the contents101 of the Home web page.
- Show an external web page104, for example allow access to the companies Intranet.
- Apply specific portal themes208.

Changing the Page Contents

You can change the wording on a page as well as adding other images. For example the Home page can be changed to share relevant information to all users. This is a brief overview on how to amend the web page selected.

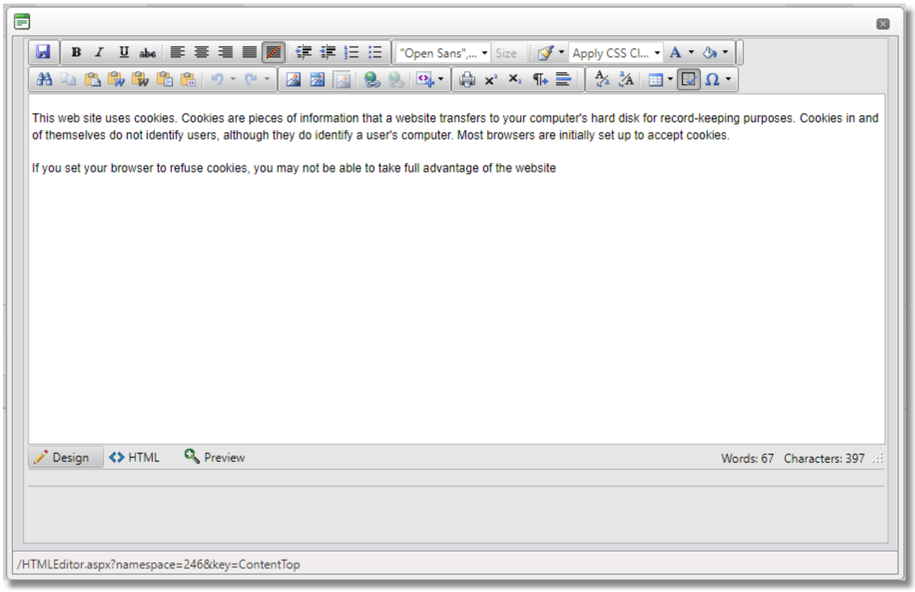
To amend the home page:

1. Log in with Editor rights.
2. Select the **Home** page and click **Edit**.
3. Floating Edit menu bars appear on the page. These can be used to amend the page.



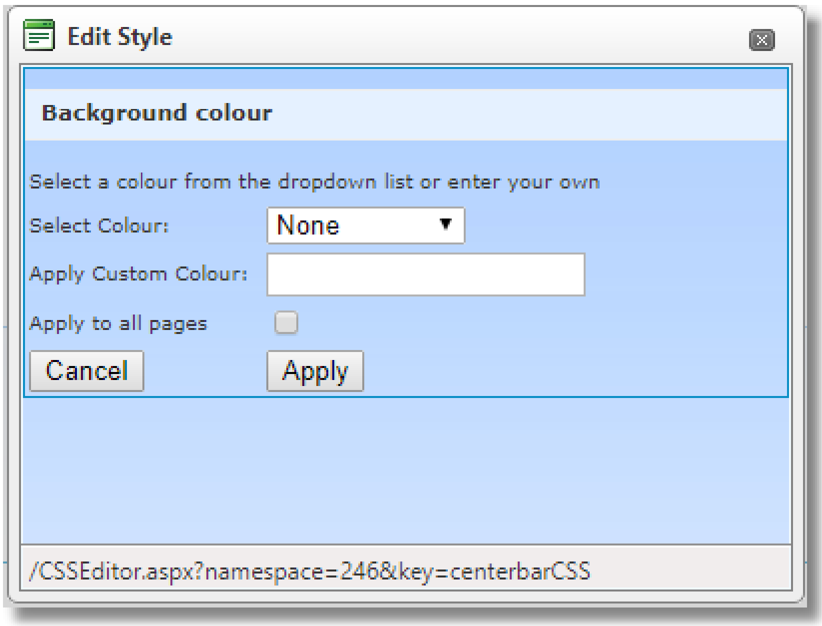
Edit HTML

When you click the HTML editor window opens containing the text and graphics of the area selected. The example below shows the HTML editor window open for the main body of the page when the icon on the lower toolbar is selected. Use the editor to make your changes and update your page.



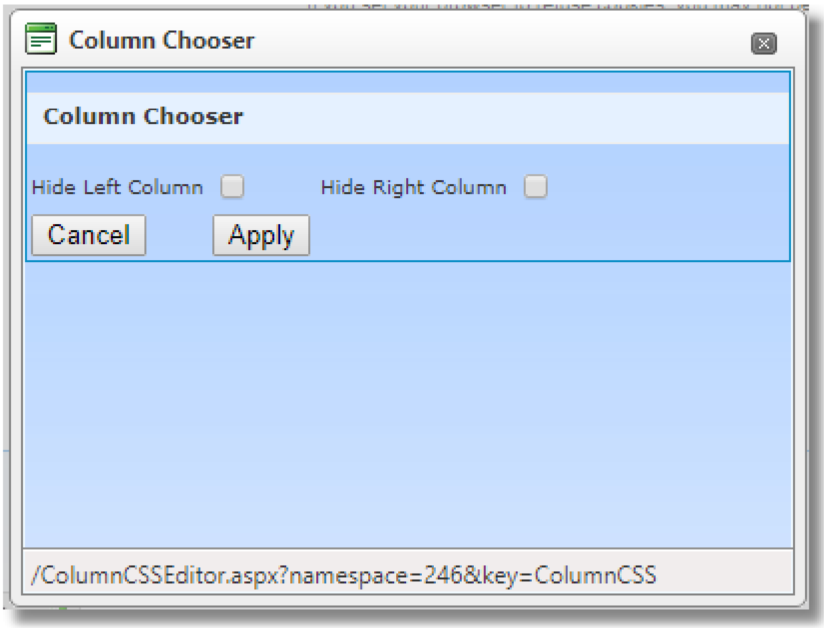
Edit Style

You can change the background colour of the pages using the icon. A new window opens which you can select the colour or specify a custom colour.



Edit Columns

The text is layered out in columns. You can choose to show the hidden columns to the left or right. Make the selection from the column chooser and click Apply.



Showing an External Web Page

Linking to an external website is a useful way of adding extra functionality to your Skyline installation. You can link a tab in Skyline to any internal or external site that is usually available to users of the system via their web browsers. This will be available to all users of the portal. To create a tab to show another website you first need to create a custom page and then add it to the portal.

Note: If you log in with a user name with Host Privileges, you can create a page that will be available to all the portals on a Skyline server.

To create a custom page:

1. Log in with Administrator & Editor rights and go to **Admin**.
2. In the Content section click **Custom Pages**.

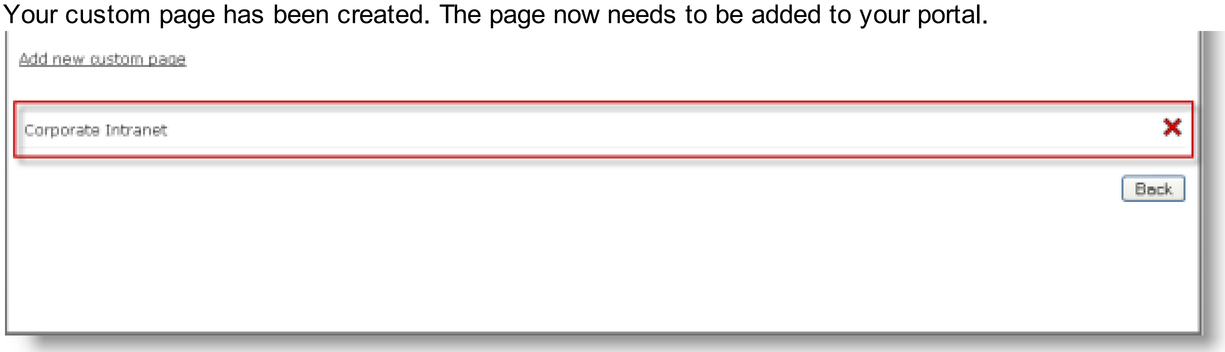
3. A list of any existing pages will show.

   1. Click the link **Add new custom page**.

4. A new field appears.

   1. Enter a name for the new web page.
   2. Click **Submit**.

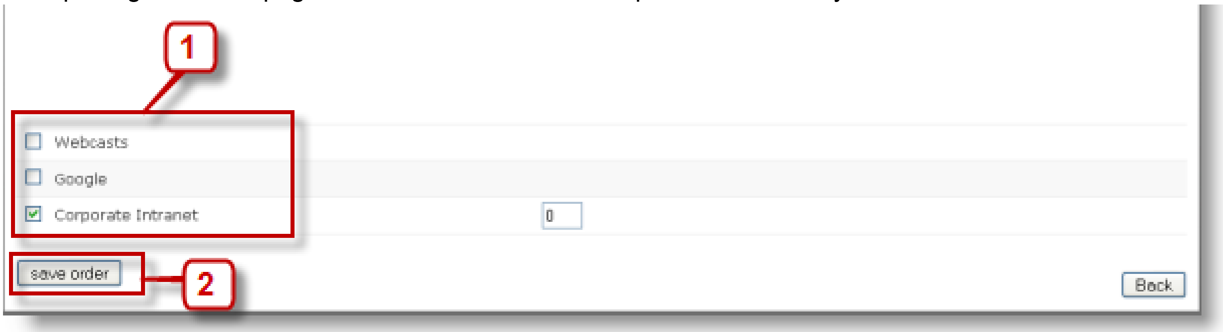
5. Your custom page has been created. The page now needs to be added to your portal.



6. Click the **Admin** link.

7. In the Content section click **Selected Custom Pages**.

8. All the custom pages available to the portal are listed. Some pages may have be created by a user with Host privileges. These pages will be available to all the portals on the Skyline server.



   1. Select the pages you want to add to your portal. If more that one page is added, a drop-down list next to each page will show the order the pages will appear on the navigation tab.

   2. Click **Save order**.

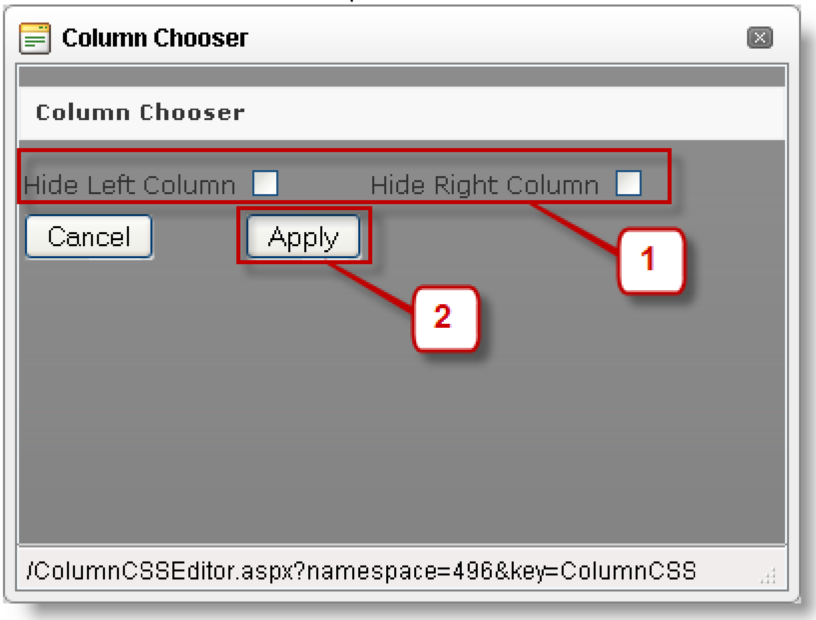
9. The new web page tab will be added.

   1. Select the new web page tab that you have created.

   2. Click the **Edit** link at the top of the page.

   3. The edit tools for each website pane will load.

10. You need to ensure that the embedded page fills the entire lower pane. Click  in the centre column. The column chooser window opens.



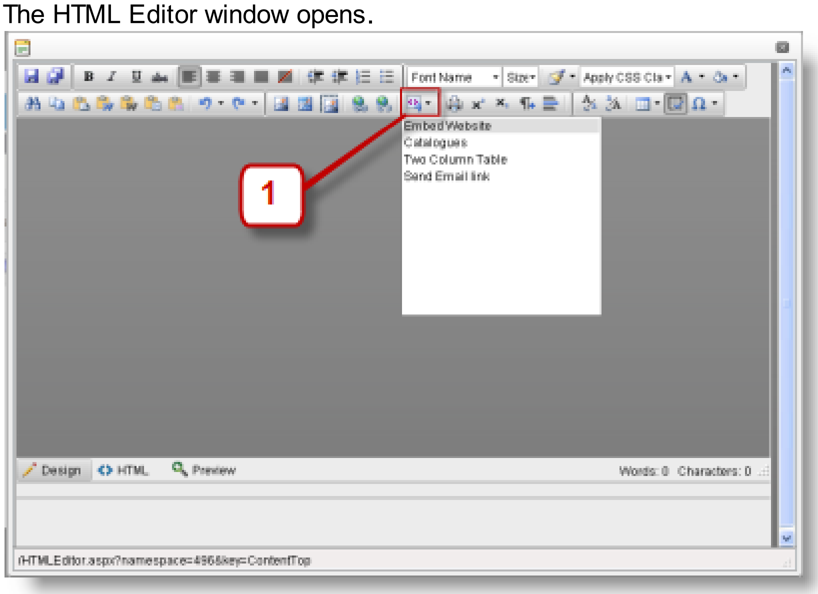
1. Select **Hide Left Column** and **Hide Right Column**.

2. Click **Apply**.

11. The external web page needs to be embedded.

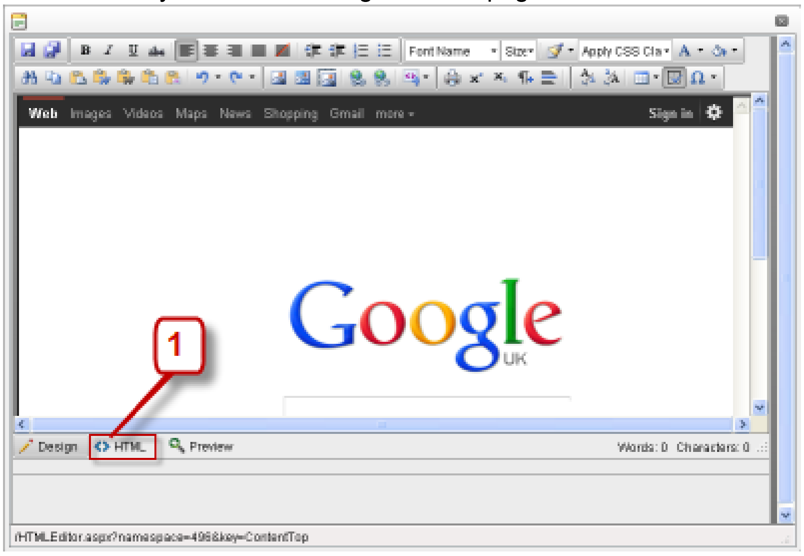
1. Click the Edit link at the top of the page.

12. The HTML Editor window opens.



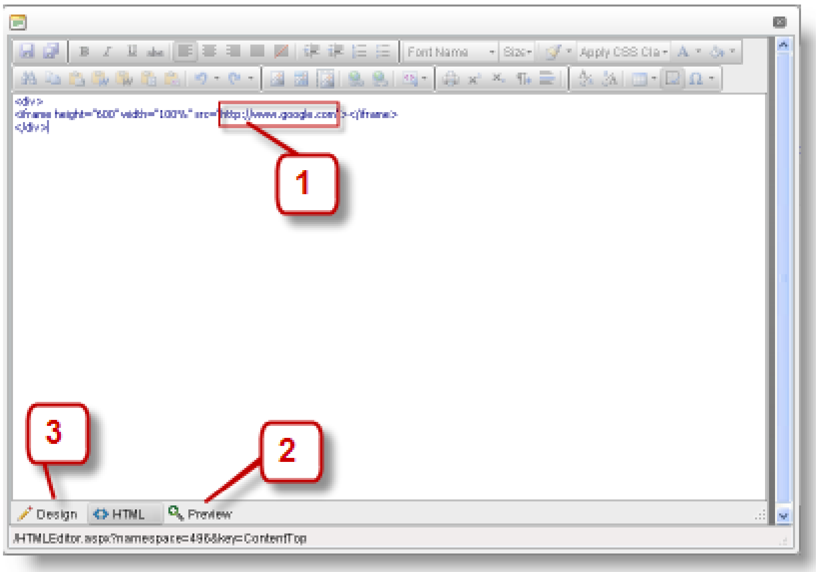
1. Click **Insert Code Snippet** and select **Embedded Website** from the drop down menu.

13. The frame may fill with the Google search page.



1. To change the embedded page click HTML at the bottom of the edit window.

14. Look at HTML code.



1. Change the URL to the page you want to embed. So http://www.google.com becomes http://your_web_address_here.com.

2. Click Preview to view how the page will look if you save it.

3. Click Design then click  to save the page and your changes.

Editing the Login Page

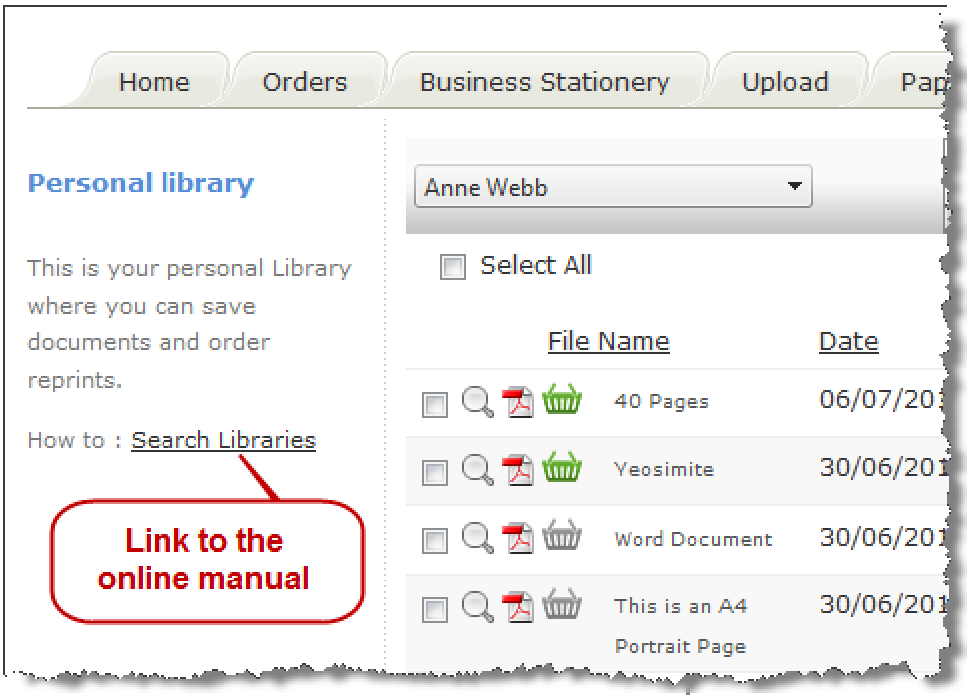
Normally, the only time you see the log in page is when you are logged out, but when you log out, you no longer have access to the editor. To be able to edit the log in page, do not log out of the portal.

To edit the log in page:

1. Open the portal you want to edit and click the **Home** tab.
2. Click **Edit**.
3. In the browser address bar, edit the portal URL and change it from http://... /Default.aspx to http://... / login.aspx
   This opens the log in page without having to log out.
4. Edit as required.

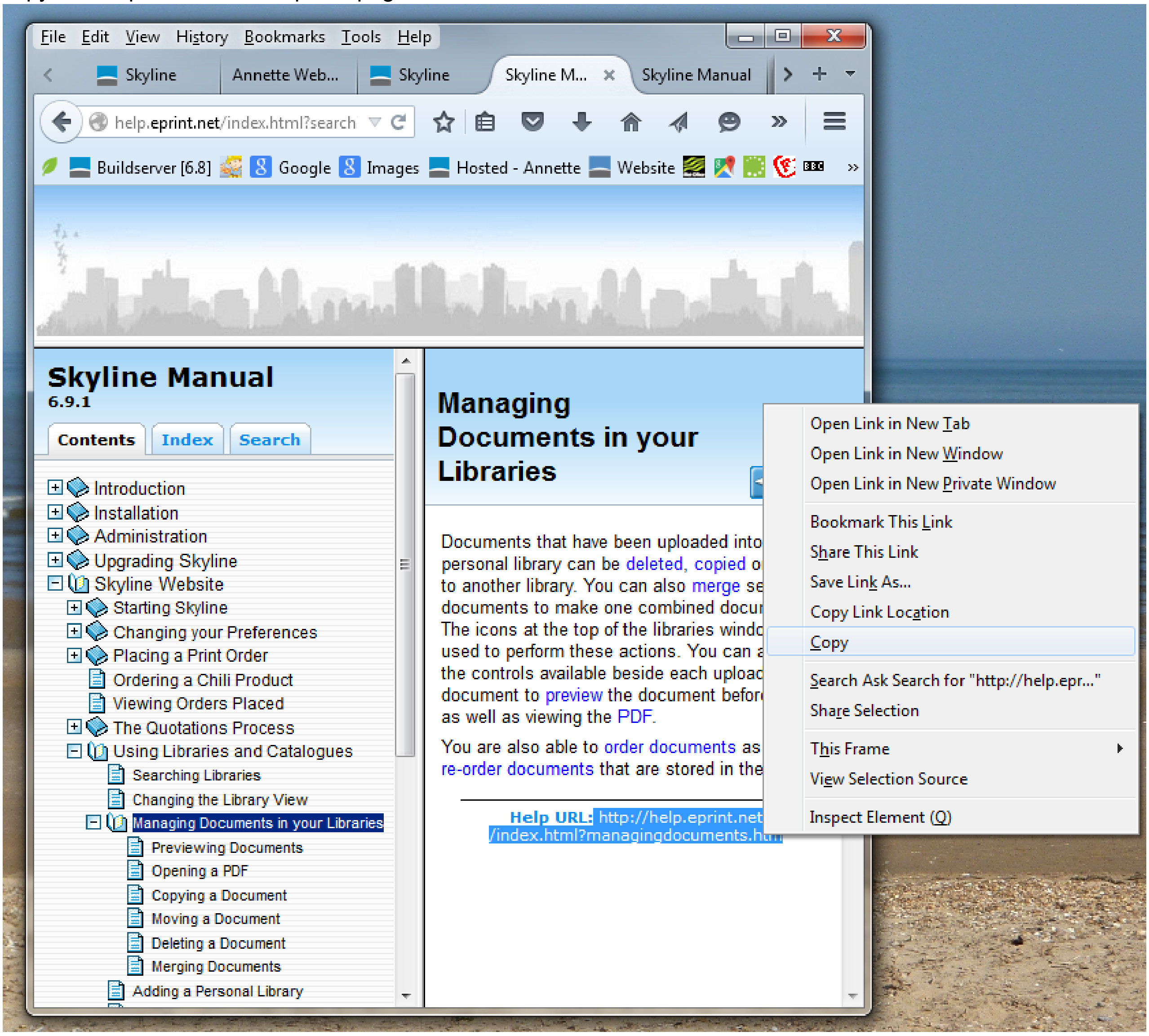
Adding Links to the Online Manual

To make it easier for your users you can add links on the web pages to the online Skyline Manual. For example, you can add a link on the libraries page linking to Searching Libraries page in the online manual



To add a link to a Web page:

1. Open the online help [http://help.eprint.net/] and view the page that you want to link to. Highlight and copy the help URL to the required page.



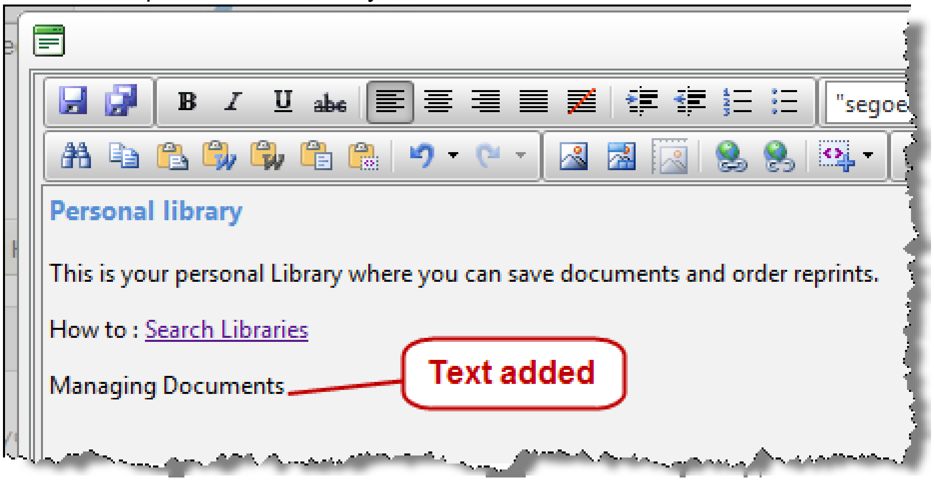
2. Log in with Editor rights to Skyline.

3. Select the web page that you want to add the link.

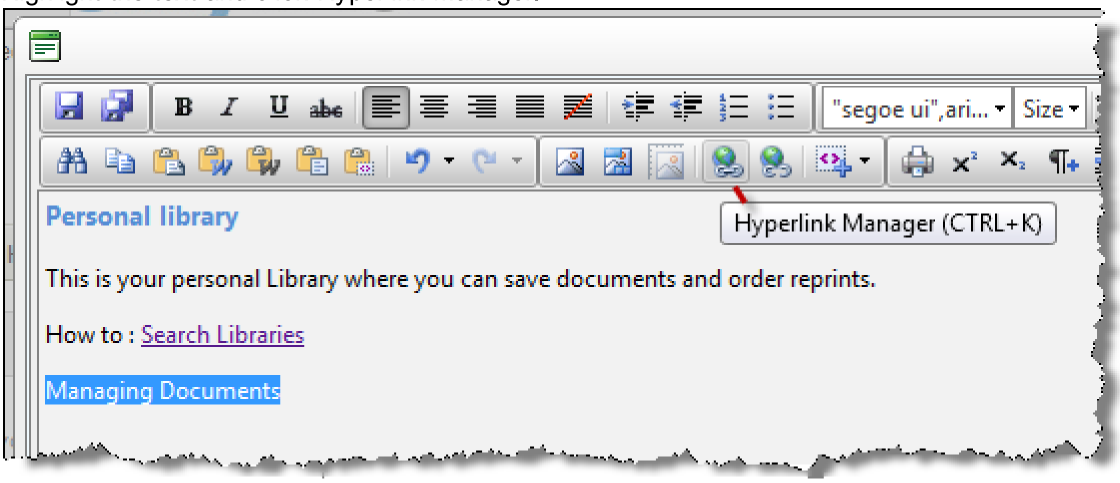
4. Click **Edit**. The floating edit menu bars appear on the page.

5. In the area to add the link click ✎. The HTML editor window opens containing the text and graphics of the area selected.

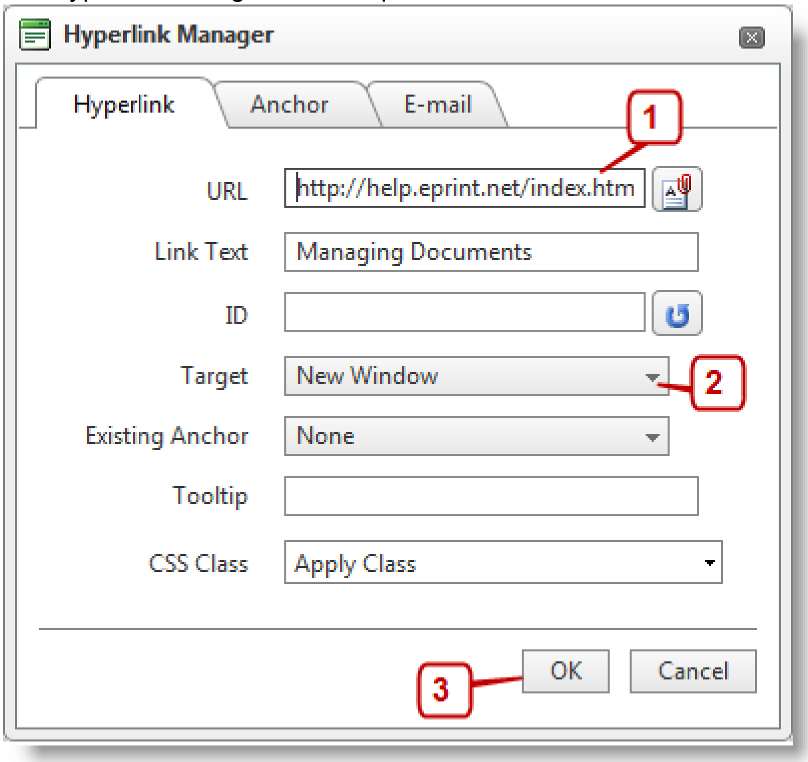
6. Enter the required text for the layout.



7. Highlight the text and click Hyperlink Manager.



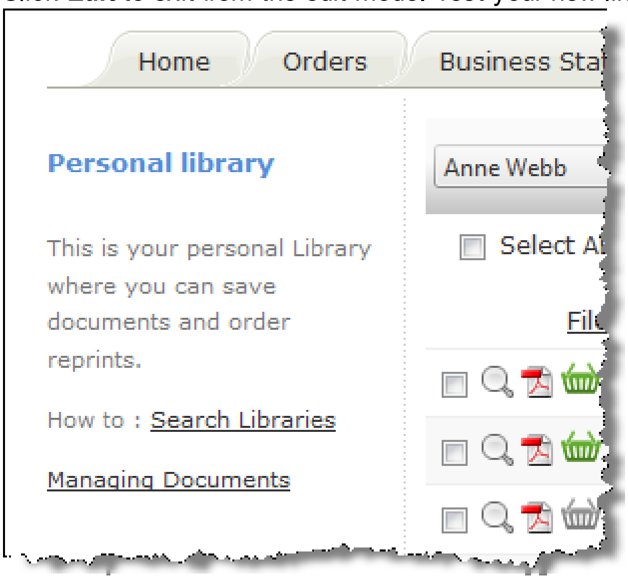
8. The Hyperlink Manager window opens.



   1. Paste Help URL you copied in step 1 into the URL field.
   2. Select the Target **New Window**.
   3. Click **OK**.

9. When the mouse pointer is moved over the text it is shown in blue. The text is underlined on the page to indicate that it is an URL. Click **Save**.

10. Click **Edit** to exit from the edit mode. Test your new link. The help page should open in a new window.

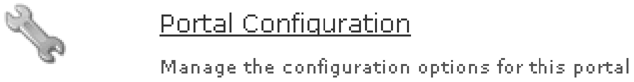


Changing the Default Language

If the default language is not listed in the list of specified website languages 113 then Skyline will not start.

To change the default language:

1. Log in with Administrator rights and go to **Admin**.
2. In the Portals section click **Portal Configuration**.

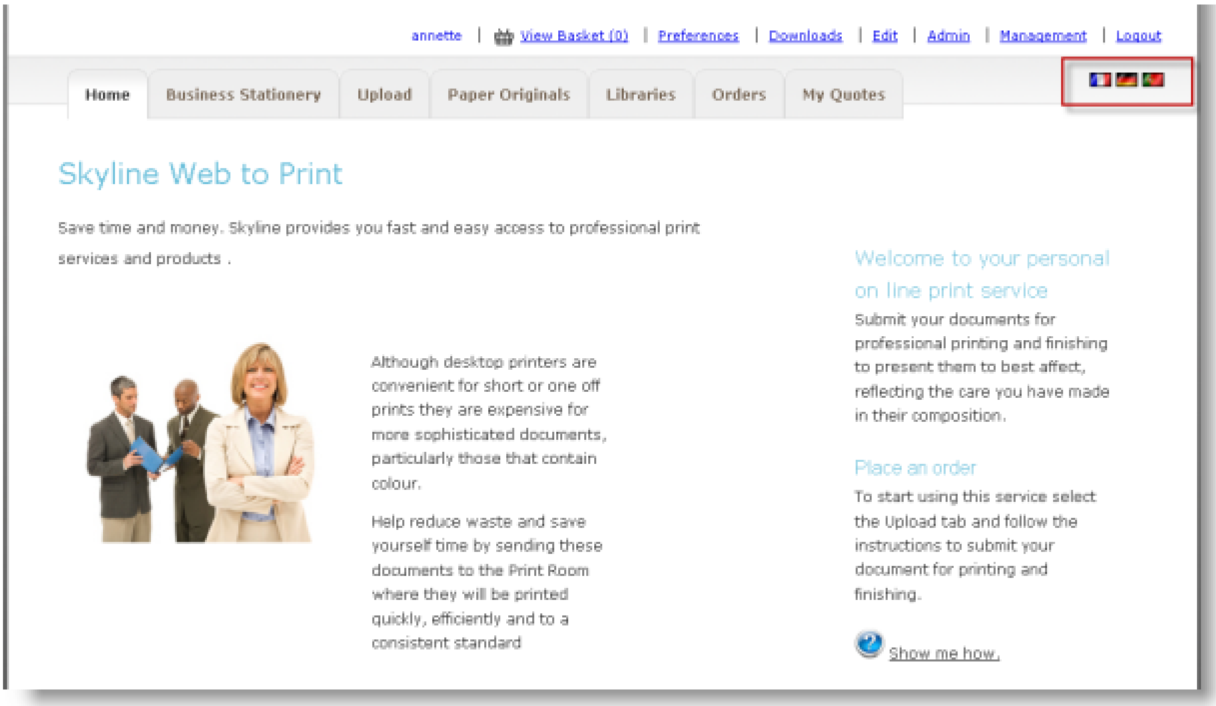


3. Find **Look And Feel - Language** in the list.
4. To amend this option click and enter the required language code. For more details refer to the Language Country Codes listed in the appendix.
5. Click to save the setting.

To configure **Look And Feel - Language** for all portals associated with Skyline use the default configuration option. These options are only available when you are logged in with Host privileges. Any changes to the default configuration will affect **ALL** portals associated with Skyline.

Using Multiple Languages

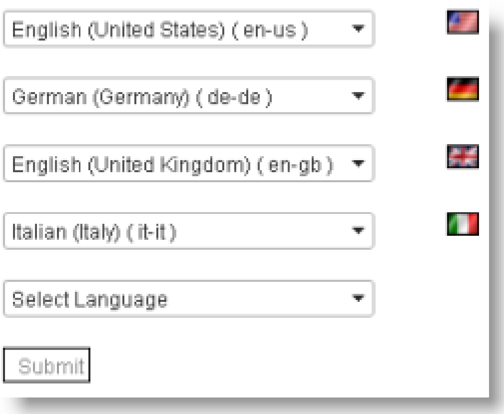
A Skyline portal can be configured to be able to switch languages. Once a Skyline portal has been set up for multiple language selection the language required by the user is selected by clicking on the nationality flag in the top right hand corner of the Skyline portal.



To select the available languages:

1. Log in with Administrator rights and go to **Admin**.
2. In the Portals section click **Website Languages**.

3. Select the required languages from the drop down menus.

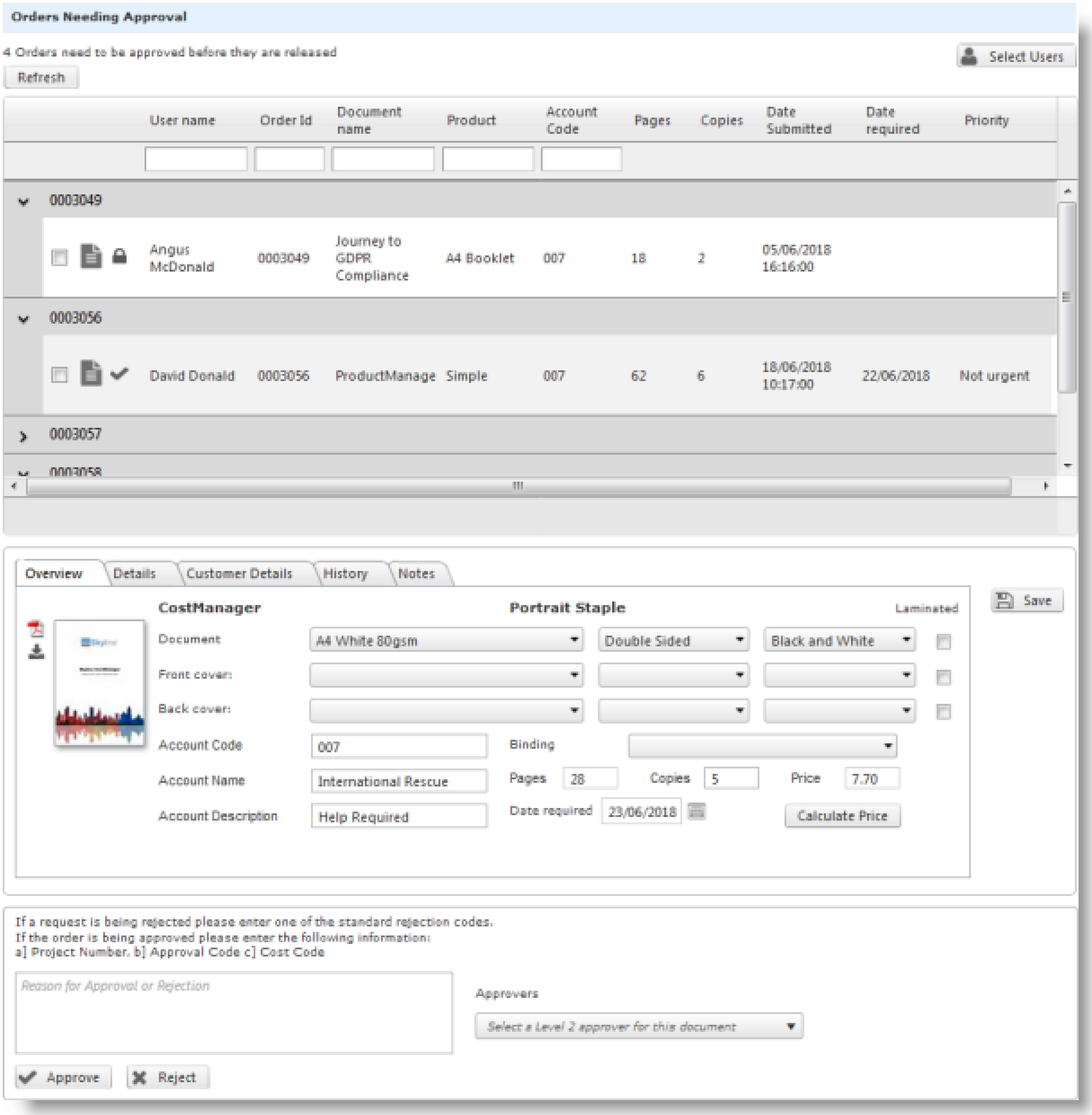


4. Click **Submit** to save your selection.
5. Confirmation that you have successfully updated your available languages is shown. Click **OK** to complete the procedure.

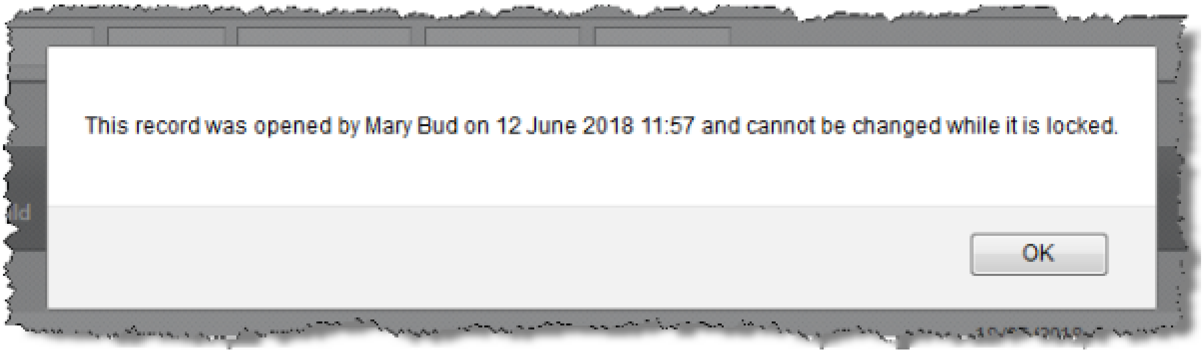
Configuring Approval

The approval function allows managers to decide what jobs are printed by Skyline and automatically keep the user informed of those decisions.

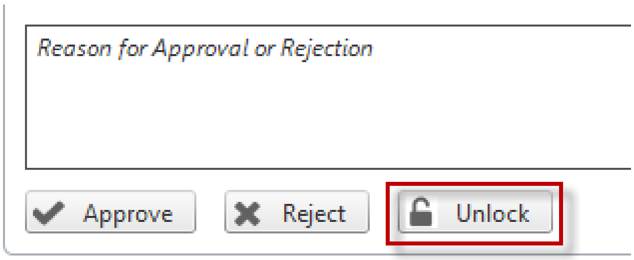
When a user completes placing an order an approval message[132] will inform them that their order requires approval before it is passed to the print room for processing.



Any job with ✔ are orders that you have selected and the it is locked to you. If you leave the page without clicking the refresh button, the order will stay locked. Orders with 🔒 are being viewed by another approver and are locked to that user. If you select the order you will be able to view who has the order opened.



When you click OK you will be able to view the order details at the bottom of the screen. If you need to unlock the order click the Unlock button at the bottom of the window. This will assign the order to you and the other approver will no longer be able to make any changes.



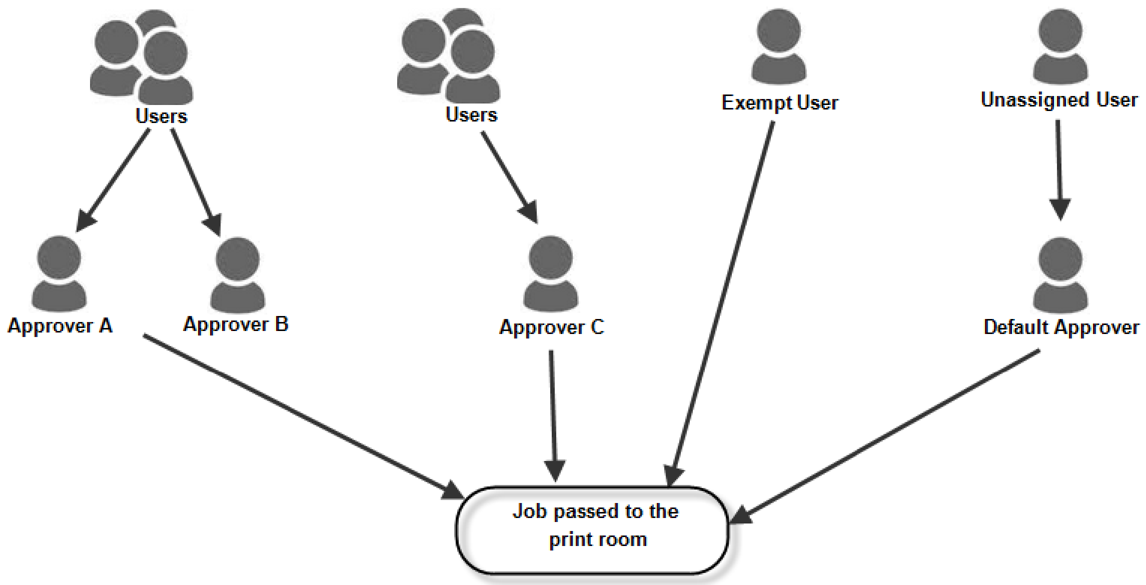
An Approver can view orders details so that they can decide to send the order to the PrintStation or reject the order. The system can be configured to allow approvers to change the following parts of the order if appropriate.

- Order details (125) - For example they could change the paper type, printing options e.g. double sided or single sided, Mono or colour print and quantity.
- Account Information (126) - amend the account code, name or description.
- Recalculate prices (127) - If orders are priced using CostManager there could be a cost implication if there are any changes to the order details. If this happens then the order price needs to be re-calculated.
- Customer Details (128) - contact details

Single Level Approval

Users can be assigned to one or more approvers. However, if a user has not been assigned an approver notification of their request is passed to the default approver and any administrator by email. The users is also shown in red when viewing the list of users that can be allocated to approvers. If there are no default approvers then all the approvers with administrative rights will receive an email stating that a user "has placed an order but they do not have an approver allocated to them. Please allocate an approver to this user". For more information see the section on assigning users to approvers134.

In some cases you might have users that will not require their orders to be approved. You can make the user exempt139 so that any orders they place are passed directly to the PrintStation in the print room. For more information see the section on assigning users to approvers134.

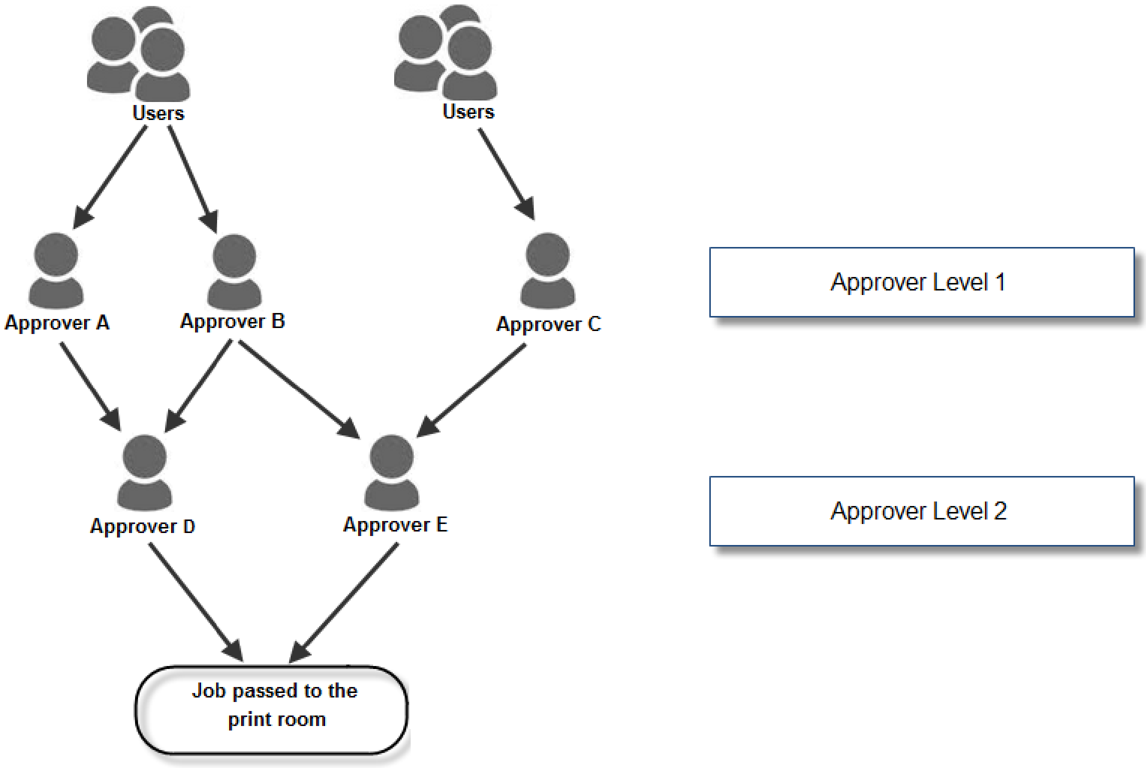


Approval is set and configured for each portal in your system.

Two Level Approval

If you use a two level approval process any job that has been approved is then passed to a level 2 approver and not the print room. If the level 2 approver approves the job, then it is passed to the print room.

Any user that is exempt will still be able to place an order which will pass directly to the PrintStation in the print room. Any Default Approver or Administrator will still receive notification of any orders placed by users which have not been assigned to an approver.



To help approvers decide whether an order should be passed to the PrintStation the system can be configured to allow them to download the associated PDF 129.

Anyone assigned the role of Approver will be able to see details of the jobs and then decide whether to pass the order to the PrintStation. Skyline will automatically send an email to the person who placed the order to confirm that their document has been approved or rejected. The wording of all automated email messages 133 can be changed to suit your requirements.

Assigning Approver Roles

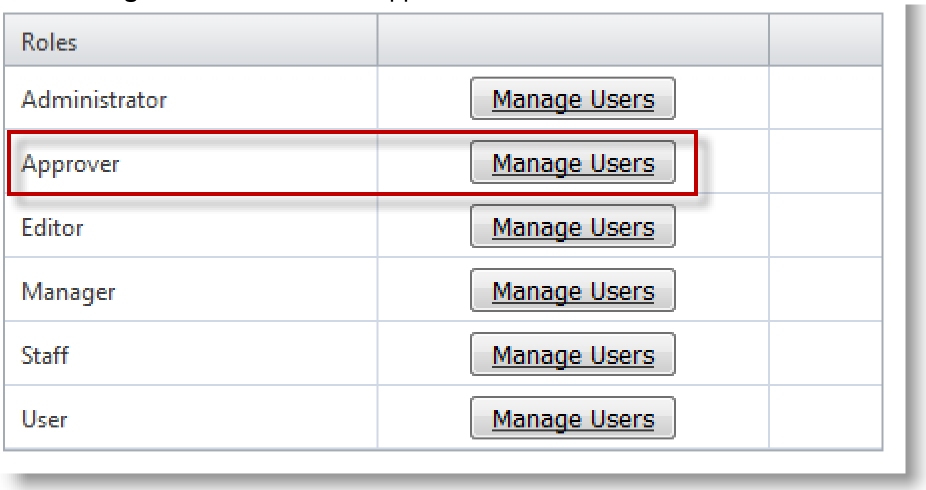
Users who will be approving jobs need to be added to the role Approver. When a user is made an approver, they will not see the Approval tab until they log in again. Once they have logged in again they will be able to view the approval page whether there are any orders to approve or not.

To assign a user as an approver:

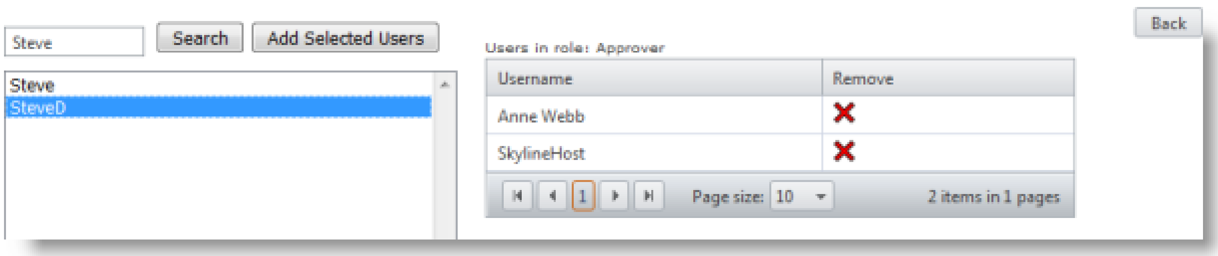
1. Log in with Administrator rights and go to **Admin**.

2. In the Users section click **Roles**.

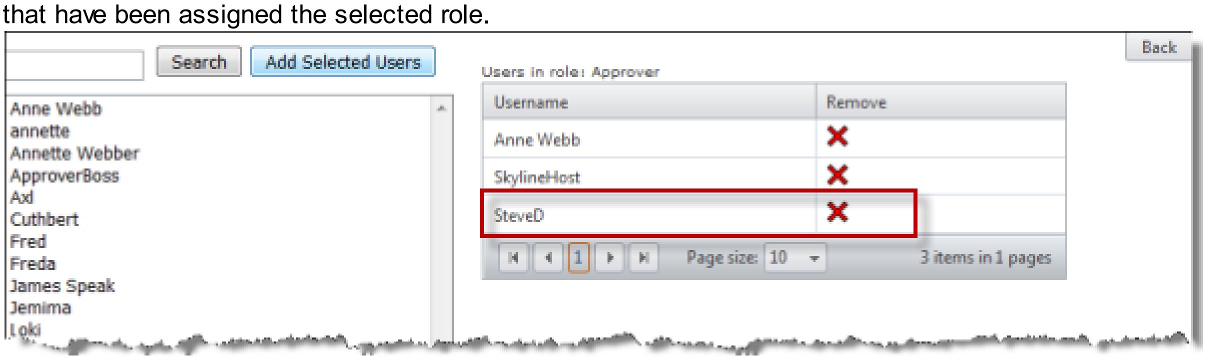
3. Click **Manage Users** next to the Approver Role.



4. If you can not see the user's name in the list, enter the name in the field and click Search. In the example below, the search facility has been used to show all users called Steve. SteveD has been selected.



5. Click **Add Selected Users** to assign the role of Approver to SteveD. The user is added to the list of users that have been assigned the selected role.

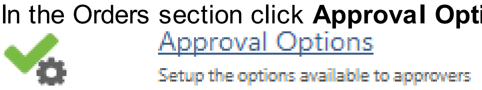


Turning Approval on

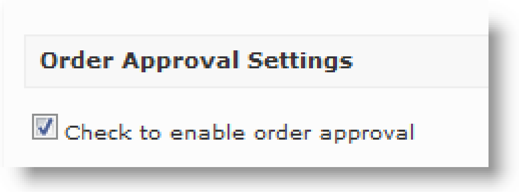
By default approval is not turned on. Approval needs to be enabled and the required settings selected.

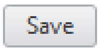
To select the approval settings:

1. Log in with Administrator rights and go to **Admin**.
2. In the Orders section click **Approval Options.**

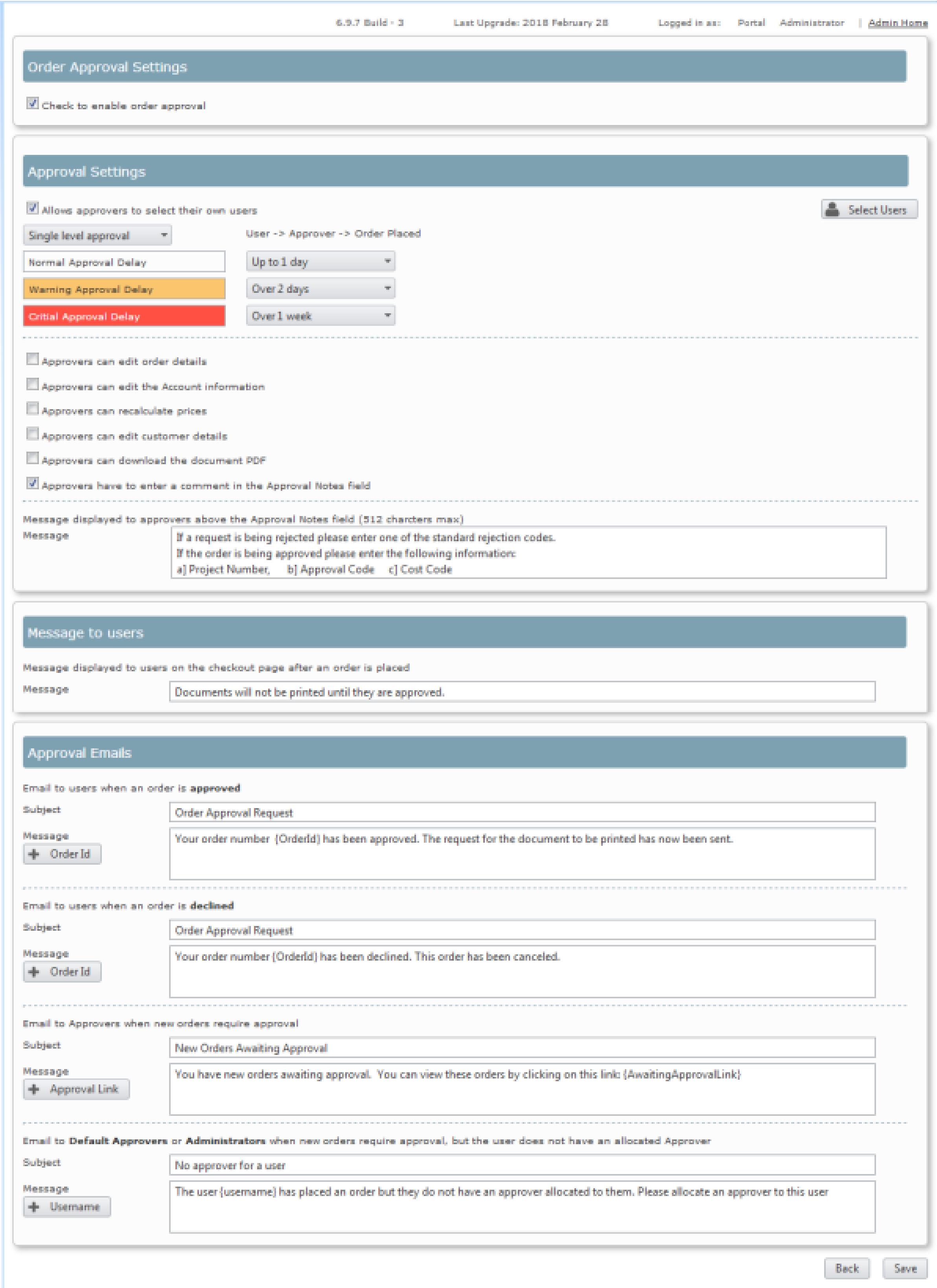


3. Select the option **Check to enable order approval** to turn approval ON.



4. Click 

When approval has been turned on more options are available.

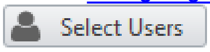


Example of all the appoval options available

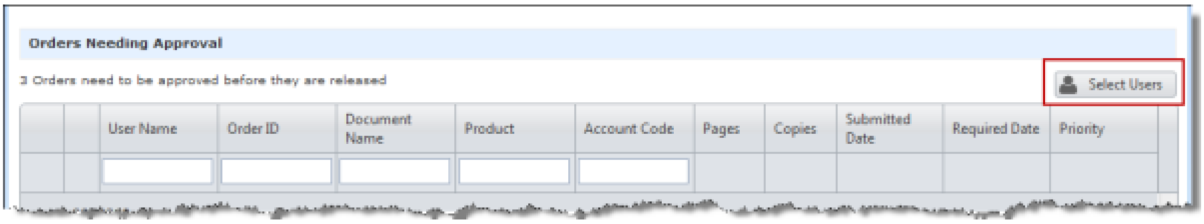
Configuring Approval Settings

The amount of changes that approvers can make to orders can be controlled by choosing the required options in the Approval Settings section.

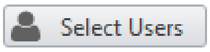
Enabling Approvers to Select Users

Depending on your requirements Approvers can be assigned users or they can select the users that they will manage. Please refer to the section on Assigning Users to Approvers[134] for more information. If Approvers are able to select their own users a 

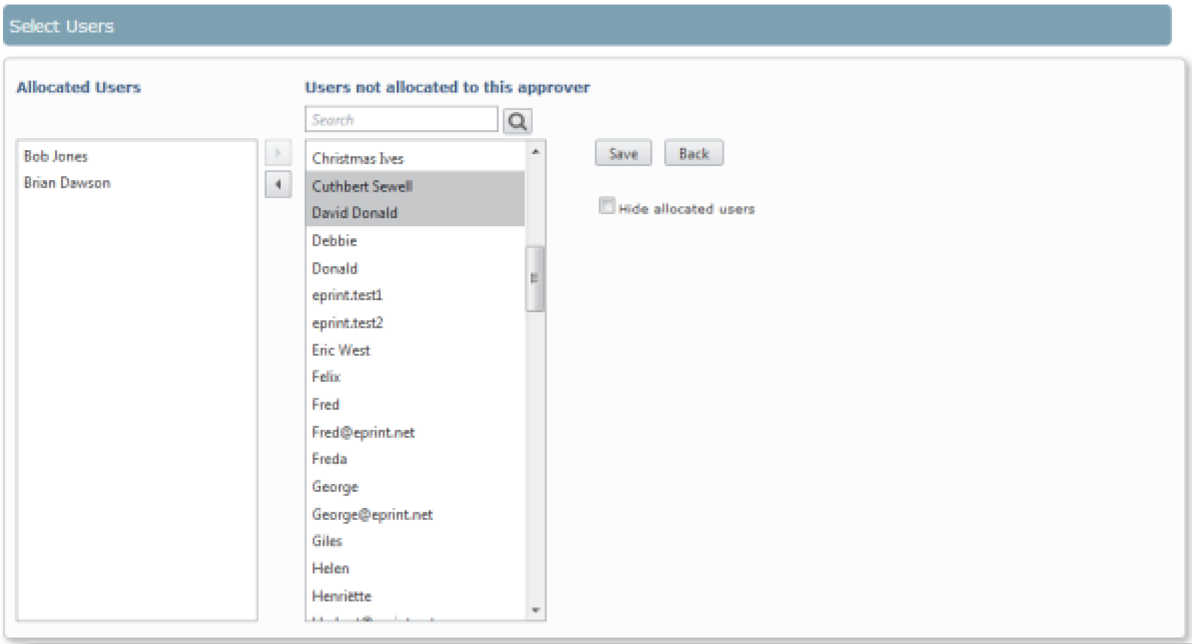
button is available in their Approval page.



Examle of the Approval page with the Select Users button available,

When an approver clicks 

they will see a list of users allocated to them as well as a list of users not allocated to them. They are able to select and remove users from their allocated users list.



Approvers will be able to edit the Additional Field values if they have "Allows approvers to select their own users" selected.

To make the Select Users button available:

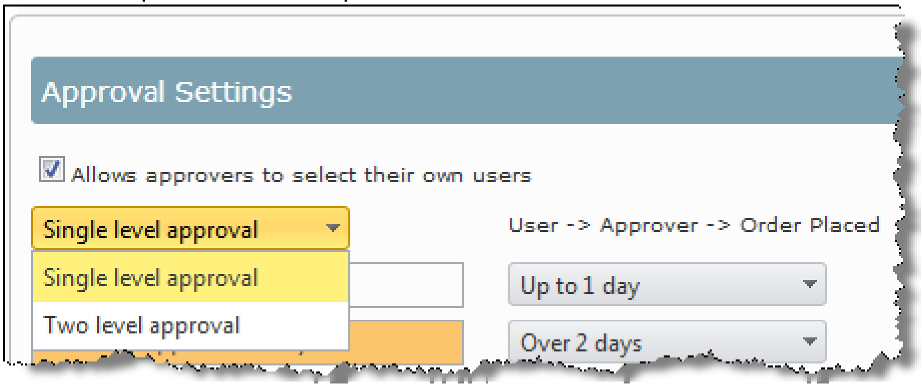
1. Select the option **'Allow approvers to select their own users'** and save your change.

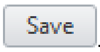
Selecting Approval Type

Approval can be either single or two level approval. For more information please see the section on Configuring Approval 114.

To select the Approval Level:

1. Select the option from the drop down list.



2. Click 

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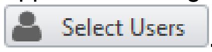
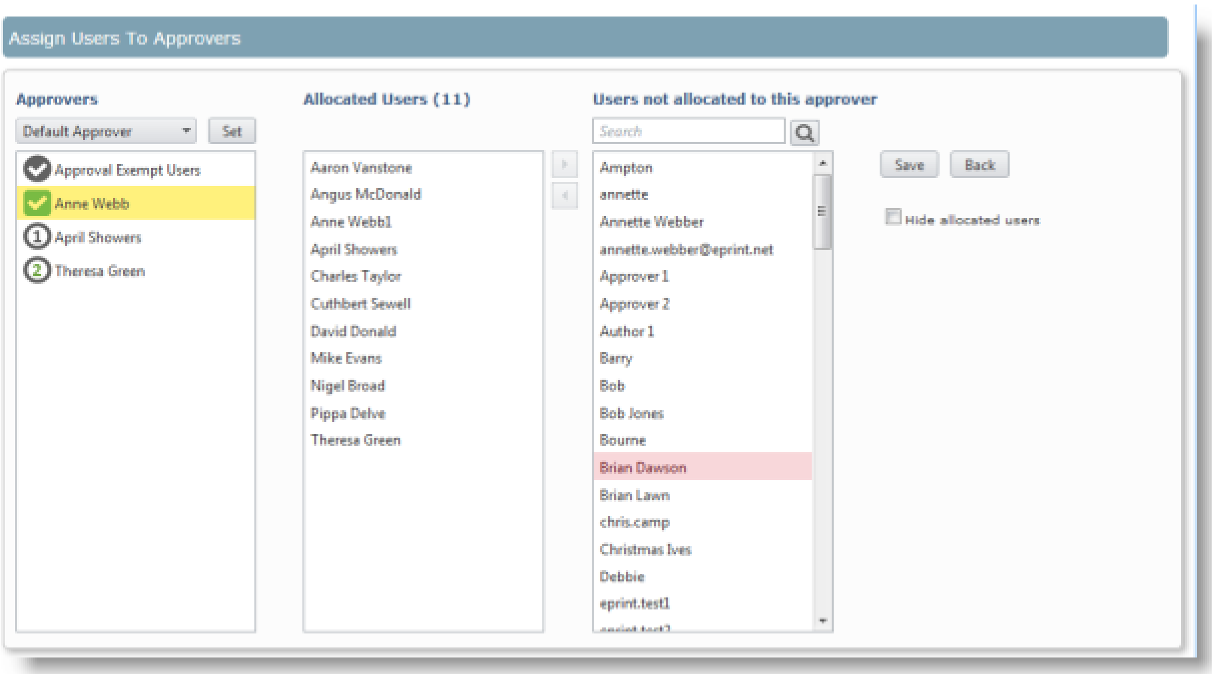
If you are using two level approval you need to change approvers from being a level one approver to being a level 2 approver. After you have saved the approval setting as 'Two Level Approval' click 

. The Assign Users to Approvers window opens. Level 1 approvers have 

next to their name and level 2 approvers have 

.



Example showing Approvers who are level 1 and level 2.

To allocate Level 2 Approvers:

1. Select the required approver.
2. Select **Level 2 Approver** from the drop down list.
3. Click 

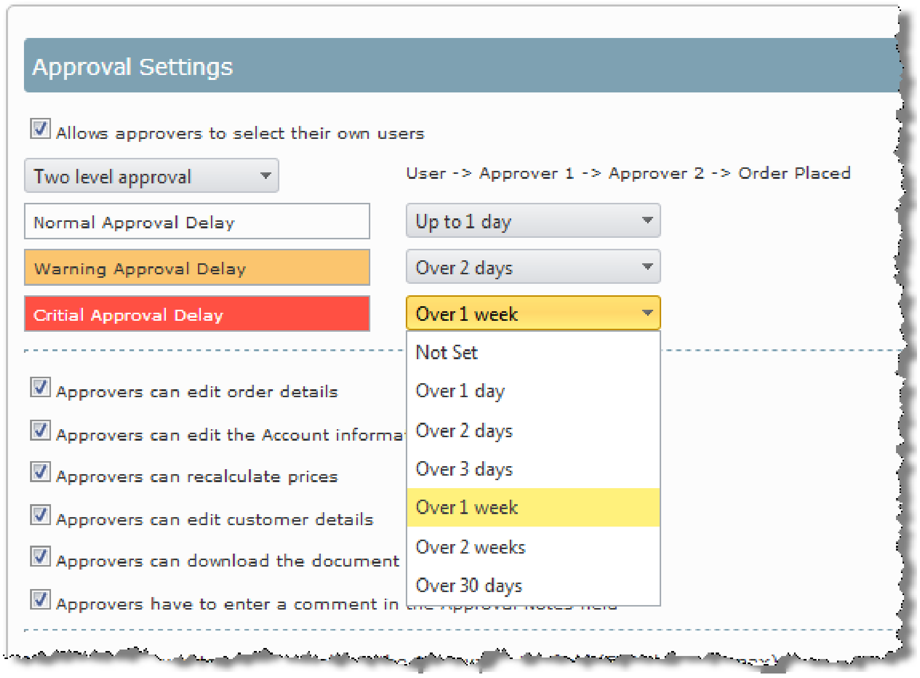
.

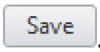
Select Warning Time Period

The status of orders waiting for approval can be viewed using the Approval Status report. If any of the orders have been waiting to be approved for over a specified time period the orders can be highlighted. Days waiting refers to the number of days since the document was ordered. Not the number of days waiting for the particular level of approval.

To select the warning time period:

1. Select the time period from the drop down list for each of the approval delay levels.



2. Click 

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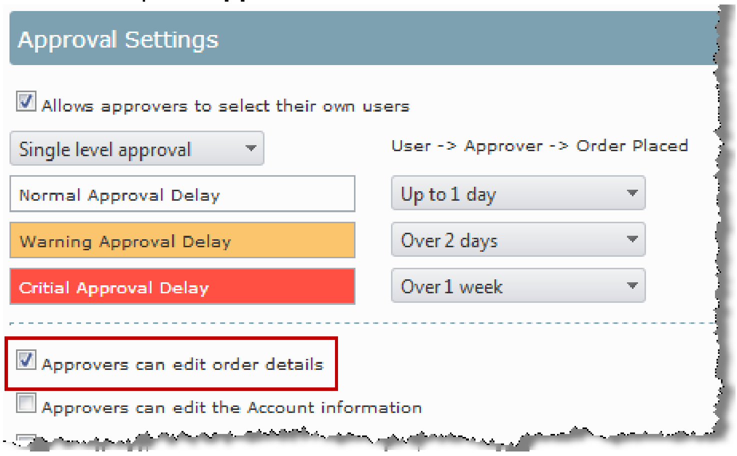
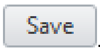
Enable Editing of Order Details

To enable an approver to edit order details:

1. View the Approval Settings.
2. Select the option **Approvers can edit order details**.



3. Click 

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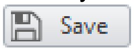
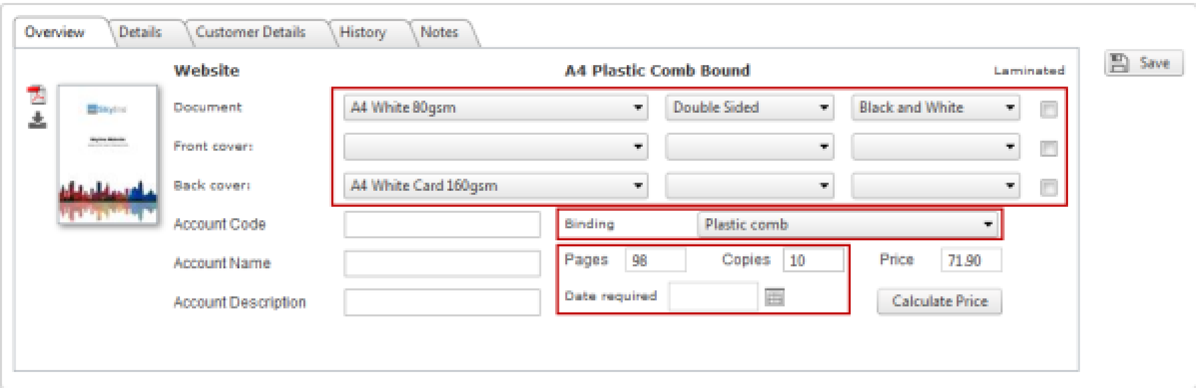
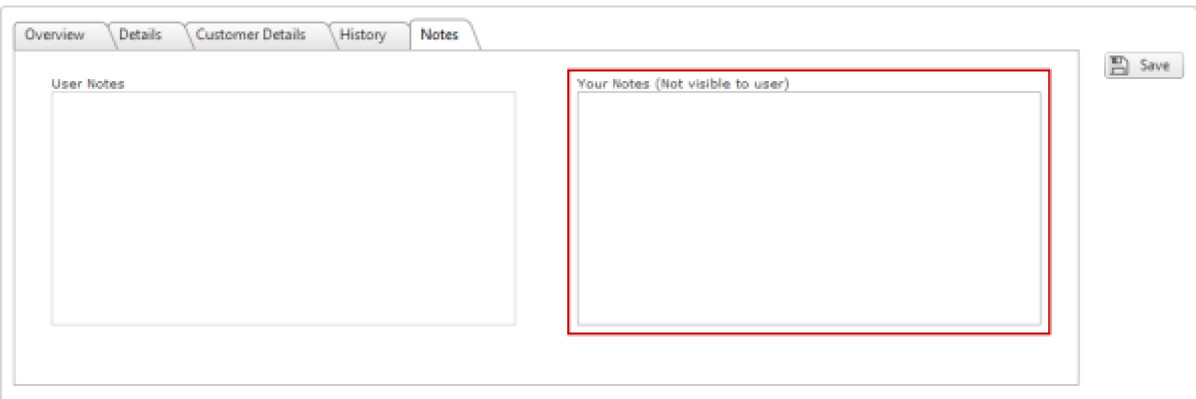
If an approver can edit the order details they can amend the fields outlined below. When amendments have been made they are not saved until 

is clicked. The number of pages can only be changed for ZIP files & paper original documents.



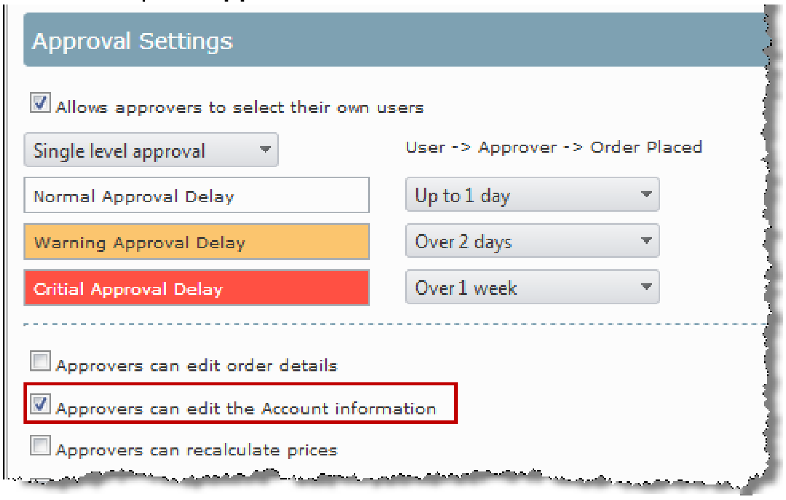
Notes can be added to the order which are not visible to the person who placed the order.



Enable Editing of Account Information

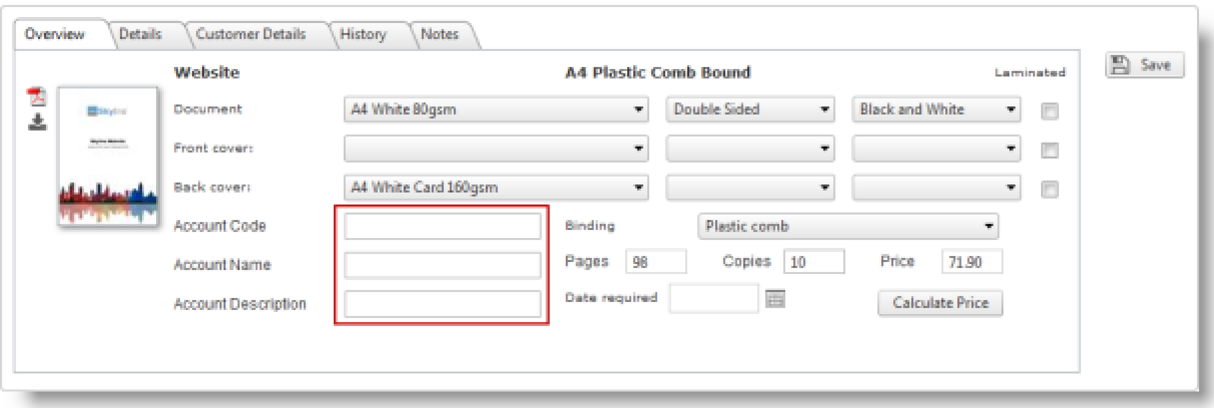
To enable an approver to edit account information:

1. View the approval options.
2. Select the option **Approvers can edit the Account information**.

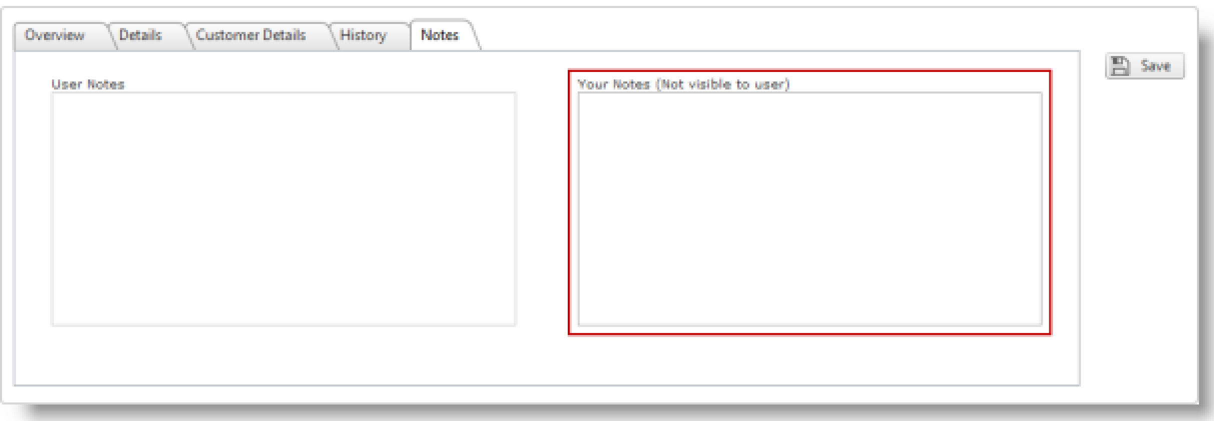


3. Click Save.

If an approver can edit the account information they can amend the account code, name and description. The field labels are set on the Accounts and Pricing [186] page. Click Save to save any changes.



Notes can be added to the order which are not visible to the person who placed the order.

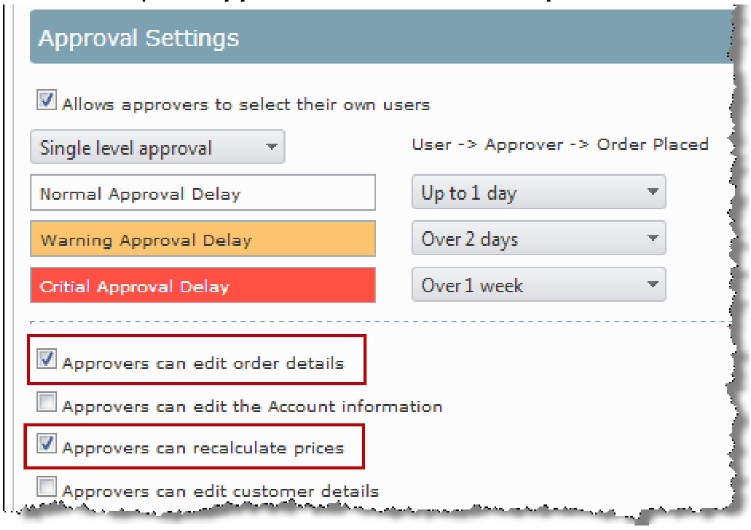


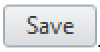
Enable Price Recalculation

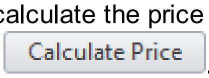
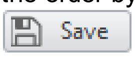
If the pricing of orders is automatically calculated using CostManager any changes to the order details could effect the price. If changes are made there is a recalculate button available to update the price.

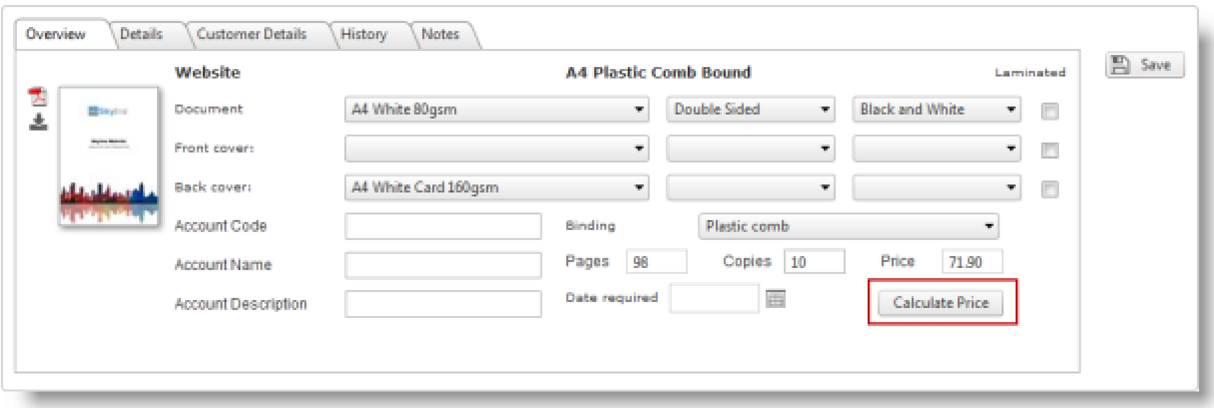
To enable an approver to recalculate prices after amending order details:

1. View the approval options.
2. Select the option **Approvers can edit order details**.
3. Select the option **Approvers can recalculate prices**.



4. Click .

If an approver can recalculate the price of an order after editing the order details they can update the price of the order by clicking . When amendments have been made they are not saved until  is clicked.

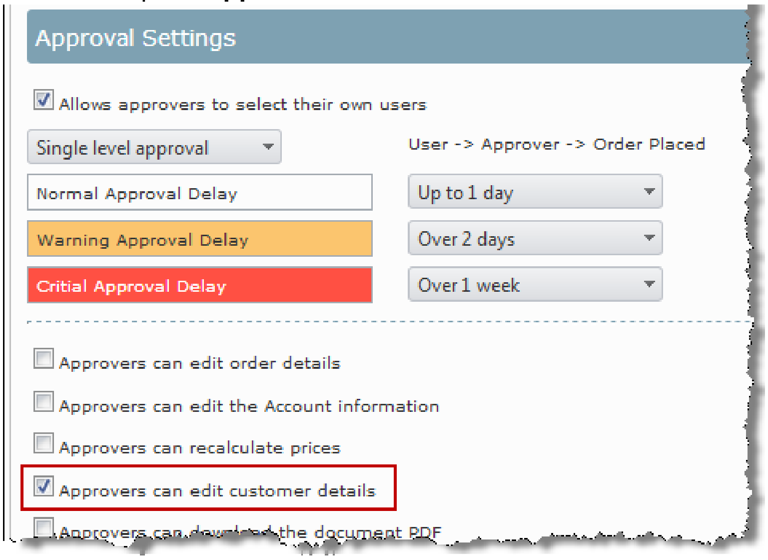


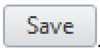
Example showing the location of the Calculate Price button.

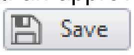
Enable Editing of Customer Details

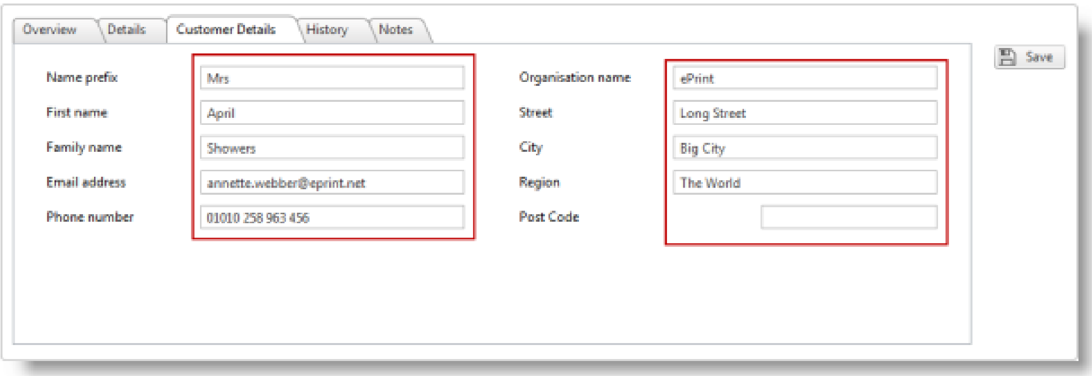
To enable an approver to edit customer details:

1. View the approval options.
2. Select the option **Approvers can edit customer details**.

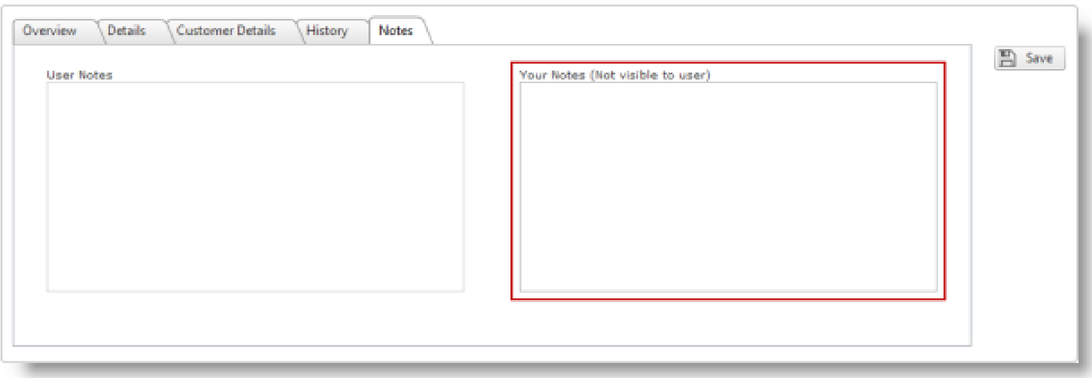


3. Click .

If an approver can edit the customer details they can amend the information fields shown below. Click  to save any changes.



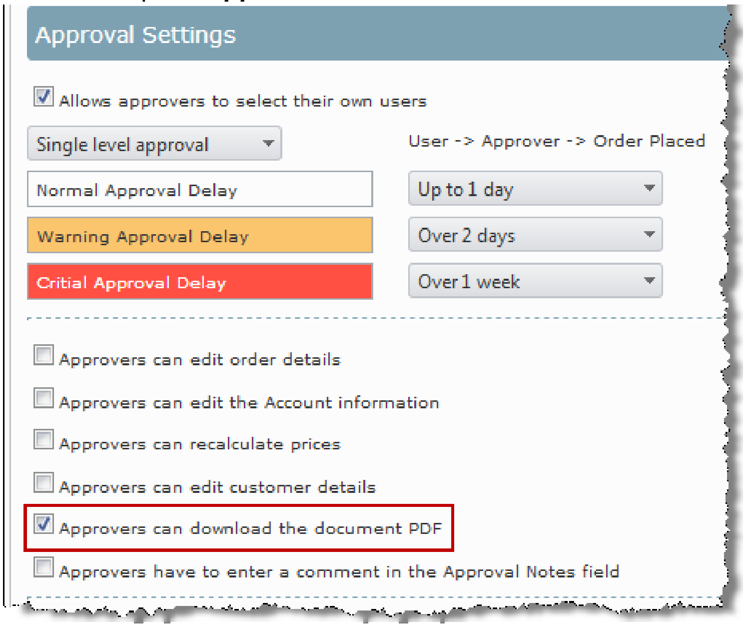
Notes can be added to the order which are not visible to the person who placed the order.



Enable Viewing of PDF

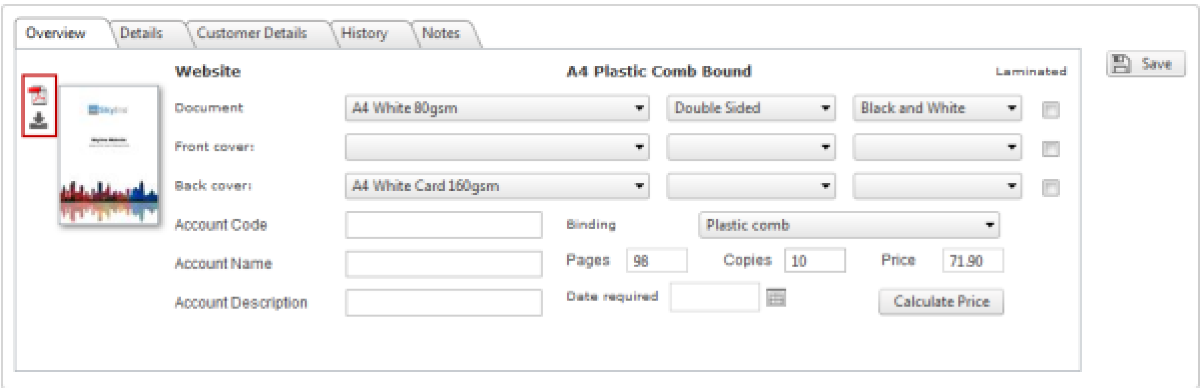
To enable an approver to download and view a PDF:

1. View the approval options.
2. Select the option **Approvers can download the document PDF**.



3. Click Save

If an approver can download the document PDF a is available to the left of the document image. Click to download and view the document PDF.



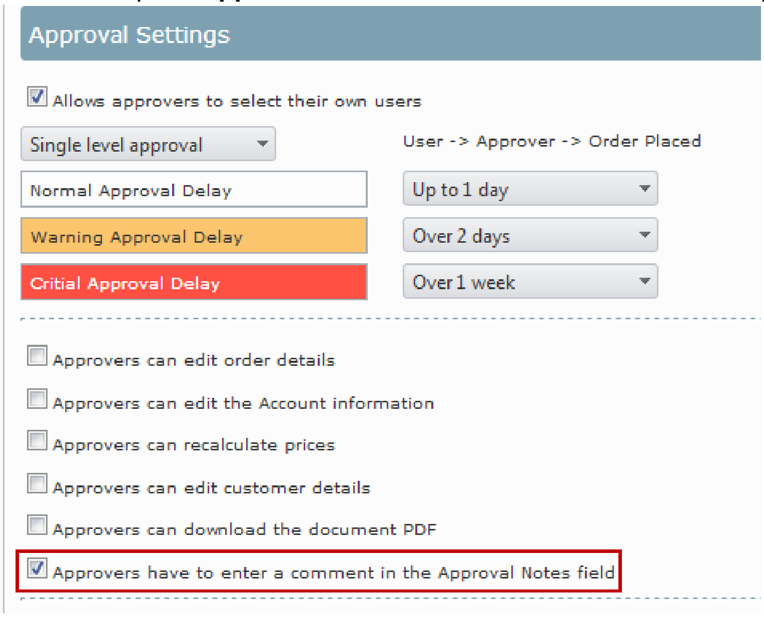
Example showing the location of the View PDF button.

Enable Compulsory Notes

If this option is selected approvers have to enter a comment in the Approval Notes field before an order can be approved or rejected.

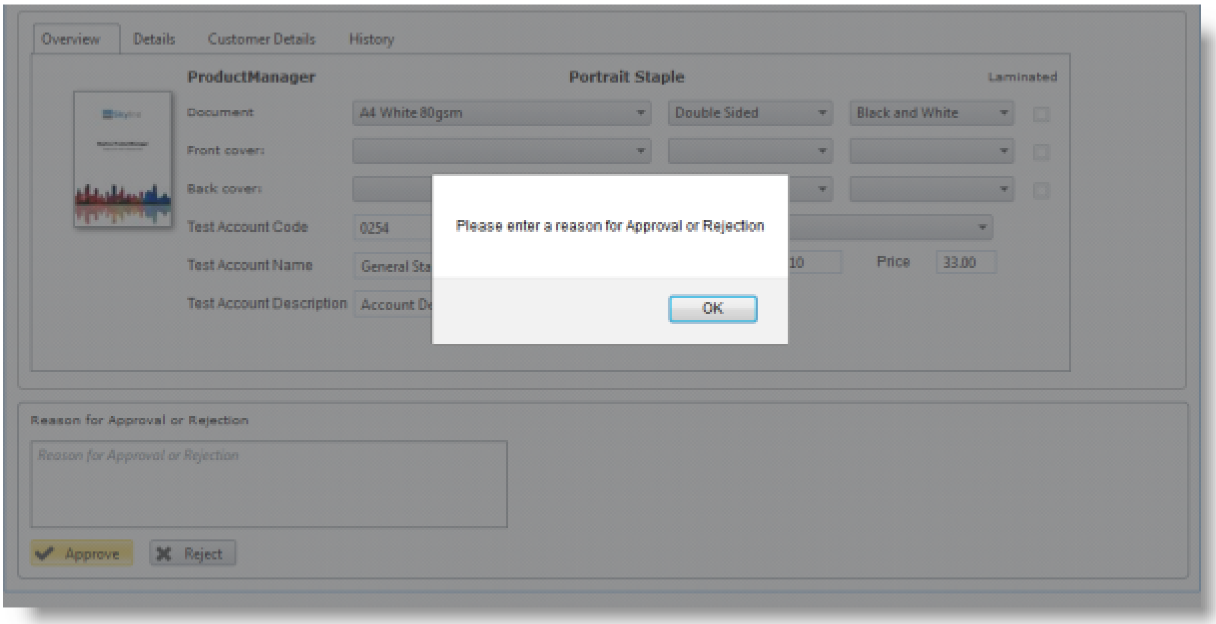
To force approvers to add a reason for approval or rejection:

1. View the approval options.
2. Select the option **Approvers have to enter a comment in the Approval Notes field**.



3. Click Save

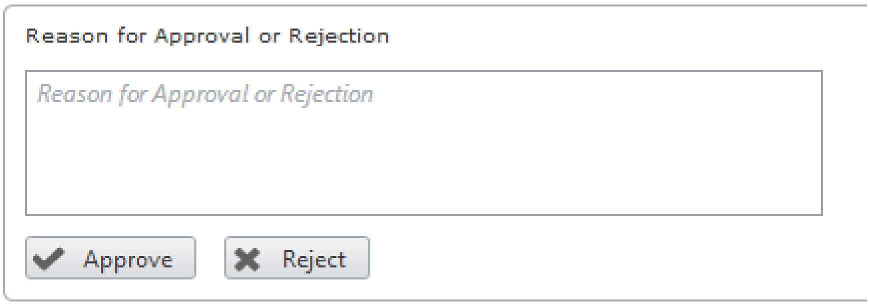
If an approver does not enter a comment and tries to approve or reject the order, an error message is displayed..



Example showing the error message when no comment has been entered.

Add a Message to Approvers

The standard message displayed above the approvers comments is **Reason for Approval or Rejection**.

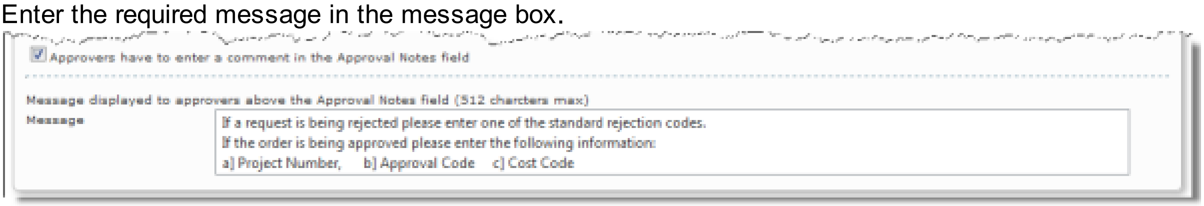


Example of the Standard Message.

Depending on how you organisation you might require approvers to enter a reason code or include specific information. The text above the comments box can be amended as required.

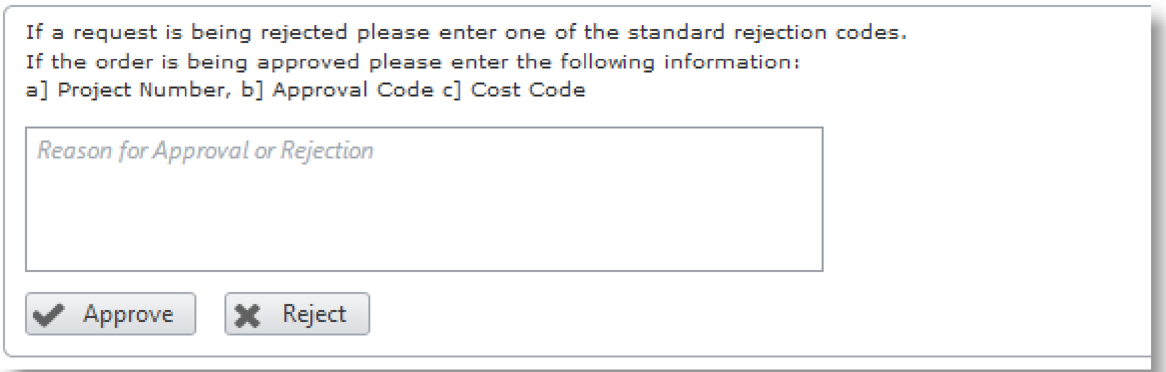
To amend the message to approvers:

1. View the approval options.
2. Enter the required message in the message box.



3. Click Save

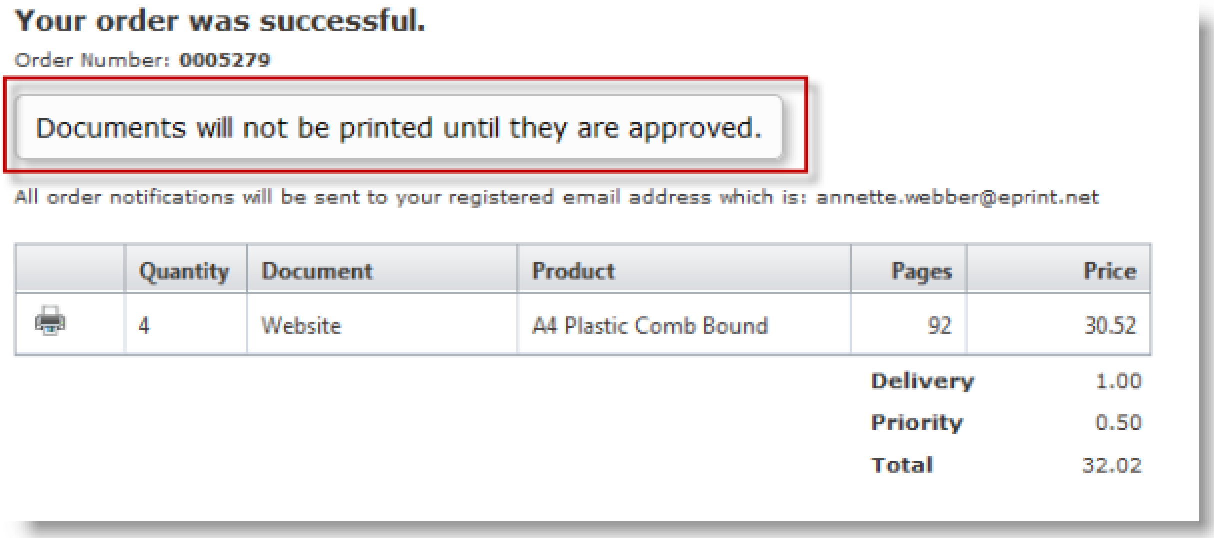
The message displayed to approvers will be updated with the text specified.



Example of a new message

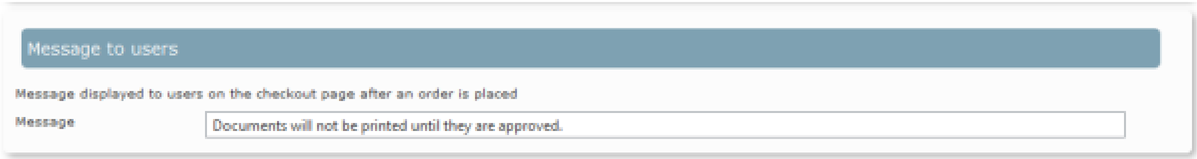
Changing the Checkout Message

When a user completes the order process a message will be shown informing them that the order requires approval.



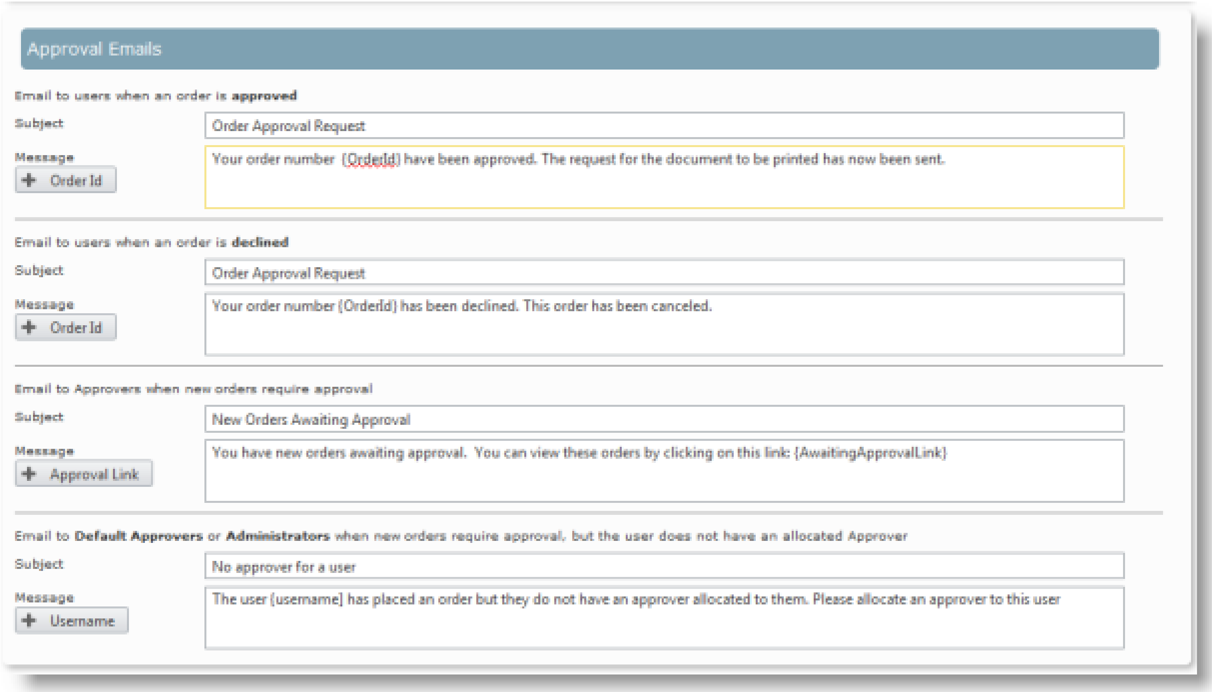
Example of approval checkout message.

The message can be altered as required on the Approval Options page. Simple enter the text required in the message field in the section Message to users.



Amending Email Messages

Email messages are automatically sent out to users and approvers to keep them informed about their order.



Approval Emails

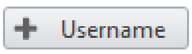
When an order is placed an email is sent to the user's approver letting them know that they have received an order which requires their approval. If a users places an order and they have not been assigned to an approver an email is sent to the default approver or if no default approver has been set the message will be sent to any Skyline administrator. This ensures that an order is not left 'in limbo' and is processed as required.

When the approver reviews the order they can accept the order for processing by the print room and an automatic email is sent to the user telling them that their order has been accepted. If the order is rejected and email is sent to the user informing them that the order has not been accepted. The order is deleted and not passed to the print room.

The wording of the email subject and content can be altered as required. An automatic field can be added to the email if required by clicking the insert field button. The following information is added:

- The order number is inserted into the email text.

- A link to the Approvals Web page is inserted into the email text.



- The name of the person who placed the order is inserted into the email text.

If the form is saved and any of the subject or message fields are blank they are automatically completed with the default text.

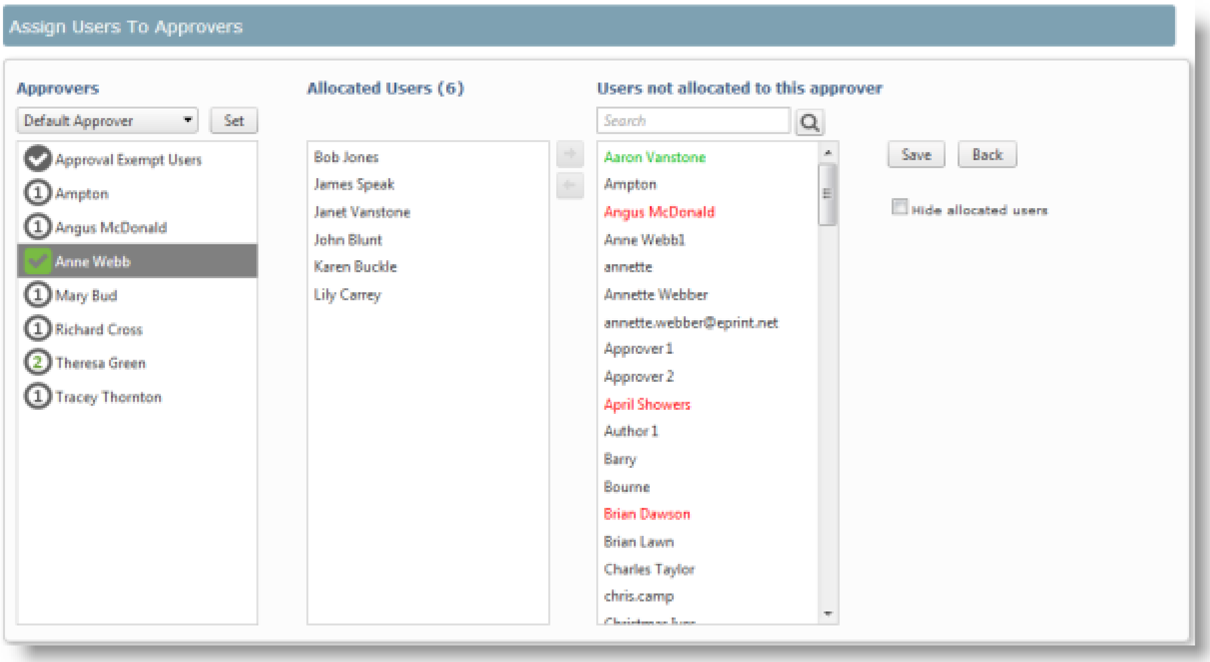
Assigning Users to Approvers

Users need to be allocated to approvers. They can be allocated to one or more approvers depending on your requirements. There may be users in your organisation that do not require their orders to go through the approval process. Those users can be allocated to an exempt group so their orders will be passed directly to the print room.

To allocate users:

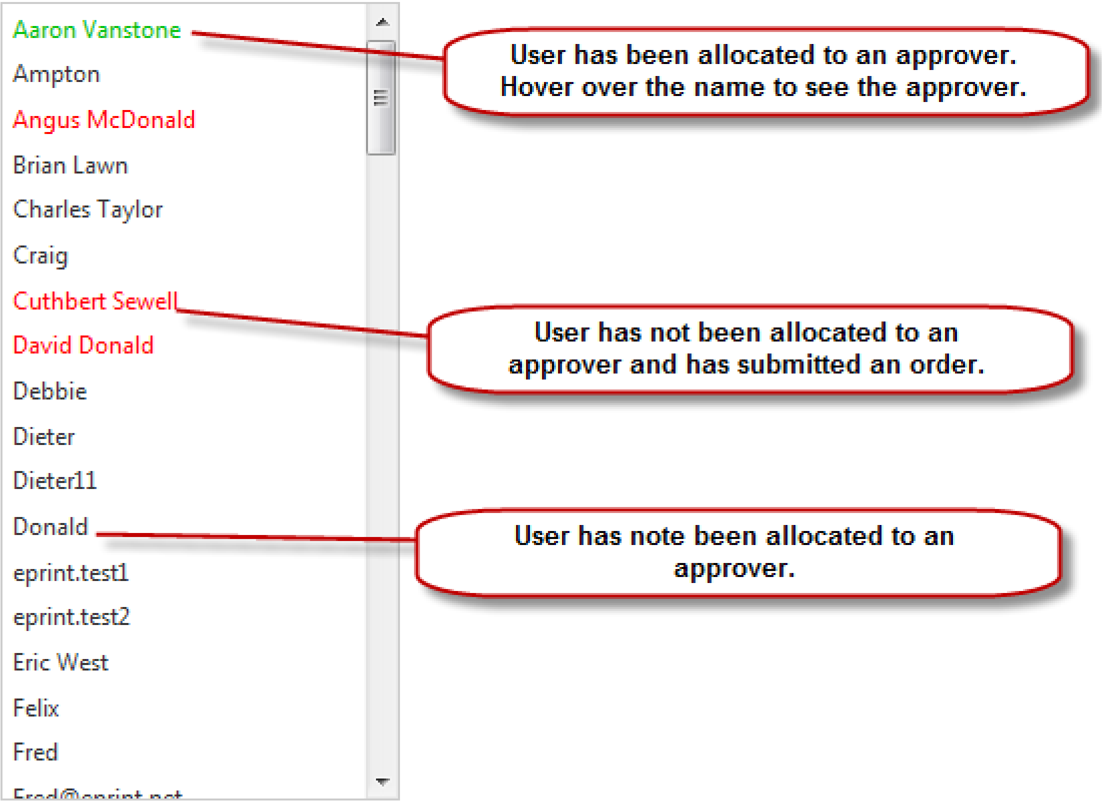
1. Log in with Administrator rights and go to **Admin**.
2. In the Orders section click **Approval Users.**

3. The Assign Users to Approvers window opens.



All approvers are shown in the left hand list. The allocated users shown in the middle list belong to the selected approver. Users are listed in the right-hand list.

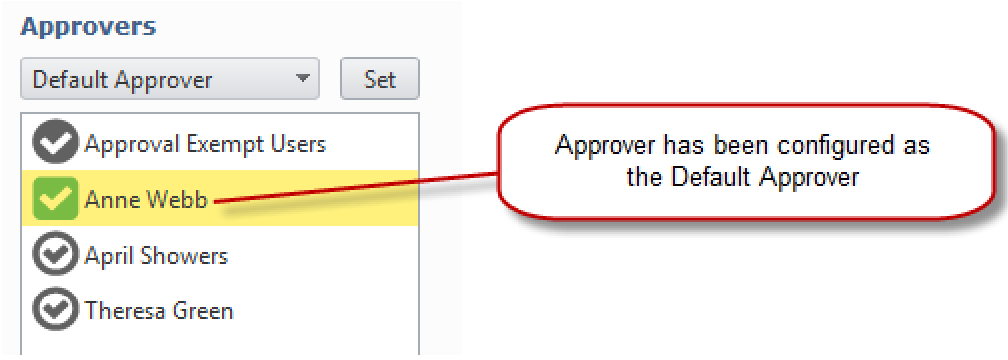
If a user is in green they have been allocated to an approver. If they are in red then they have placed an order but not been allocated to an approver. Until a user is allocated to an approver or they place an order they are shown in black.



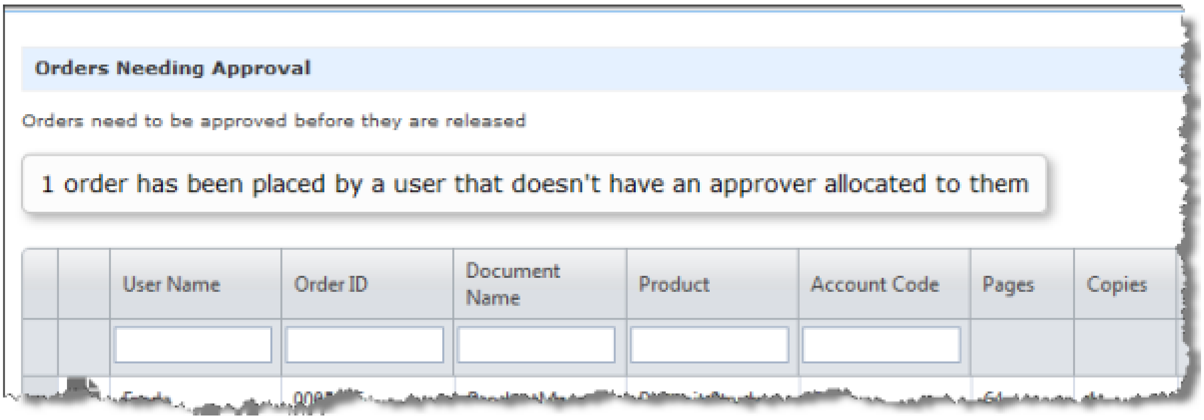
If the option to hide allocate users is selected all the users that have been allocated to an approver will be hidden.

Allocated users are hidden

Default Approvers



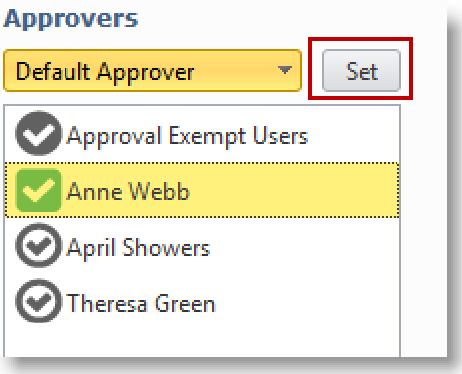
An email is sent to all users who have been assigned as a default approver & anyone with administrator rights when orders are submitted by users that have not been allocated to an approver. The Default Approver will also see a message if they view their approval page. There can be more than one default approver for each portal.



Example of the message seen by default approver

To create an Default Approver:

1. Select the Approver.
2. Select the option **Default Approver** from the drop down list.

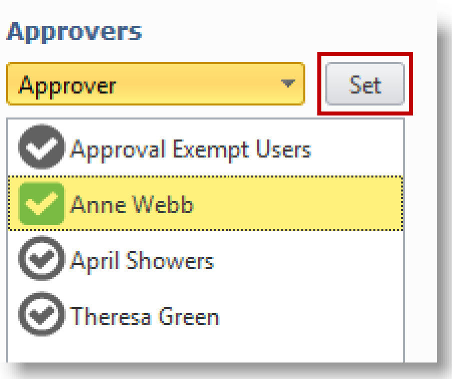


3. Click .

To remove a Default Approver:

1. Select the Approver.

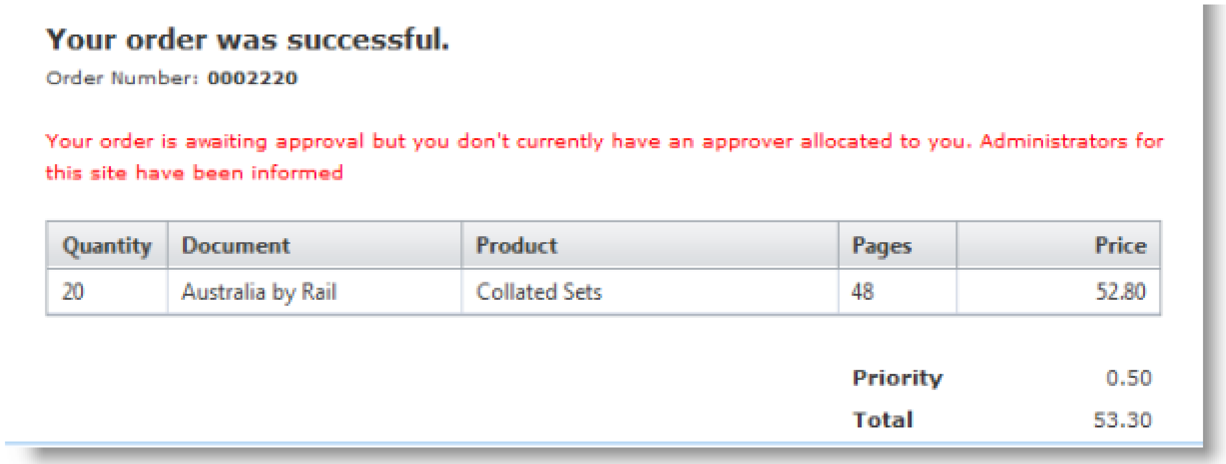
2. Select the option **Approver** from the drop down list.



3. Click 

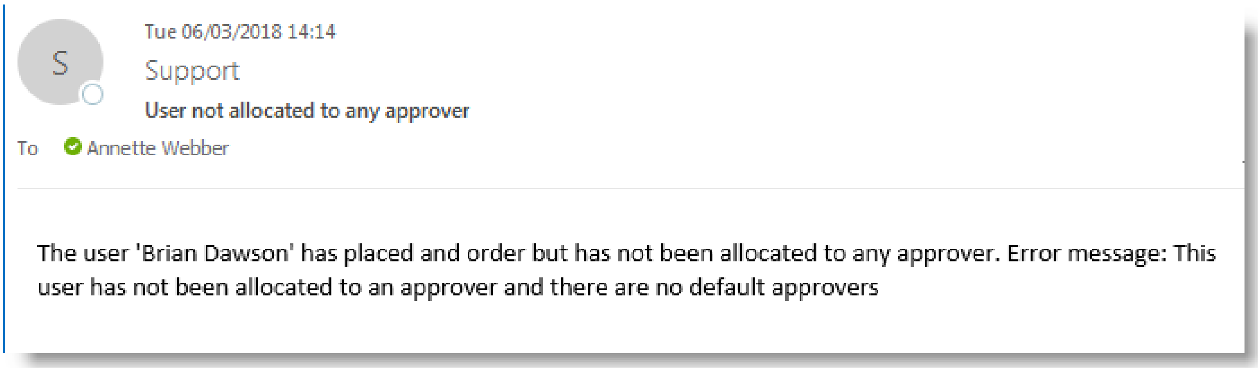
.

If a user has not been assigned to an approver and there is no default approver the user will see a message when they place an order. The message states the 'Your order is awaiting approval but you don't currently have an approver allocated to you. Administrators for the site have been informed."



Example of the error message shown to a user with no approver allocated.

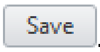
An email is automatically sent out to all Skyline Administrators on the portal, see the example below.



Example of email sent out when there is no assigned approver for a user and no default approver.

Allocating Users

To allocate a user to an approver:

1. Select the Approver.
2. Highlight the user or a group of users by using the CTRL key.
3. Click  to add the selected users.
4. Click 

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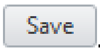
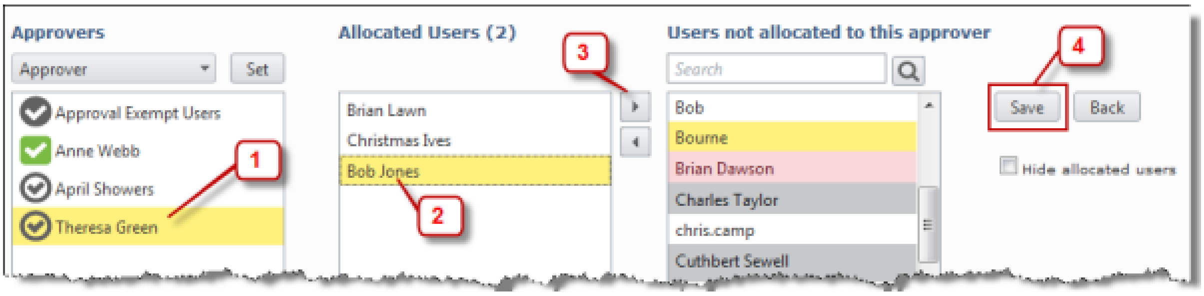
Removing Allocated Users

To remove a user from an approver:

1. Select the Approver.
2. Highlight the allocated user or a group of users by using the CTRL key.
3. Click  to add the selected users.
4. Click 

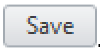
.

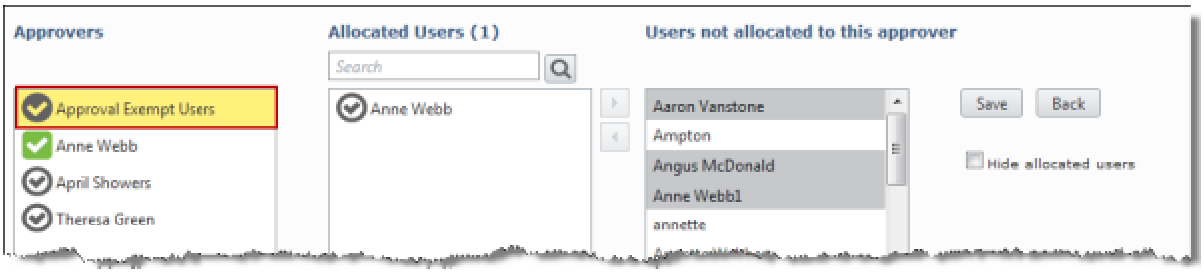


Approval Exempt Users

In some cases you might have users that will not require their orders to be approved. You can make the user exempt so that any orders they place are passed directly to the PrintStation in the print room.

To add a user to the Approval Exempt list:

1. Select the **Approval Exempt Users**.
2. Highlight the user to be added.
3. Click  to add the selected user.
4. Click .



Configuring Pricing Options

You can select your pricing requirements for orders placed.

- Pricing can be done automatically when a user places an order. When an order is placed the value of the order is shown in their shopping basket. You need to use CostManager to set the pricing.
- Additional fields can be added to a product which will provide information or add an additional charge depending on how the fields are used.
- Prices can be recorded for reporting purposes even when prices are not shown to users. If you want to hide the pricing from the user you need to remove the price column 144 from the shopping basket page.
- You need to select a payment method of either Account 143, Stripe 189 or WPM Education 191.

If you have enabled the account code feature 143 you can configure the account information required to suit your accounting requirements including:

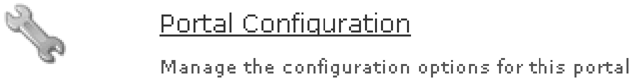
- Making an account code mandatory 182.
- Providing a list of internal account codes 155.
- Linking Skyline to an existing account code database 156.
- Validate a manually entered account number 149.

Activating Colour Analysis

Colour Analysis is a licensed feature of Skyline. The license needs to be installed before you can activate the feature. For more information please see the section on using colour analysis.

To Activate Colour Analysis:

1. Sign in with SkylineHost or administrator privileges and go to **Admin**.
2. In the Portals section click **Portal Configuration**.

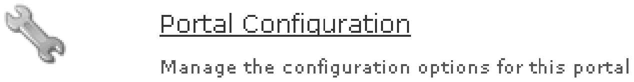


3. Find **Library - Enable Colour Analysis of uploaded documents** in the list.
   - If the option is set as **True** colour analysis will be available.
   - Colour Analysis is turned off by setting the option to **False**.
4. To amend this option click .
5. Click to save the setting.

It is recommended that colour analysis happens during the upload procedure. This will mean that the documents will take slightly longer to upload, depending on their size. If analysis happens on the Website it will prevent the website being operational for other users during the analysis.

To set Colour Analysis to happen during upload:

1. Sign in with SkylineHost or administrator privileges and go to **Admin**.
2. In the Portals section click **Portal Configuration**.



3. Find **Upload - Create PDF Thumbnails**.

- If the option is set as **True** colour analysis will happen during the document upload procedure.
- PDF's are not created during the document upload procedure by setting the option to **False**.

6. To amend this option click .
7. Click to save the setting.

To select the colour analysis model required:

1. Sign in with SkylineHost or administrator privileges and go to **Admin**.
2. In the Portals section click **Portal Configuration**.

   Portal Configuration

   Manage the configuration options for this portal

3. Find **Library - Colour Analysis Model** in the list and select the option required

   - **Black only is monochrome**.
     If the analysis shows that the values for Cyan, Magenta, Yellow are blank and there is only a value for black then the page is treated as being monochrome.

Page	Cyan %	Magenta %	Yellow %	Black %	Analysis
1	68.48	68.27	68.13	2.81	Colour
2	0	0	0	6.15	Monochrome

   - **Cyan, Magenta and Yellow equal is monochrome**.
     When you create a PDF of a Word document the text is treated as processed black. This means that the page will appear to contain some colour as there will be values for Cyan, Magenta and Yellow. If this is not what is required you should try the model where Cyan, Magenta and Yellow equal is monochrome.

Page	Cyan %	Magenta %	Yellow %	Black %	Analysis
32	1.16	1.16	1.16	1.06	Monochrome

   - **Cyan, Magenta, Yellow and Black equal is monochrome**.
     If the values are all the same then the page is treated as being monochrome.

Page	Cyan %	Magenta %	Yellow %	Black %	Analysis
1	9.02	9.02	9.02	8.33	Colour
2	9.49	9.49	9.49	9.49	Monochrome

4. Click to save the setting.

Depending on the type of documents that you receive, you may want to amend the colour percentages. You are able to do this by adjusting processed black threshold.

To amend the Process Black Threshold:

1. Sign in with SkylineHost or administrator privileges and go to **Admin**.
2. In the Portals section click **Portal Configuration**.

   Portal Configuration

   Manage the configuration options for this portal

3. Find **Library - Process Black Threshold Percentage** in the list and select the percentage required.

5. Click to save the setting.

Enabling Account Codes

When a user submits an order they can select an account code for their documents during the job ticket process.

To change visibility of the account code option when placing an order:

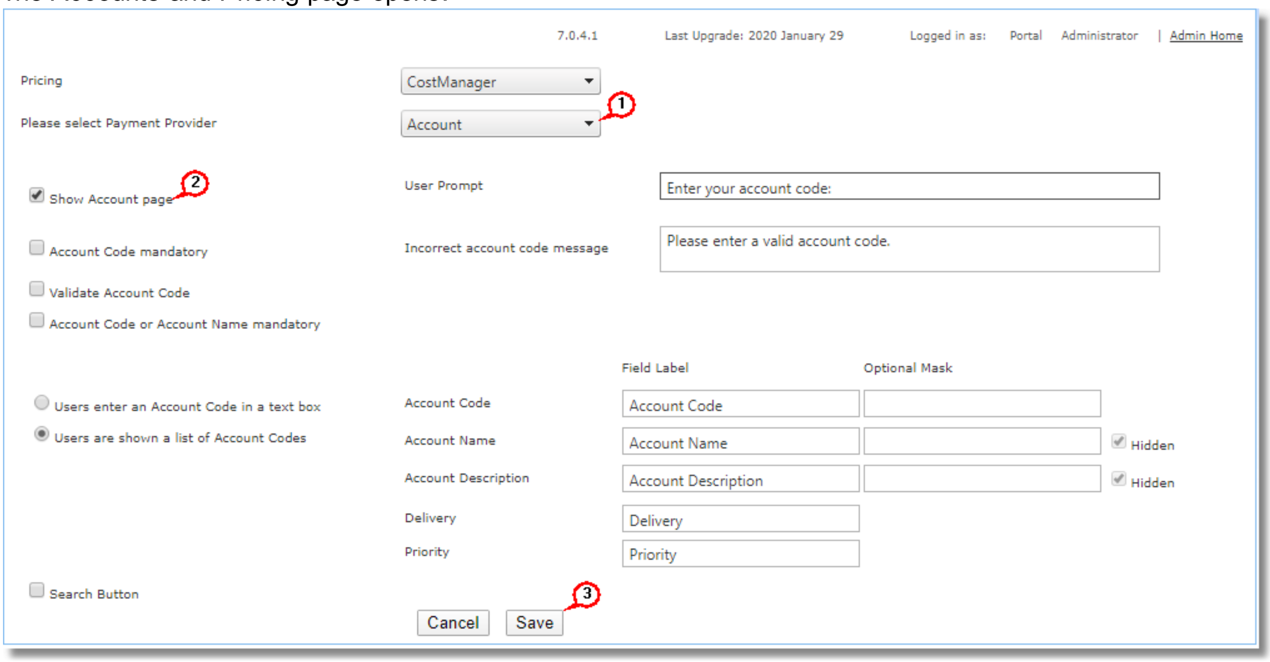
1. Log in with Administrator rights and go to **Admin**.

2. In the Orders section click **Accounts and Pricing**.

Accounts and Pricing

Setup your accounts and payment provider

3. The Accounts and Pricing page opens.



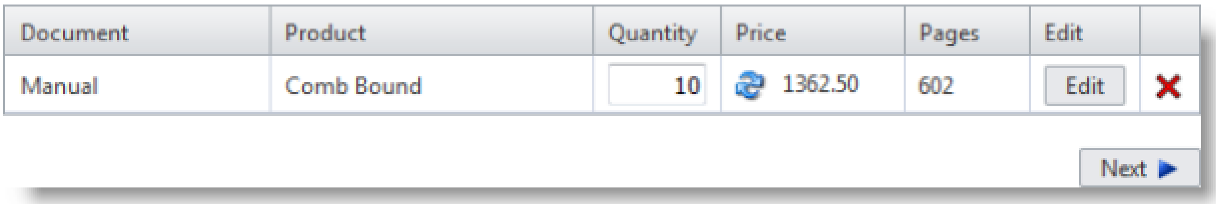
1. Select the payment provider **Account**.

2. Select the option **Show Account page**.

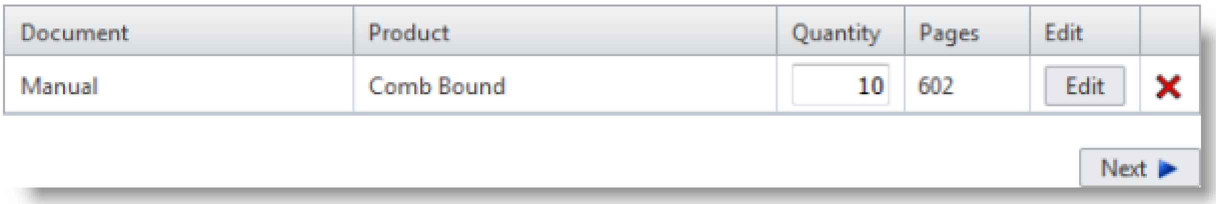
3. Click **Save.** The Accounts and Pricing page will close.

Hiding Prices in the Shopping Basket

Prices can be recorded for reporting purposes even when prices are not shown to users. If you want to hide the pricing from the users you need to remove the price column from the shopping basket page. This option should not be selected if you use the Stripe[189] or WPM Education[191] payment providers.

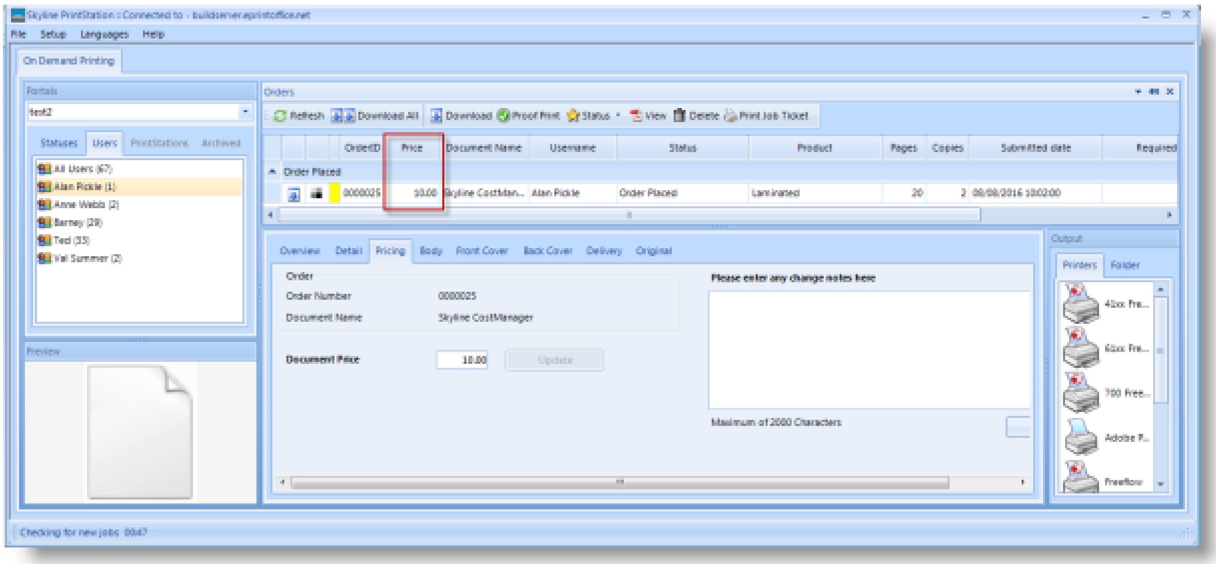


Pricing showing in the shopping basket



Prices hidden from the shopping basket

Print room operators will be able to view the price when the order is selected on the pricing tab.

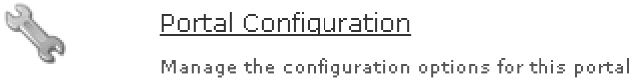


Example showing that pricing is displayed in PrintStation when the pricing is hidden from the person placing the order.

To hide pricing in the shopping basket:

1. Log in with Administrator rights and go to **Admin**.

2. In the Portals section click **Portal Configuration**.



3. Find **Ordering - Show Price** in the list.

   - If the option is set as **True** users will be able to see the pricing in their shopping basket.
   - Pricing can be hidden by setting the option to **False**.

4. To amend this option click .

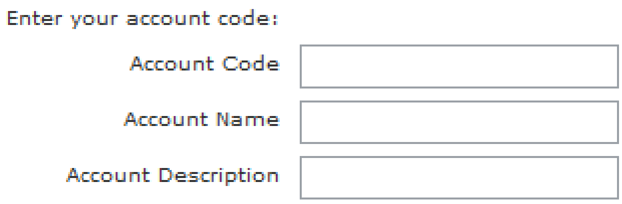
5. Click to save the setting.

To configure **Ordering - Show Price** for all portals associated with Skyline use the default configuration option. These options are only available when you are logged in with Host privileges. Any changes to the default configuration will affect **ALL** portals associated with Skyline.

Manually Enter Account Codes

Users can enter an account code into a blank field when they place an order. An example of the window that the user will view is shown below. If you use this feature you can also select to check the entries by validating the account codes[149].

If the option "Users enter an account code in a text box" is selected without validate, any information entered in the text box is passed through to the PrintStation. However, even if a correct code is entered the account name and description is not shown as the code has not been checked against an internal or external account code list which includes those details. It is therefore advised that if you use a list of account codes that you select the option to validate the account code entered to ensure that all the correct information is available.



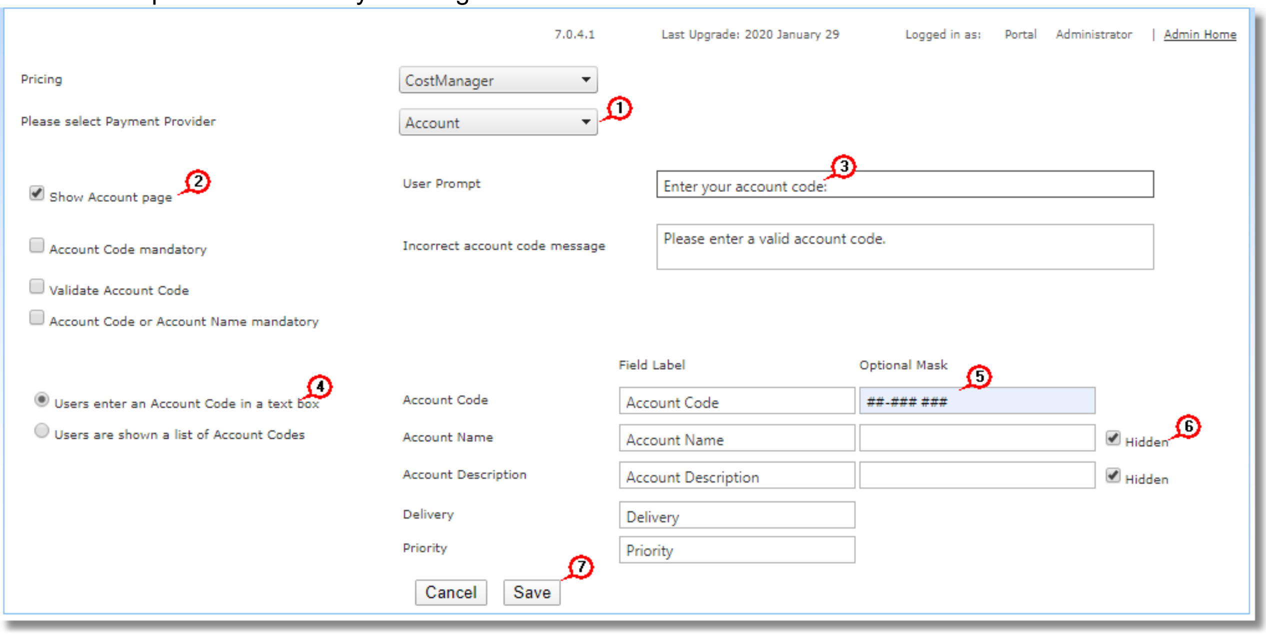
Example showing the page presented when the option to manually enter an account code is selected.

The option to enter a mask for the account number when users manually enter the account code, name or description is only available when the accounts page is shown separately. You cannot validate the entry if you want to apply a mask and the portal configuration Checkout Mode[99] should not be set to 'Combine Address Delivery and Accounts'.

To enable an account code field:

1. Log in with Administrator rights and go to **Admin**.
2. In the Orders section click **Accounts and Pricing**.

3. Choose the options for manually entering account codes.



1. Select the payment provider **Account**.

2. Select the option **Show Account page**.

3. Enter the user prompt. This is the wording that used to tell the user what details to enter in the blank field.

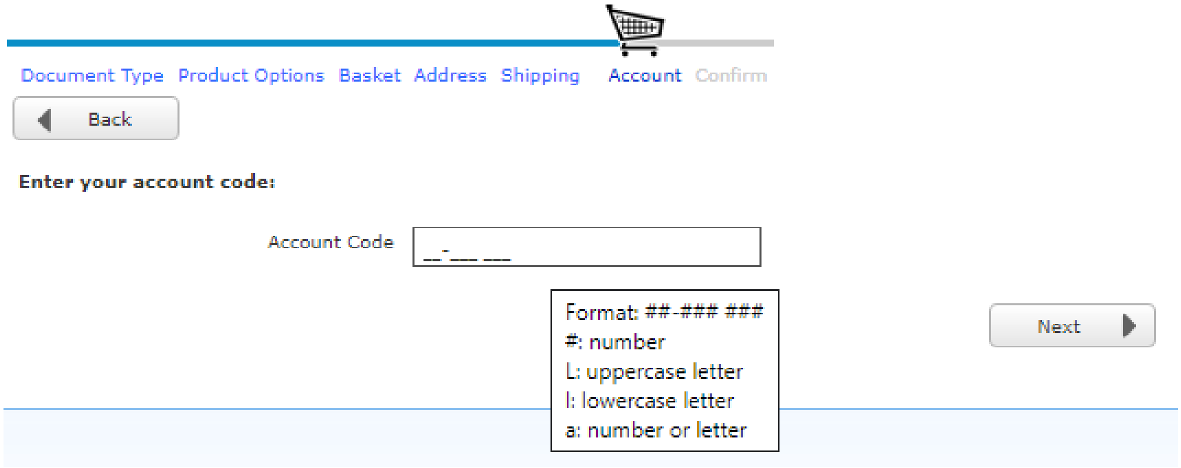
4. Select **Users enter an account code in a text box**.

5. (Optional) Enter an account mask. You can use any of the following mask characters:

#	Number
L	Uppercase character
l	Lowercase character
a	Uppercase or lowercase character

If you use any other characters in the mask they will be included as a literal value. If you require the characters L or l to be included as a literal value preceded the character with \.

6. (Optional) If the Account Name or Account Description fields have the Hidden check box selected the fields will not be available to the user. In the example shown above only the account code field will be shown to the user.



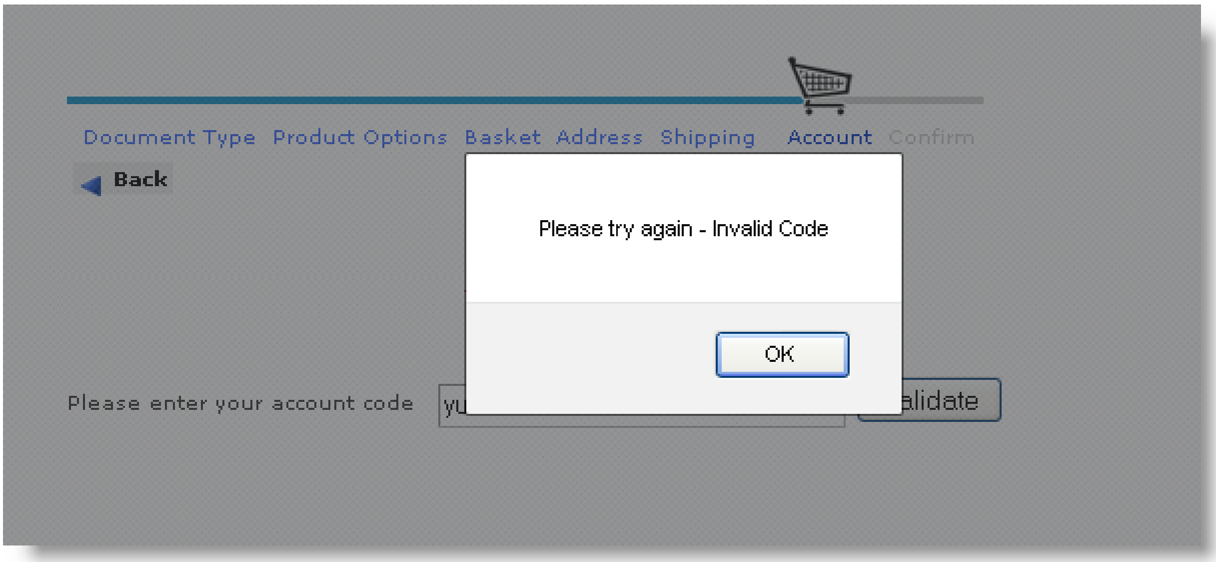
7. Remove tick in the Hidden fields if you want the fields shown to the end user.

8. Click **Save**. The Accounts and Pricing page will close.

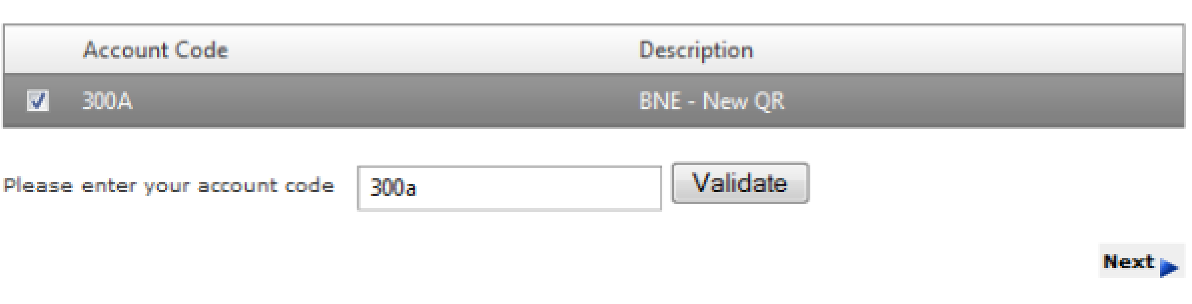
Validating Account Codes

If you have enabled the text box option for account code entry you may want to validate the entry to avoid users making mistakes when entering data. When users enter an account code they have the option to validate their entry. If they have entered an incorrect code a message is displayed. All entries will be invalid unless you have created an account code list. The code listing could be an internally created database 155 or extracted from an external database 156 which may already exist.

Note: If the option "Users enter an account code in a text box" is selected without validate, any information entered in the text box is passed through to the PrintStation. However, even if a correct code is entered the account name and description is not shown as the code has not been checked against an internal or external account code list which includes those details. It is therefore advised that if you use a list of account codes that you select the option to validate the account code entered to ensure that all the correct information is available.



Error Message Shows When an Incorrect Account Code is Entered.

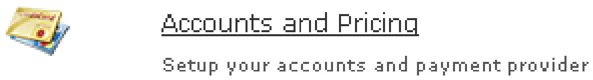


Example of an Account Code that is Validated.

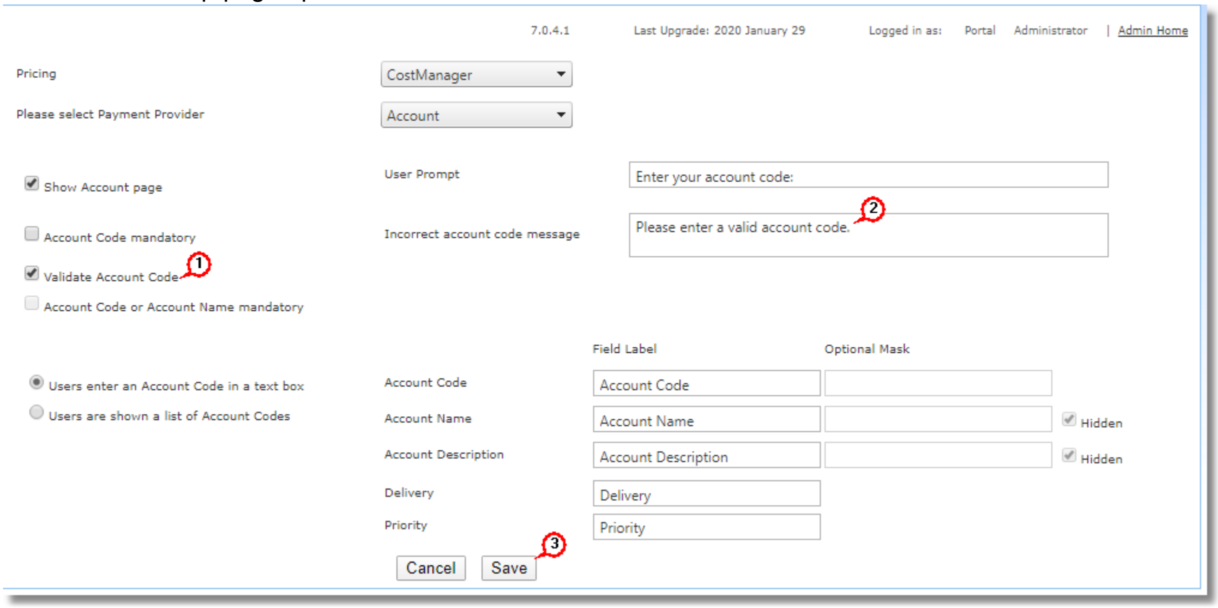
To validate an account code entry:

1. Log in with Administrator rights and go to **Admin**.

2. In the Orders section click **Accounts and Pricing**.



3. The account setup page opens.



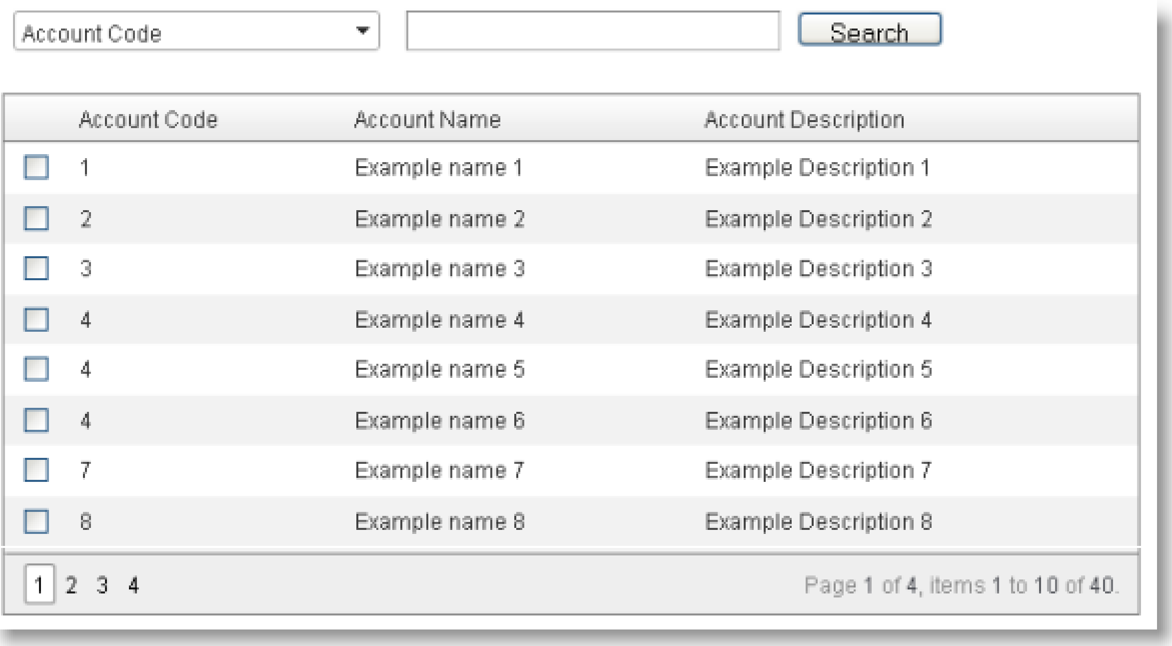
1. Select **Validate account code**.

2. Enter an incorrect account code message.

3. Click **Save**. The Accounts and Pricing page will close.

Showing a List of Account Codes

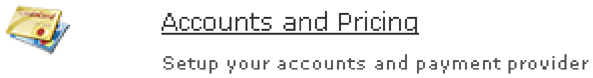
Users can enter an account code into a blank field or you can configure Skyline to provide an account code list. Users will then be able to select the correct code in the list. If you provide the users with a list of account codes you need to firstly create the account code list. The code listing could either originate from an internally created database155 or extracted from an external database156 which may already exist. If you provide a list of account codes a search box is enabled. Users will then be able to search the account code, description or details fields.



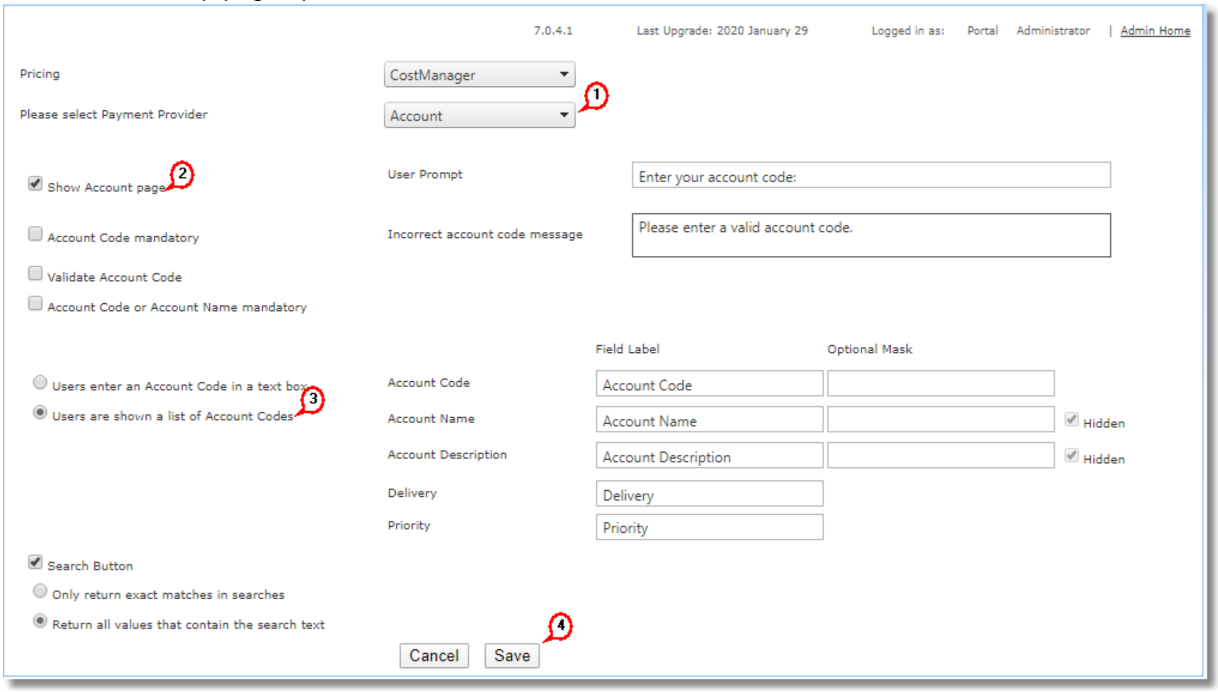
Example showing the page presented when the option "Users are shown a list of account codes" is selected.

To show an account code list:

1. Log in with Administrator rights and go to **Admin**.
2. In the Orders section click **Accounts and Pricing**.



3. The account setup page opens.

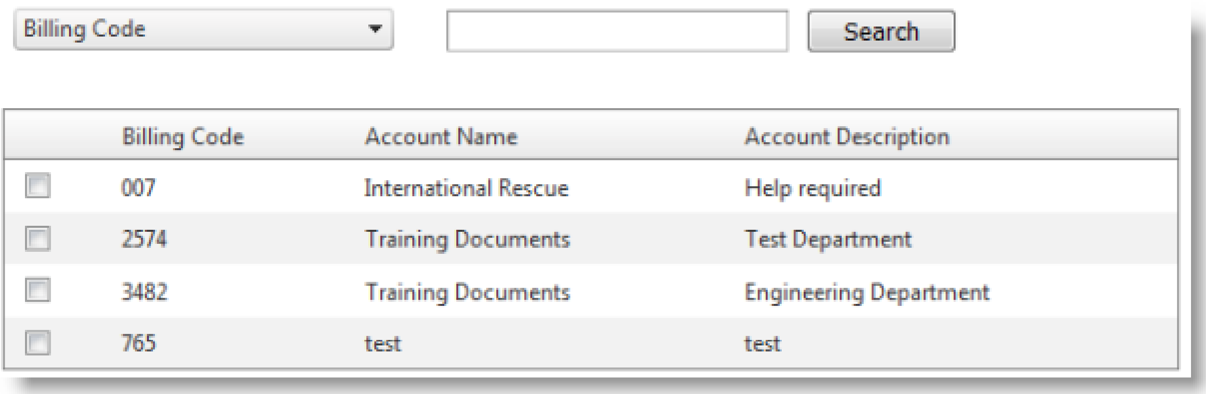


1. Select the payment provider **Account**.
2. Select the option **Show Account page**.
3. Select the option **Users are shown a list of account codes**. Select the search results that you want to return. By default the option "Return all values that contain the search text" is selected.
4. Click **Save**. The Accounts and Pricing page will close.

Assigning Specific Accounts to Users

Users can be assigned specific account codes. When a user places an order they only see the accounts that they have been assigned and not all the accounts in the system.

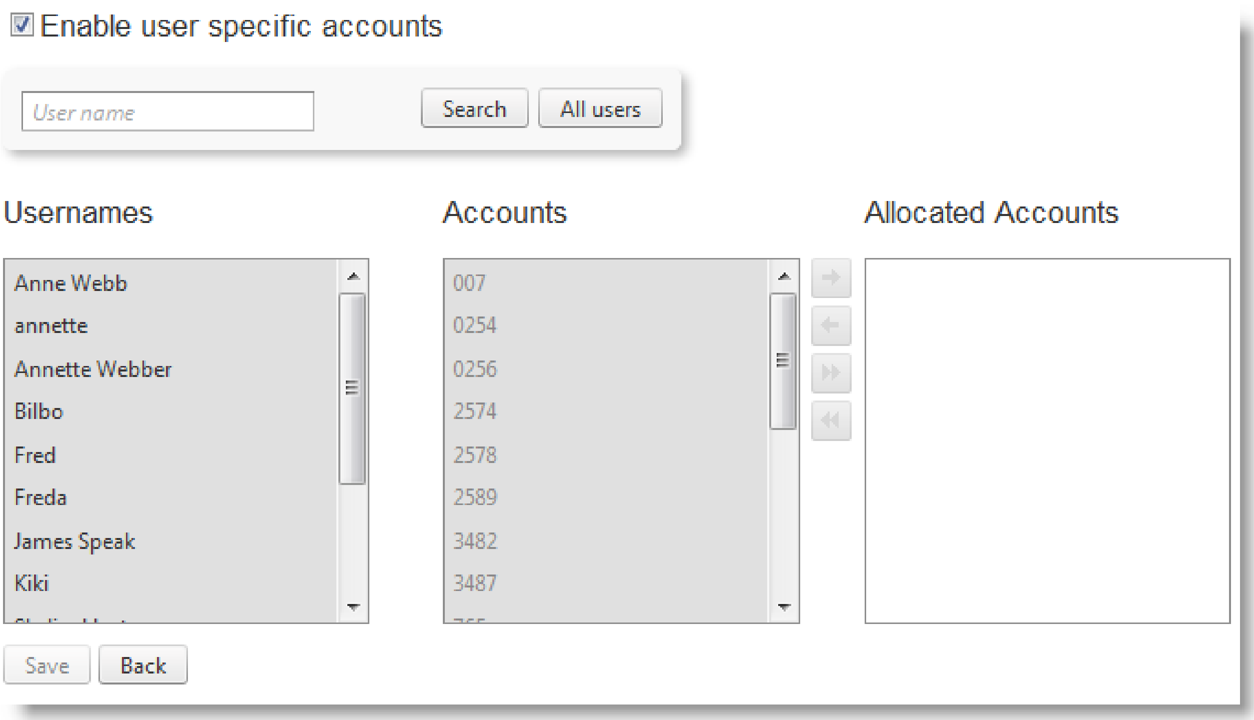
This feature can only be used with internal accounts.



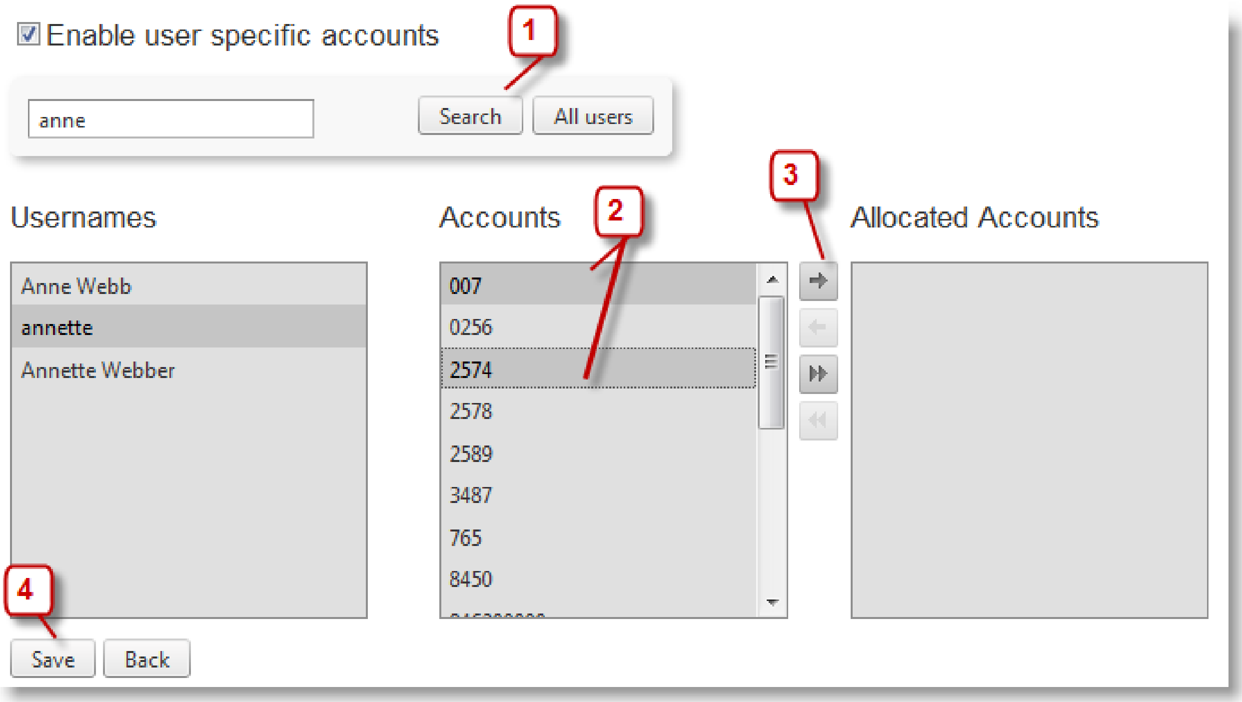
If you enable user specific accounts you will need to assign accounts to each of your users. If a user does not have any accounts assigned to them they will not be able to place an order as the account codes are mandatory and are validated.

To assign account codes to specific users:

1. Log in with Administrator rights and go to **Admin**.
2. In the **Users** section click **User Accounts**.
3. Select the option **Enable user specific accounts** if it is not already selected.



4. Use the search facility to locate the required user. You are able to select multiple account codes before you allocate the accounts to the user.



1. Enter part of the users name and then click **Search**. All users that partially match your requirements are listed as the search facility is not case sensitive. Select the required user.

2. Select the account codes to be assigned to the user. Use the Ctrl button to select non adjacent account codes.

3. Click  to allocate the selected accounts. If you want to allocate all the available account to the selected user click .

4. Click **Save** to complete allocating the accounts to the selected user.

5. Accounts that have been assigned to a specific user can be removed by either selecting the allocated account then click . If you want to remove all the allocated accounts click .

Creating Internal Account Codes

Creating Skyline or Internal account codes is a quick way of getting your Skyline installation up and running with minimal fuss. You can create new account codes[155] or change existing ones[155].

To setup and manage internal account codes:

1. Log in with Administrator rights and go to **Admin**.

2. In the Orders section click **Accounts**.

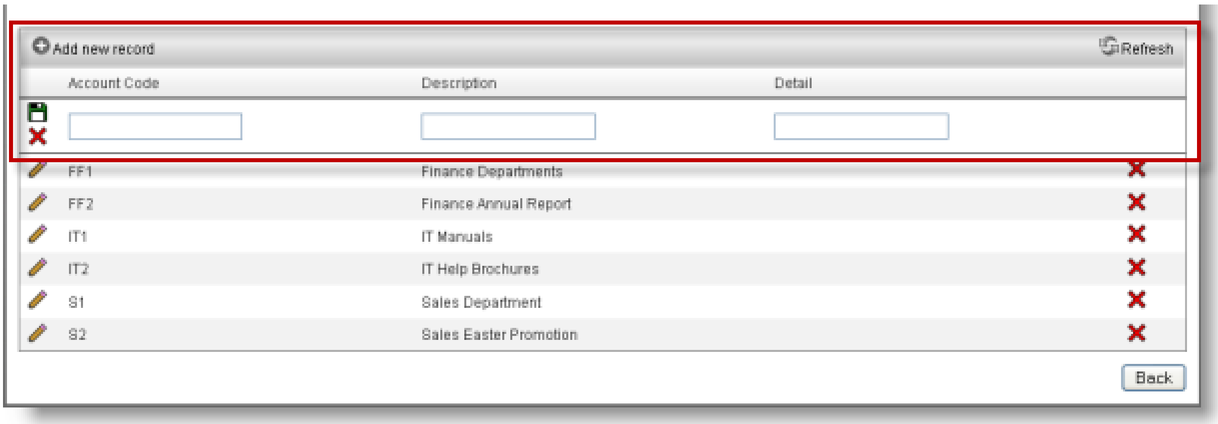
Accounts

Add, amend and delete internal account codes

3. All the current account codes are listed. From this screen you can manage existing account codes and create new ones.

To add a new account code:

1. Click **Add new record**. New fields become available.



2. Enter the new account code and a description for the user. The details section is an optional field.

3. Click to save the new account code.

To edit an existing account code:

1. Click next to the account code to be amended.

2. The account detail fields are shown. Make the amendments as required.

3. Click to save the changes.

Using an External Source

Linking to an external accounts list is a quick way of adding pre-existing account codes to Skyline. The file formats that are supported are:

- Microsoft Excel files saved as an XLS file.
- CSV files.
- Microsoft Database files (MDB).
- SQL files.

Note: Microsoft Excel files saved as an XLSX files are not currently supported.

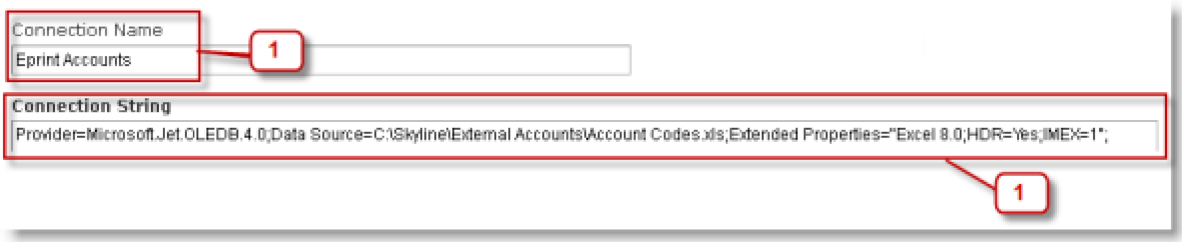
The files must be stored on the **server** that Skyline is installed on. If you are using a hosted server refer to the section on updating external accounts 164.

To create a link to external account code database:

1. Log in with Administrator rights and go to **Admin**.
2. In the Orders section click **External Accounts**.

3. Click the link **New External Accounts Connection**.

4. Enter a connection name and string.



1. In the field **Connection Name** enter a descriptive name for the accounts list. In the example the connection is called Eprint Accounts.

2. In the field **Connection String** specify the database type, location and log in credentials. In the example the account codes are in an Excel workbook called Account Codes. (If you are unsure of the correct connection string to use the website www.connectionstrings.com is helpful).

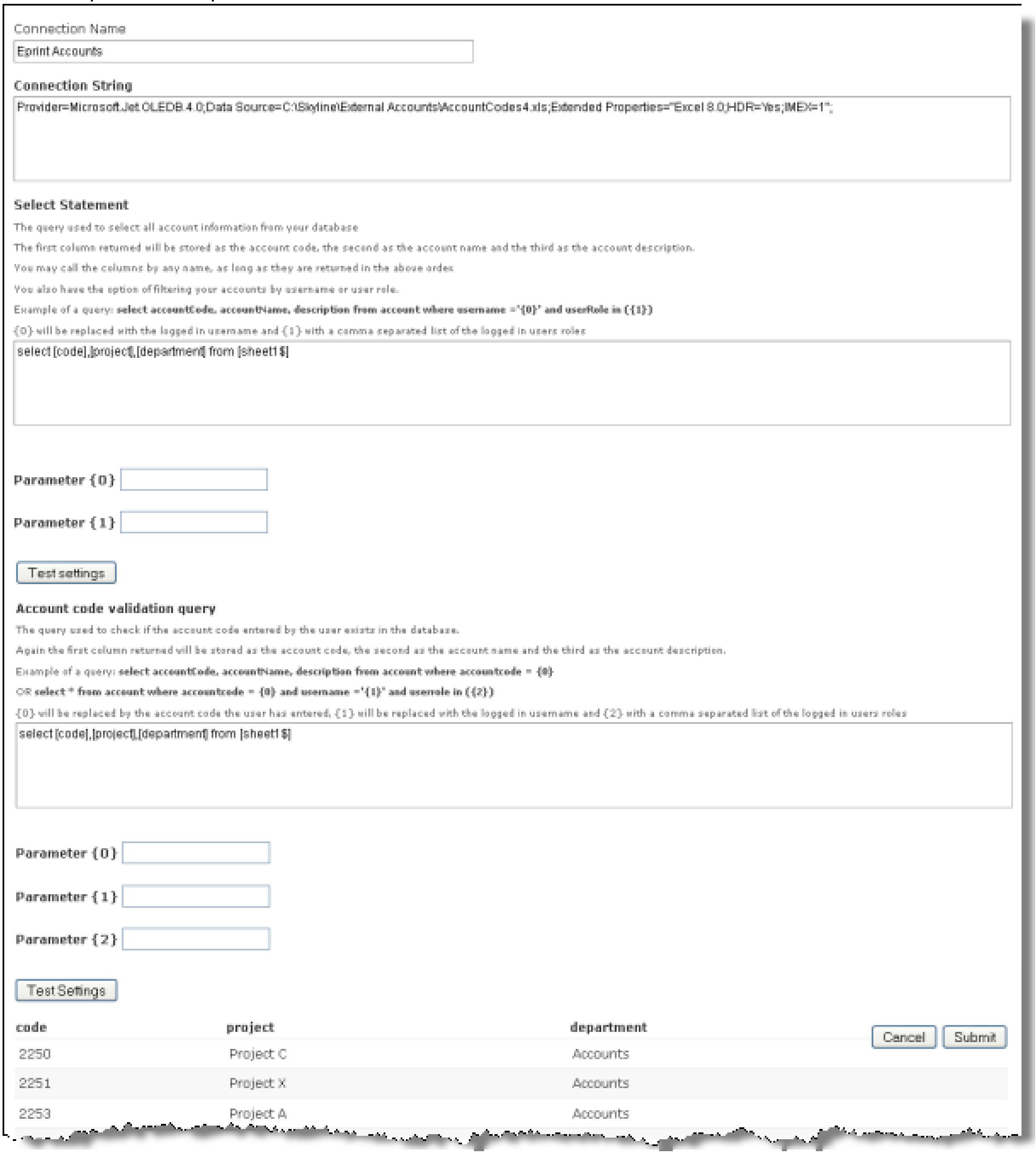
   Notes:
   If you were connecting to an CSV file the connection string would be similar to the one shown below:
   Provider=Microsoft.Jet.OLEDB.4.0;Data Source=C:\Skyline\Customers\;Extended Properties="text;HDR=No;FMT=Delimited";

   If there are no field headings in your file amend the section *HDR=Yes* to *HDR=No*, as shown in the example below.
   *Provider=Microsoft.Jet.OLEDB.4.0;Data Source=C:\Skyline\External Accounts\Account Codes.xls;Extended Properties="Excel 8.0;**HDR=No**;IMEX=1";*

5. The Select statement is used when users are shown a list of account codes. It needs to show the name of the worksheet in the workbook that contains the account details as well as specific fields, if applicable. See the section Example Queries[160] for working examples of the syntax that can be used. Click **Test settings** to test the statement.

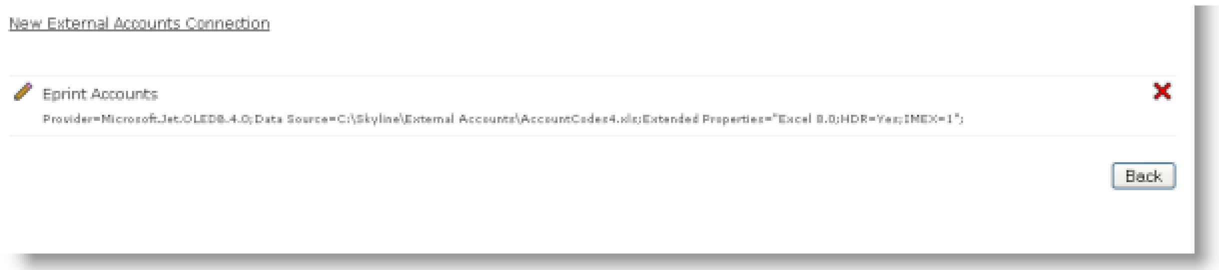
6. The Account Code Validation Query is used when users are have to enter the account code into a single field. The Select Statement & Account Code Validation Query can be the same. If this is the case you can copy the select statement into the account code validation query area and click **Test Settings**.

7. An example of a completed connection is shown below. Click **Submit** to save the connection.



Please note that the worksheet name is ended with a $ symbol.

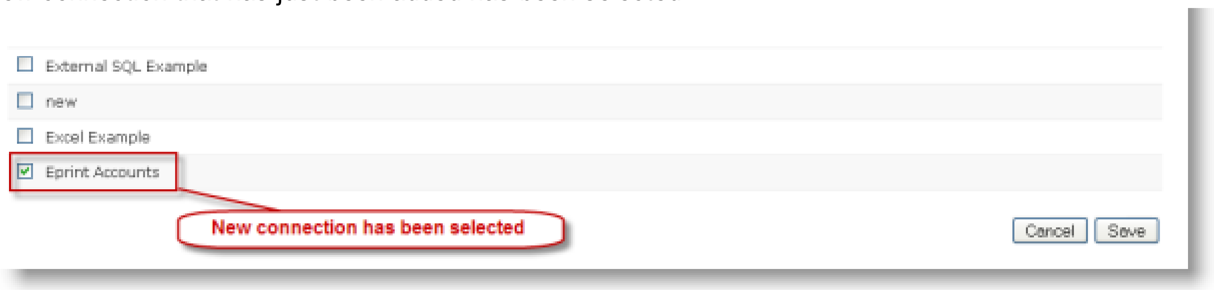
8. You are returned to the External Accounts web page. The connection details that you have entered are shown.



9. Click **Back** to return to the Admin page. The account codes need to be made available to the Skyline website.

10. In the Orders section select **Portal External Accounts**.

11. Select the external account database that you want to use and click **Save**. In the example below the new connection that has just been added has been selected.

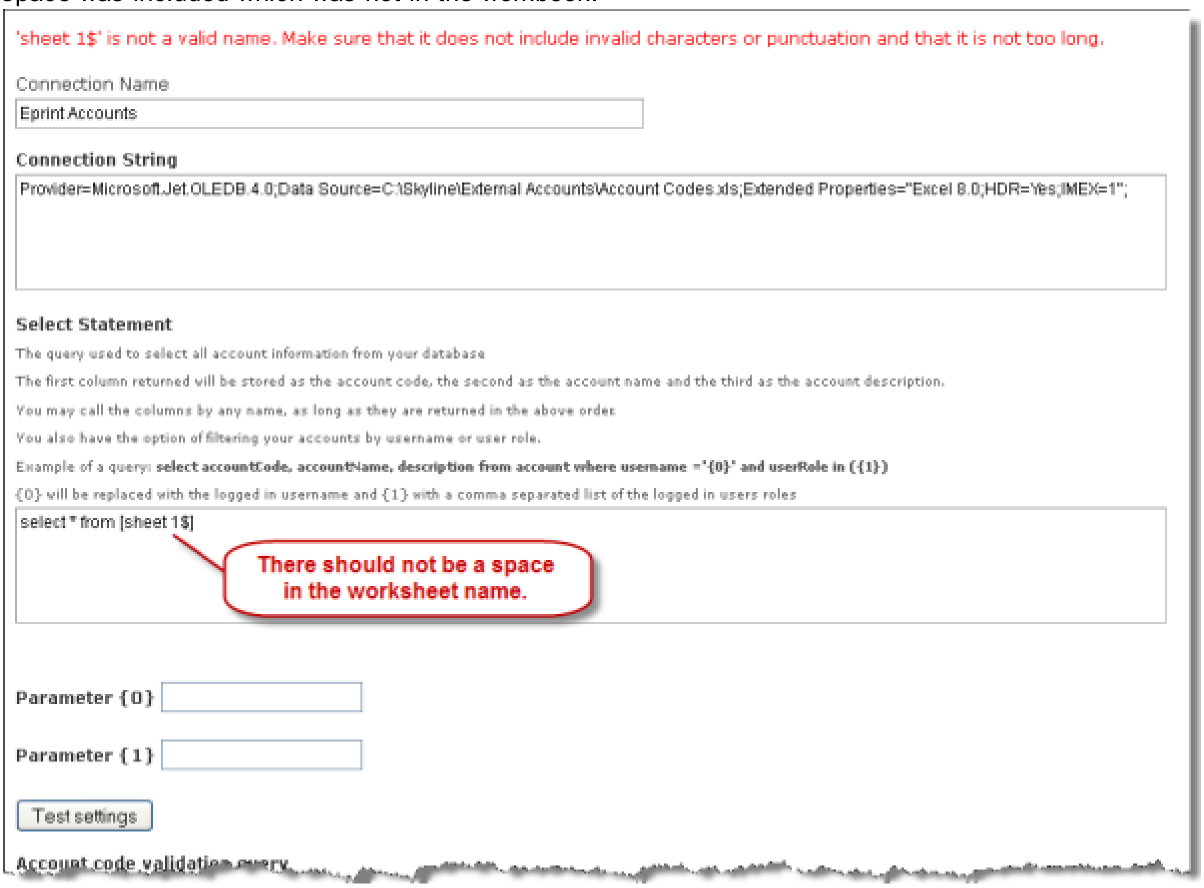


12. The connection needs to be tested. Make sure that you have enabled the account codes 143 feature then place a test order.

When creating a select statement or account code validation query the same syntax can be used.

All entries from an Excel worksheet.

In the example statement the account information required was everything in the worksheet called sheet1. When the settings were tested there was an error message returned stating that the worksheet name was not recognized. The worksheet name entered needs to be exactly the same as in the workbook. In the example a space was included which was not in the workbook.



Select Statement used when entered correctly for example: **select * from [sheet1$]**
Please note that the worksheet name is ended with a $ symbol.

No headings used in the Excel worksheet.

If there are no headings used in the Excel file the fields are referred to as F1, F2 F3 etc. When the users see a list of account codes the headings will show as F1, F2 F3 as shown in the example below.

	F1	F2	F3
☐	60589	2036	Department A
☐	60590	2037	Department B
☐	60591	2038	Department C
☐	60592	2039	Department D
☐	60593	2040	Department E

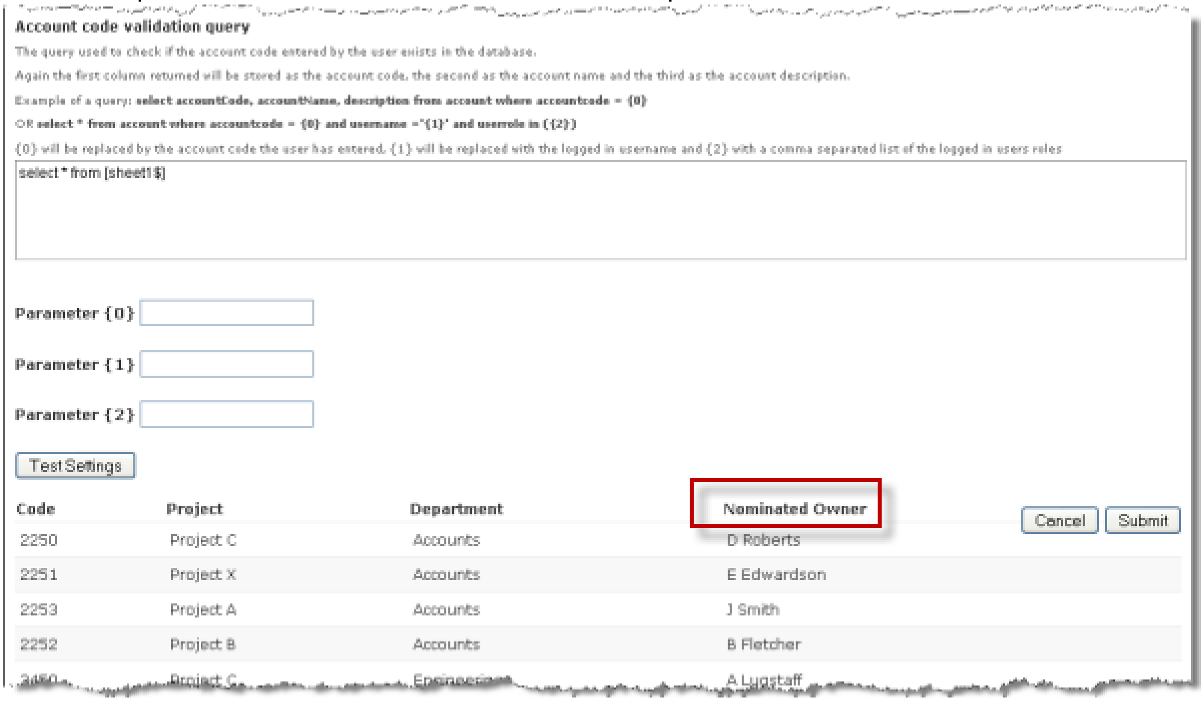
To show a descriptive name in the heading you need to amend to Select Statement to include the names, for example:
select F1 as [Work Order], F2 as [Cost Centre], F3 as [Department] from [Sheet1$]

The users will now see a lost of account codes with headings.

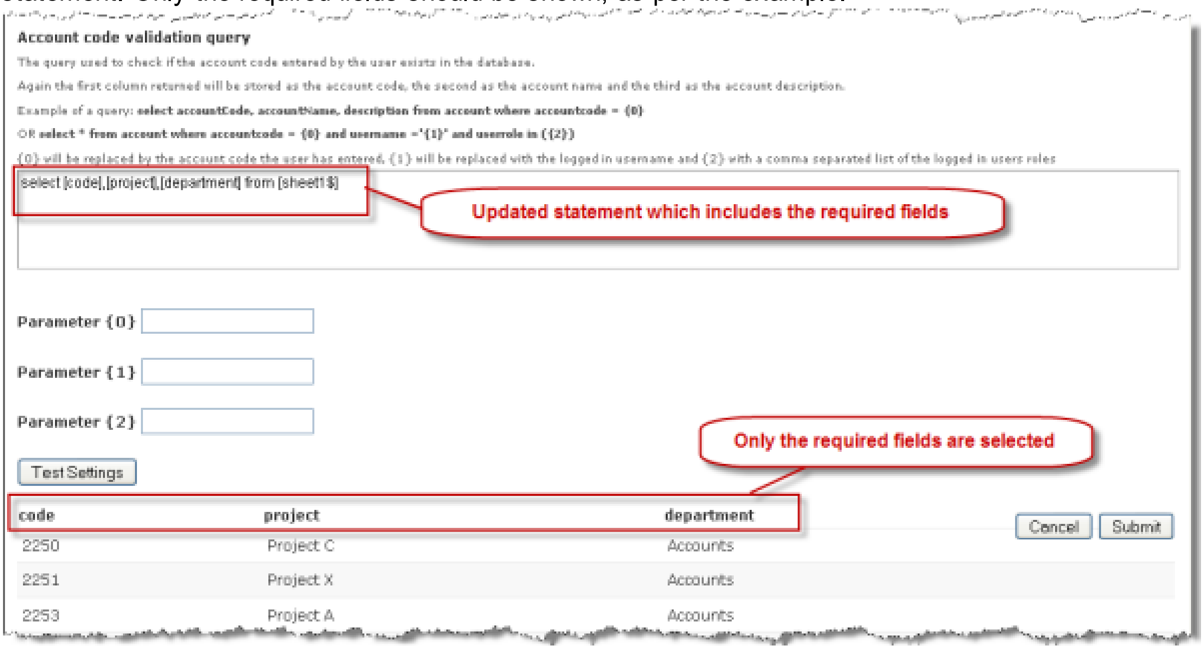
	Work Order	Cost Centre	Department
☐	60589	2036	Department A
☐	60590	2037	Department B
☐	60591	2038	Department C
☐	60592	2039	Department D
☐	60593	2040	Department E

Select specific Excel fields.

In the example below the field Nominated Owner is not required.



Amend the select statement to include the fields that you require. In the example below the field headings Code, Project & Department have been inserted in the statement. Click Test Settings to check your statement. Only the required fields should be shown, as per the example.



Select Statement used for example - **select [code],[project],[department] from [sheet1$]**.

Rename existing field headings

You can display a different field name on the website from the field name contained in the file. For example you might want to present to the end user the field name "Account Code" instead of "Code". All or just one field can be re-named.

Example of one field being re-named:

select [code] as [Account Code], [project], [department] from [sheet1$] where [Number]={0}

Example of all fields being re-named:

select [Number] as [Project Number],[Name] as [Project Name], [description] as [Project Description] from [sheet1$] where [Number]={0}

The syntax **where [Number]={0}** needs to be added when creating a query for the account code validation. It shows which field contains the account code that will be verified with the code entered by the user. The field name used needs to be the original name that is contained in the file.

If you are creating a statement query **where [Number]={0}** is not required the user will select an account code from a list.

Note: If you are using a CSV file the field names are F1 for the 1st field. F2 for the 2nd field etc. To set the field names that are displayed to the user, use the syntax **F1 as [Work Order]**. The name of the fields should always be in square brackets as in the example shown below.

Select F1 as [Work Order], F2 as [Cost Centre], F3 as [Description] from Repro.csv where F1={0}

When you need to update external account files on a hosted service you need to configure the system to update the information automatically. For example, the excel workbook containing the account details on your server is amended and then the copy that is on the hosted server needs to be updated. The update process is controlled by software called SyncBackPro which will update everything in a selected folder at a specific time.

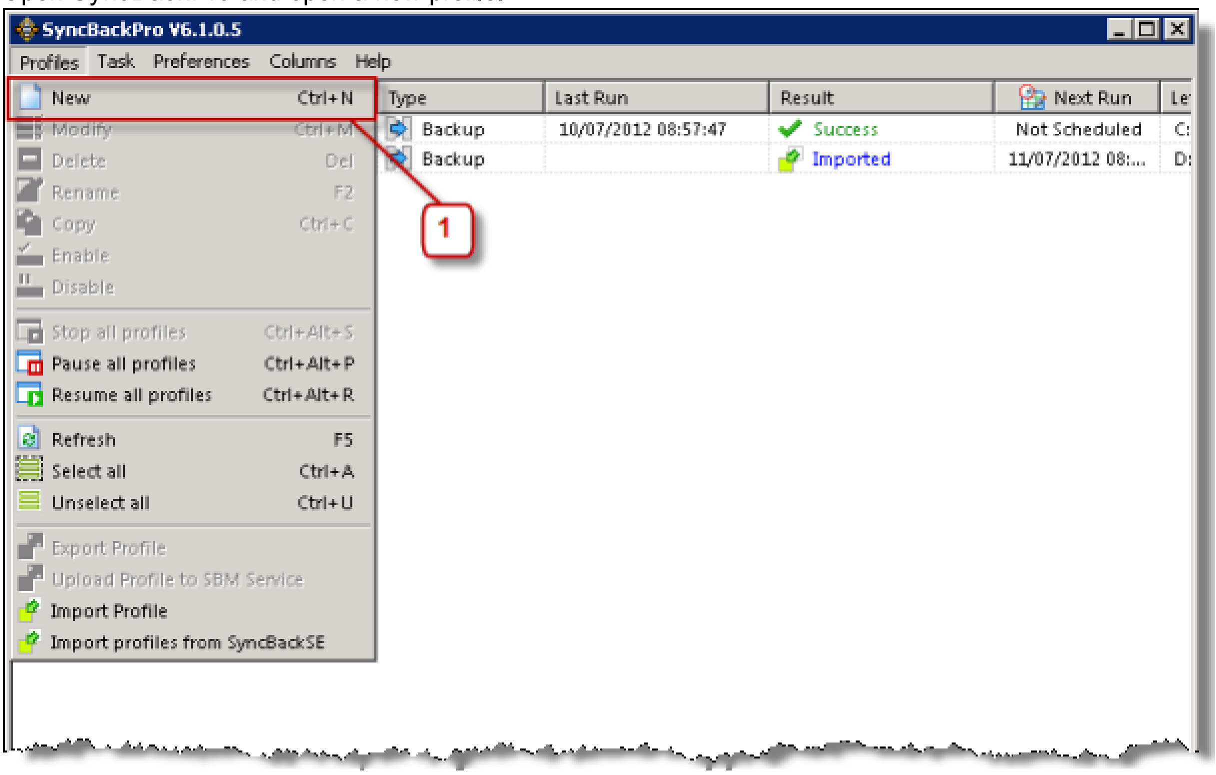
You can fully automate the synchronization of the accounts file using the utility SyncBackPro. This will provide the following features:

- A scheduled service monitoring a shared folder using SyncBackPro.
- At a specified time period any changes to the specified files in the shared folder are checked and any changed files are automatically uploaded to the FTP server.
- All the FTP traffic is encrypted using a strong SSL certificate on the server. Non-encrypted traffic is not permitted.
- The account codes are automatically updated on your Skyline portal.

Note: You need to Install and license SyncBackPro. The software can be purchased from http://www.2brightsparks.com. Before you are able to configure SyncBackPro you need the user name and password associated with your folder on the hosted server. Please contact Eprint for FTP access.

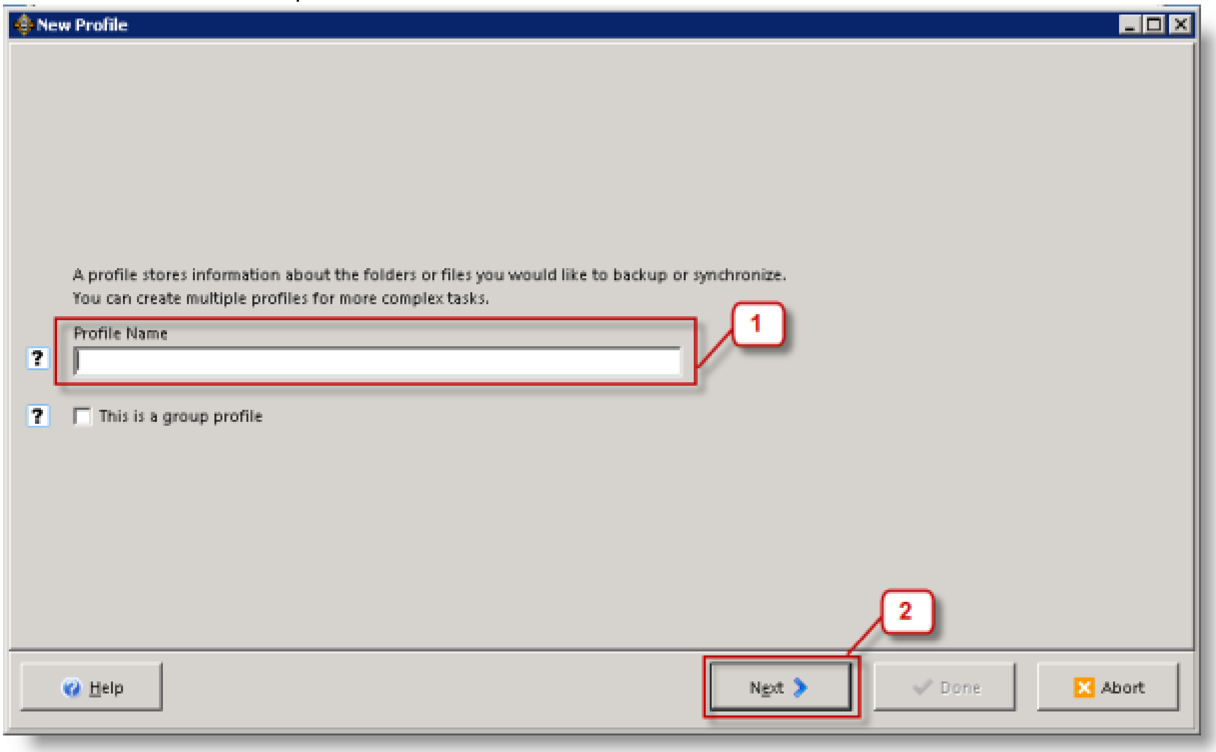
To configure an external account file on a hosted service using SyncBackPro:

1. Open SyncBackPro and open a new profile.



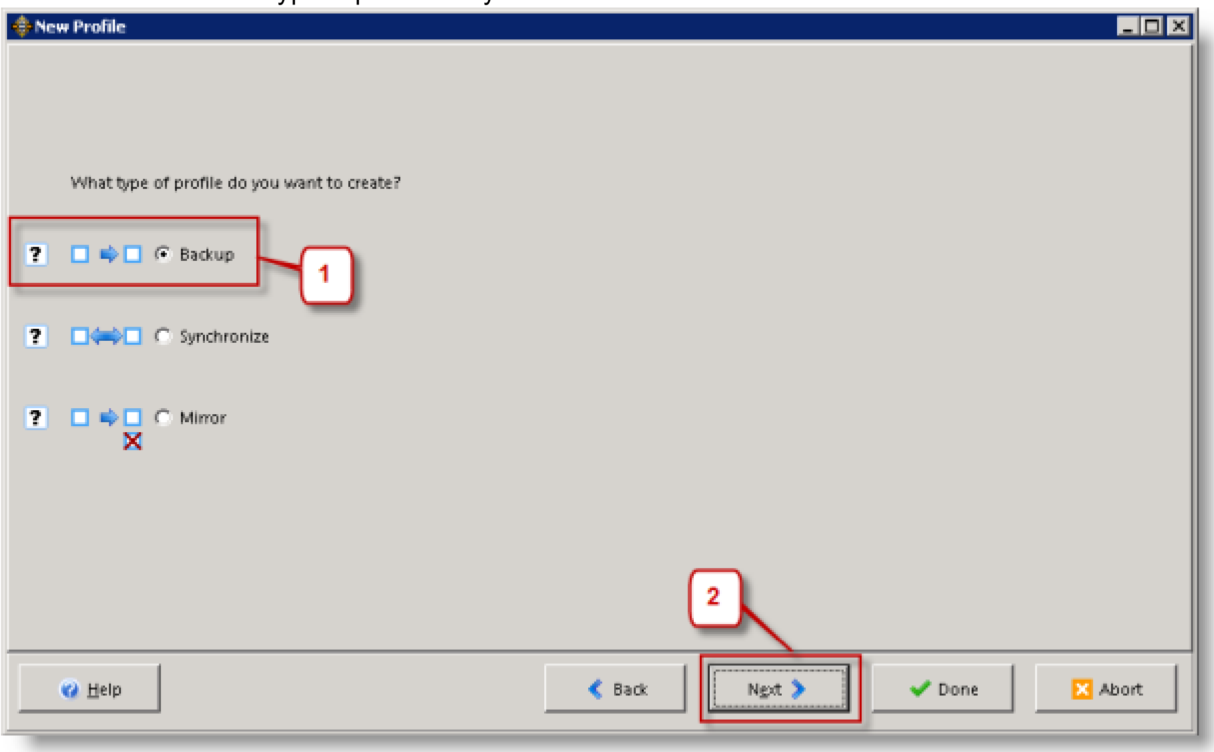
1. From the Profiles drop down menu select **New**.

2. The New Profile window opens.



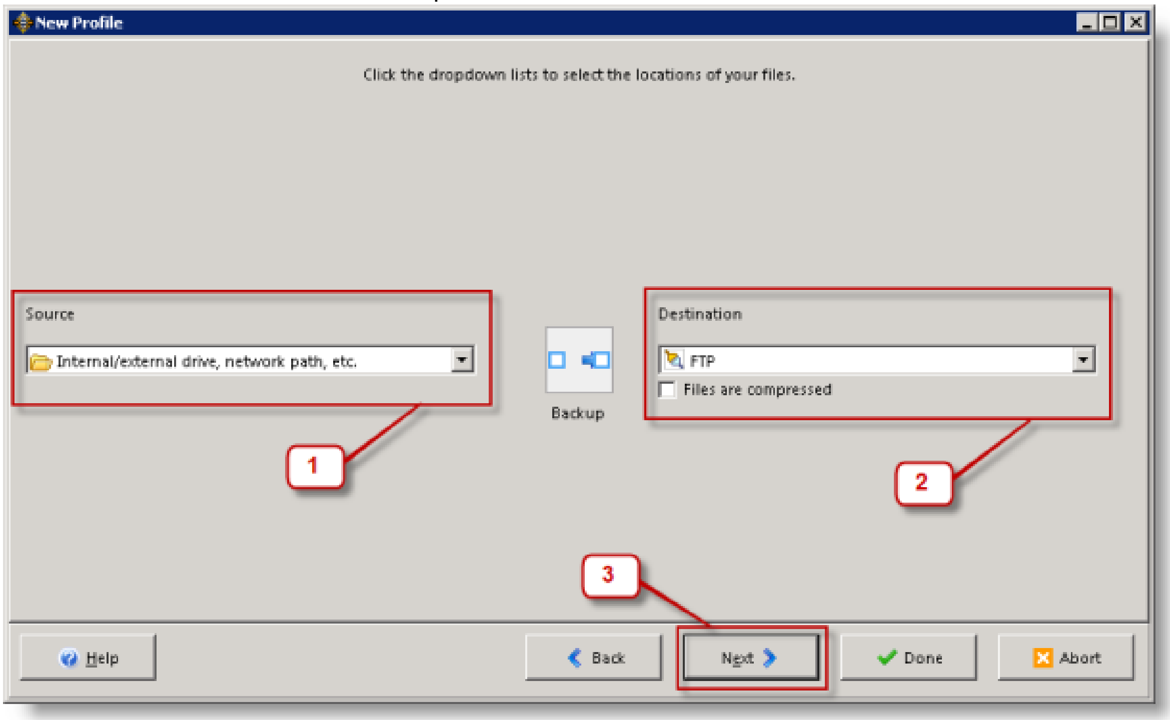
   1. Enter a name for your new profile.
   2. Click **Next**.

3. You need to select the type of profile that you want to create.



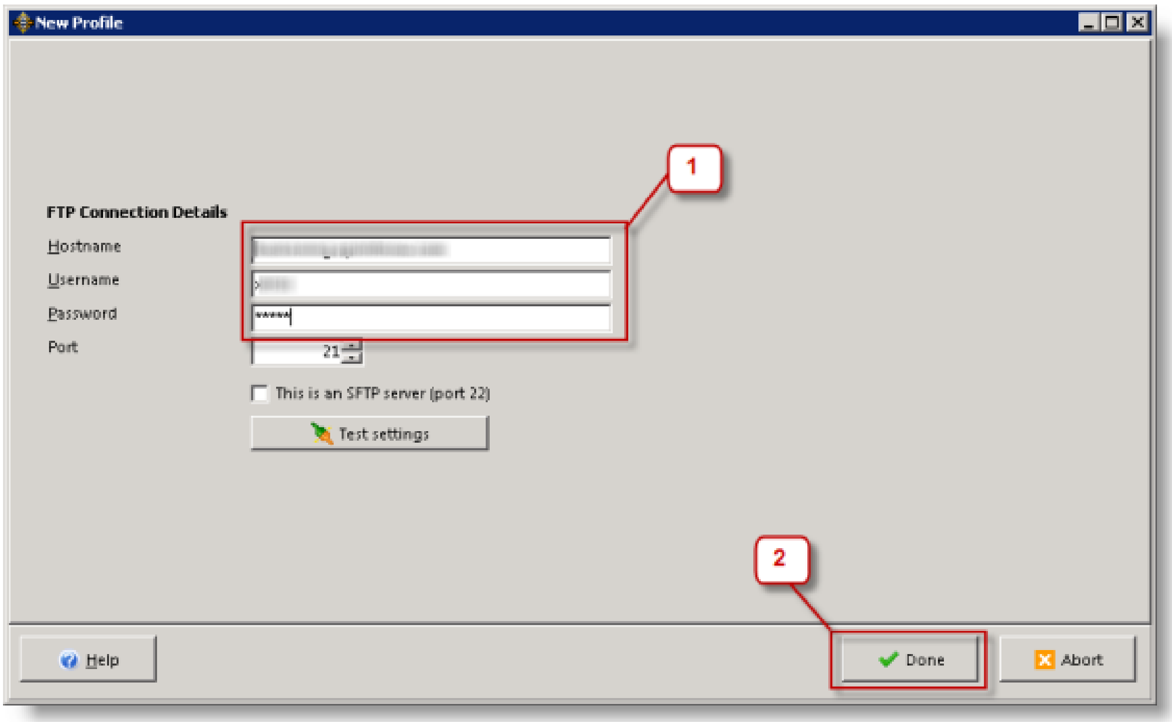
   1. Select the option Backup.
   2. Click **Next**.

4. The locations of the files need to be specified.



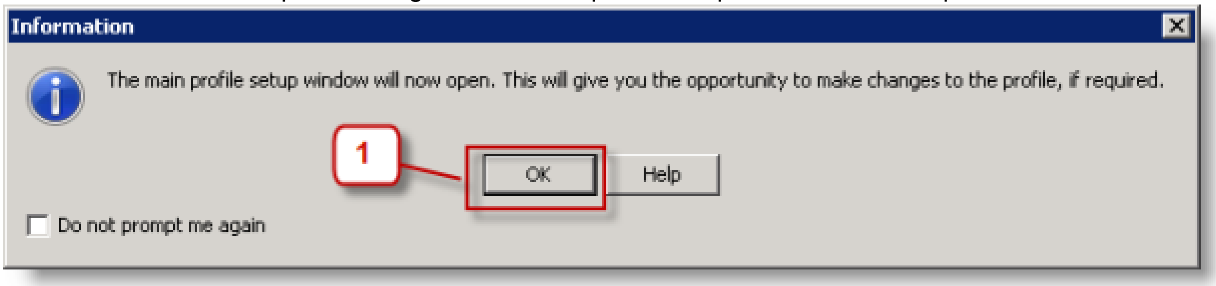
   1. Select the location that of the external accounts file.
   2. The destination is **FTP**.
   3. Click **Next**.

5. The FTP connection details need to be entered.



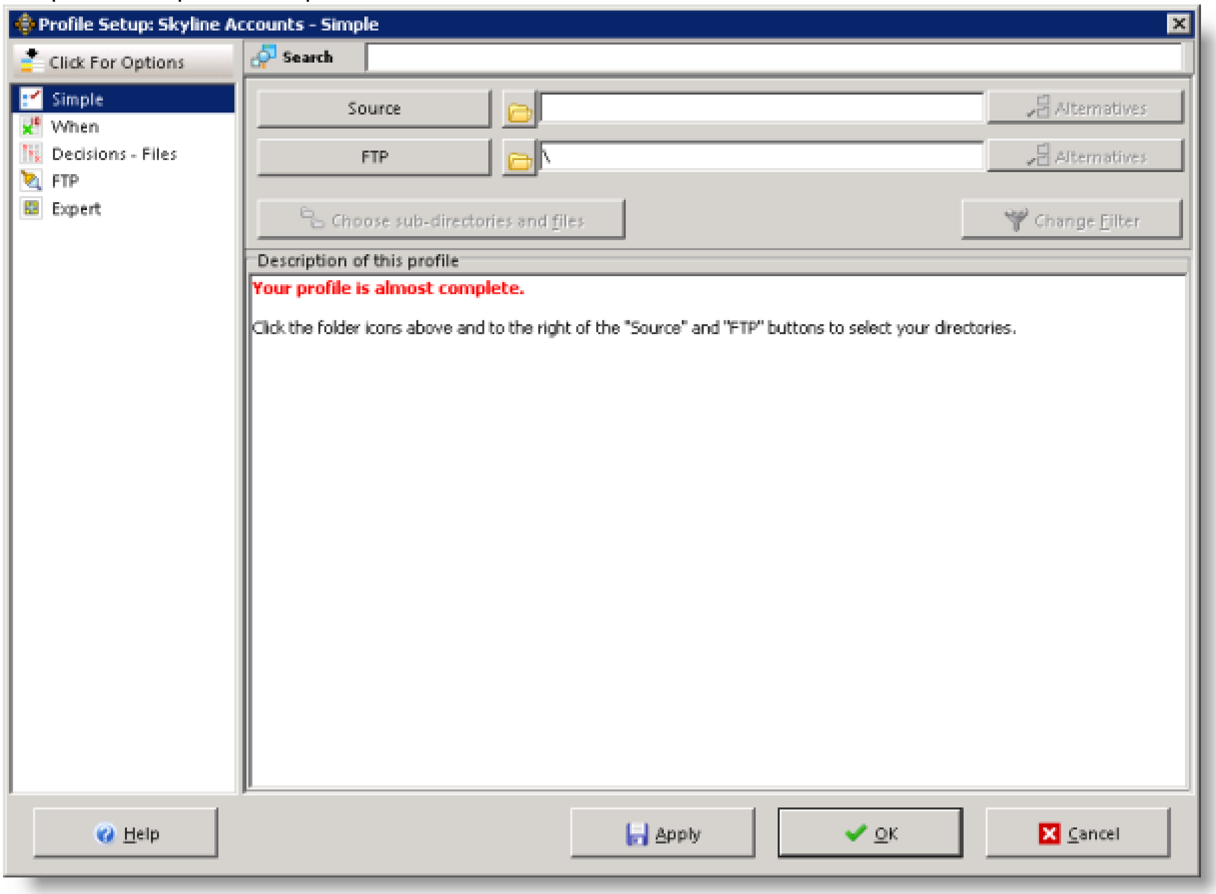
   1. Enter the Hostname, username and password as supplied by ePrint.
   2. Click **Done**.

6. An information window opens stating that the main profile setup window will now open.

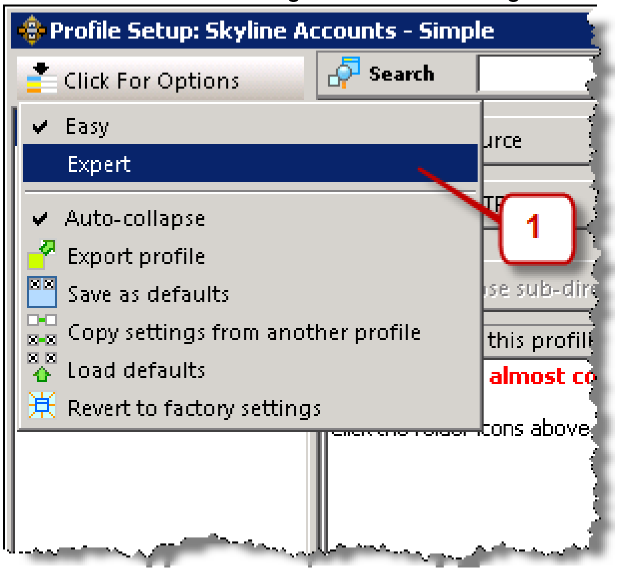


   1. Click **OK**.

7. The profile setup window opens.

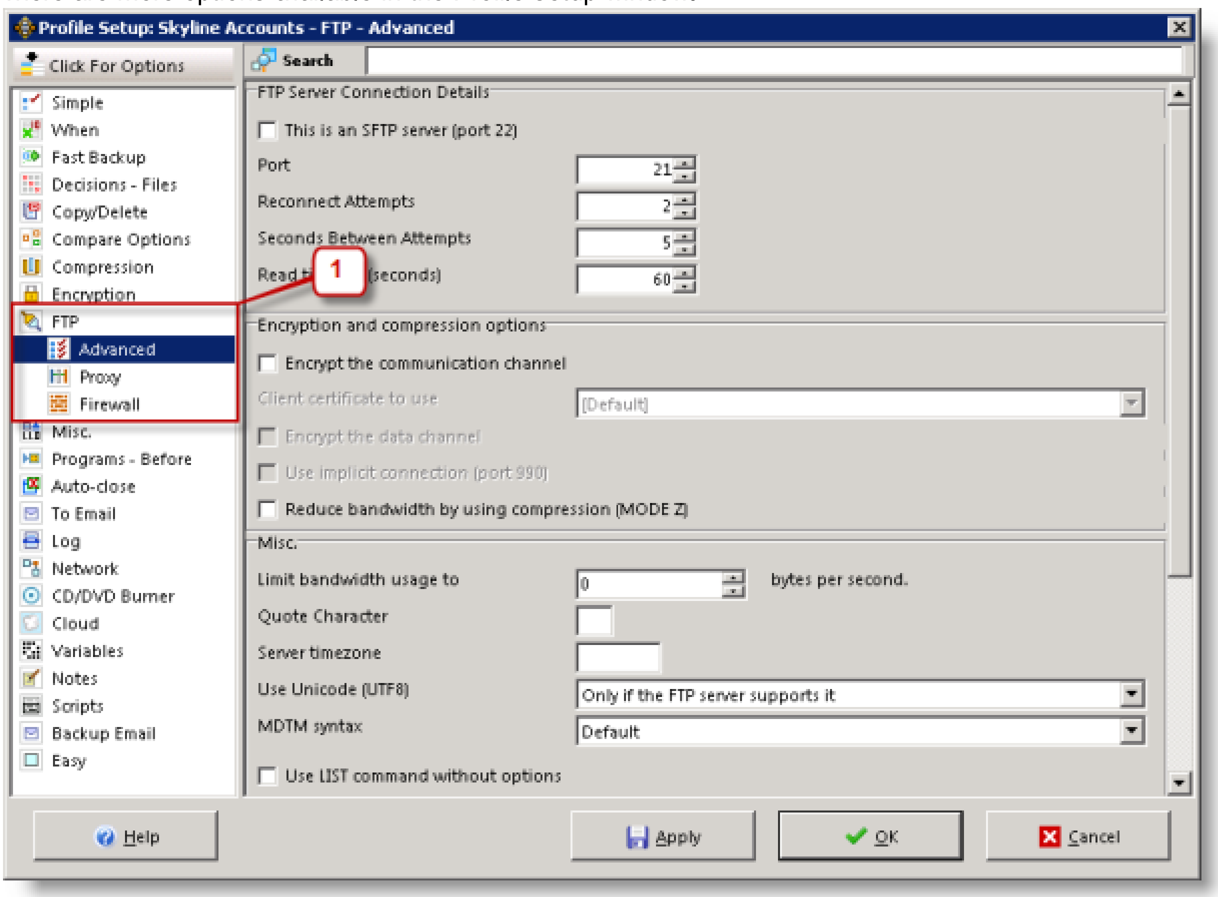


8. The FTP advanced settings need to be configured.



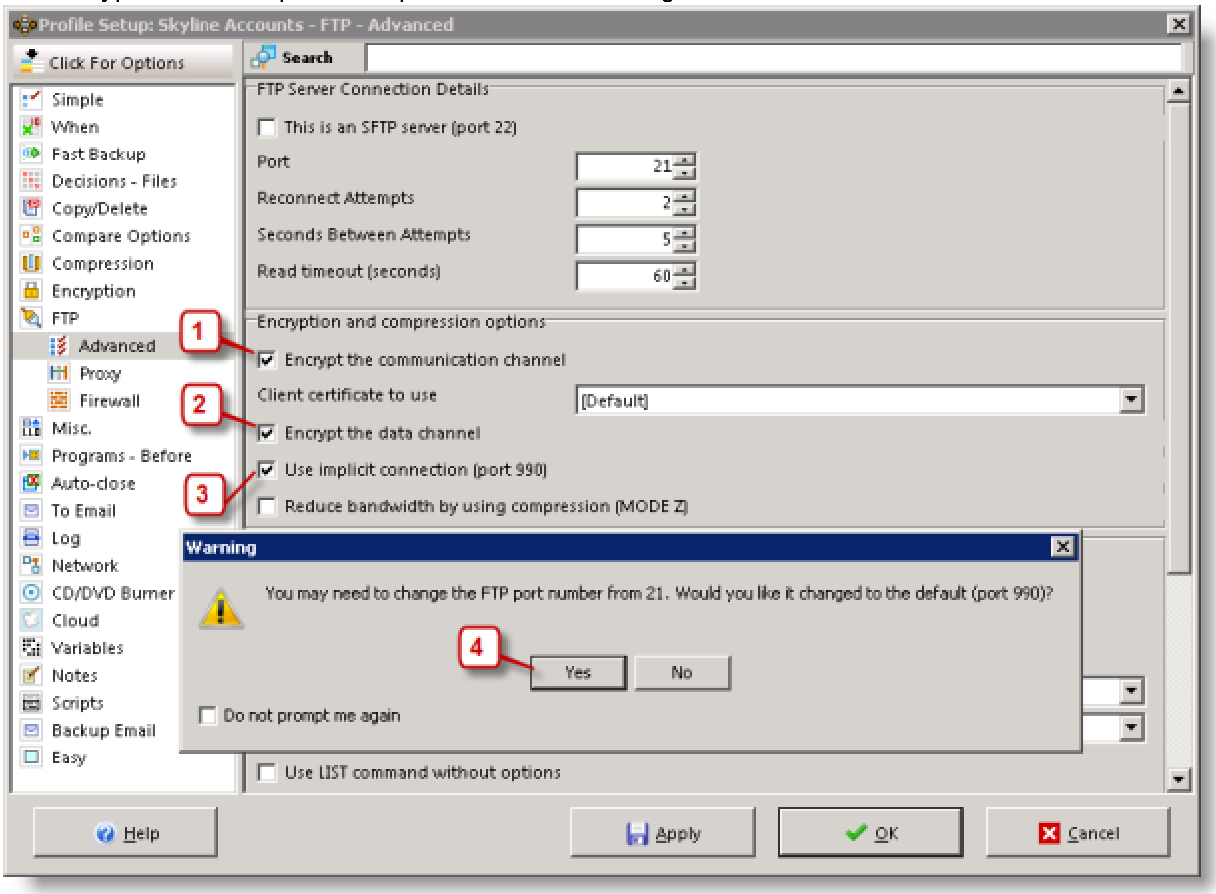
1. From the **Click for Options** drop down menu select **Expert**.

9. There are more options available in the Profile setup window.



1. Under **FTP** select the **Advanced** option.

10. The encryption and compression options need to be configured.



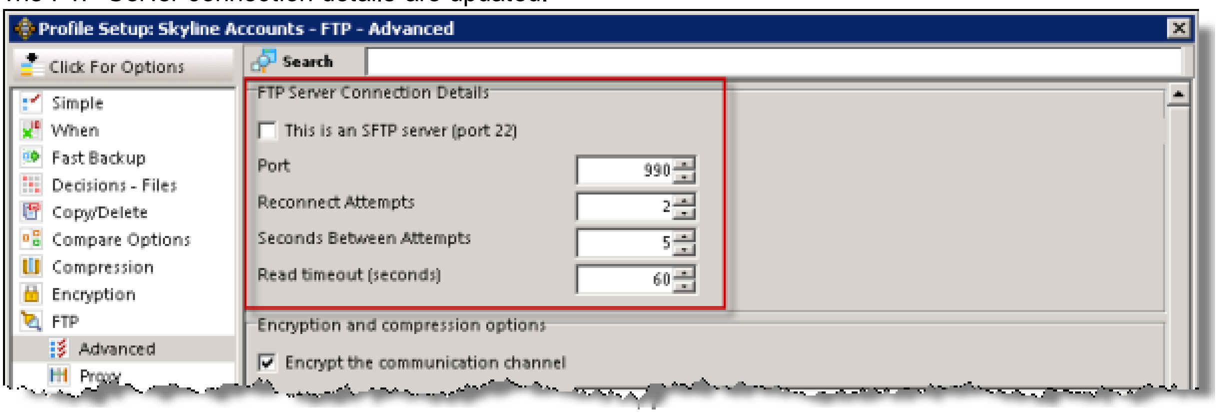
1. Select the option **Encrypt the communication channel**.

2. Select **Encrypt the data channel**.

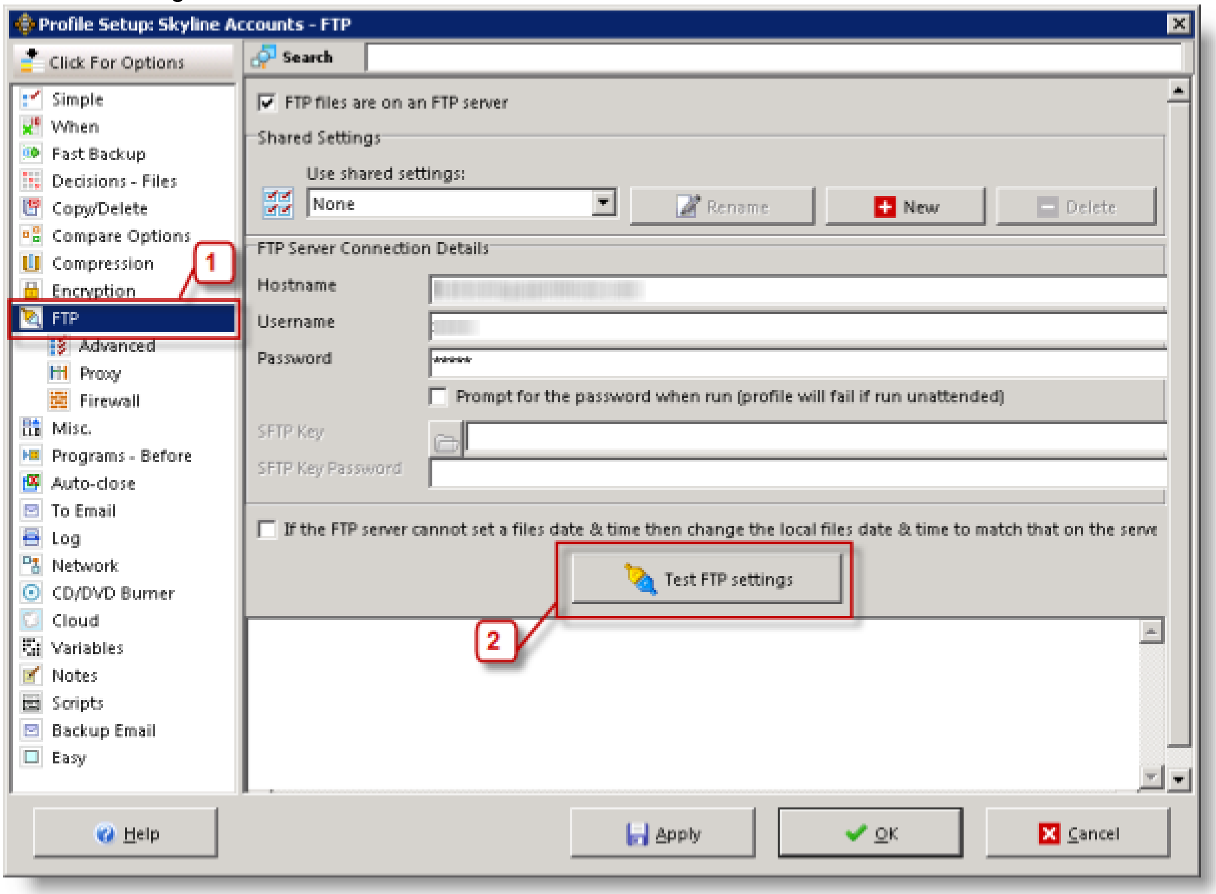
3. Select **Use implicit connection (port 990)**.

4. Select **Yes** when you receive the warning "You may need to change the FTP port number from 21. Would you like it changed to the default (port 990)".

11. The FTP Server connection details are updated.

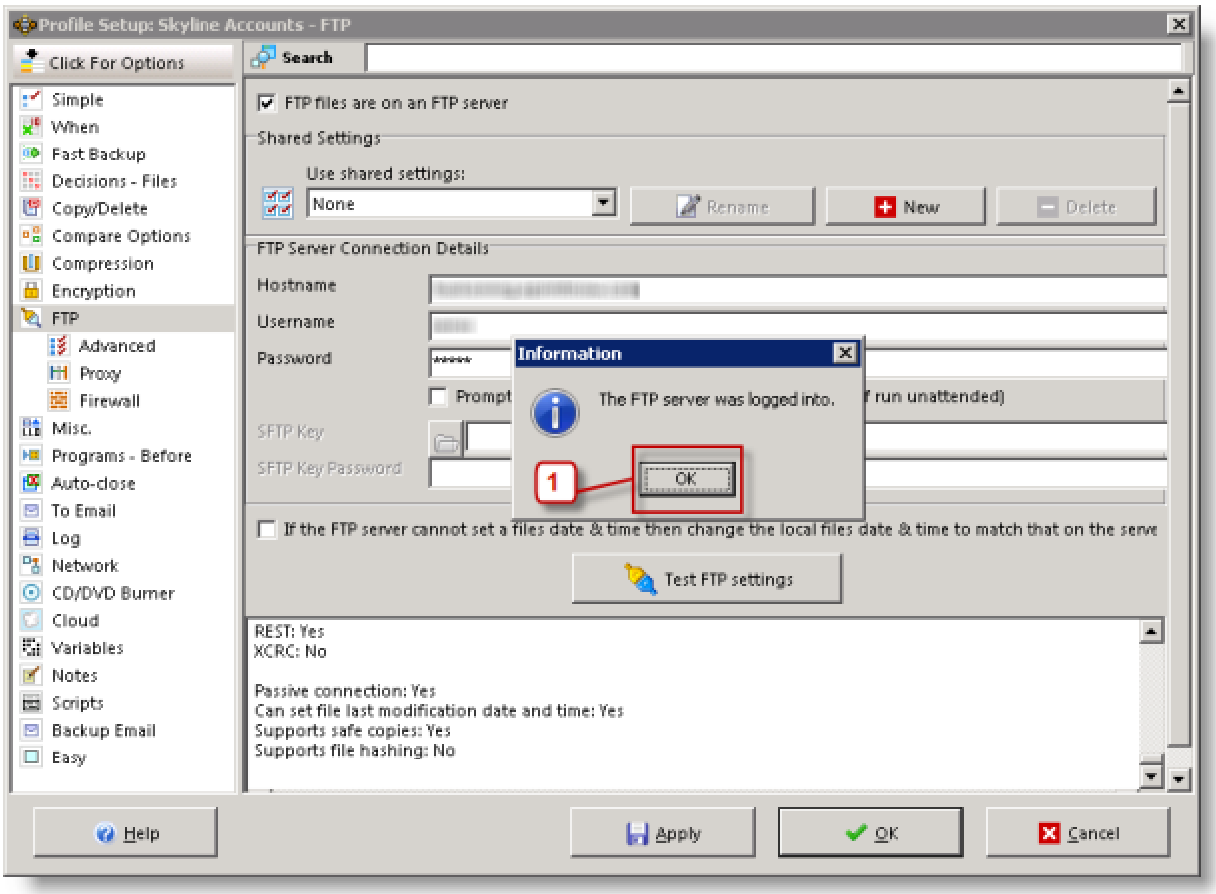


12. The FTP settings need to be tested.



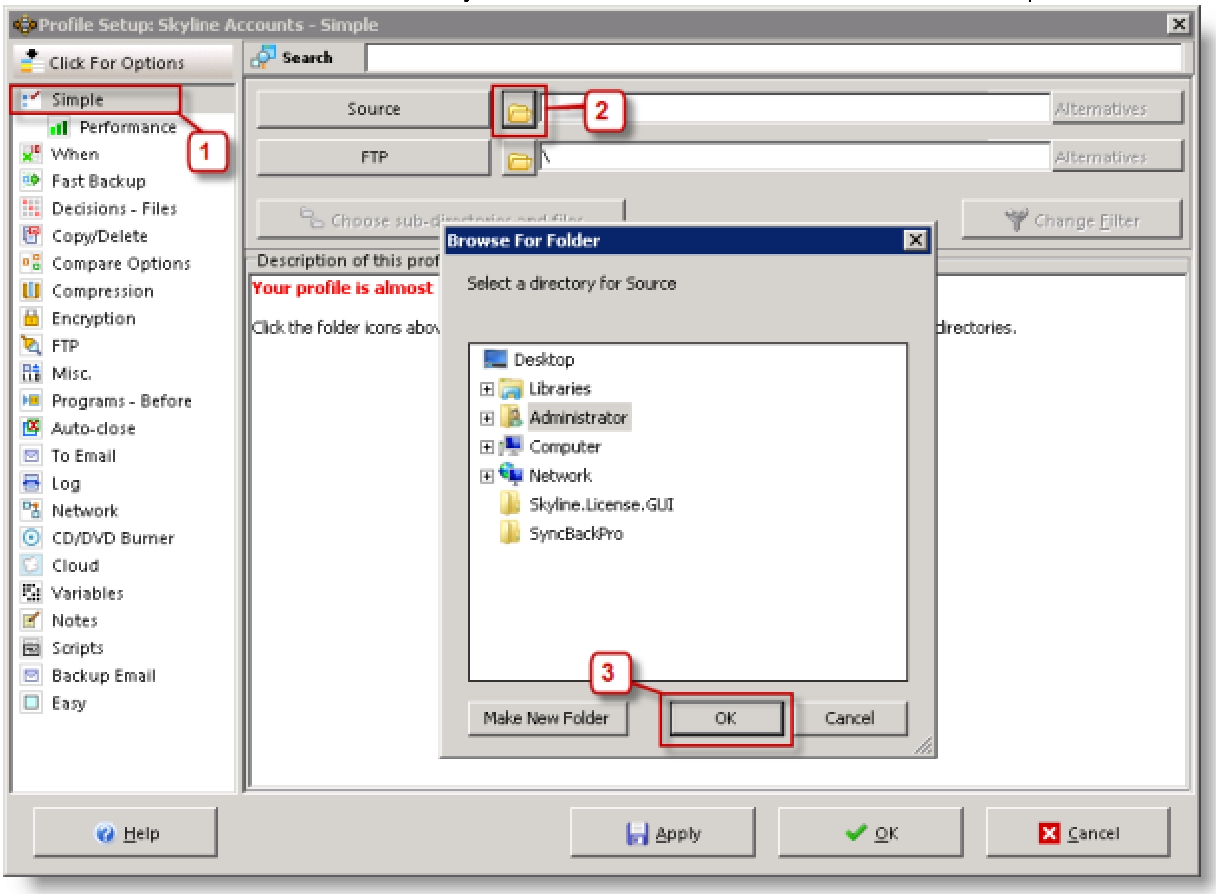
1. Select **FTP**.
2. Click **Test FTP settings**.

13. The settings are tested. When complete you will receive the message that the FTP server was logged into.



1. Click **OK**.

14. The locations of the folder that contains your external accounts information needs to be specified.

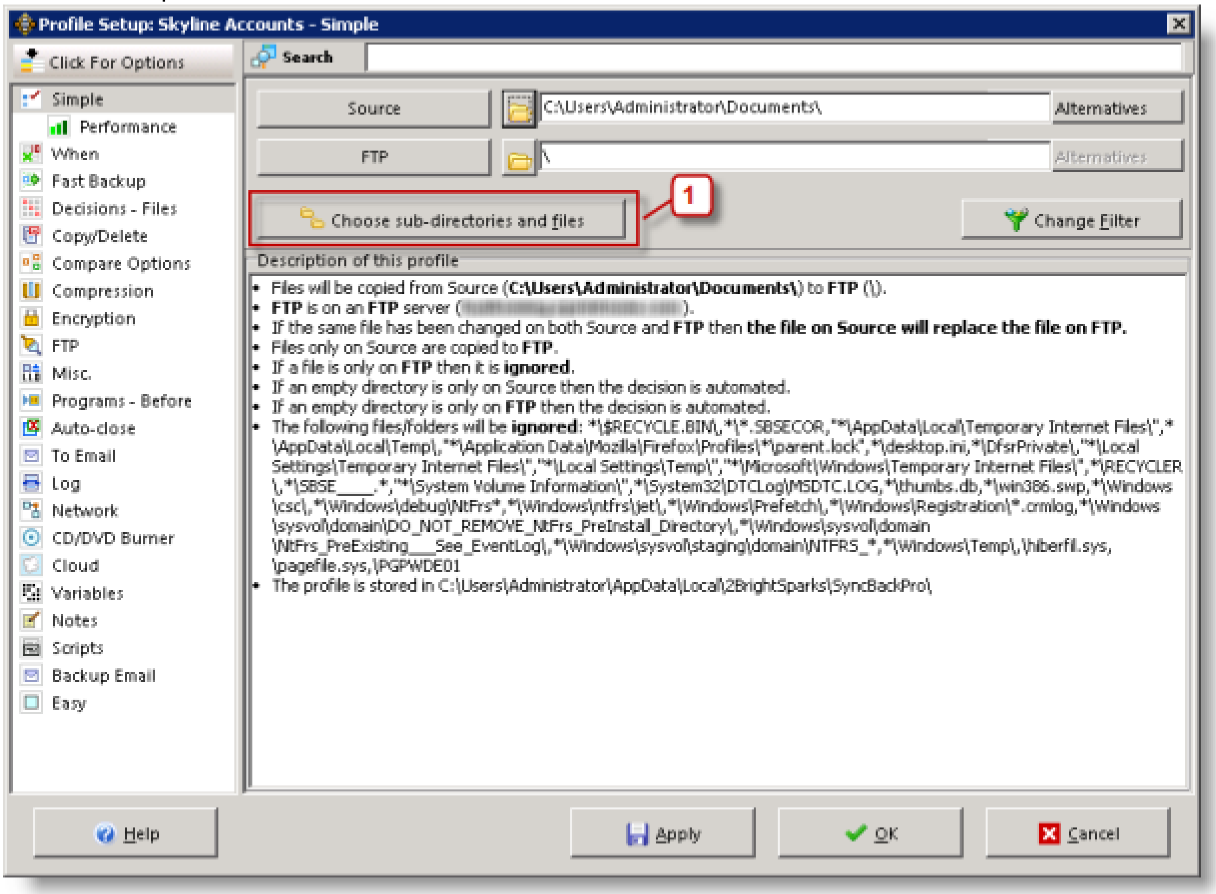


1. Select the option **Simple**.

2. Specify the location of the folder by clicking **Choose Directory**.

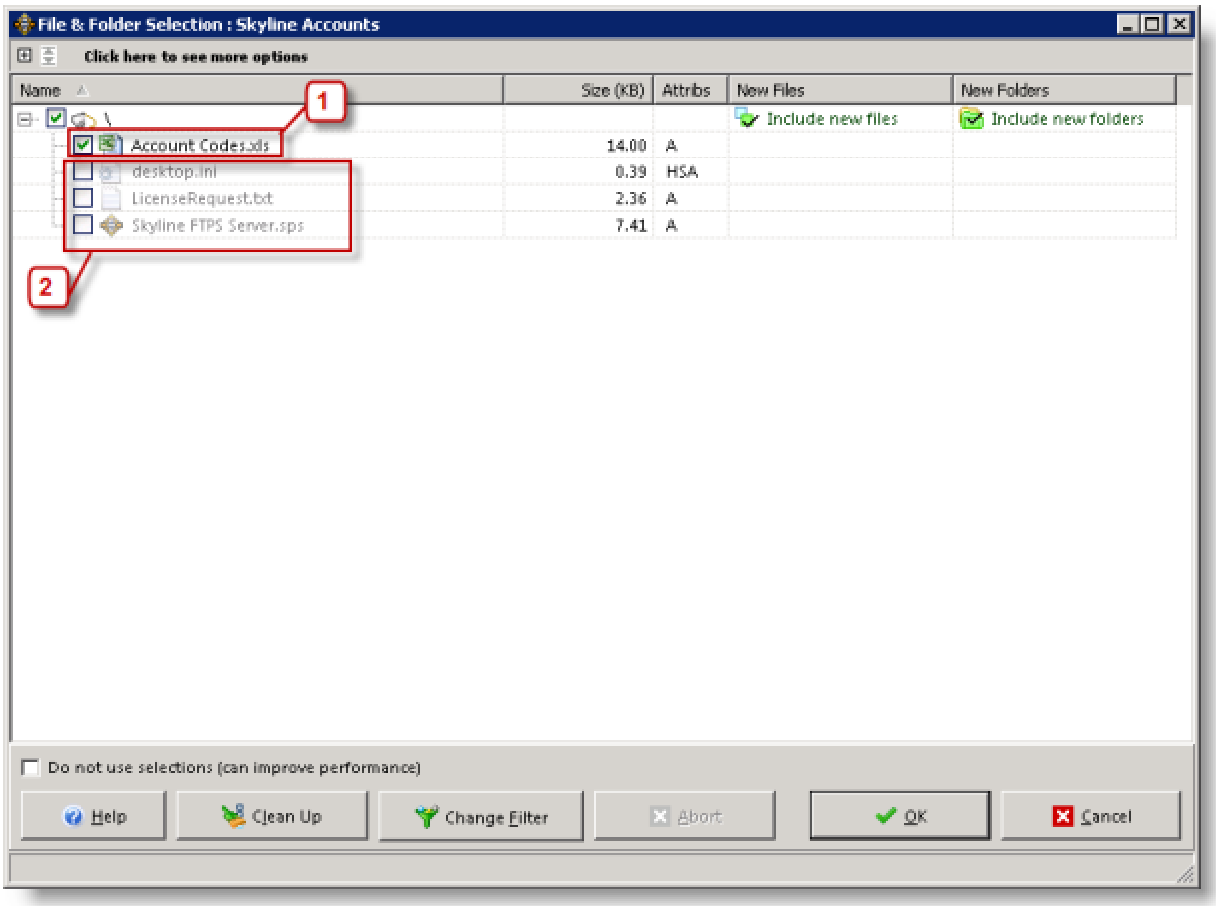
3. Select the directory that contains the external accounts file and click **OK**.

15. Details of the profile are shown.



1. Click **Choose sub-directories and files**.

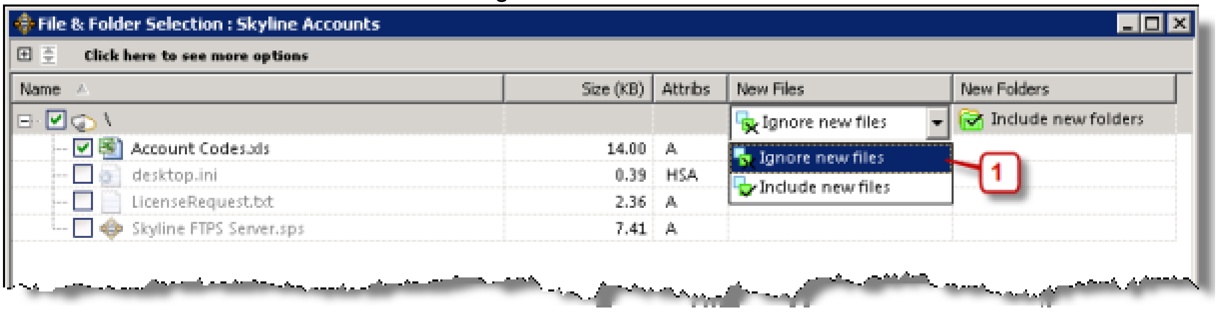
16. A list of all the files in the selected folder is shown.



1. Select the file that contains the accounts details. In the example the Excel file "Account Codes.xls" is selected.

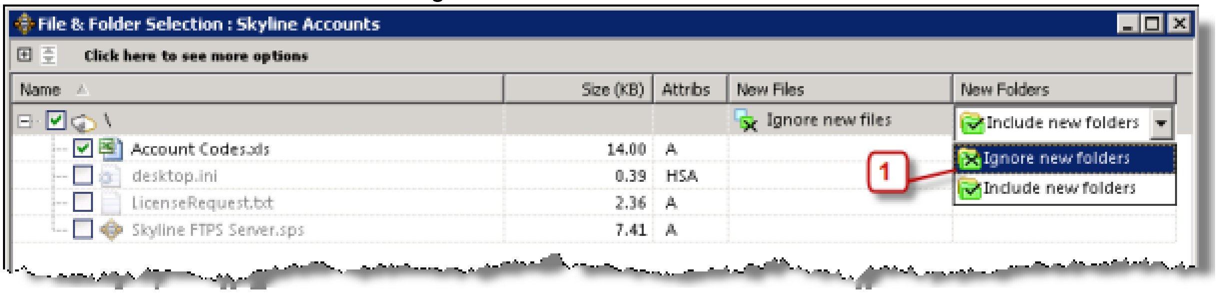
2. Make sure that no other files are selected.

17. All new files added to the folder should be ignored.



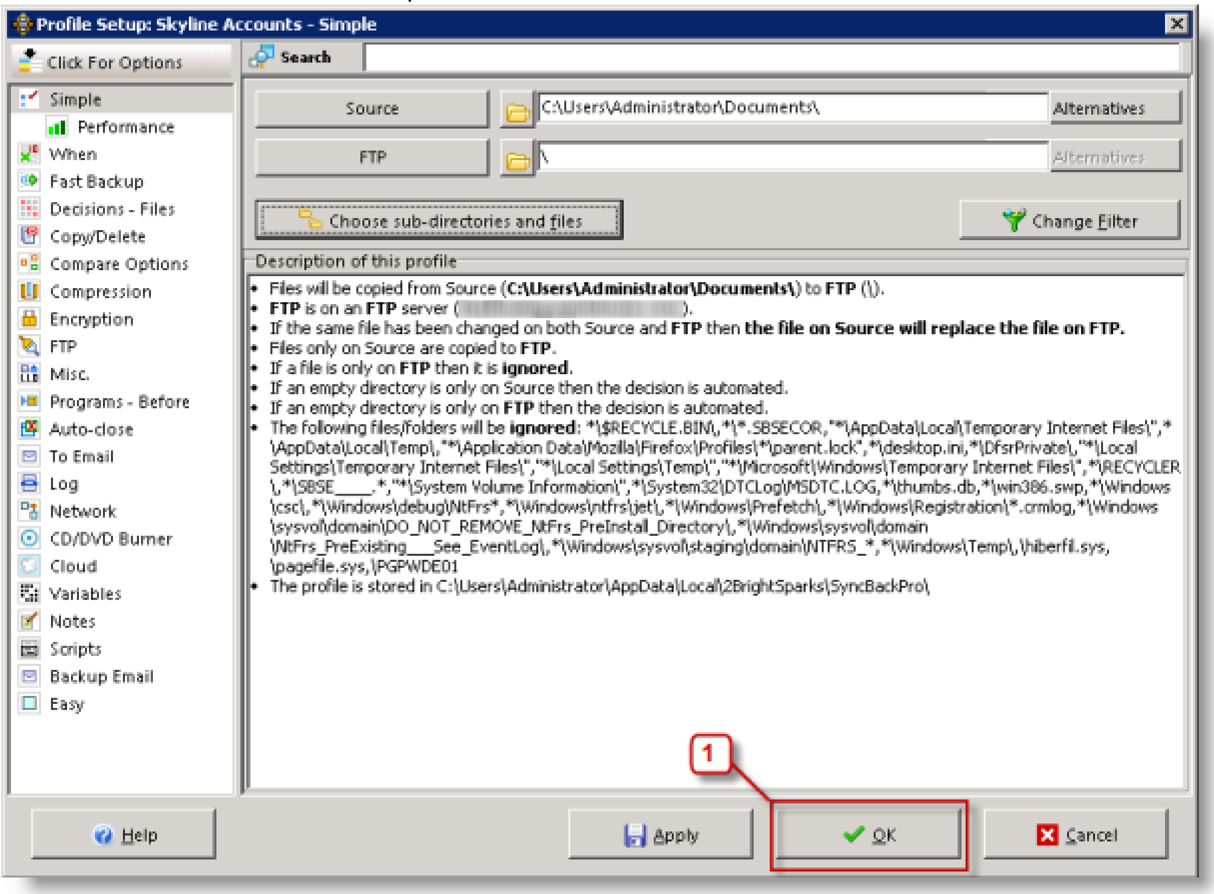
1. Select the option **Ignore new files**.

18. All new sub-folders added should be ignored.



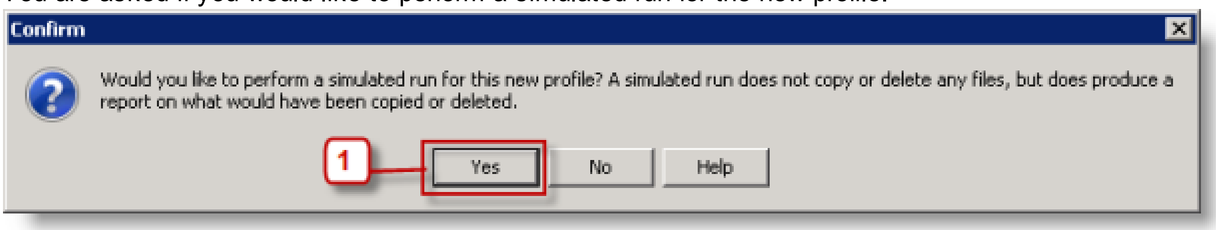
1. Select the option **Ignore new folders**.

19. You are returned to the Profile Setup window.



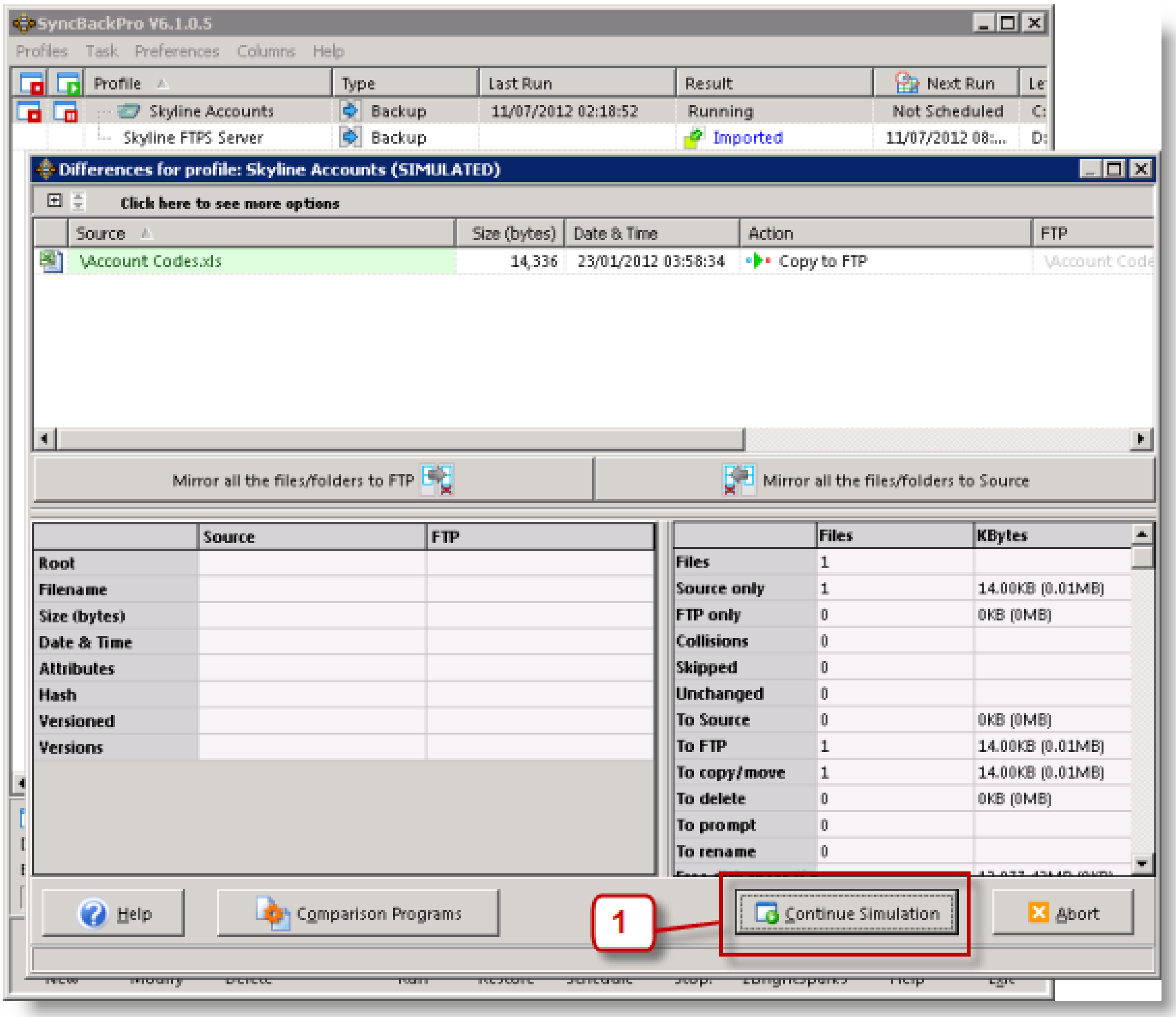
1. Click **OK**.

20. You are asked if you would like to perform a simulated run for the new profile.



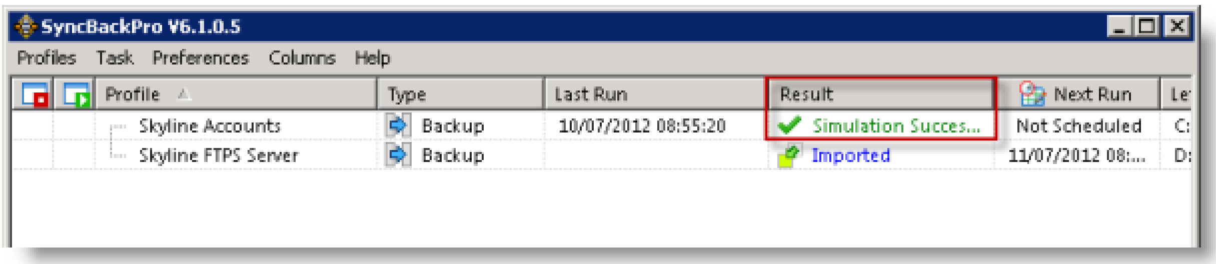
1. Click **Yes**.

21. A simulated test is run.

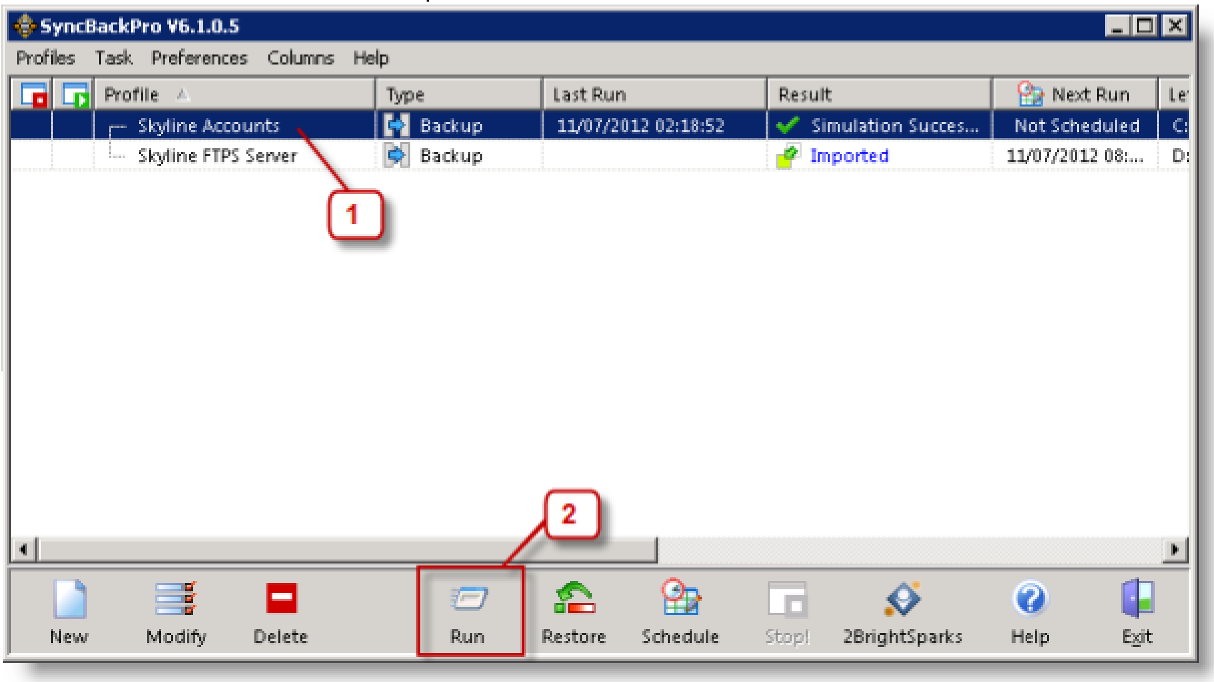


1. Click **Continue Simulation** to complete the test.

22. When the test is complete you return to the main SyncBackPro window where the test result is shown.

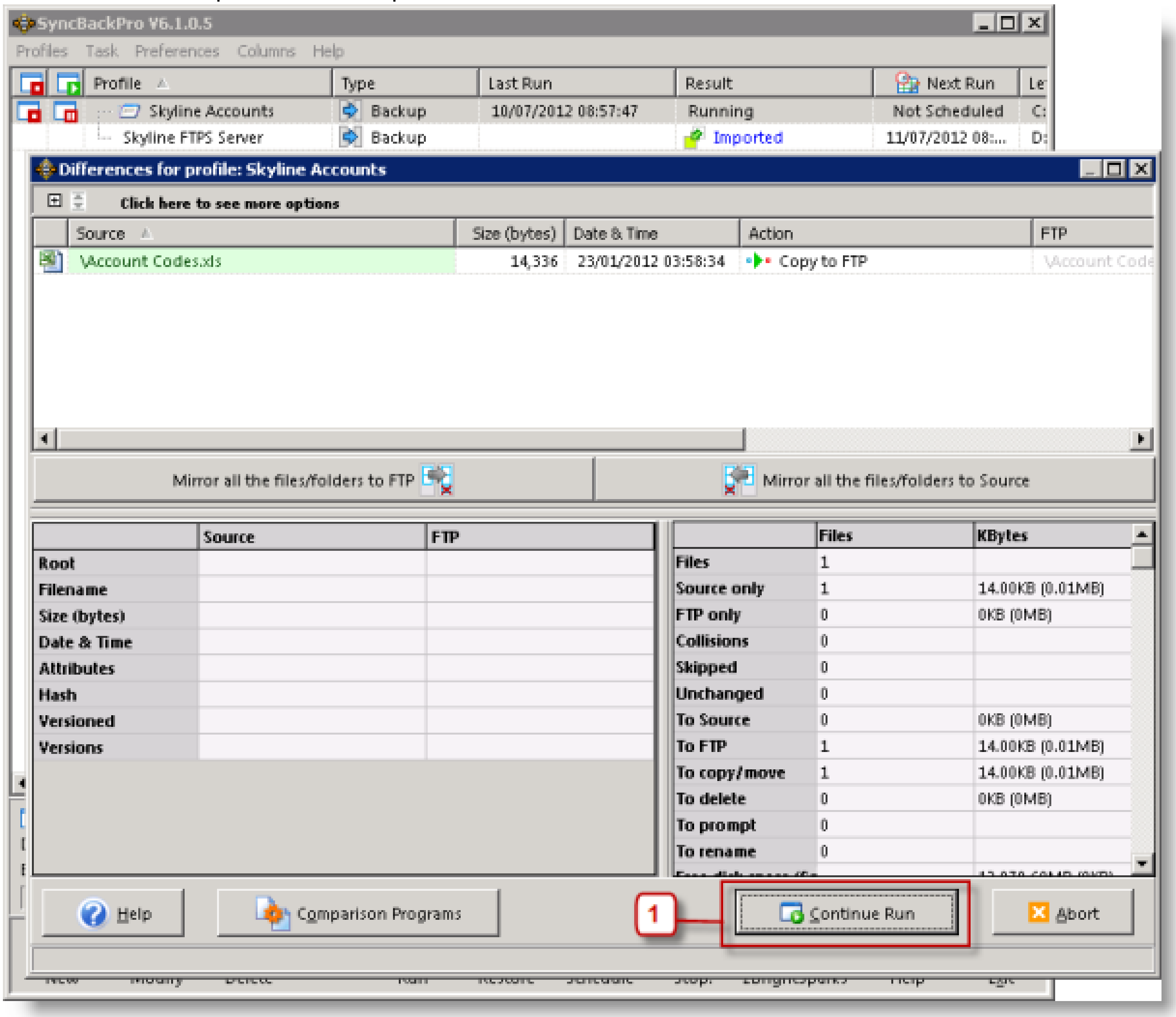


23. As the simulation test has been completed a full test needs to be run.



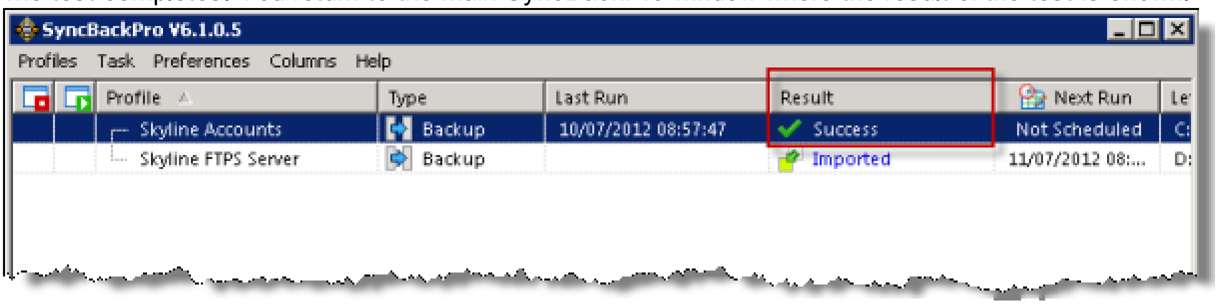
1. Select the profile that you have just created.
2. Click **Run**.

24. The Differences for profile window opens.

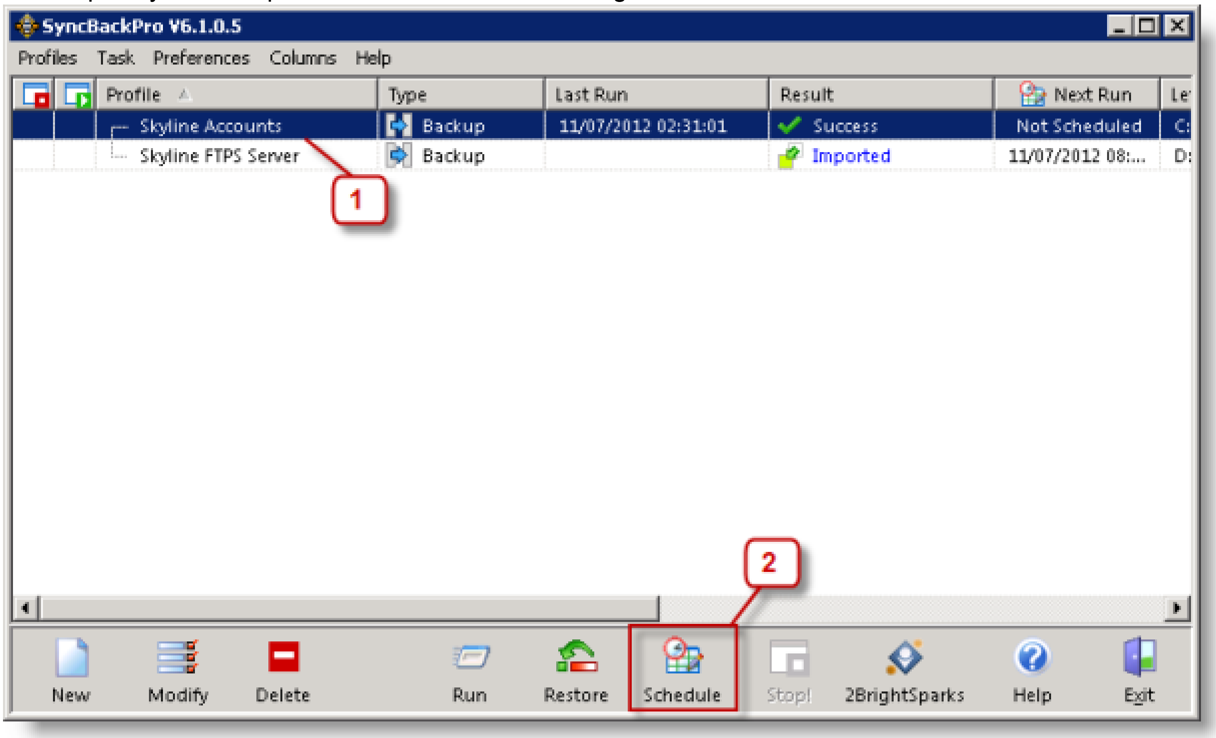


1. Click **Continue Run**.

25. The test completes. You return to the main SyncBackPro window where the result of the test is shown.

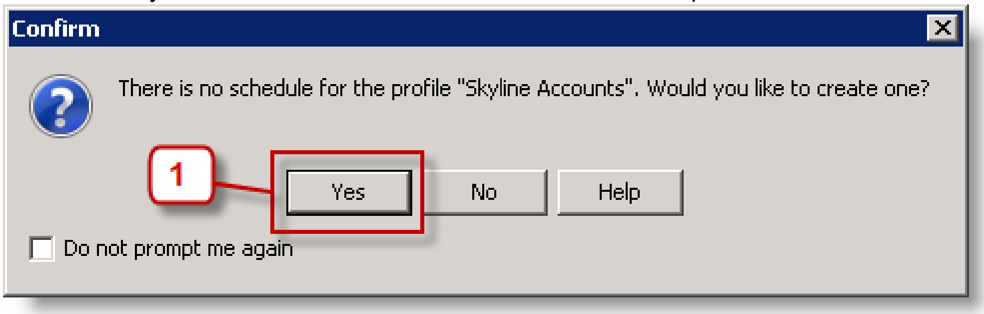


26. The frequency that the profile is run needs to be configured.



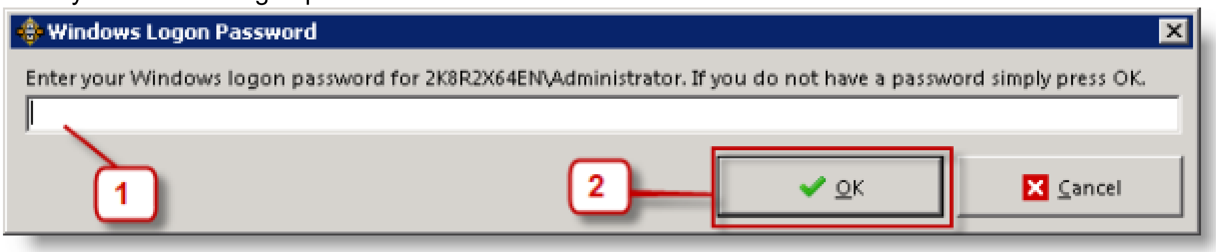
1. Select the Profile.
2. Click **Schedule**.

27. Confirm that you want to create a schedule for the selected profile.



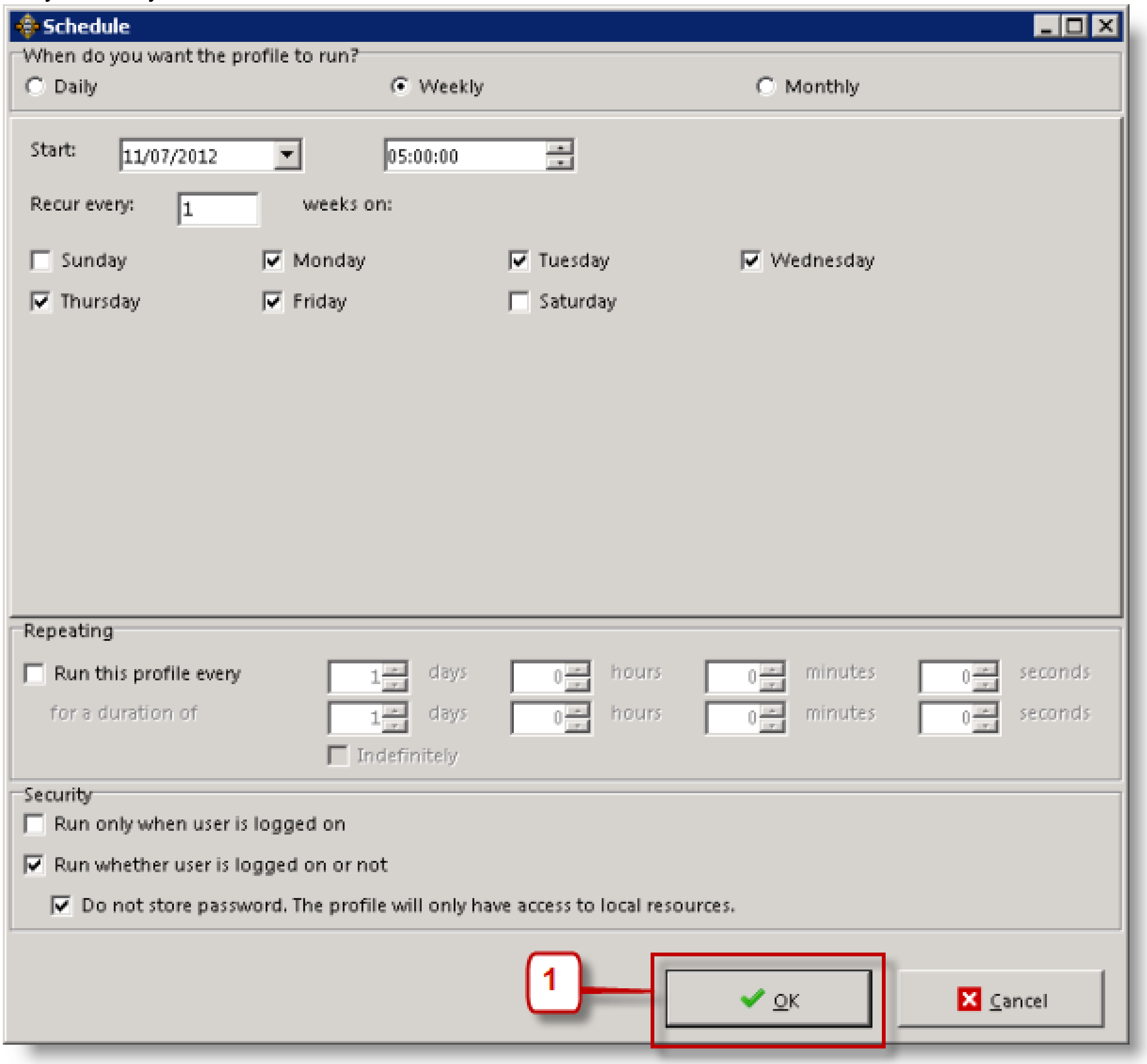
1. Click **Yes**.

28. Enter your windows logon password.



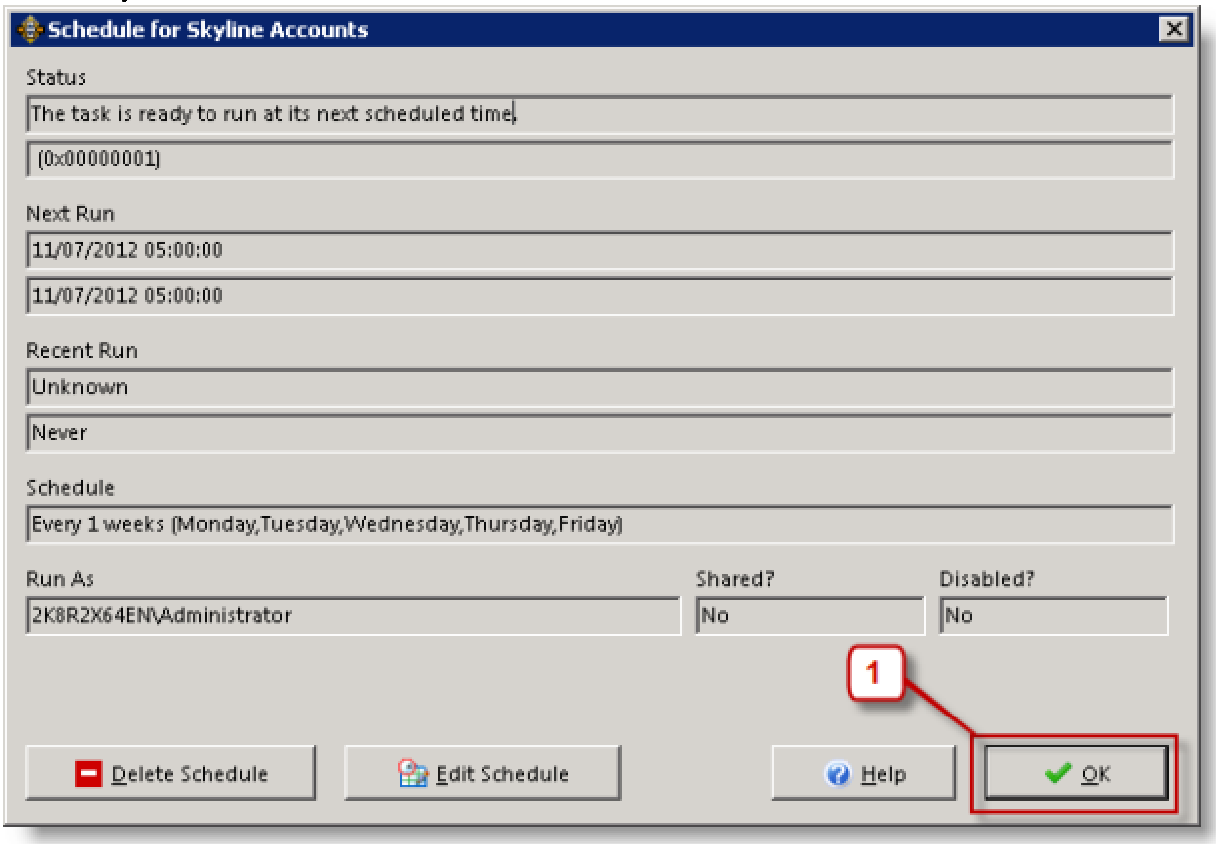
1. Enter your password.
2. Click **OK**.

29. The Schedule window opens. Enter when you want the profile to run. In the example the profile will be run every weekday at 05:00.



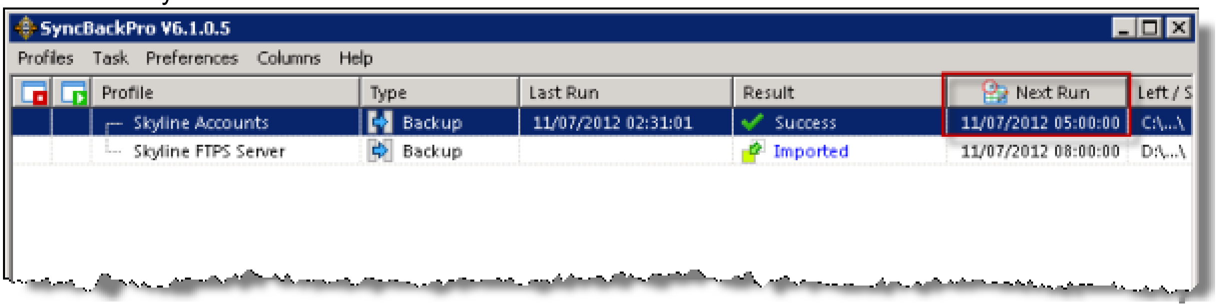
1. Enter the schedule details then click **OK**.

30. A summary of the schedule created is shown. Click **OK**.



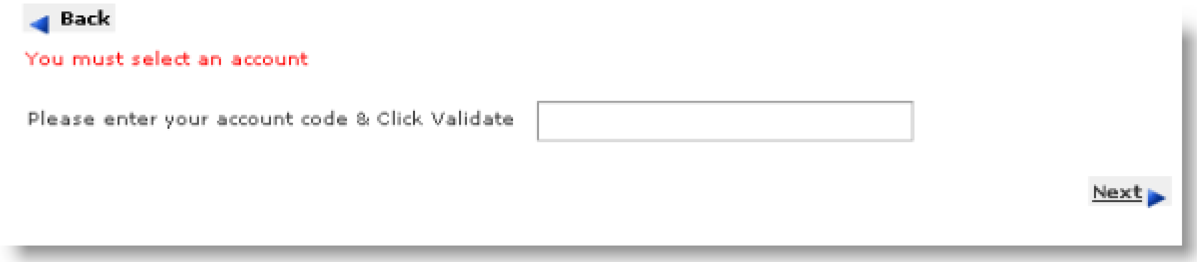
1. Click **OK**.

31. At the main SyncBackPro window details of the next scheduled run are shown.



Forcing Entry of Account Codes

When users submit a job via Skyline you may wish to force the user to enter or select an account code in order to charge back for the job. When an order is placed an account code must be entered or selected for the order to be processed. If an account code is not completed an error message is shown.



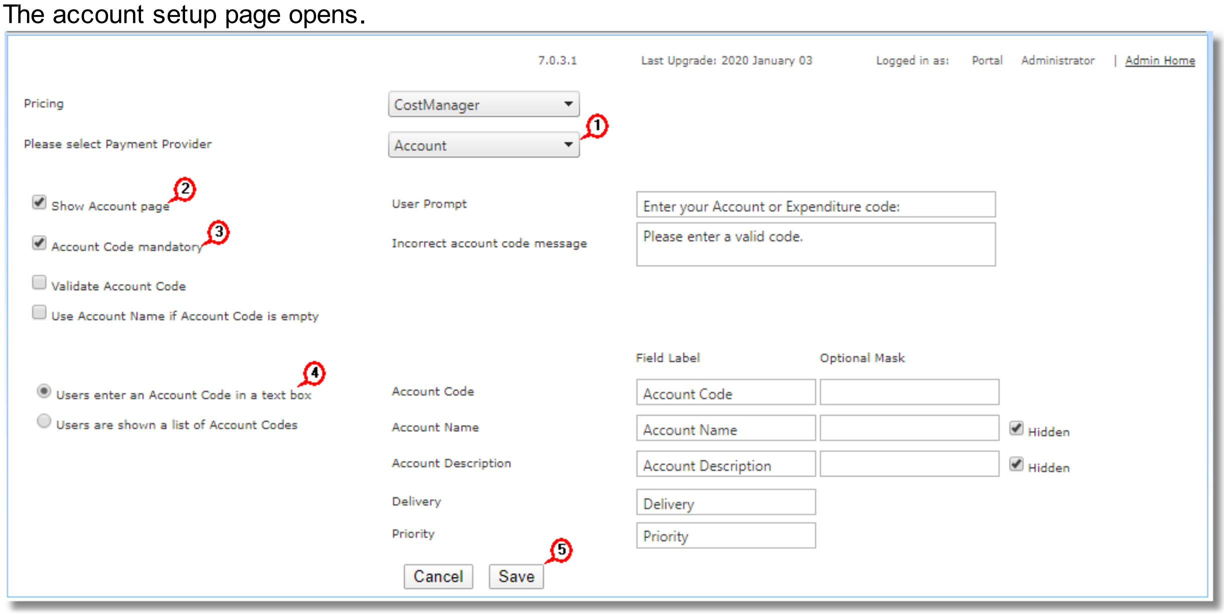
Example showing that an account code must be entered.

To force an account code selection:

1. Log in with Administrator rights and go to Admin.

2. In the Orders section click Accounts and Pricing.

3. The account setup page opens.



1. Select the Payment Provider **Account**.

2. Select the option **Show Account page**.

3. Select the option **Account code mandatory**.

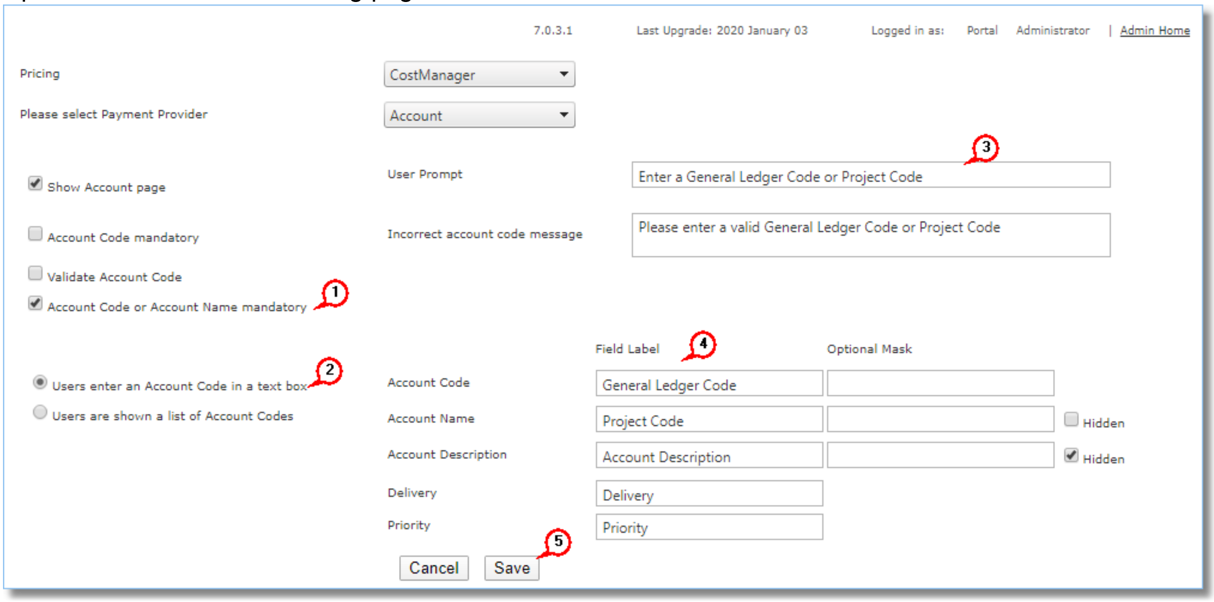
4. Select the option **Users enter an account code in a text box** or **Users are shown a list of account codes**.

5. Click **Save**. The Accounts and Pricing page will close.

Some accounts setups will require users to enter one of two different codes when placing and order, for example an expenditure code may be required or an account code. Skyline can be configured to enable this by using the Account Name field as another field to input a code. The code entered in either the Account Code or Account Name field will be treated as an account number.

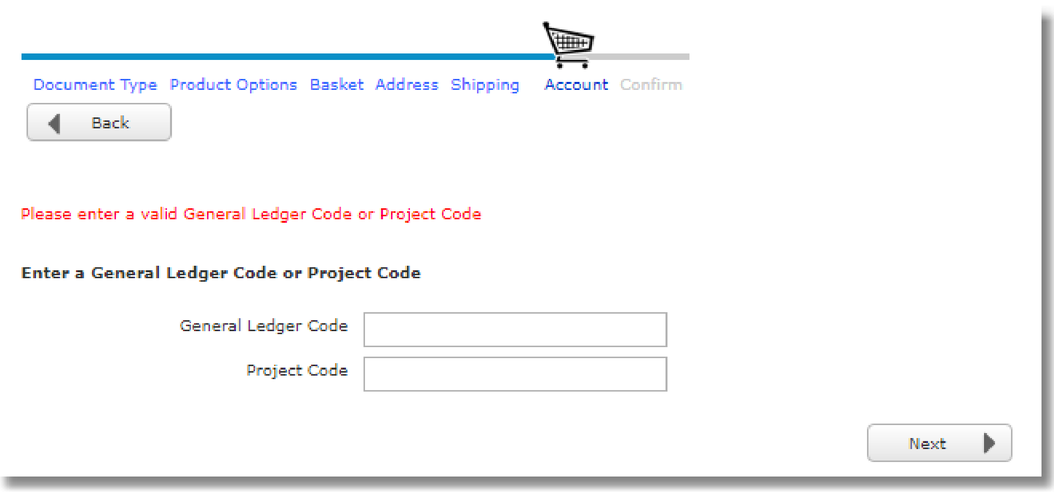
To configure 2 code fields where either one has to be completed:

1. Open the Accounts and Pricing page.



1. Select **Account Code or Account Name mandatory**.
2. Select the option **Users enter an Account Code in a text box**.
3. Update the **User Prompt** so that an appropriate message is displayed to the user.
4. Enter the appropriate **Field label** for the fields Account Code and Account Name.
5. Click **Save**. The Accounts and Pricing page will close.

In the above example, when a user places an order they will have to enter either a General Ledger code or Project code to continue placing their order. If they do not enter a code into either field they will get the message that was entered into the **Incorrect account code message** field.



Example of the message shown when no codes are entered.

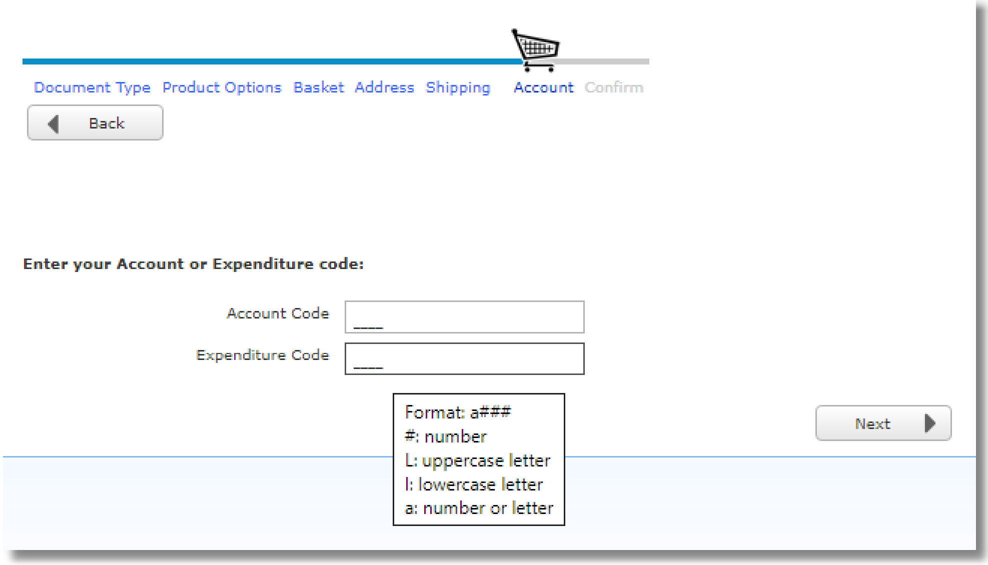
If your codes need to be entered in a specific format you can enter masks for the code fields.

You can use any of the following mask characters:

#	Number
L	Uppercase character
l	Lowercase character
a	Uppercase or lowercase character

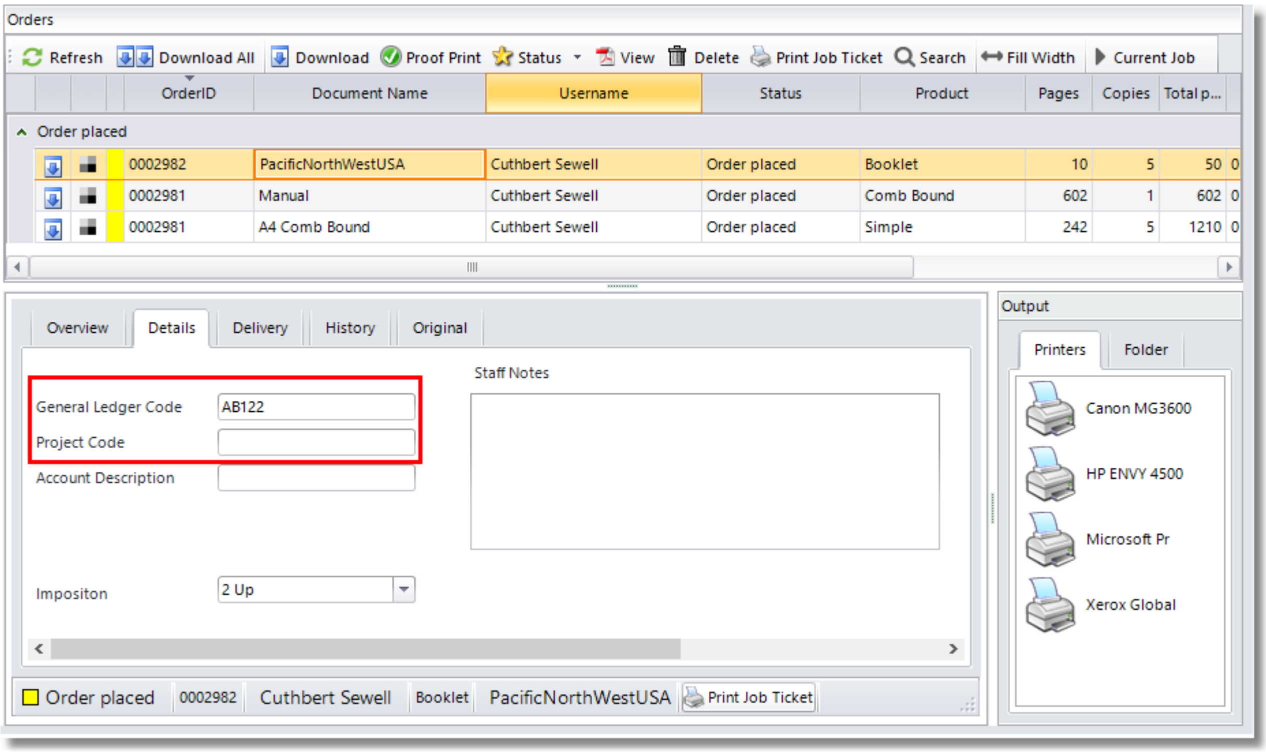
If you use any other characters in the mask they will be included as a literal value. If you require the characters L or l to be included as a literal value preceded the character with \.

When a user places an order they will only be able to enter characters or numbers which are permitted by the mask. When the cursor hovers over the field the format required to be entered is shown as in the example below. If both fields are left blank or incomplete the order can not be placed and a warning message is displayed to the user.



Example of the details of the mask as shown to the user.

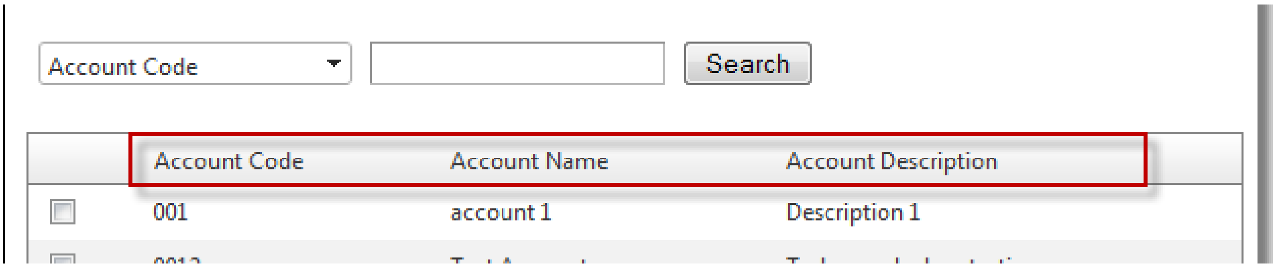
The information is passed to the PrintStation. In the Details tab either the General Ledger Code or the Project Code is shown.



Example of an order in PrintStation with the General Ledge Code completed

Amending the Account Labels

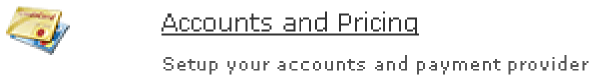
The names that appear on the accounts page can be amended to suit your working environment. By default the names are "Account Code", "Account Name" and "Account Description".



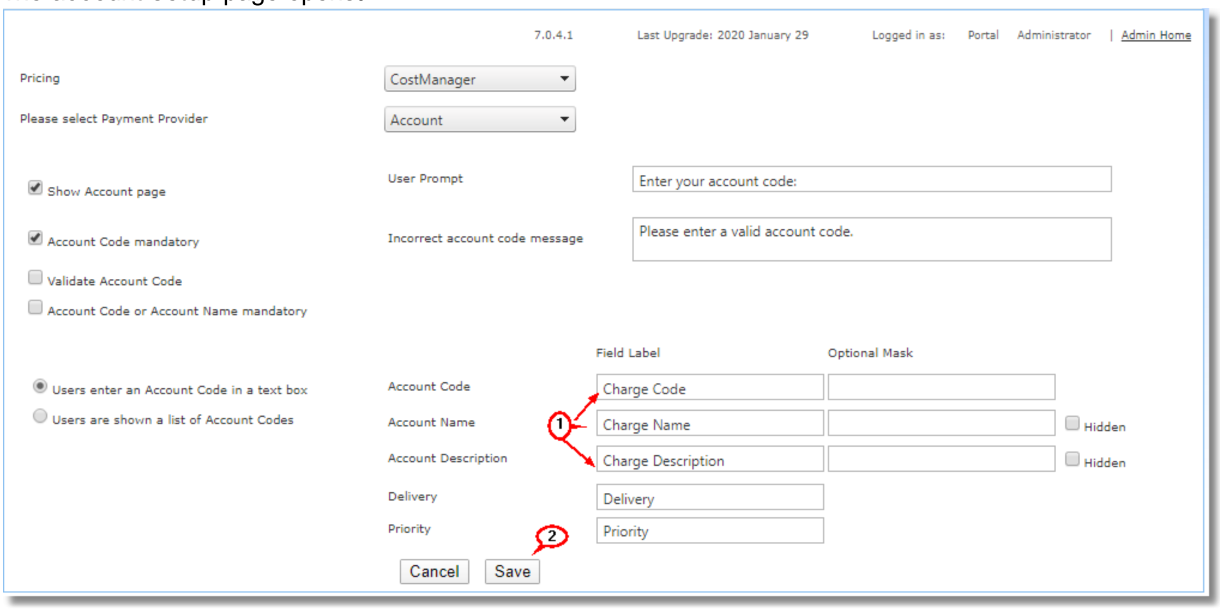
Accounts page during the ordering process.

To change the account field names:

1. Log in with Administrator rights and go to **Admin**.
2. In the Orders section click **Accounts and Pricing**.

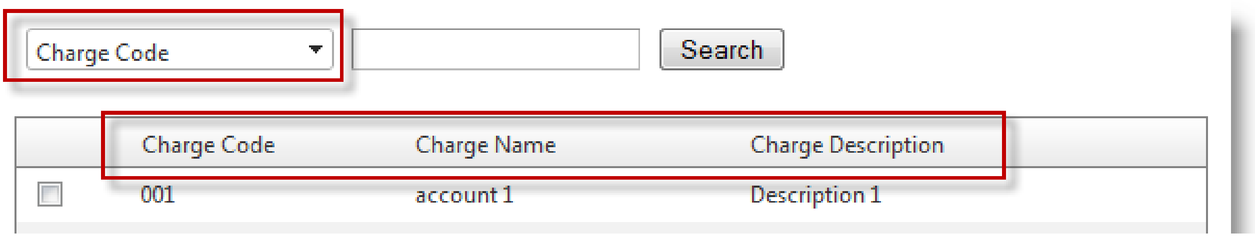


3. The account setup page opens.



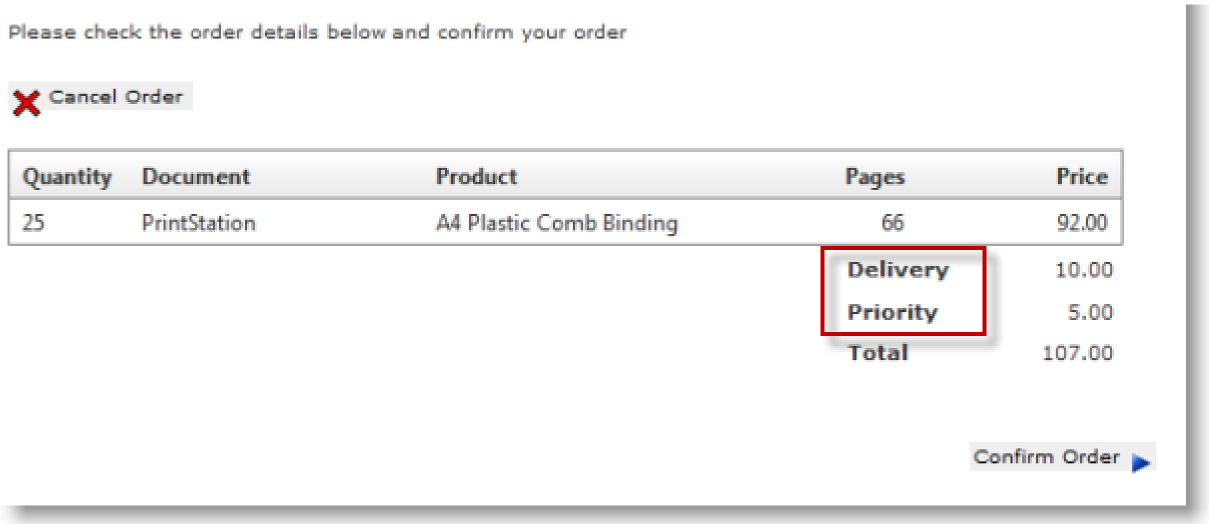
   1. Enter the new account names.
   2. Click **Save**. The Accounts and Pricing page will close.

4. Test the change by placing an order. View the Account page to make sure that the new account names are shown in the field headings and drop down search criteria box.



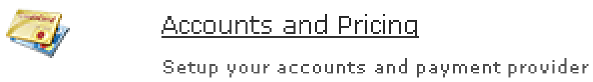
Amending Delivery and Priority Labels

The names that appear on the confirmation page can be amended to suit your working environment. By default the names are "Delivery" and "Priority". The field will only show if the pricing option is turned on and the chargeable options are included as options in the delivery form.

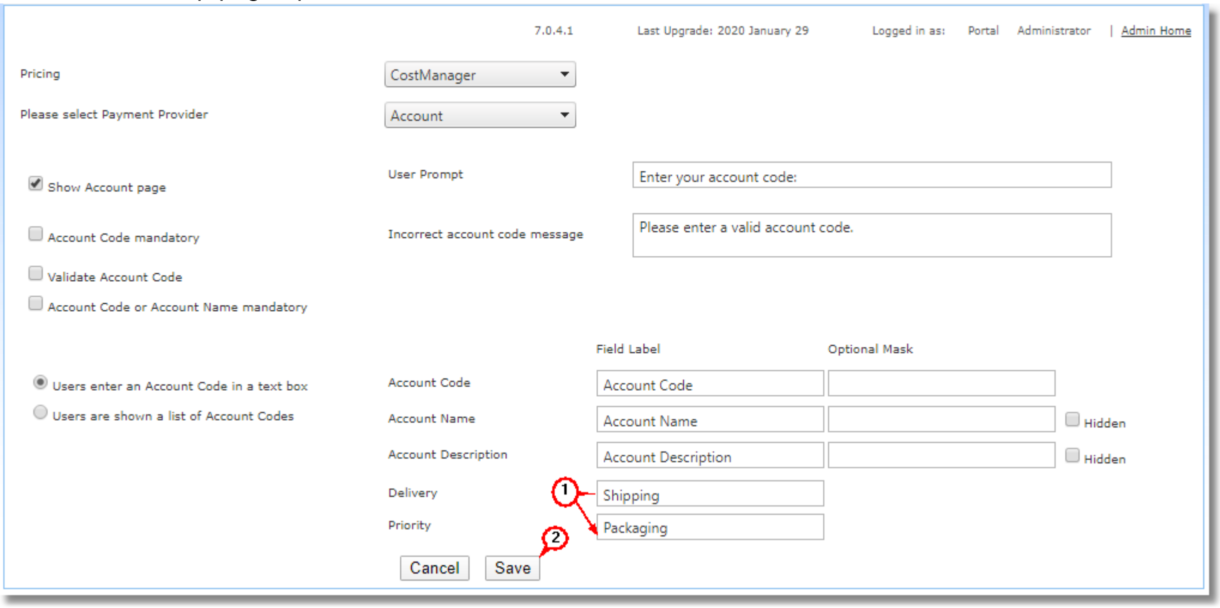


To change the Delivery or Priority field names:

1. Log in with Administrator rights and go to **Admin**.
2. In the Orders section click **Accounts and Pricing**.

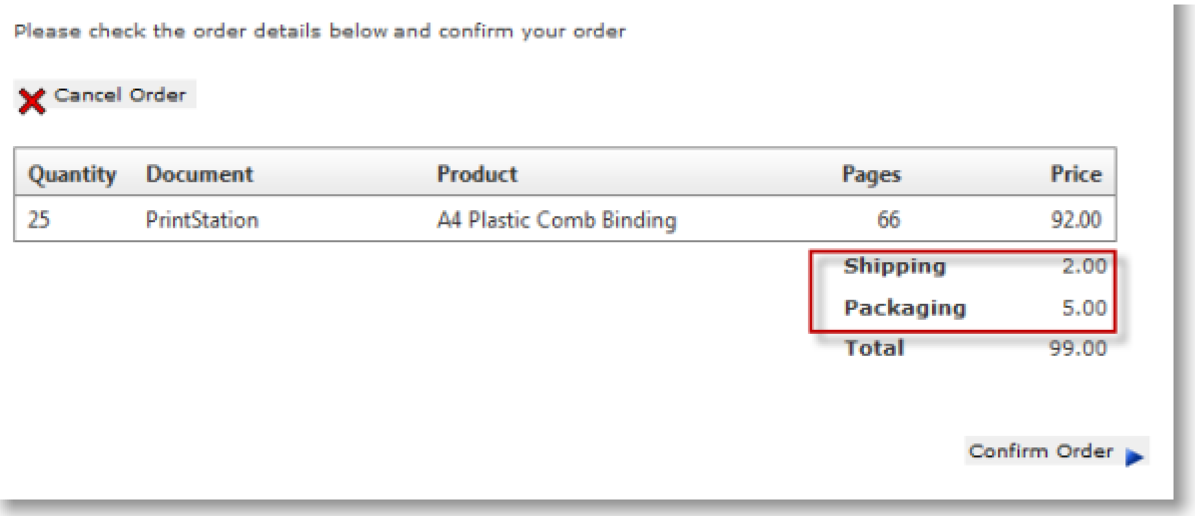


3. The account setup page opens.



   1. Enter the new names.
   2. Click **Save**. The Accounts and Pricing page will close.

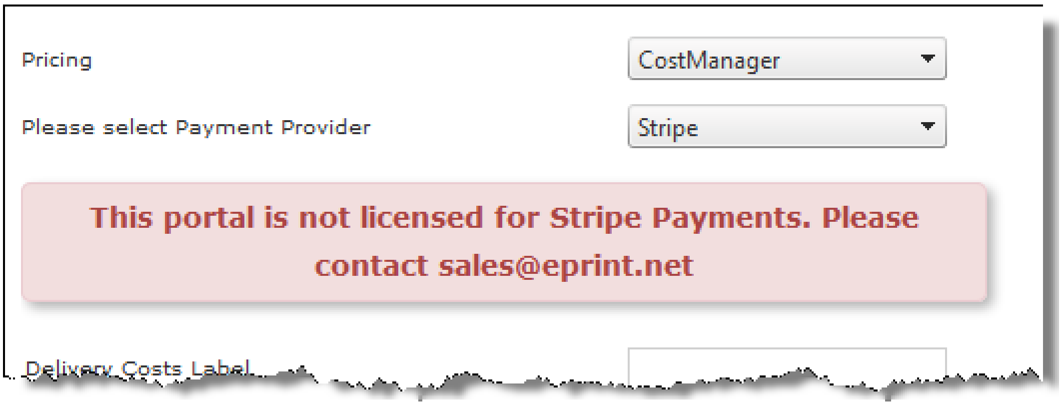
4. Test the change by placing an order. View the confirmation page to make sure that the new field names are shown.



Enabling Stripe

When orders are placed using Skyline and you are using CostManager to calculate prices, you are able to select the payment provider Stripe. Stripe can provide 3D Secure authentication for every transaction. Please refer to the section Using Stripe to Pay for an Order for further details.

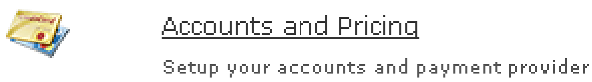
Stripe is a licensed feature of Skyline.



To configure the payment provider Stripe:

1. Log in with Administrator rights and go to **Admin**.

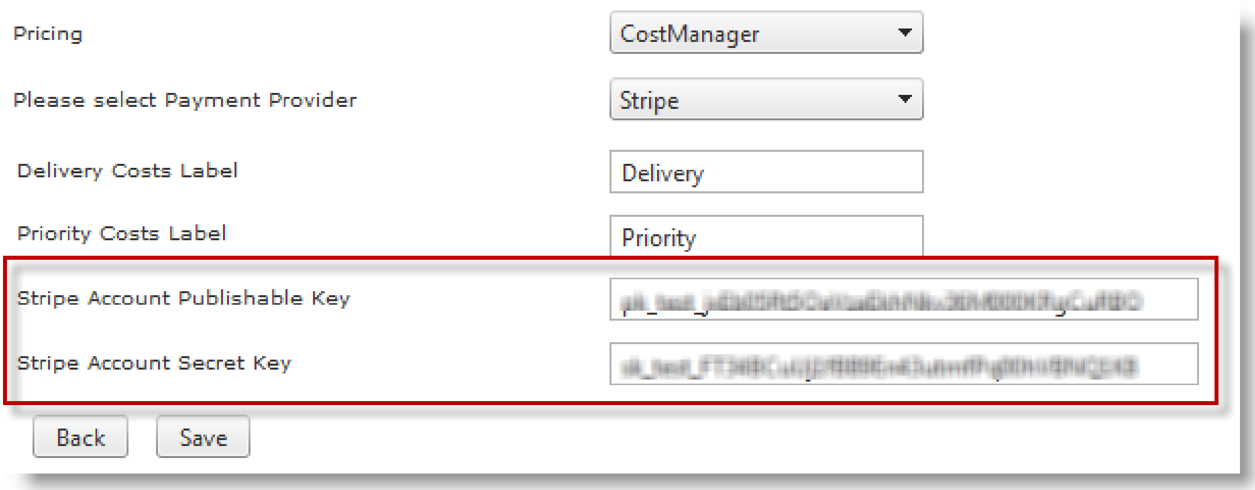
2. In the Orders section click **Accounts and Pricing**.



3. The Accounts and Pricing page opens. Select the pricing option **CostManager**.

4. Select the Payment Provider **Stripe**.

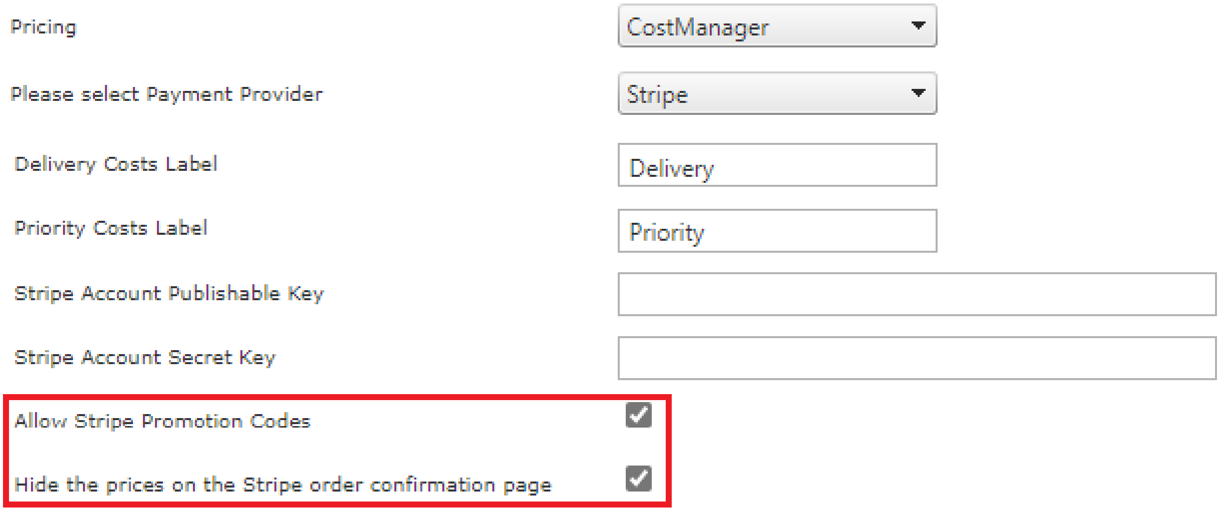
5. Enter the Stripe Account Keys in the fields. These keys will have been provided when registering with Stripe.



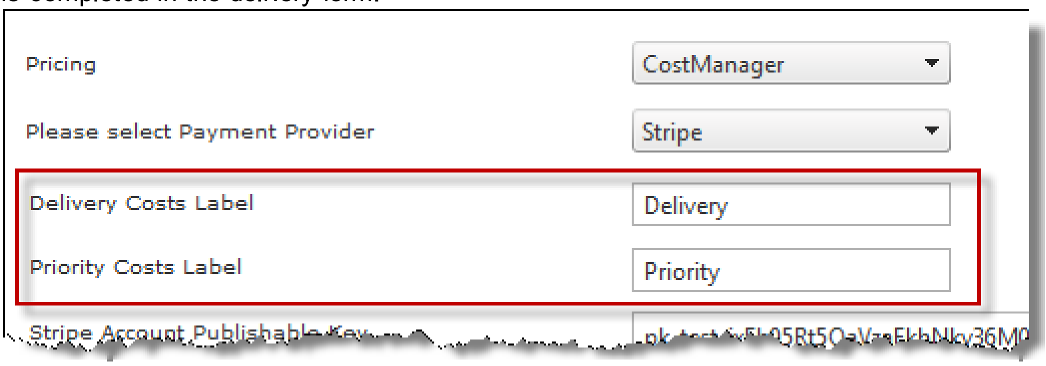
Note - It is recommended that the Test Keys provided are entered when setting up the system. Then place an order to check the system. When you have completed testing the system replace the test keys with the Live keys.

6. If you want the option to apply promotional codes to the total cost you need to select the options **Allow**

Stripe Promotion Codes and **Hide the prices on the Stripe order confirmation page**.



7. You can amend the Delivery Costs and Priority Costs labels to match the terminology used on your delivery form. The amended labels will appear on the confirmation page. The field will only show if options is completed in the delivery form.

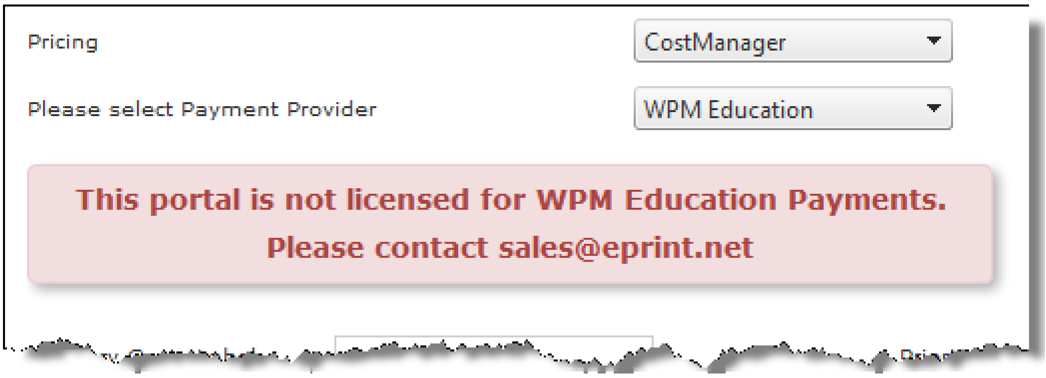


8. Click Save.

Enabling WPM Education

When orders are placed using Skyline and you are using CostManager to calculate prices, you are able to select the payment provider WPM Education. Please refer to the section Using WPM Education to Pay for an Order for further details.

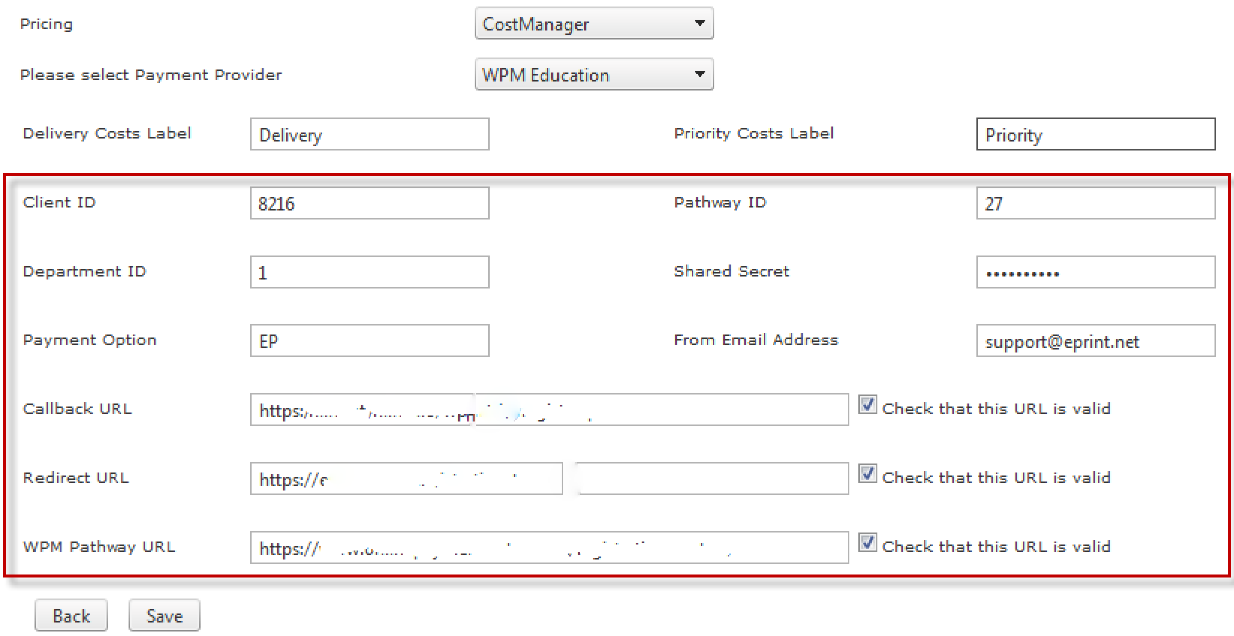
WPM Education is a licensed feature of Skyline.



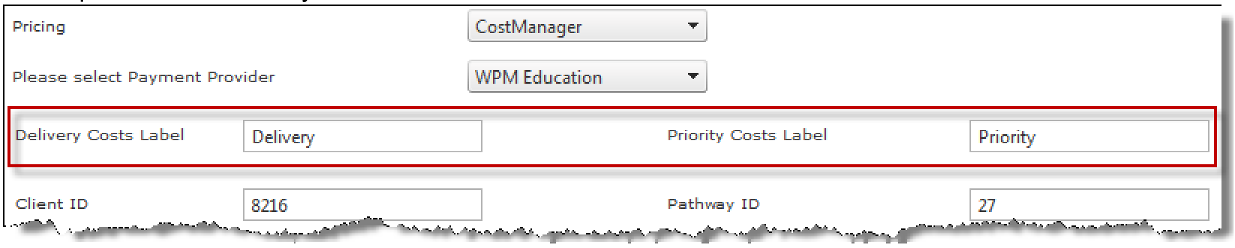
To configure the payment provider WPM Education:

1. Log in with Administrator rights and go to **Admin**.
2. In the Orders section click **Accounts and Pricing**.

3. The Accounts and Pricing page opens. Select the pricing option **CostManager**.
4. Select the Payment Provider **WPM Education**.
5. Enter the configuration details supplied by WPM Education.



6. You can amend the Delivery Costs and Priority Costs labels to match the terminology used on your delivery form. The amended labels will appear on the confirmation page. The field will only show if options is completed in the delivery form.

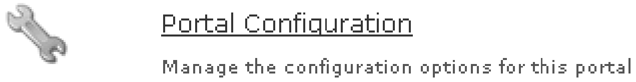


7. Click Save. You are returned to the Admin page.

Configuration can be selected to include the media with the document name on the payment page.

To include media on the payment page:

1. Sign in with SkylineHost privileges and go to **Admin**.
2. In the Portals section click **Portal Configuration**.



3. Find **WPM - Add the media ordered to the document name on the payment page** in the list.
   - If the option is set as **True** media will be added to the document name on the payment page.
   - Media is turned off by setting the option to **False**.
4. To amend this option click .
5. Click to save the setting.

Enabling Quotations

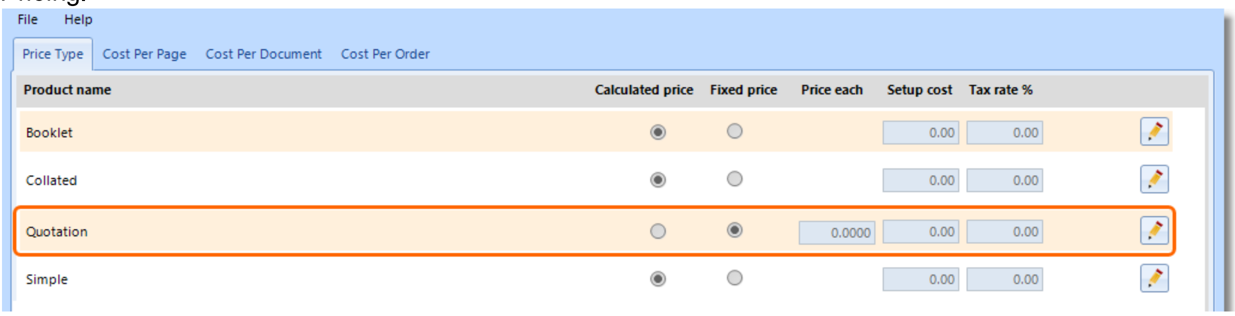
Some orders will need to be priced manually as they have special requirements. A user can request a quotation which can be priced up in the print room and the quotation sent to the user via PrintStation. The user can then either accept the quotation and the order is placed on PrintStation or they can reject the quotation and the order is marked as deleted.

Quotations can be used with third party payment providers, for example Stripe.
The Quotations process is not designed to work with the approval process.
If emails are not turned on then the Quotation process will not work.

To enable quotations to be used:

1. A product needs to be created that contains at least the body section. A free text area can be added in the notes section where the user can enter specific details, if required. You need to have a separate product to other products already created as the price will not be automatically calculated. For more information on creating products, please refer to the section on Creating a Product.

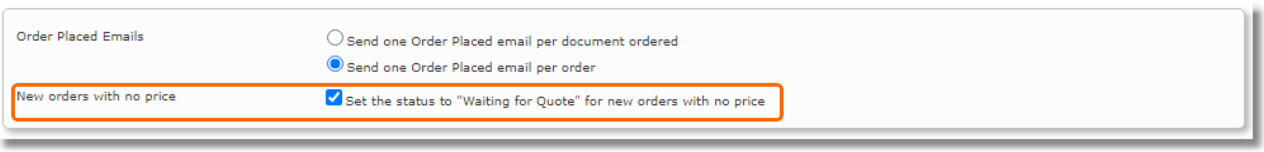
2. The product needs to be priced in CostManager with a fixed price of zero. Products can be either Global or Portal specific. For more information on pricing products, please refer to the section on Selecting the Pricing.



3. Assign the product to the required portal. For more information, please refer to the section on Adding Products to a Portal.

4. Open the website and sign in with Administrator rights. View the **Admin** page and In the Orders section click **Order Statuses**.

5. Select the option **Set the status to 'Waiting for Quote' for new orders with no price**.



6. Check that emails are sent for the statuses 'Waiting for Quote', 'Quote Sent', 'Order Placed and 'Awaiting Paper Originals'. Update the email text for the statuses 'Waiting for Quote' and 'Quote Sent'. Please refer to the section on Changing the Wording in a Status Email for more information.

When users require a quotation they need to use the Quotation product and place an order in the usual way. The order status will show as 'Waiting for Quote' in their Orders. For more information, please refer to Requesting a Quotation.

The PrintStation will receive the quotation request. The print room operator can manually enter a quotation value into the Price field and save the change. When they change the status of the order to 'Quote Sent' and email will be sent to the user and they will be able to reject or accept the order. For more information, please refer to Quotation Requests.

Configuring Order Details

When job orders are created using Skyline you can configure the following order features to suit the way your business works.

- Specify the number that the Order numbers should start at 195 .
  You may wish to set the start number to help differentiate Skyline jobs from any others in your print room. As an example Skyline orders may start at 60000 while other jobs start at 00000.

- Modify the format of the order numbers 196 .
  You can modify the format of the order number to match a system you already have in place in your print room. The order number can include specific fields, for example the year or the portal name. You can also include your own text string in an order number format.

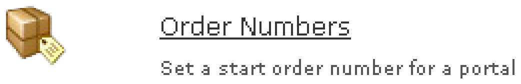
- Amend the status of orders 198 .
  When an job order is placed on PrintStation the order is listed in the Orders web page where the status of the order is shown. As the order is processed the order status is automatically updated. PrintStation can be configured to automatically generate an email message when a job status is changed. You can also configure the wording shown for the status shown in the Orders web page.

Specifying the Starting Order Number

As well as modifying the order number format for Skyline orders you may wish to set the start number to help differentiate Skyline jobs from any others in your print room. As an example Skyline orders may start at 60000 while other jobs start at 00000.

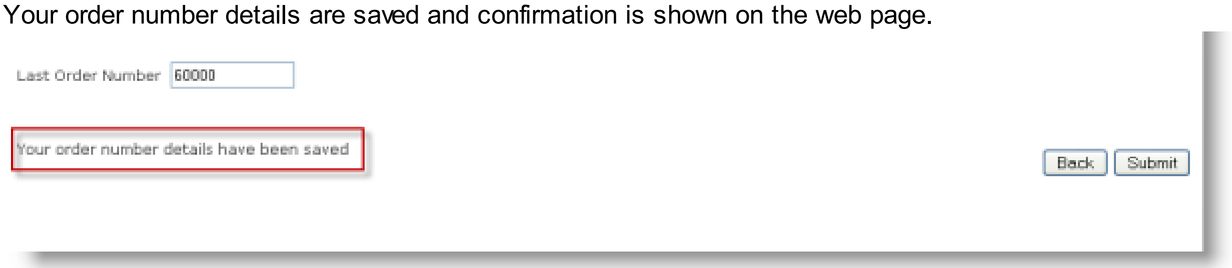
To specify the starting number:

1. Log in with Administrator rights and go to **Admin**.
2. In the Orders section click **Order Numbers**.



3. Enter the start number in the field **Last Order Number**.

4. Click **Submit**.
5. Your order number details are saved and confirmation is shown on the web page.



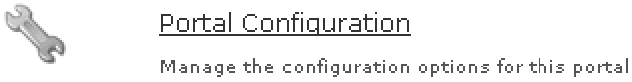
Modifying the Format of Order Numbers

When orders are placed in Skyline and order number is created to represent that order in the system. You can modify the format of the order number to match a system you already have in place in your print room. The order number can include specific fields, for example the year or the portal name. You can also include your own text string in an order number format. The maximum length of the order number is 36 characters, including spaces.

Note: If you want to change the start number of your orders, please refer to the section on specifying the starting order numbers 195.

To amend the order number format:

1. Log in with Administrator rights and go to **Admin**.
2. In the Portals section click **Portal Configuration**.

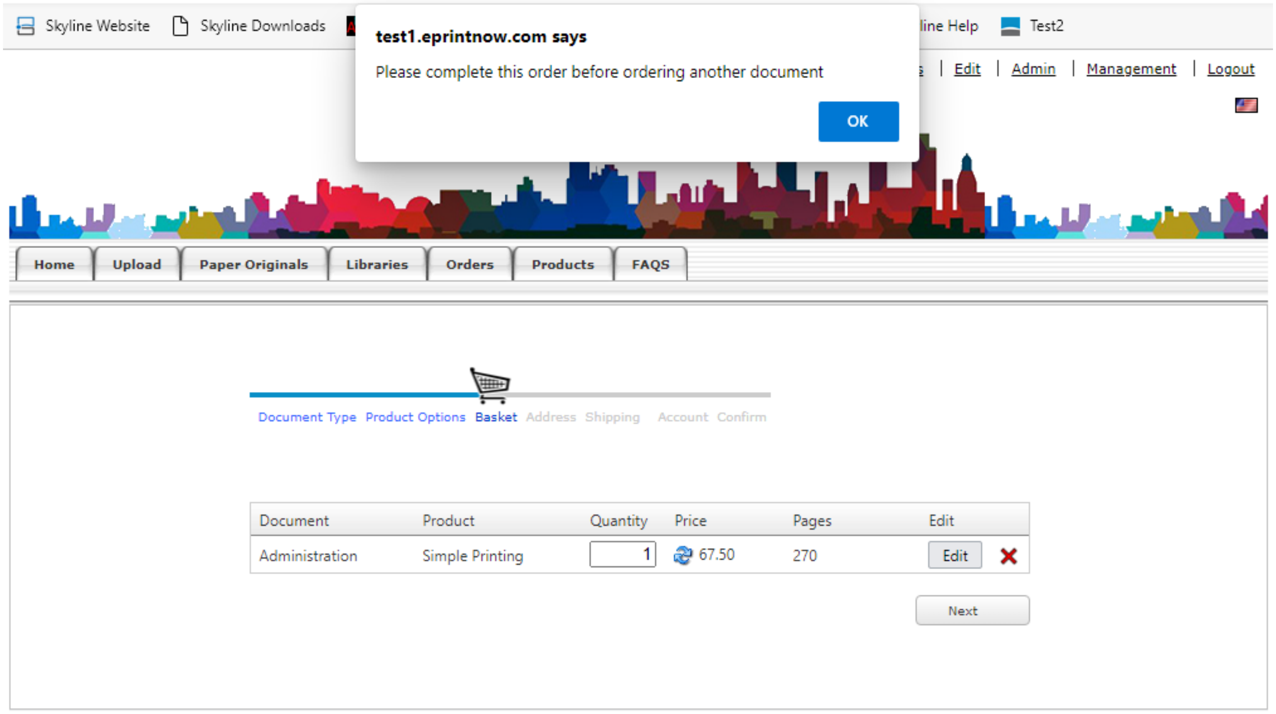


3. Find **Ordering - Order Number Mask** in the list.
4. To amend this option click . Enter the relevant mask. The options are:
   - **[#####]** where each # represents a digit of the order number with leading zeros.
   - **[OrderNumber]** the order number is shown with no leading zeros.
   - **[Date]** the order number can include the date the order was placed. For example, [#####] [Date] would display the order number with leading zeros, followed by a space then the date the order was placed.
   - **[Year] [Month]** and **[Day]** will be replaced by the vales of the year, month and day the order was placed.
   - **[PortalName]** will be replaced by the name of the portal where the order was placed, and [PortalName,n] will be replaced by the first n characters of the portal name.
   - Any other characters entered in the Order Number mask will be shown as is. For example [PortalName,2]-[######] /[Year]/[Month] would be replaced by Sk-000234 /2010/03 if the portal name was Skyline, the next order number was 234 and the order was placed in March 2010.
   - Any other text can be added to the order number simply by typing it in the order number mask. For example, ABC[#####],[PortalName] would create an order number ABC00123, Skyline if the portal name was Skyline.
5. Click to save the setting.

To configure **Ordering - Order Number Mask** for all portals associated with Skyline use the default configuration option. These options are only available when you are logged in with Host privileges. Any changes to the default configuration will affect **ALL** portals associated with Skyline.

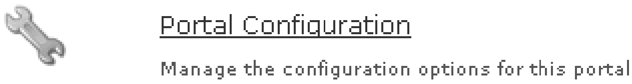
Restricting the number of documents that can be ordered

You are able to restrict the number of documents that are ordered per order number to one document. If there is an order in the basket and the user tries to order another document before completing the order they will be taken to the basket page and asked to complete the current order before placing another one.



To restrict an order to one document:

1. Log in with Administrator rights and go to **Admin**.
2. In the Portals section click **Portal Configuration**.



3. Find **Ordering - One Document Only** in the list.
4. To amend this option click .
   - If the option is set as **True** users will only be able to order one document at a time.
   - To allow users to order many documents per order set the option to **False**.

Amending the Status Name

When an job order is placed on PrintStation the order is listed in the Orders Web Page[100] where the status of the order is shown. As the order is processed the order status can be automatically updated. PrintStation can be configured to automatically generate an email message[199] when a job status is changed. You can also configure the wording shown for the status displayed in the Orders web page.

Make sure that you re-start PrintStation if it is already running after any changes made to the Statuses. Some changes will not be shown in PrintStation until the program is re-started.

Waiting for Quote status can be renamed but will always be treated as a quotation request. Renaming this status could have unexpected results and it should only be renamed to something else that means Waiting for Quote, maybe in a different language.

To view the current system statuses of orders:

1. Log in with Administrator rights and go to **Admin**.
2. In the Orders section click **Order Statuses**.

   Order Statuses

   Create, edit & delete order statuses
3. The current system statuses that have been selected are shown.

System Statuses

	Type	Name	End User Display	Email User	Allow order to be deleted	Show Orders on Printstation
	Waiting for Quote	Waiting for quote	Waiting for quote	☑	☑	☑
	Quote Sent	Amended Order	Amended Order	☑	☑	☑
	Order Placed	Order placed	Order Placed	☑	☑	☑
	Awaiting Paper Originals	Awaiting Paper Originals	Awaiting Paper Originals	☑	☑	☑
	Downloaded	Downloaded	Downloaded	☑	☐	☑
	Paper Originals Received	Paper Originals Received	Paper Originals Received	☑	☐	☑
	Query Outstanding	Query Outstanding	Query Outstanding	☑	☐	☑
	In Production	In Production	In Production	☑	☐	☑
	Printed	Printed	Printed	☑	☐	☑
	Completed	Completed	Completed	☑	☑	☑
	Archived	Archived		☐	☐	☑
	Deleted	Deleted		☐	☐	☑

4. The status shown under the heading Name is used as the PrintStation Status name and the Job Ticket Status name. The status shown under the heading End User Display is the status shown on the Orders Web page in the Skyline Website.
5. Click by the type to amend a status name.

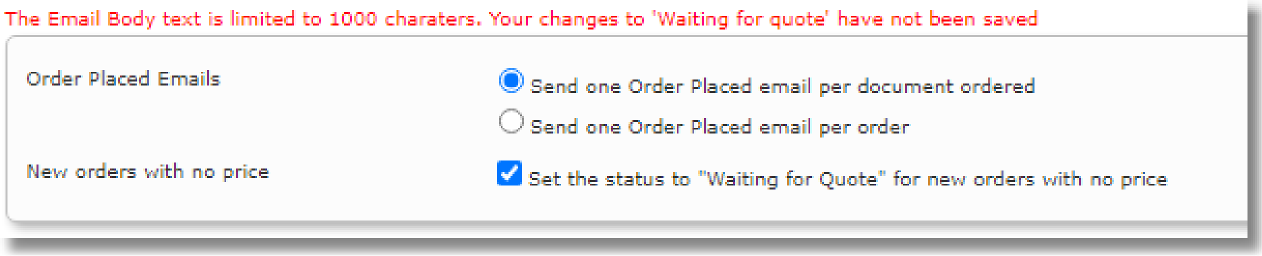
Amending Status Emails

PrintStation can be configured to automatically generate an email message when a job status is changed in PrintStation. The message can be copied to as many people as required by entering their email address in the CC List field.

You can select when a change in the order status will generate an email message as well as specifying the wording of the email. The example below describes how to configure PrintStation for the status type "Query Outstanding".

There are some specific requirements when creating an Order placed email. Please refer to the section Order Placed email in Configuring PrintStation regarding these requirements.

You are limited to 100 characters in the email subject or 1000 characters in the email body. If you exceed the limit your changes are not saved and an error message appears at the top of the window.

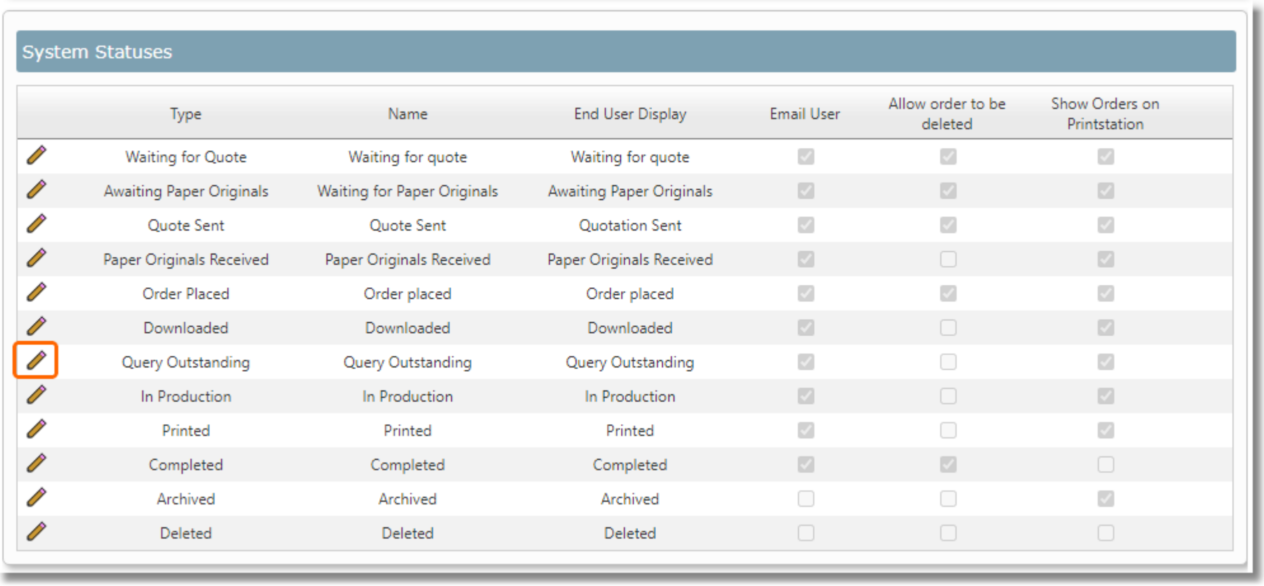


Example of error message when too many characters are entered into the body of the email.

To automatically send an email message when the status is change to Query Outstanding:

1. Open Skyline and log in with Administrator rights and click **Admin**.
2. In the Orders section click **Order Statuses**.

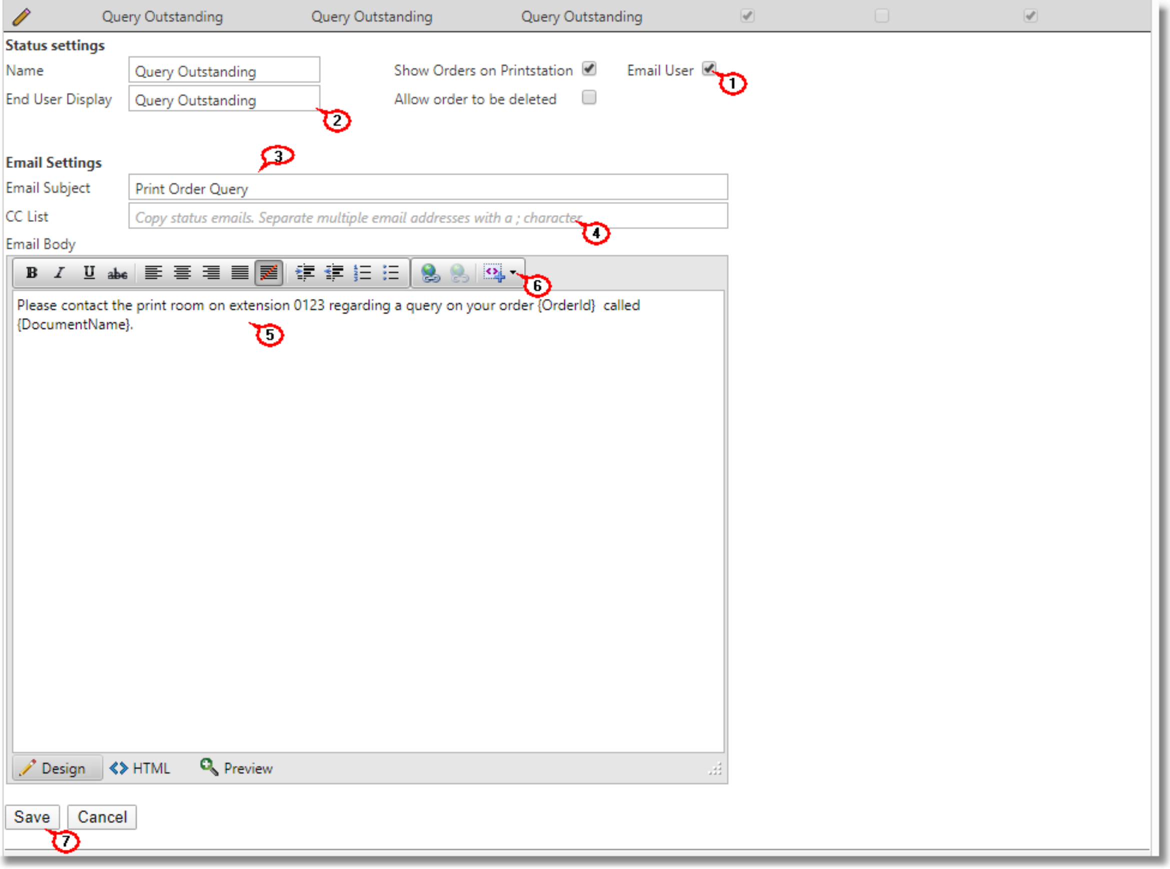
3. Details of all the System Statuses are listed. Click by the type Query Outstanding.



System Statuses

Type	Name	End User Display	Email User	Allow order to be deleted	Show Orders on Printstation
Waiting for Quote	Waiting for quote	Waiting for quote	☑	☑	☑
Awaiting Paper Originals	Waiting for Paper Originals	Awaiting Paper Originals	☑	☑	☑
Quote Sent	Quote Sent	Quotation Sent	☑	☑	☑
Paper Originals Received	Paper Originals Received	Paper Originals Received	☑	☐	☑
Order Placed	Order placed	Order placed	☑	☑	☑
Downloaded	Downloaded	Downloaded	☑	☐	☑
Query Outstanding	Query Outstanding	Query Outstanding	☑	☐	☑
In Production	In Production	In Production	☑	☐	☑
Printed	Printed	Printed	☑	☐	☑
Completed	Completed	Completed	☑	☑	☐
Archived	Archived	Archived	☐	☐	☑
Deleted	Deleted	Deleted	☐	☐	☐

4. The status settings for the status Query Outstanding can be updated.



1. Select the option Email User. When this option is selected the person who placed the job order will be automatically sent an email when the job status is changed to Query Outstanding.

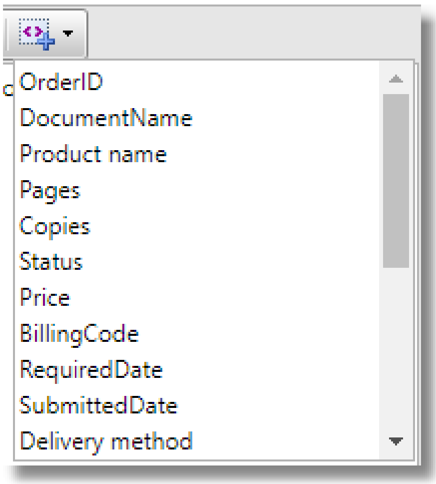
2. Enter text that will be shown when the user views the status of their job orders. In this example the words "Query Email Sent" will be shown against any job order that they have placed and the PrintStation operator has changed the job status to Query Outstanding.

3. Enter the text that will be used as the email subject. In this example the words "Print Order Query" will be used as the email subject when an email is automatically sent out.

4. If you require a copy of the email to be sent to other people enter their email addresses in the CC List field. Separate email addresses with a semi colon.

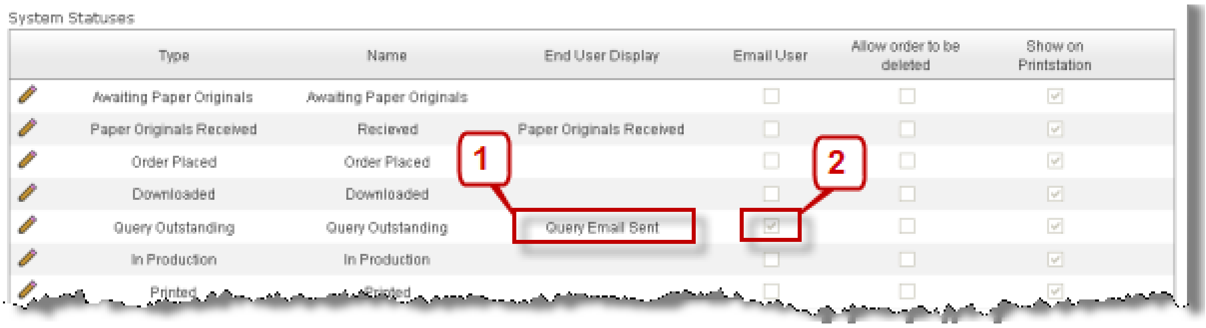
5. Enter the body of the text which can include a contact name or number. The text can be a maximum of 1,000 characters spread over a maximum of 52 lines.

6. Automatically completed fields can be included. Click the Insert Code Snippet button to view a list of all the fields that are available. Text entered after the snippet will appear on a new line.



7. Click OK to save your changes.

5. The System Statuses details have been updated.



1. The end user display will be Query Email Sent.

2. The user will automatically be sent an email if the status of their job order is changed to Query Outstanding.

Allowing Orders to be Deleted

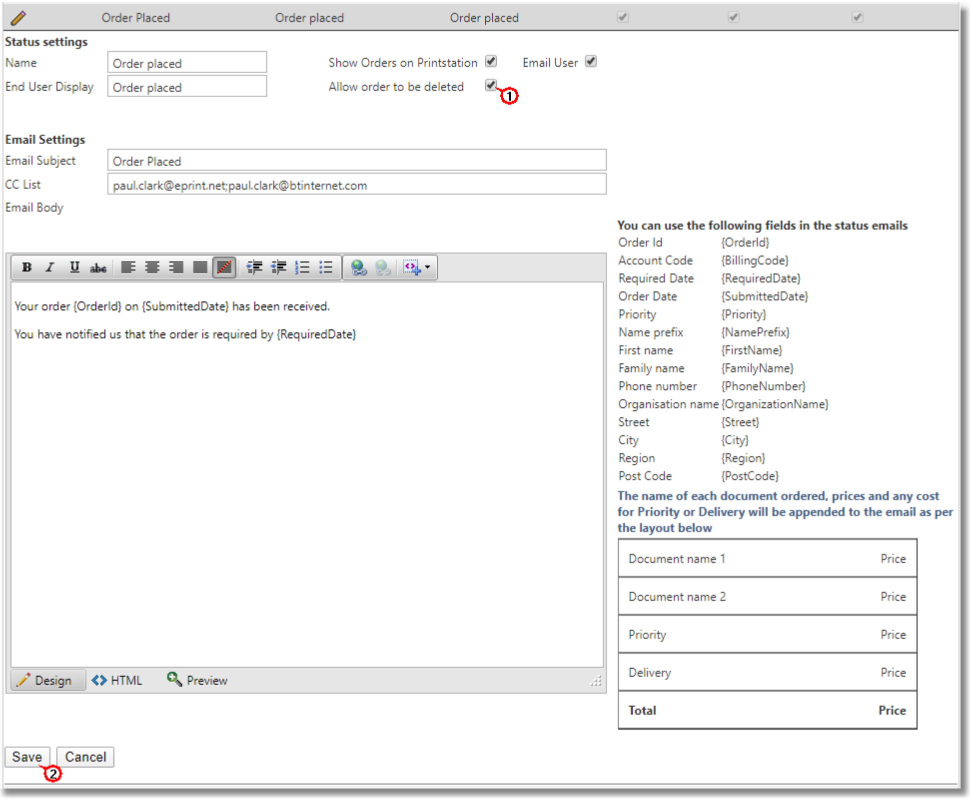
You can configure Skyline to allow users to delete any orders that they have placed. This should only be done before they are downloaded by the PrintStation. If users are able to delete an order that they have placed they will see a red cross when they view their Orders web page.

Example showing an order with the status Order Placed that can be deleted.

To allow users to delete orders before they are downloaded by PrintStation:

1. Log in with Administrator rights and go to **Admin**.
2. In the **Orders** section click **Order Statuses**.

3. Click by the status type Order Placed.



1. Select the option **Allow order to be deleted**.
2. Click **Save**.

Hiding the Orders Tab

You can configure Skyline to prevent users from viewing any orders that they have placed by hiding the Orders web page.

PDF	Job Ticket	Document	Order Number	Order Date	Required Date	Status	Quote	Delete
	View	TUI Iceland	0000111	30/04/2024 14:03		Downloaded		
	View	WorldWide Escorted Tours	0000111	30/04/2024 14:03		Order Placed		
	View	Administration	0000111	30/04/2024 14:03		In Production		
	View	Manual	0000111	30/04/2024 14:03		Order Placed		
	View	NewEngland	0000111	30/04/2024 14:03		Completed		
	View	Word (6 pages) Mono	0000111	30/04/2024 14:03		Downloaded		
	View	Testing Notes for Additional Fields	0000111	30/04/2024 14:03		Printed		

Example Orders Web Page

To allow users to view their orders:

1. Log in with Administrator rights and go to **Admin**.
2. In the Portals section click **Portal Configuration**.

   Portal Configuration

   Manage the configuration options for this portal
3. Find **Upload - Show Orders Tab** in the list.
   - If the option is set as **True** the Orders tab will be visible.
   - The option is **False** the user will not have access to the Orders tab.
4. To amend this option click .
5. Click to save the setting.

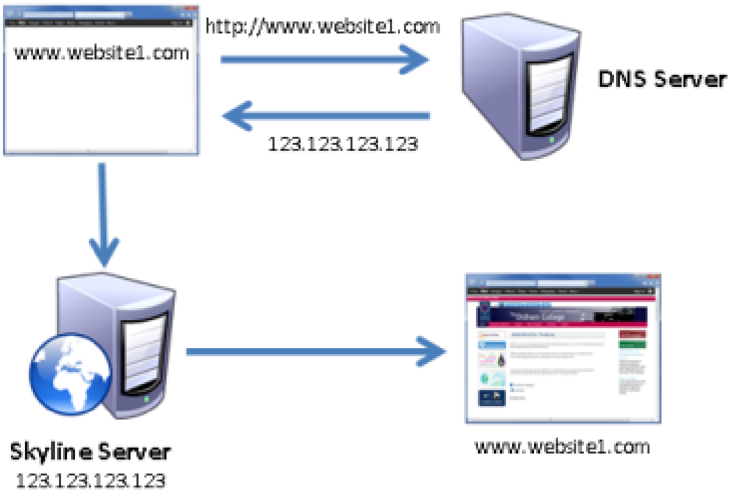
Configuring Skyline Portals

Skyline portals have their own URL (Web address) and this allows the print room to offer multiple portals/Web addresses per Web server. You can add portals to your Skyline as well as apply separate themes or the same theme to each of your portals.

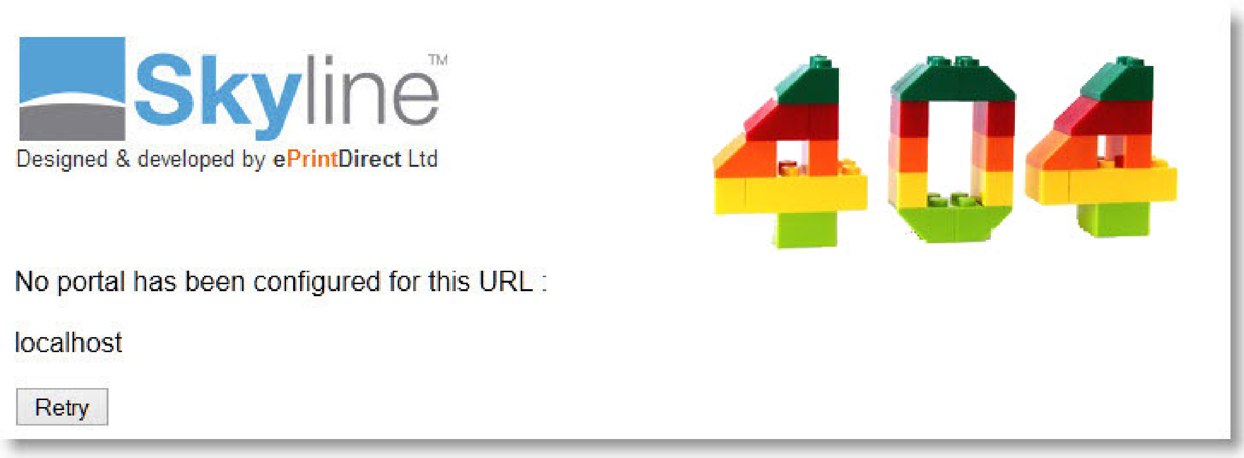
Portal themes can be designed to meet your companies preferred style and colours. The themes are supplied in a zip file which needs to be added to Skyline before you can apply the new theme.

Associating a Portal with a Website

When you have created a portal you need to associate the portal with the Skyline website. When you type in a website address the IP Address for the website is requested from the DNS Server. When the website receives the IP Address it will contact the Skyline server and show you the correct website portal. You can have many portals associated with one Skyline website.



If a portal is not associated with a website you will see an error message when you enter the website details, as shown below.



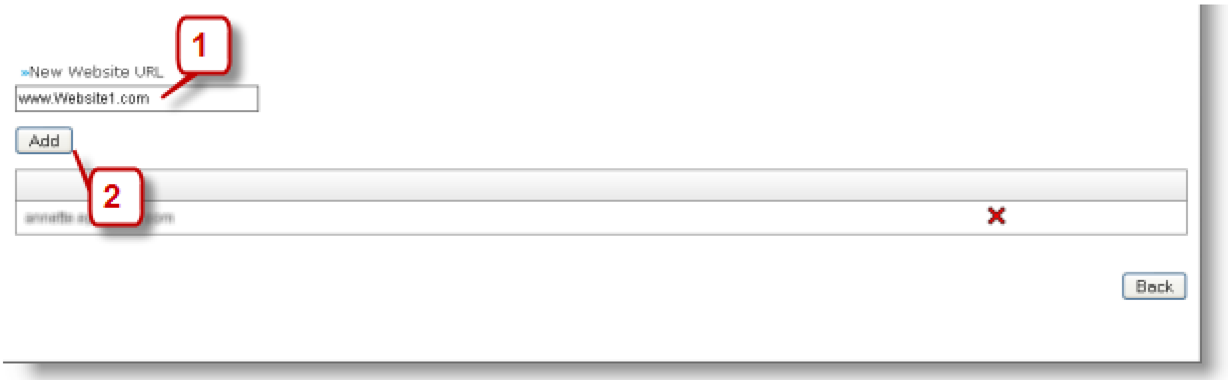
Note: Before a portal can be added you need to associate the Skyline fixed IP address with the Portal URL in the DNS (Domain Name Server). This is usually done by your network administrators.

You can use the command **nslookup** to check to see if the portal URL has been mapped in the DNS.

To associate a Portal with a website:

1. Log in with Administrator rights and go to **Admin**.
2. In the Portals section click **Portal URL's**.

3. A list of associated websites is shown.



   1. Enter the full URL of the website.
   2. Click **Add**. The website will be added to the list.

4. Restart the website by entering the command IISRESET at the command prompt on the Skyline server.

Adding a Portal

You may wish to add additional portals to your system. These portals can be set to specifically host services for a select group of users that will access the portal via a URL.

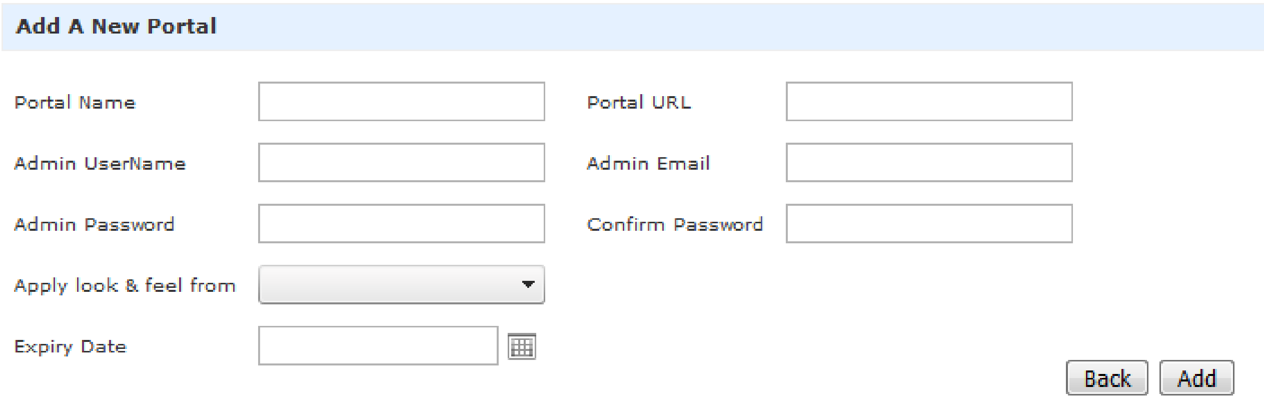
Note: Before a portal can be added you need to associate the Skyline fixed IP address with the Portal URL in the DNS (Domain Name Server). This is usually done by your network administrators.

To add a portal:

1. Log in to the Primary Skyline Portal as Host and go to **Admin**.

2. In the Portals section click **Portals**.

3. A list of the available portals is shown. Scroll to the end of the listing to view the **Add a New Portal** fields.



4. Enter the details of your new portal then click **Add**.

Adding New Portal Themes

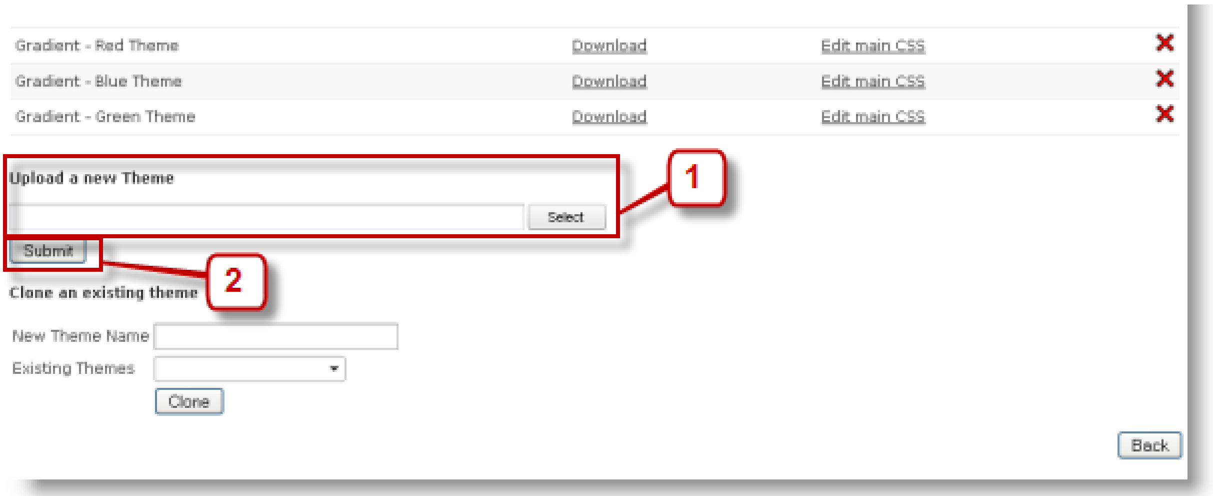
Portal themes can be designed to meet your companies preferred style and colours. The themes are supplied in a zip file which needs to be added to Skyline before you can apply the new theme.

To add a new portal theme:

1. Log in to the Primary Skyline Portal as Host and go to **Admin**.

2. In the Portals section click **Themes**.

3. A list of all your available themes is shown. Scroll to the bottom of the page to view the **Upload a New Theme** field.



   1. Click **Select** to locate your zip file containing your new theme and upload the zip file. This will add the theme.

   2. Click **Submit** to add the theme.

4. You can now apply the portal theme 208.

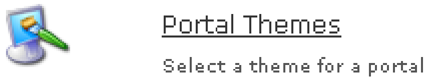
Applying Portal Themes

A theme can include the size of the website, the background colour, the style of the text, the style of the navigation tabs and much more.

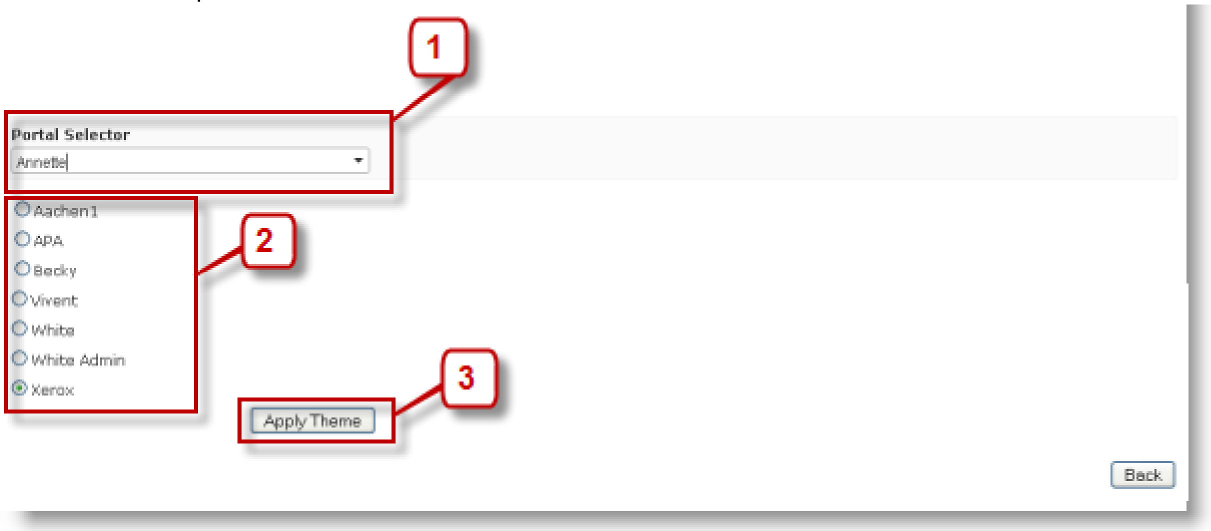
To apply an existing theme to a portal:

1. Log in to the Primary Skyline Portal as Host and go to **Admin**.

2. In the Portals section click **Portal Themes**.



3. A list of available portal themes are shown.



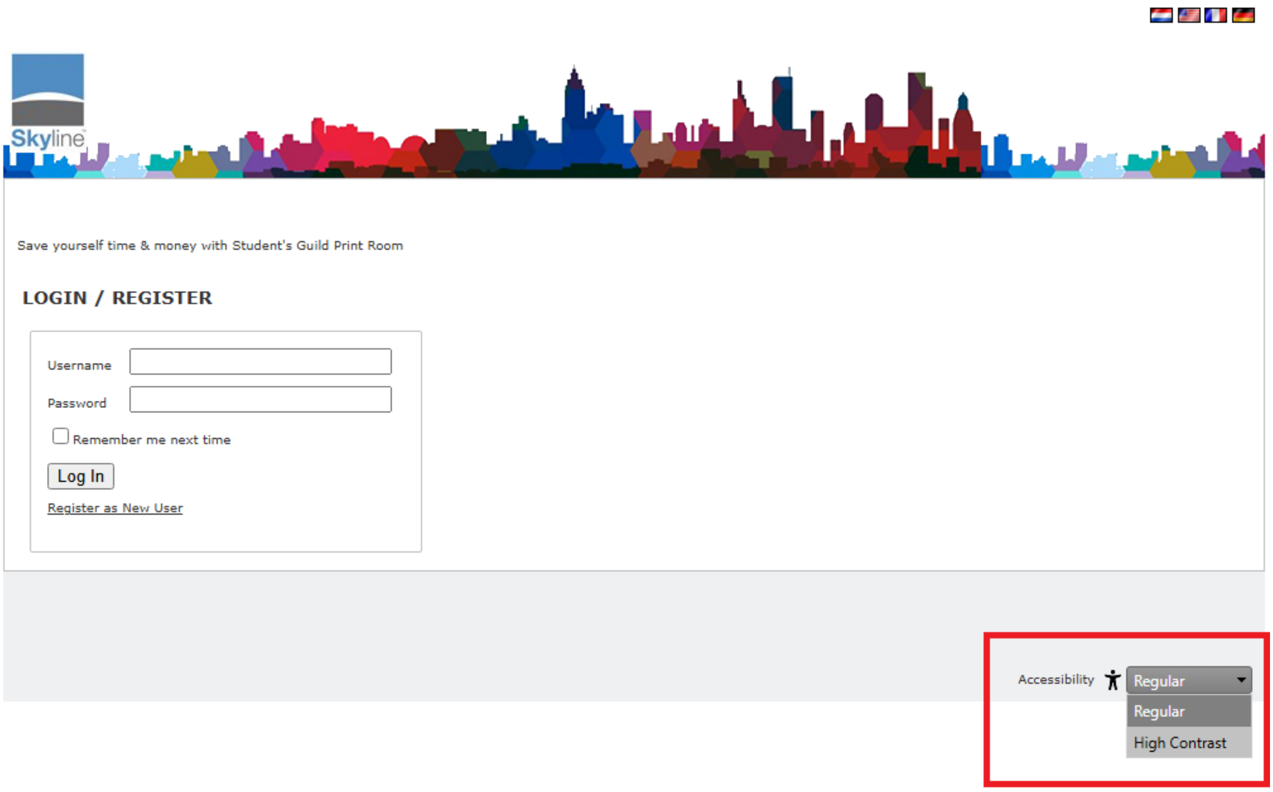
1. Select the portal that you want to apply a new theme to.

2. Select the theme.

3. Click **Apply Theme**.

Accessibility Themes

A portal theme can be amended to enhance accessibility by, for example, creating a high contrast between the text and the background. Users can be given the choice of using the accessibility theme via a selector.



To Show the Accessibility Selector:

1. Log in with Administrator rights and go to **Admin**.
2. In the Portals section click **Portal Configuration**.

   Portal Configuration

   Manage the configuration options for this portal
3. Find **Theme - Show Accessibility Selector** in the list.
4. To amend this option click .
5. Click to save the setting.

To enable the accessibility selector for all portals associated with Skyline use the default configuration option. These options are only available when you are logged in with Host privileges. Any changes to the default configuration will affect **ALL** portals associated with Skyline.

Amending Email Settings

When a new portal is being configured you are able to specify the email settings for the automatic emails that are sent.

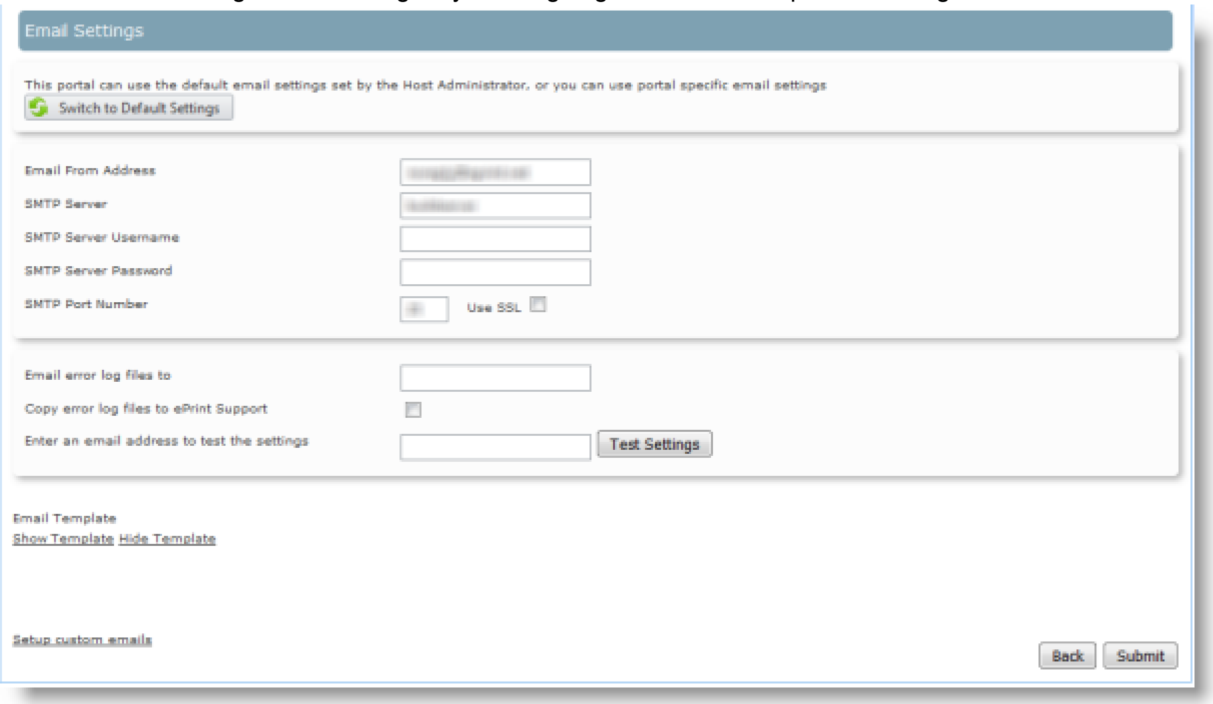
If the sender's name in an email is 'noreply' the email may be judged as unsolicited mail that should be treated as junk. If this happens users may have trouble finding the email and will need to look in their Junk email folder.

To amend the email settings:

1. Log in with Administrator rights and go to **Admin**.

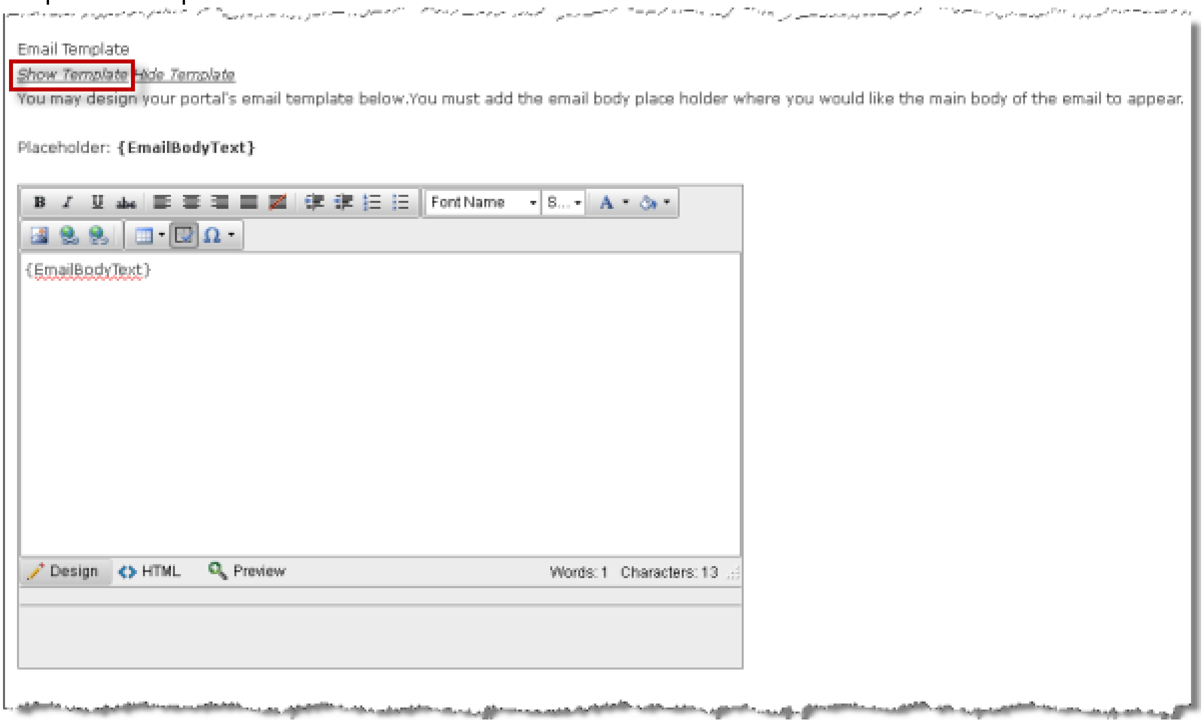
2. In the Configuration section click **Email Settings**.

3. Enter the email configuration settings if you are going to use Portal Specific settings.



- **Email From Address**. The address that is used when sending out emails.
- **SMTP Server**: The details of the SMTP Server that will be used to send emails.
- **SMTP Server UserName**: The user name of the SMTP Server that is used to send emails.
- **SMTP Server Password**: The password of the SMTP Server that is used to send emails.
- **SMTP Port Number**: Enter the port number.
- **Use SSL**: Select if a SSL certificate is used on the server.
- **Copy error log files to ePrint Support**: If this option is selected a copy of the error log files will be sent to the email address as detailed in the field Email error log files to.
- **Email error log files to**: The email address that the log files should be sent to.

4. To amend the email template for your specific requirements click the link **Show Template**. An email template form opens.

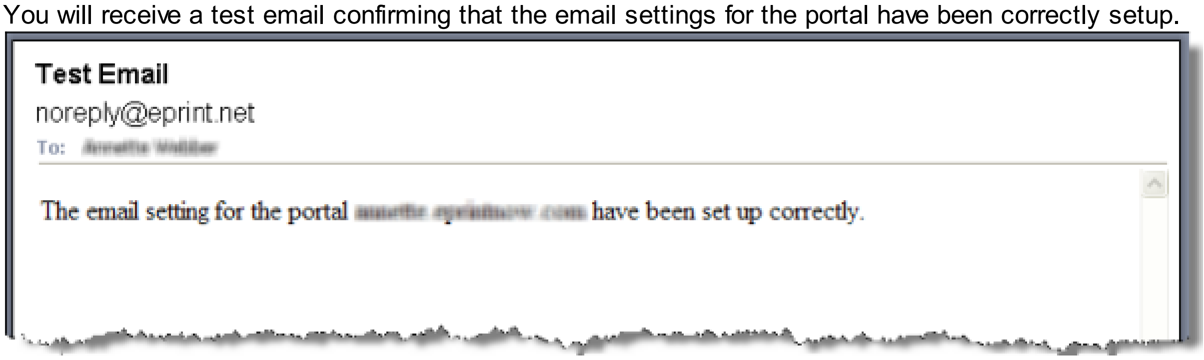


Amend the email template by adding details to appear on all the automatic emails generates as required. For example, you might add your company logo or a contact number.

5. At the bottom of the web page enter an email address in the field and click **Test Settings**.

6. A message will show on the web page stating that "the email has been sent, please check your inbox".

7. You will receive a test email confirming that the email settings for the portal have been correctly setup.



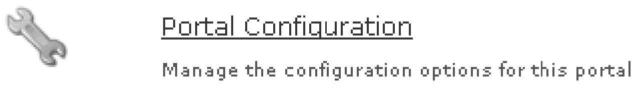
Setting the Timeout Period

You can set the length of time that Skyline will remain open when it is not being used. When the length of time is reached, the user will be logged out.

To change the session timeout setting:

1. Log in with Administrator rights and go to **Admin**.

2. In the Portals section click **Portal Configuration**.



3. Find **Session Timeout** in the list.
   Enter the length of time that the session will last before it time-outs. You have the choice of up to 60 minutes.

4. To amend this option click .

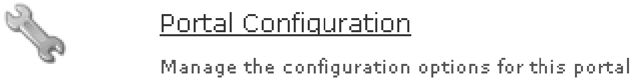
5. Click to save the setting.

To configure **Session Timeout** for all portals associated with Skyline use the default configuration option. These options are only available when you are logged in with Host privileges. Any changes to the default configuration will affect **ALL** portals associated with Skyline.

Viewing Error Messages

To change the details shown to users when an error happens:

1. Log in with Administrator rights and go to **Admin**.
2. In the Portals section click **Portal Configuration**.



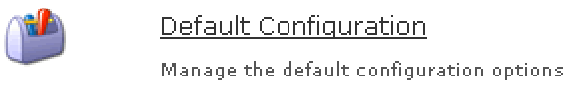
3. Find **Global Errors - Show Friendly Error Messages** in the list.
   - If the option is set as **True** users will be unable to see full error details.
   - Full error details are shown by setting the option to **False**.
4. To amend this option click .
5. Click to save the setting.

Changing the Driver Upload Directory

You can change the server path for where uploads from the Skyline driver are stored. It makes good sense from a server management point of view to keep these files separate from other files such as those uploaded via the web portal.

To change the upload directory:

1. Log in with Host rights and go to **Admin**.
2. In the Portals section click **Default Configuration**.



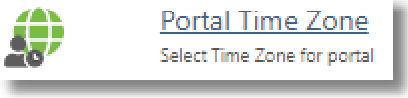
3. Find **Upload - Directory** in the list.
   - The default upload directory is "Documents\UploadedDriverFiles\". Amend as required.
4. To amend this option click .
5. Click to save the setting.

Changing the Time Zone

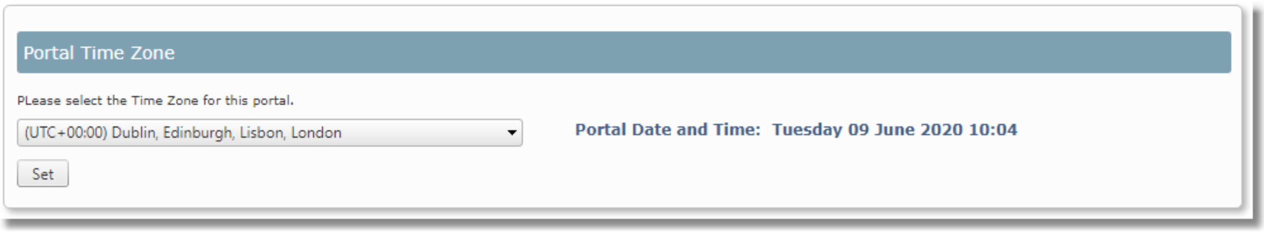
The time zone used to record date and time when placing an order and during the ordering process can be set for specific portals or for globally for all portals.

To amend the time zone for a portal:

1. Log in with Administrator rights and go to **Admin**.
2. In the Portals section click **Portal Time Zone**.

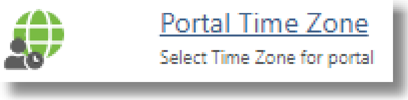


3. Select the required time zone for the portal and click **Set**

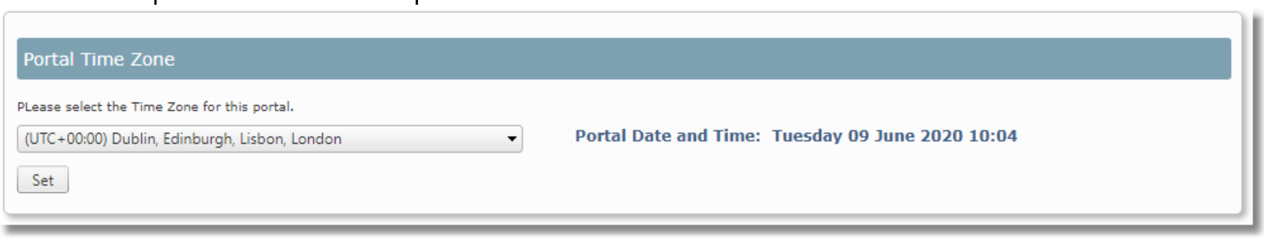


To amend the time zone for all portals:

4. Log in with Skyline Host rights and go to **Admin**.
5. In the Portals section click **Portal Time Zone**.

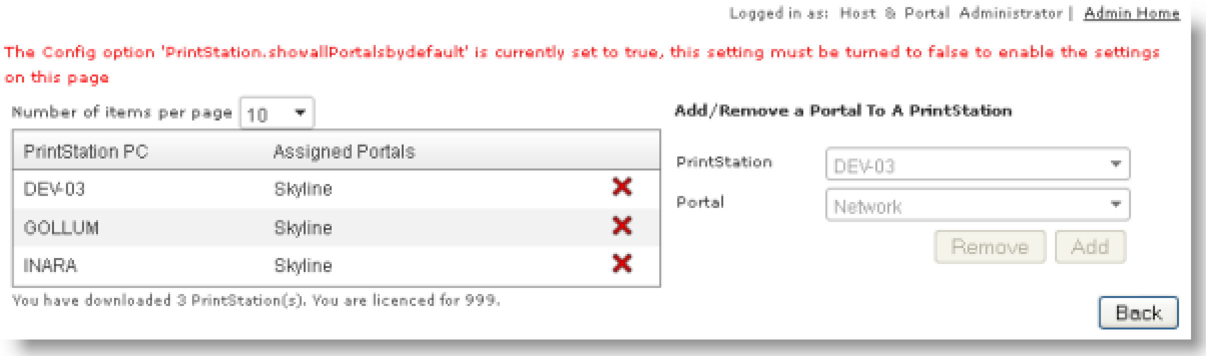


6. Select the required time zone for all portals and click **Set**



Configuring PrintStation Options

You can associate a PrintStation and Portal if the default configuration setting **PrintStation - Show all portals by default** is set to false.

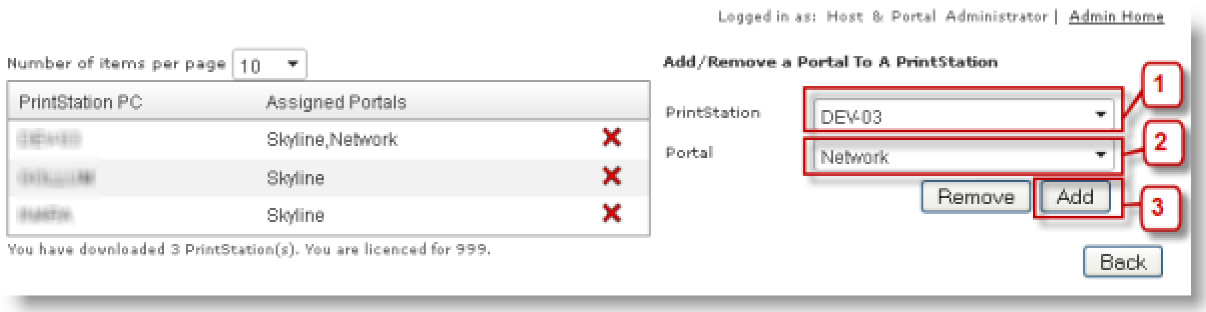


Example showing the Manage PrintStation options when the default configutation printstation.showallportalsbydefault is True.

To associate a PrintStation & Portal:

1. Log in to the Primary Skyline Portal as Host and go to **Admin**.
2. Make sure that the default configuration setting **PrintStation - Show all portals by default** is set to false.
3. In the PrintStation section click **Manager PrintStation**.

4. Us the Add/Remove a Portal to a PrintStation section to add the details.

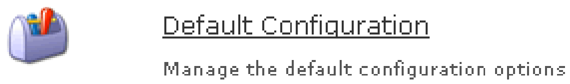


1. Select the PrintStation from the drop down menu.
2. Select the Portal from the drop down menu.
3. Click **Add**.

When you download and first start PrintStation it can be automatically associated with the portal that it was downloaded from if there are enough PrintStation licenses. If there are not any unallocated PrintStation Licenses an error message will show stating '**There has been a problem with your PrintStation License. Please contact your administrator**'.

To automatically associate a PrintStation & Portal:

1. Log in to the Primary Skyline Portal as Host and go to Admin.
2. In the Portals section click **Default Configuration**.



3. Amend the default configuration **PrintStation - Automatically assign to portal** to **True**.

Transferring a PrintStation License

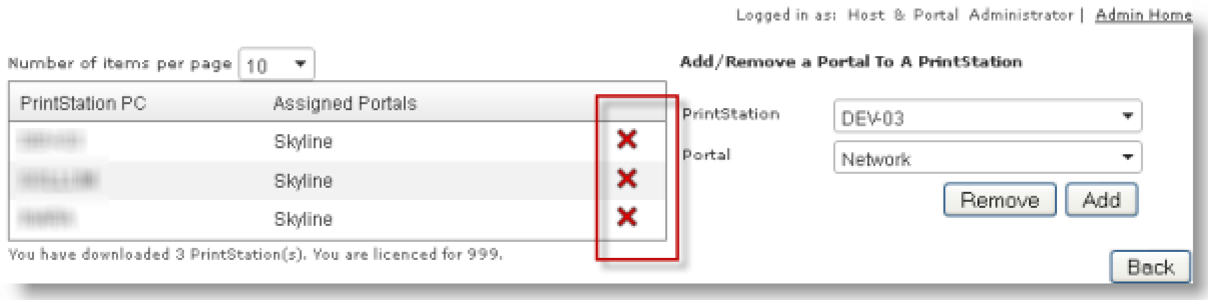
It is an easy process to transfer a PrintStation license from one PC where it is no longer required to another PC. It is good practice to remove the PrintStation program from the original PC.

To transfer a PrintStation License:

1. Log in to the Primary Skyline Portal as Host and go to **Admin**.

2. In the PrintStation section click **Manager PrintStation**.

3. Click the red cross associated with the PrintStation PC to release the allocated PrintStation license.



4. When the PrintStation is started on a new PC a license is automatically assigned when a user logs in to the newly installed PrintStation.

Changing PrintStation Directory Security Settings

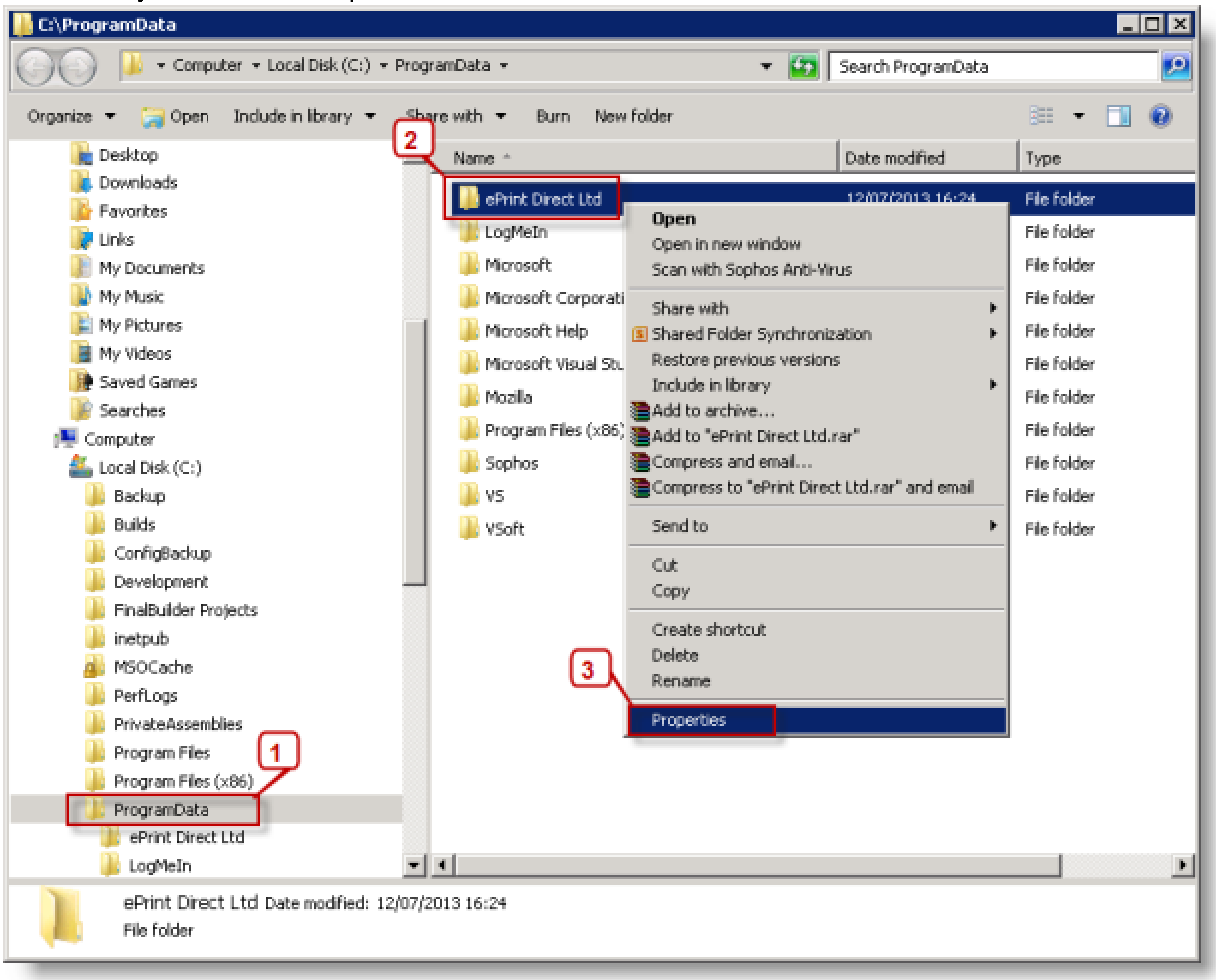
PrintStation requires full Read/Write access to the directory C:\Skyline\PrintStation & C:\ProgramData\ePrint Direct Ltd. If PrintStation cannot write to a required location then an error message is generated stating that 'Access to the path c:\ProgramData\ePrint Direct Ltd\Skyline\Xpaths.xml' is denied'.

Note:
The directory C:\Skyline\PrintStation is created automatically during the installation process..

To change the security settings:

1. Log in as a local administrator and open explorer.

2. The directory folders window opens.

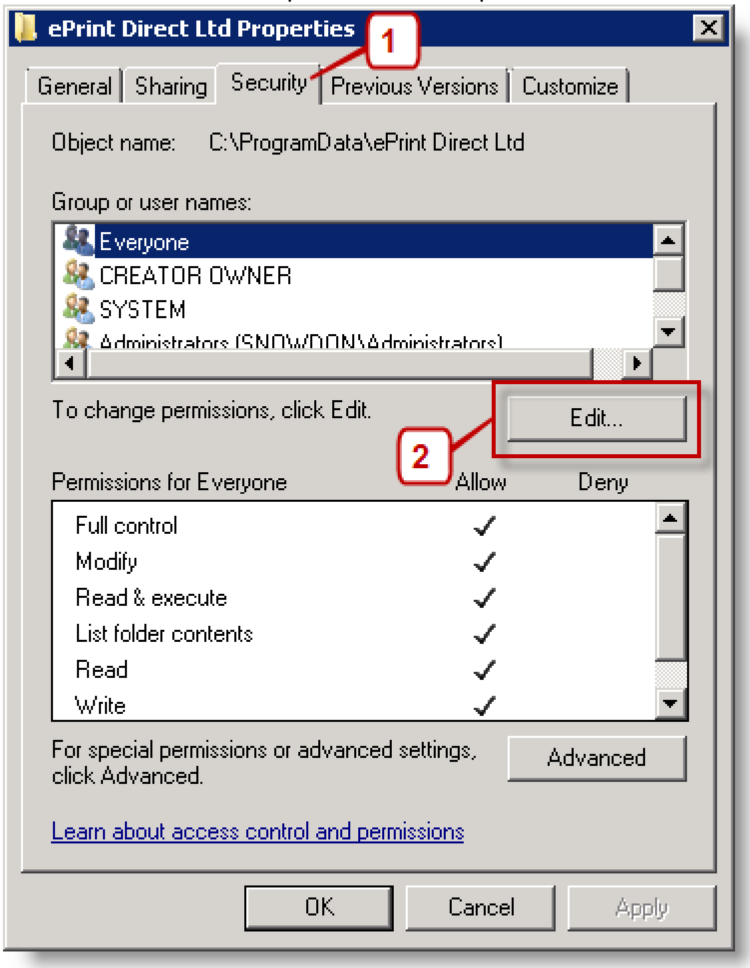


1. Open the **ProgramData** folder.

2. Right-click the **ePrint Direct Ltd** folder.

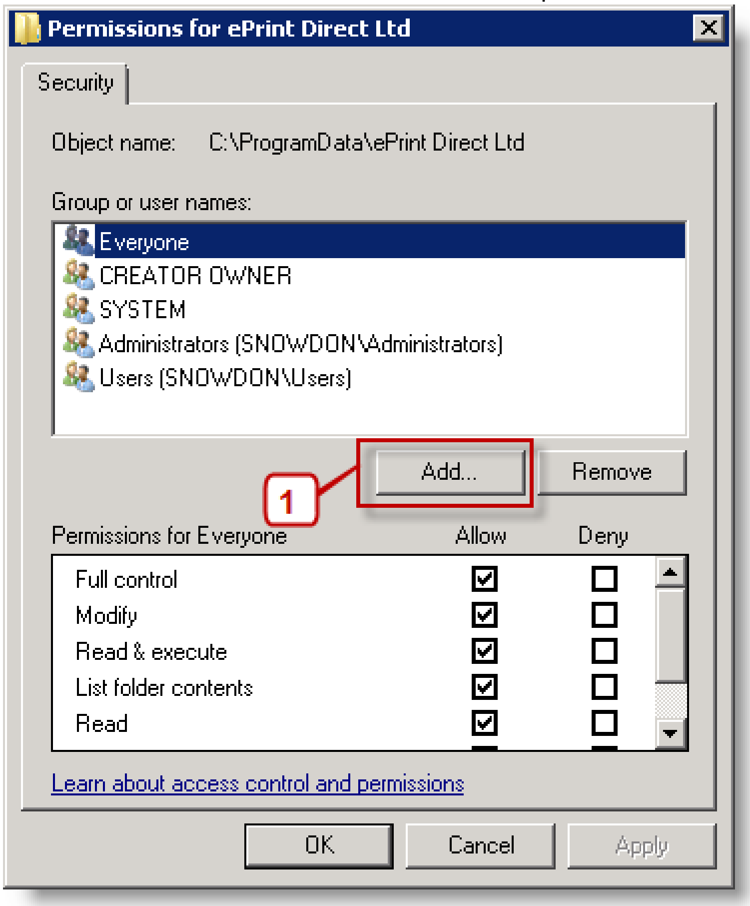
3. Select **Properties**.

3. The ePrint Direct Ltd Properties window opens.



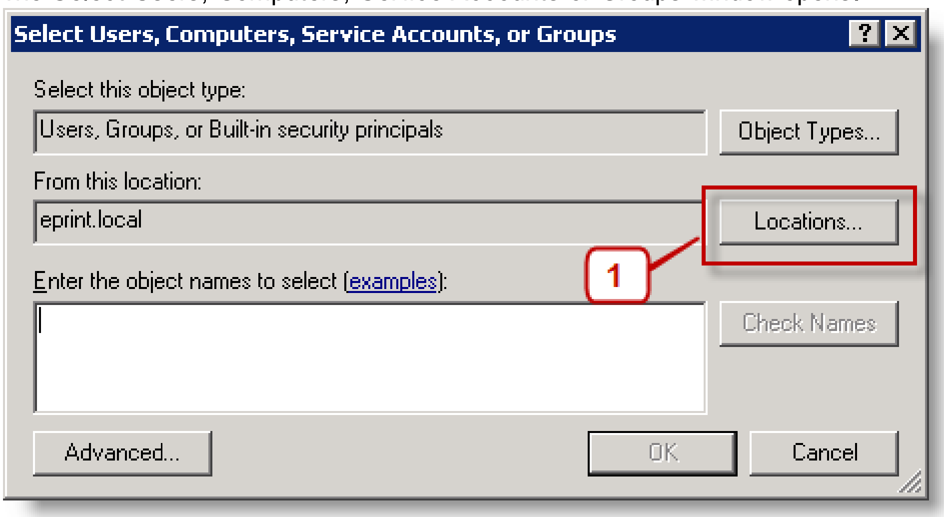
1. View the **Security** page.
2. Click **Edit**.

4. The Permissions for ePrint Direct Ltd window opens.



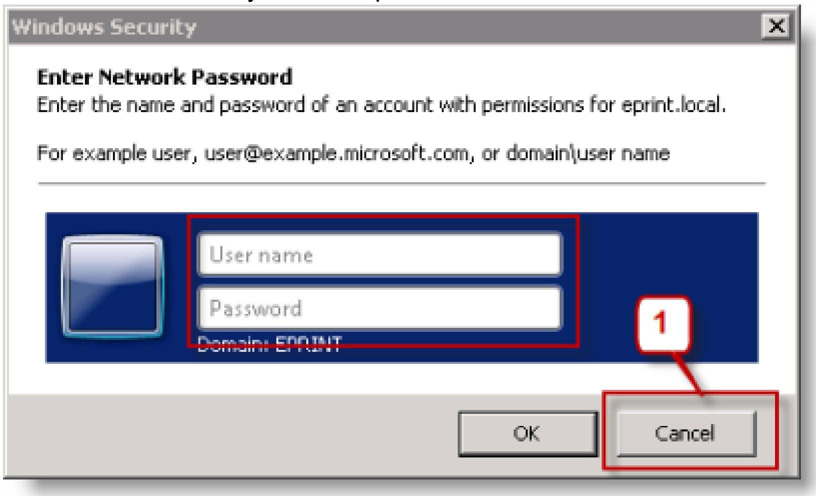
1. Click **Add**.

5. The Select Users, Computers, Service Accounts or Groups window opens.



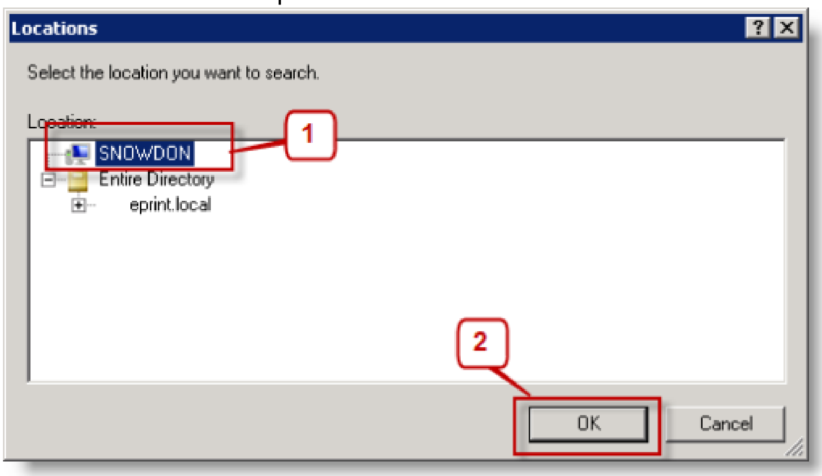
1. Click **Locations**.

6. The Windows Security window opens.



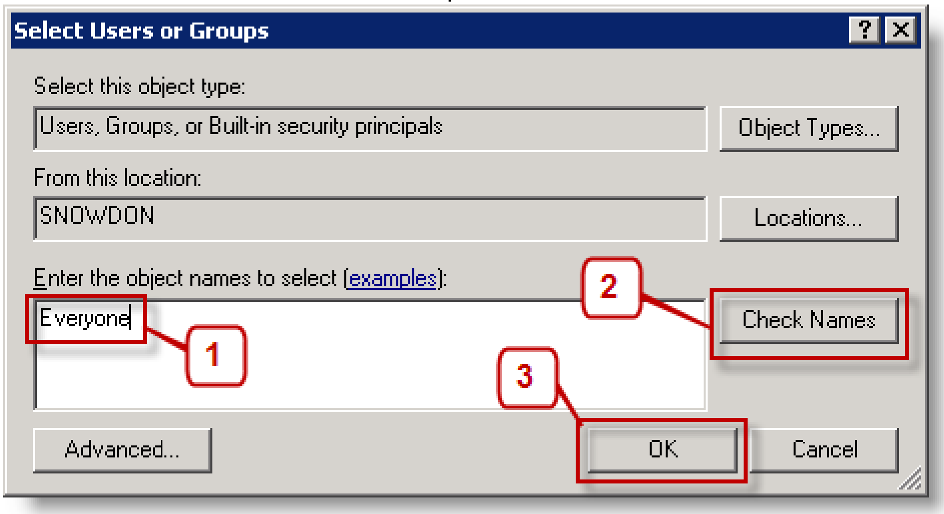
   1. Click **Cancel**. You only need access to the local machine not to the network

7. The Locations window opens.



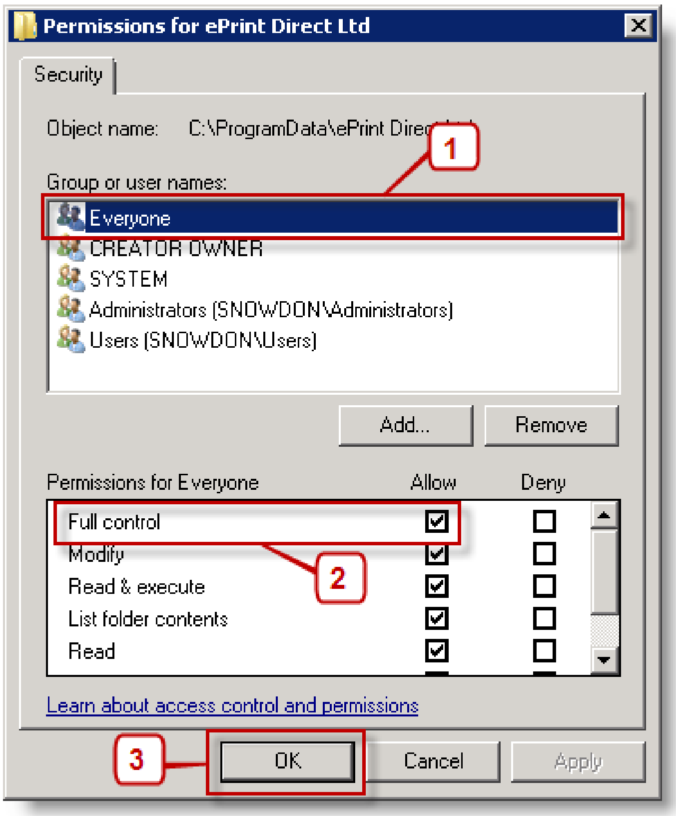
   1. Select your PC name at the top of the list.
   2. Click **OK**.

8. You return to the Select Users or Groups window.



1. Type **Everyone**.
2. Click **Check Names**.Check that **Everyone** is now underlined. Click **OK**.

9. You are returned to the Permissions for ePrint Direct Ltd window.



1. Select the user group **Everyone**.
2. In the section Permissions for Everyone check the option **Full Control**. Click **OK**.

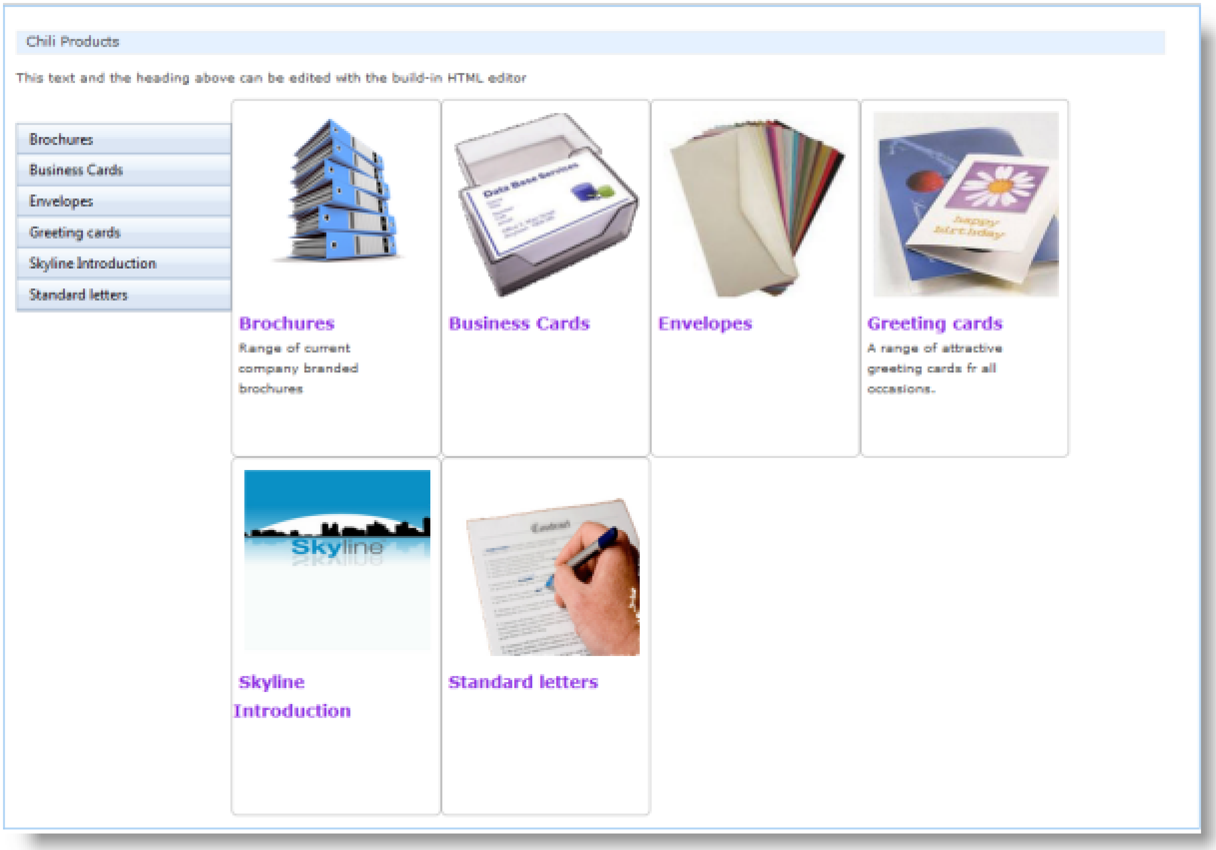
10. You are returned to the ePrint Direct Ltd Properties window. The user group Everyone should now have Full control. Click **OK**

Configuring Skyline Publisher

The web-based Skyline Publisher software is available through ePrint as a pre-configured Skyline web to print solution. Publisher products are available to your customers through their Skyline home page. You can use Publisher with portal specific and global products.

You use the Product Editor to create products for Skyline Publisher. There are 3 configuration options available for the Product Editor:

- **Product Editor: Full screen height** - Specifies the height of the window when using full screen.
- **Product Editor: Use full screen** - Specifies whether to display the Product Editor in full screen or not.
- **Product Editor: Back button return URL** - Enter the page URL that you want the user to be returned to. Requires 'Product Editor: Use full screen' to be True.

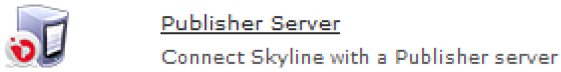


Associating a Publisher Server

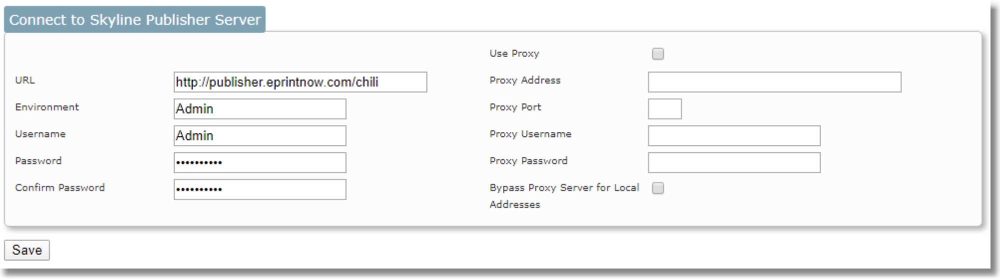
Before you can use Publisher products with Skyline you need to associate your Publisher server with Skyline.

To associate a Skyline Publisher server:

1. Log in with Host rights and go to Admin.
2. In the Skyline Publisher section click **Publisher Server**.



3. Enter the required Skyline Publisher server details



   1. **URL** - This is your Skyline Publisher server URL. This should start with https://
   2. **Environment** - As created within Skyline Publisher Backoffice.
   3. **Username** - As created within Skyline Publisher Backoffice
   4. **Password** - As created within Skyline Publisher Backoffice
   5. **Confirm Password** - Confirm the password
   6. **Proxy Address** - Enter the address of the Proxy server.
   7. **Proxy Port** - Enter the Port number used
   8. **Proxy Username** - Complete if relevant
   9. **Proxy password** - Complete if relevant
   10. **Bypass Proxy Server for Local Address** - Select if required

4. Click , you will return to the Admin page.

Associating Portals & Publisher

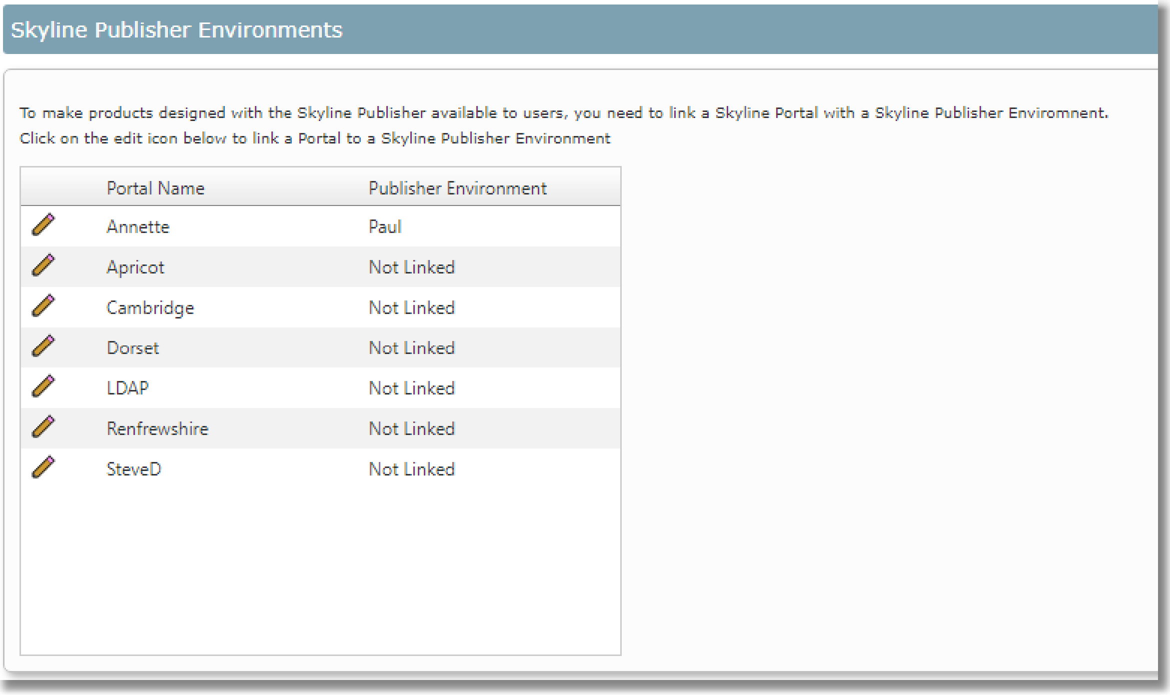
Many Skyline portals can be associate with 1 Skyline Publisher environment. In order to make products designed with the Skyline Publisher available to users, you need to link a Skyline Portal with a Skyline Publisher Environment.

To associate Skyline portals with a Skyline Publisher server:

1. Log in with Host rights and go to Admin.
2. In the Publisher section click **Publisher Environments**.

Publisher Environments
Assign Publisher Environments to Portals

3. A list of Portals and whether they are linked to a Skyline Publisher Environment is shown.



1. Click associated with the portal that you want to link to an Environment.
2. Select the Environment from the drop down list.

Editing Folders

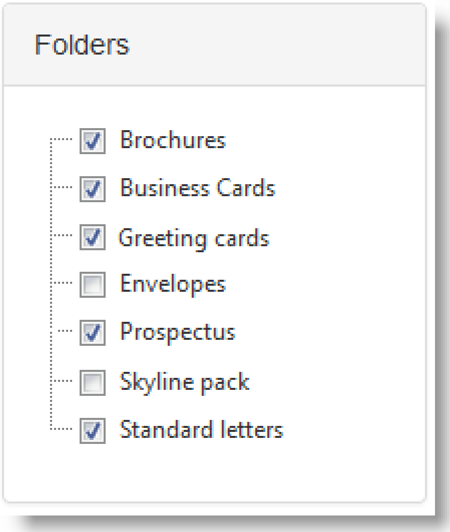
The folders listed on the Product web page are the folders that have been created within Skyline Publisher. You can select the folders to display to your users and change the style as required.

To assign Skyline products to a Publisher product:

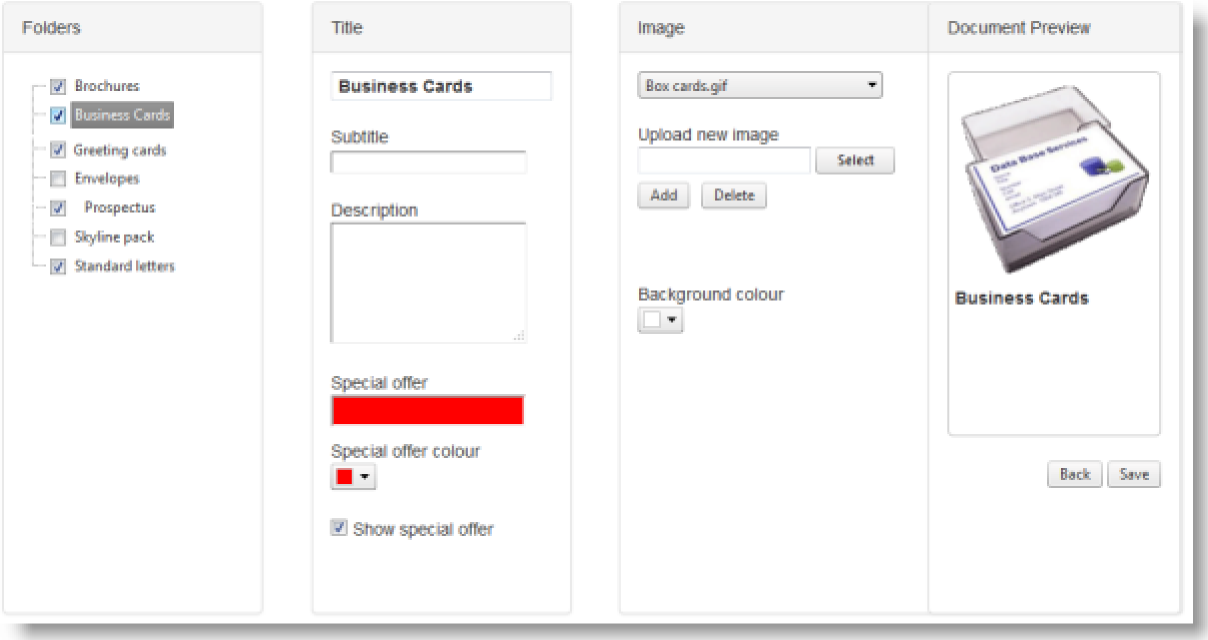
1. Log in with Administrator rights and go to Admin.

2. In the Publisher section click **Publisher Folders**.

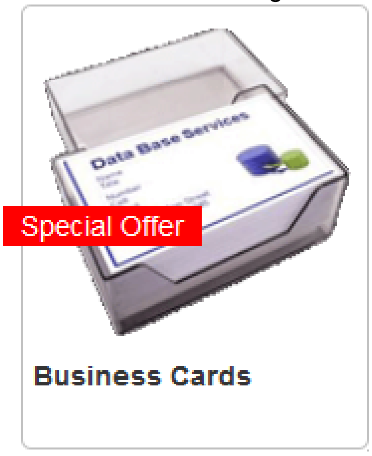
3. All the available Publisher folders are listed. The folders that are ticked are visible from the Skyline website.



4. You can change the style or presentation of a folder. Click on the name of the folder that you want to change. Folder information that can be changed is shown in two new sections. Any changes made are shown in the Document Preview section after the changes have been saved. Folders that are not visible to the Skyline user are not ticked but the folder properties can be changed.



- **Title** - Amend as required. If the folder contains any special offers you can show a banner to indicate that there is a special offer available. The wording is entered in the Special Offer field and the banner background colour can be selected. The wording will not show until the changes are saved.



- **Image** - Images can be selected from a drop down list of pre-installed images. Select the required image and then click **Save** to display the selected image in the preview You can also add new images using the Add feature. Select the location of the image and when it had been uploaded click Add. The image is added to the drop down list.

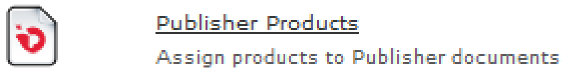
Showing Products on the Products Web Page

When you open any folder shown in the Publisher product web page you can see the available products. The products that are shown is controlled from the Publisher Products admin option where you can assign products created in Skyline ProductManager to a Skyline Publisher product. If a publisher product does not have a Skyline product assigned to it then the publisher product will not show in the Skyline product web page.

To assign Skyline products to a Skyline Publisher product:

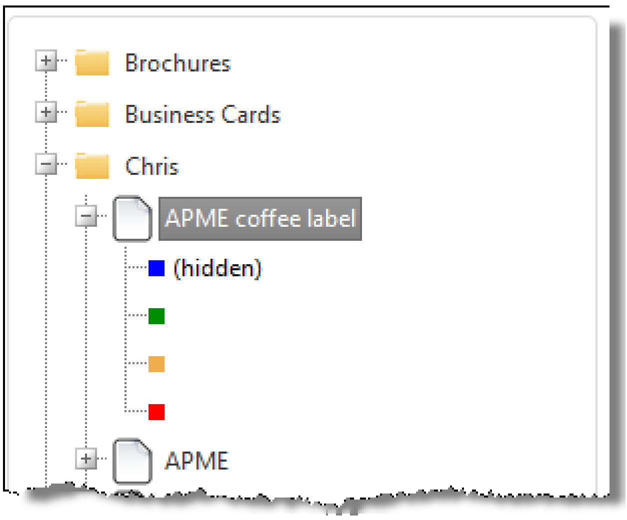
1. Log in with Administrator rights and go to Admin.

2. In the Skyline Publisher section click **Publisher Products**.

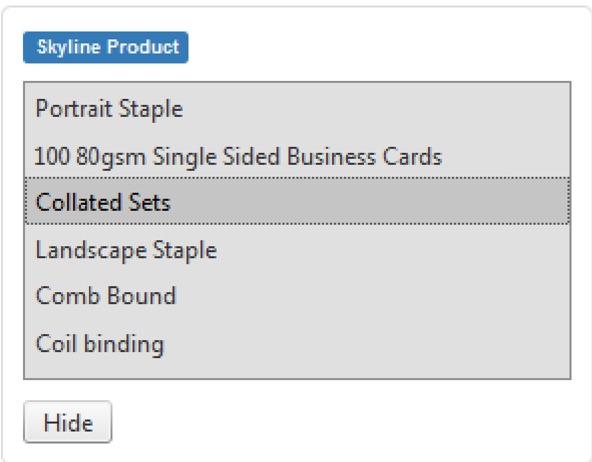


3. Any publisher product to be shown to Skyline users needs to be assigned a Skyline Product, Workspace, View Setting and PDF Setting.

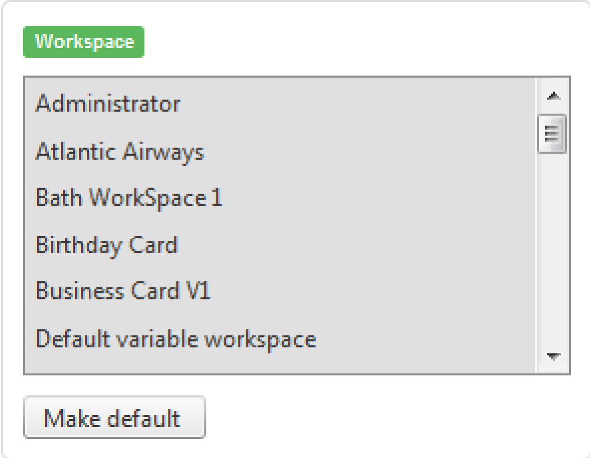
    1. Open the folder & select the publisher product that has no Skyline product associated with it. Any publisher product with a blank icon does not have a Skyline product associated. The Skyline Product will be shown as hidden.



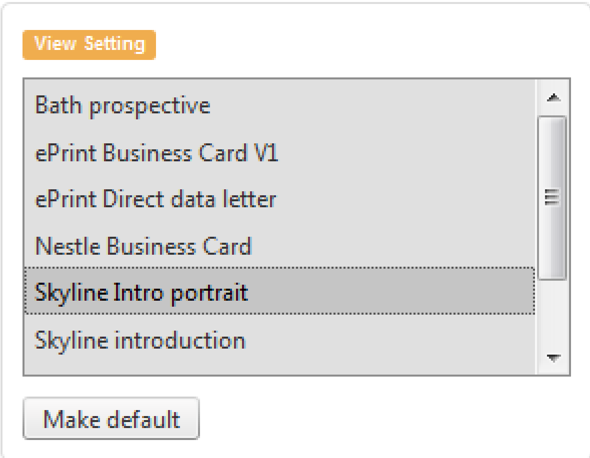
    2. Select the Skyline Product to be associated with the publisher product. All products created with the ProductManager show as available products.



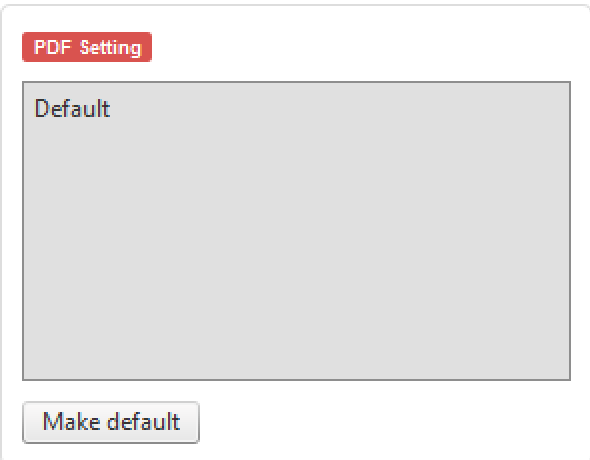
3. Select the Workspace. If there is a workspace that is frequently used that workspace can be selected by default. Select the workspace and click **Make Default**.



4. Select the View Setting. If there is a View setting that is frequently used that setting can be selected by default. Select the setting and click **Make Default**.

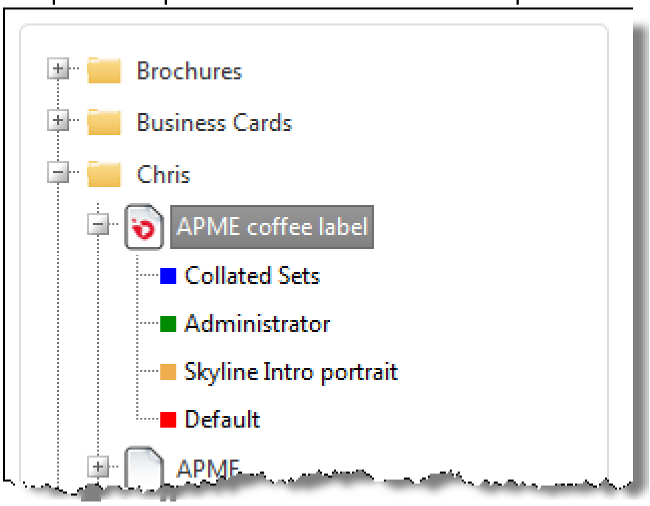


5. Select the PDF Setting. If there is a PDF setting that is frequently used that setting can be selected by default. Select the PDF setting and click **Make Default**.



6. Click **Save** by the Preview

4. The publisher product will show with a logo to indicate that a Skyline product has been associated with it. The publisher product will be available in the products web page within Skyline.



Removing Products from the Products Web Page

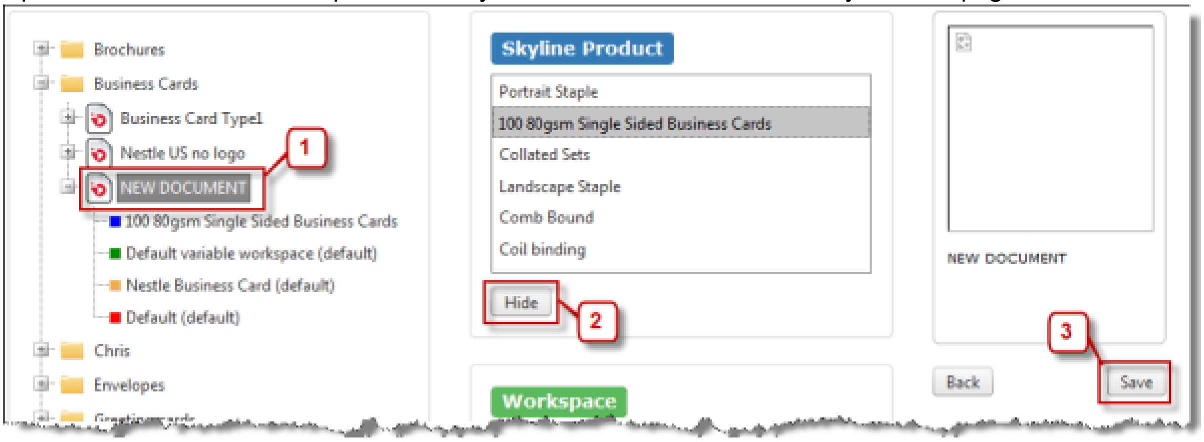
Publisher products can be removed from the Skyline Products web page.

To remove a publisher product:

1. Log in with Administrator rights and go to Admin.
2. In the Skyline Publisher section click **Publisher Products**.

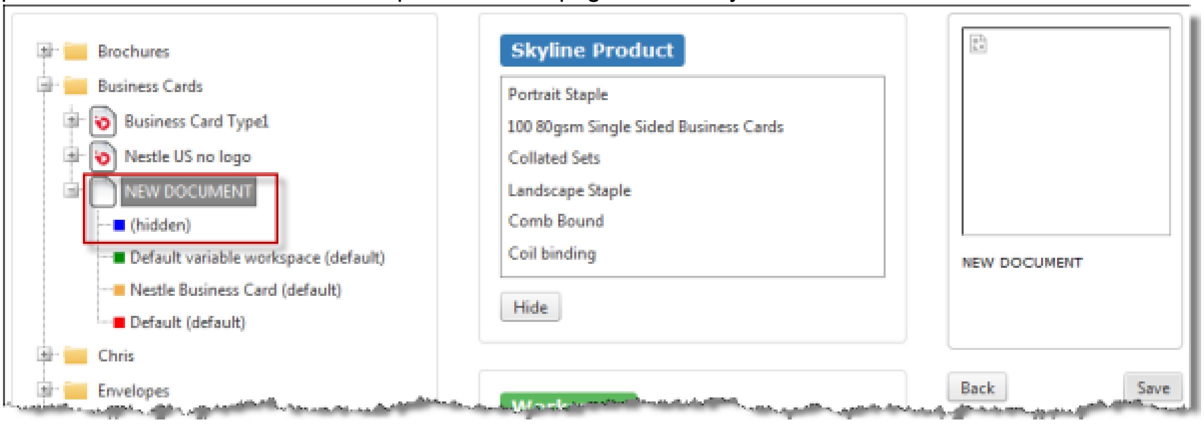
   Publisher Products
   Assign products to Publisher documents

3. Open the folder & select the product that you want to remove from the Skyline web page.



   1. Select the product.
   2. The Skyline Product associated with the selected Publisher product is highlighted. Click **Hide**. No Skyline Product will be selected.
   3. Click **Save**.

4. The Publisher product will show with no logo to indicate that a Skyline product has not been associated with it. Where the Skyline product was shown before it has been replaced with the word Hidden. The product will not be available in the products web page within Skyline.



Maintenance

When you have installed and competed you initial configuration of Skyline there are occasions that you may need to perform certain maintenance tasks to Skyline. Details in this section cover:

- Running a Manual Backup 240.
  It is strongly recommended that Skyline databases is backed up on a regular basis. Automatic backups should be handled by applications such as Backup Exec, Red Gate or the Maintenance Plans in the full version of SQL. You need to backup the 3 databases as well as Uploaded docs & website also need to be backed up on a regular basis.

- Taking the Website Offline 235.
  If you are doing an upgrade or doing a manual backup 240 you need to take the Skyline website offline. This will prevent changes to the database during the backup.

- Accessing SQL Service through a Firewall 246.
  For Skyline to be able to reach the databases on an external SQL server the relevant ports on this server must be open.

- Amending Skyline Email Settings 247.
  You are able to enter the email addresses that are used when the Skyline system generated emails are sent.

- Moving the Skyline Database 250.
  The standard Skyline installation program installs all the required elements on the C: drive of the server. This section shows how to move these elements to different drives.

Viewing License Settings

You can view your Skyline license details and the total number of Portal and PrintStation licenses that are available.

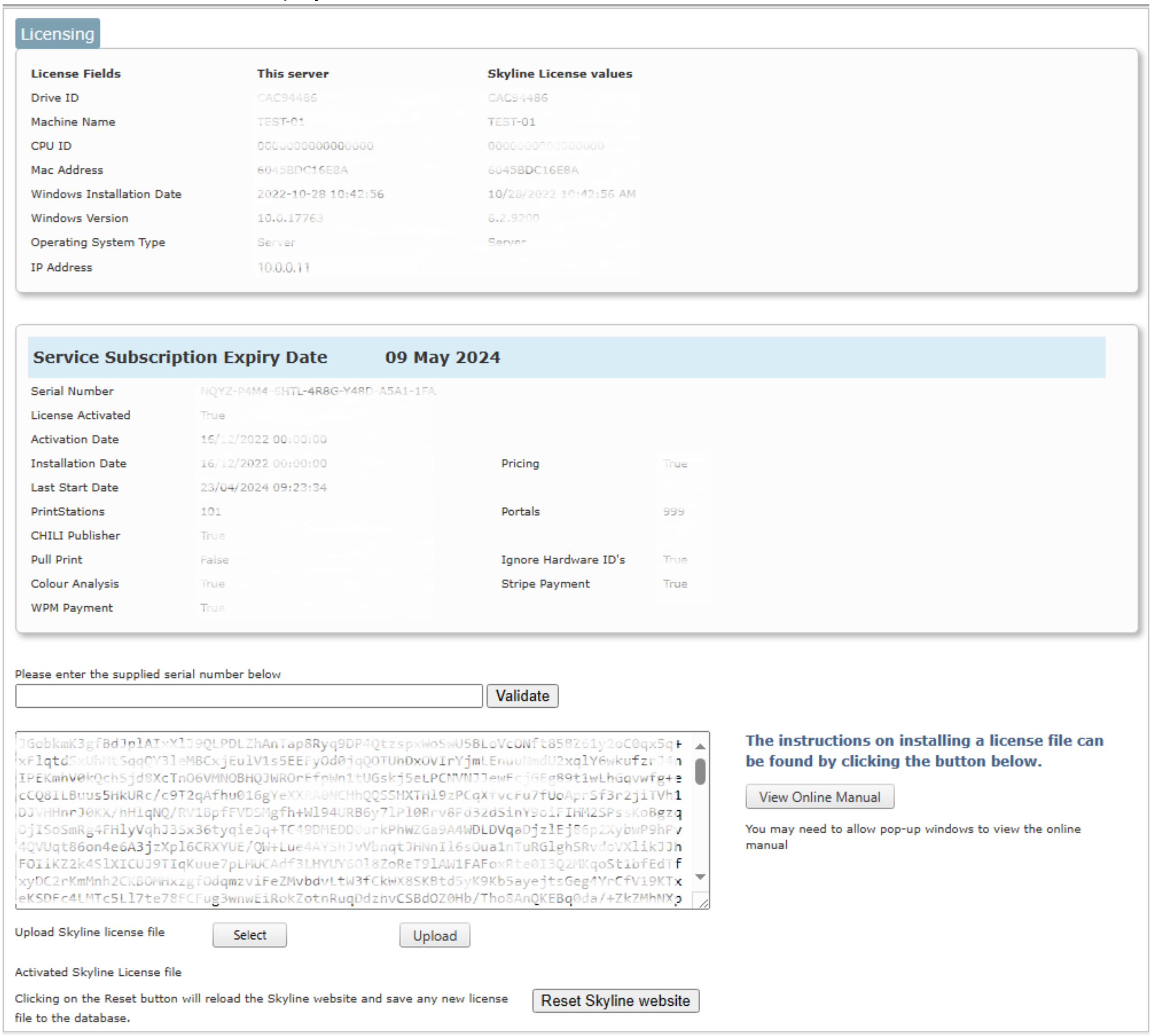
To view your license details:

1. Log in to Skyline and go to **Admin**.

2. In the Configuration section select **License Settings**.

License Settings
Add and Renew License

3. Your license details are displayed.



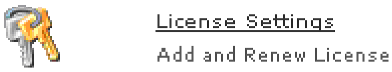
Update Service Subscription

When you renew your service subscription you will need to re-license Skyline. To install the new license and reset the software will take only a few minutes but it is recommended that it is done outside busy times. The Skyline license is also tied to 3 values that identify the server it is installed on. If any of these change then Skyline will also need to be re-licensed.

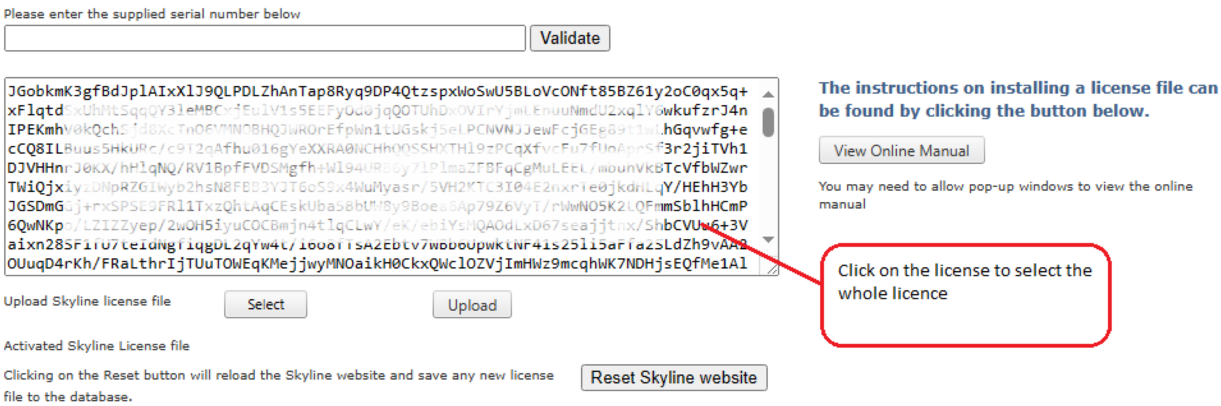
- Machine name
- Windows installation date
- MAC address

To Update your Skyline License:

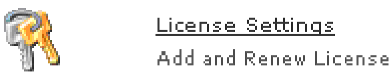
1. Log in to Skyline and go to **Admin**.
2. In the Configuration section select **License Settings**.



3. Make a copy of your Skyline license number by copying and pasting into Notepad. Save as a .TXT file with the name of your company e.g ePrint.txt.



4. Email the TXT file containing your license number to sales@eprint.net so that it can be updated with the new details.
5. You will receive an email with your updated license file called **skyline.lic** Save the file in a location that is accessible from Skyline.
6. Log in to Skyline and go to **Admin**.
7. In the Configuration section select **License Settings**.



8. Click  and select the new **skyline.lic** file.
9. Click  to upload your new license.
10. When the new license has been uploaded click . The website will be updated and when completed you will be left viewing the home page.

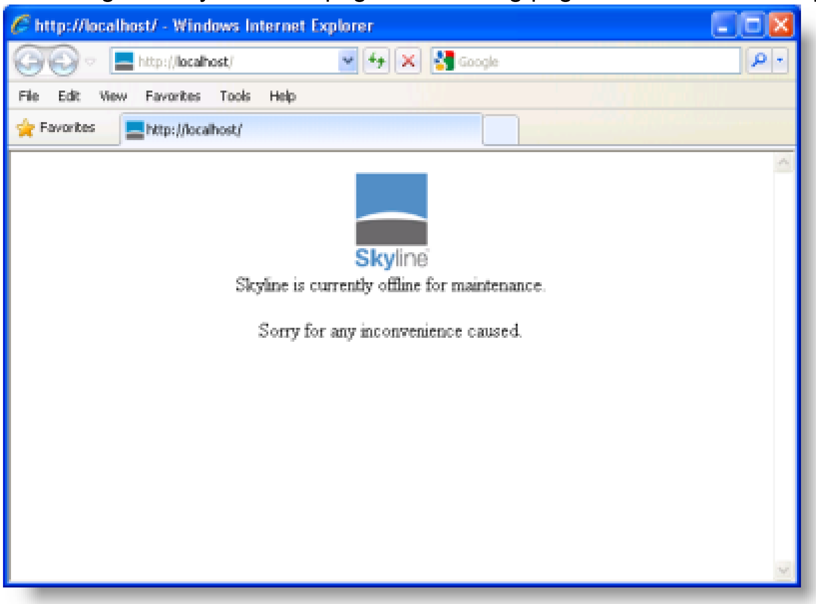
11. View the license settings page and check the new Service Subscription Expiry Date.

Taking the Website Offline

If you are upgrading Skyline or running a manual backup 240 you need to take the Skyline website offline. This will prevent changes to the database during the backup.

To take the website offline:

1. In the root of the website locate the file **app_offline.htm_rename** and rename it to **app_offline.htm**. By default, the root of the website is located in "C:\Skyline\wwwroot". If you are not sure where your Skyline Website is located refer to the section on locating your Skyline Website 236. Renaming this file will change to Skyline homepage to a holding page shown in the example below.



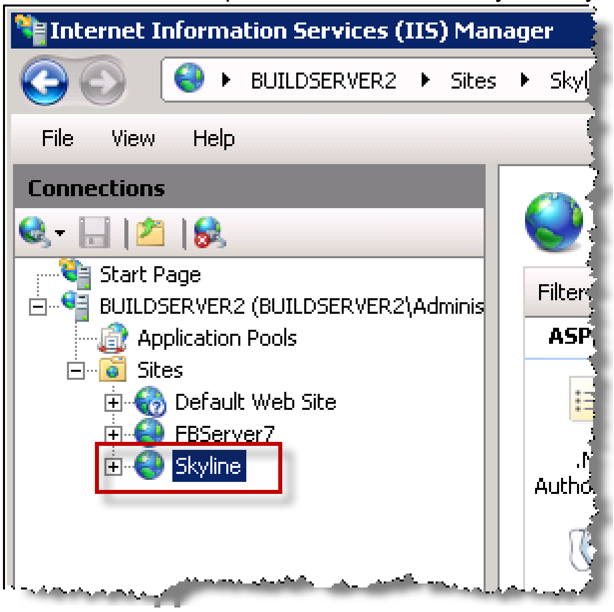
Locating your Skyline Website

There are occasions when you will need to know the location of your Skyline website. The default location of your Skyline website is C:\Skyline\wwwroot but the location can be changed if required by your system setup.

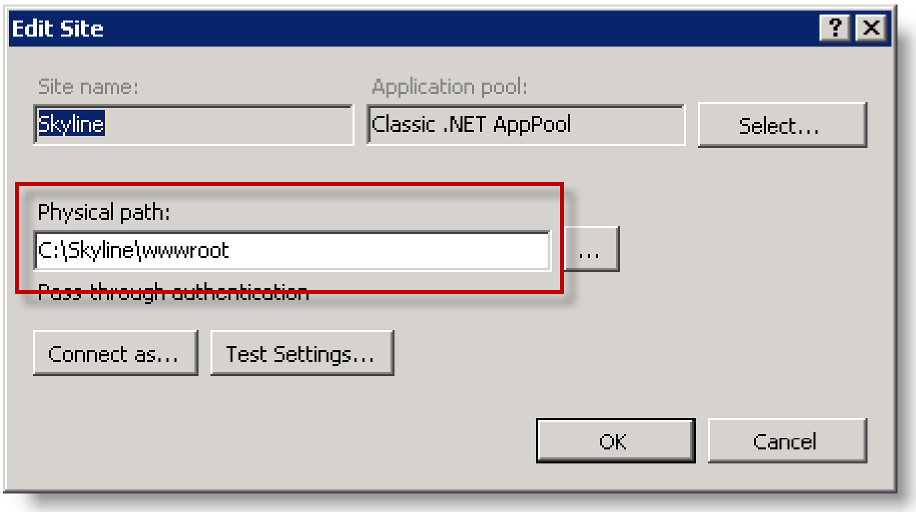
To check the Skyline Location:

1. On your Skyline server open **Internet Information Services (IIS) Manager**.
   (Start > Administrative Tools > Internet Information Services (IIS Manager)

2. In the Connections pane locate and select your Skyline website.



3. In the Actions pane click **Basic Settings**. The Edit Site window opens. The Physical path of your Skyline website is shown in the Physical path field. In the example the Skyline website has not been moved and is still in the default location.

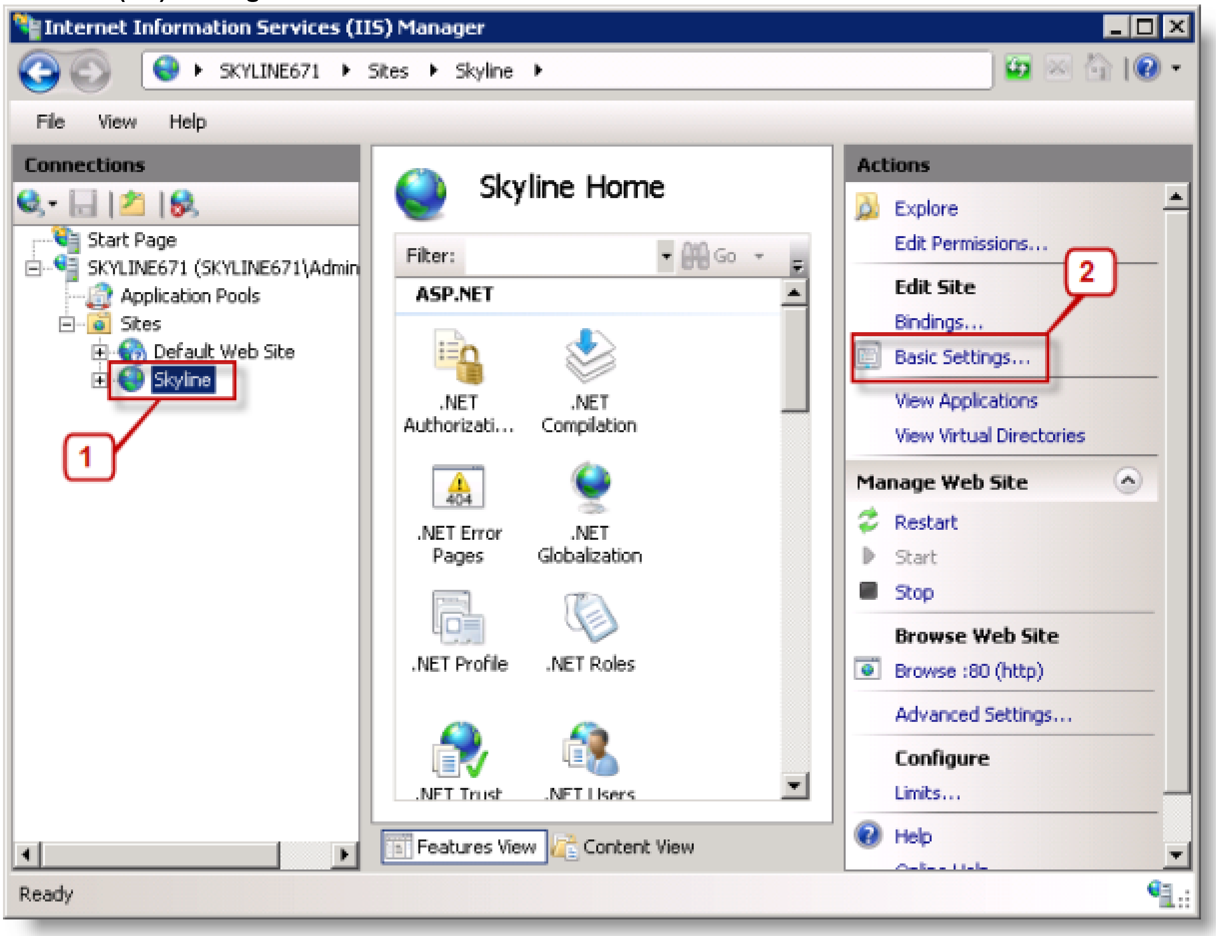


Locating your Skyline Databases

Before you can backup or restore your Skyline databases you need to verify the location of the database.

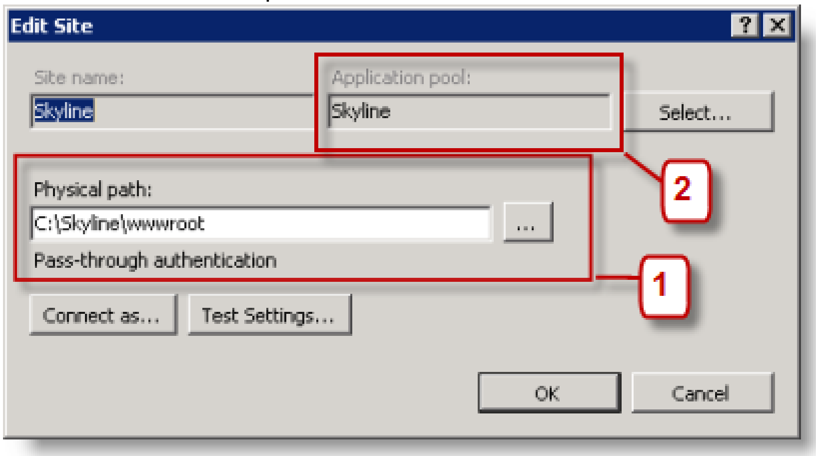
To confirm the location of your database:

1. You need to confirm the physical location of your Skyline website. To do this open **Internet Information Services (IIS) Manager**.



1. Select the **Skyline** website.
2. Click **Basic Settings**.

2. The Edit Site window opens.

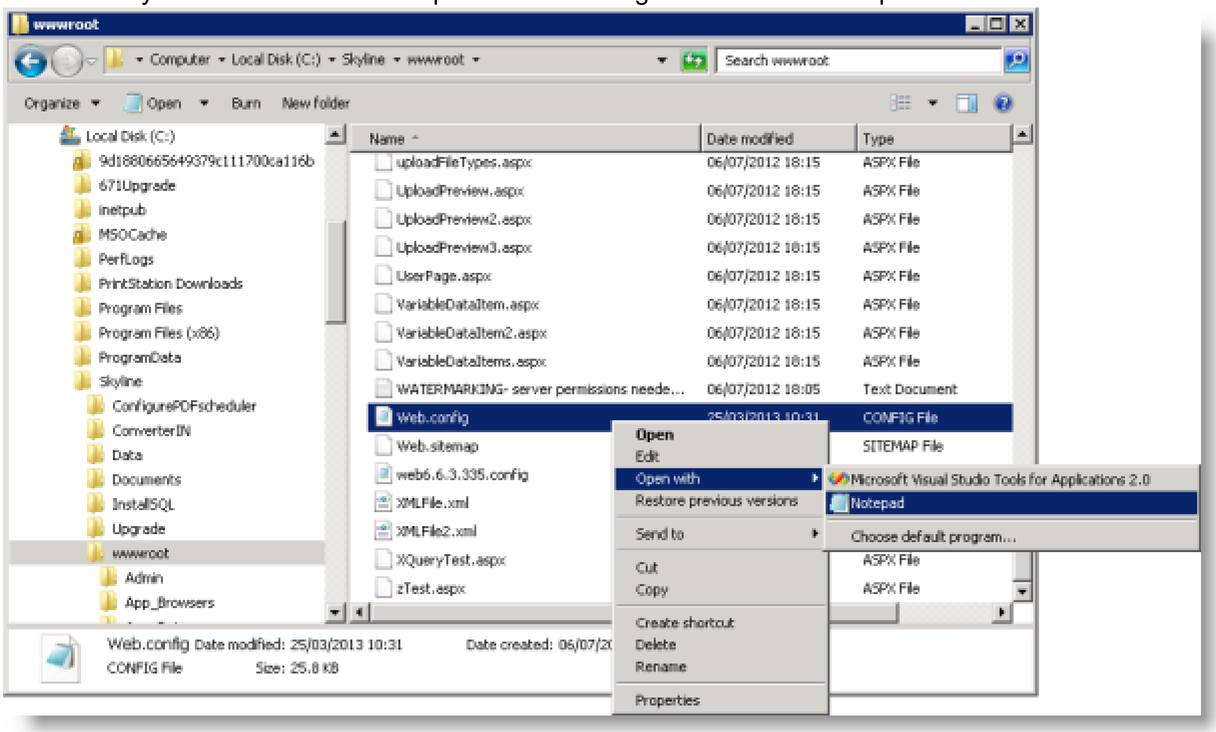


Make a note of:

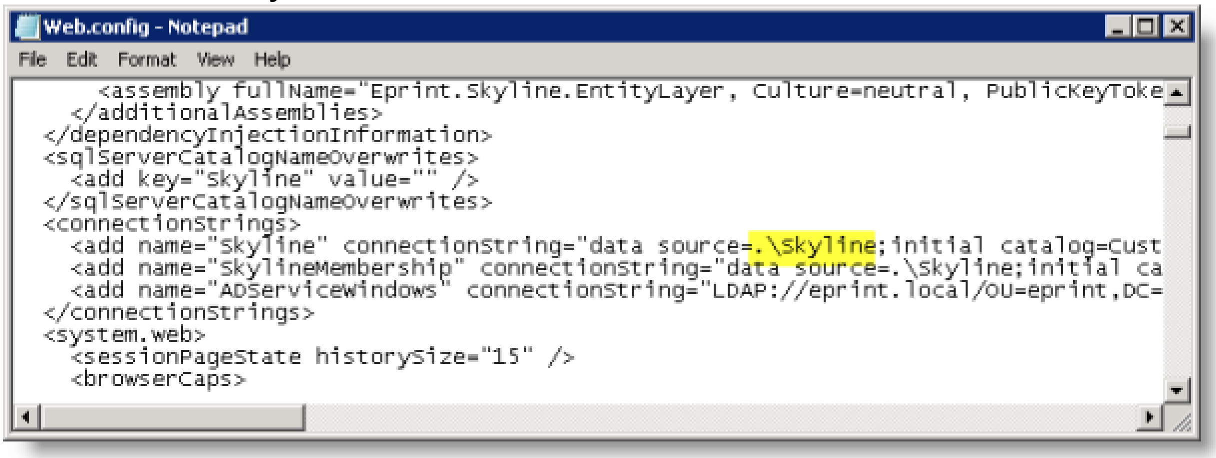
1. the physical path of the website. By default it is C:\Skyline\wwwroot.

2. the name of the application pool that the website uses. This is needed during an upgrade procedure.

3. View the Skyline website folder and open the web configuration file with notepad.



4. In the <connectionStrings> section identify the server name and database name. In the example below the server name is **.\Skyline**.



Web.config - Notepad

File Edit Format View Help

```
    <assembly fullName="Eprint.Skyline.EntityLayer, Culture=neutral, PublicKeyToke
  </additionalAssemblies>
</dependencyInjectionInformation>
<sqlServerCatalogNameOverwrites>
  <add key="Skyline" value="" />
</sqlServerCatalogNameOverwrites>
<connectionStrings>
  <add name="Skyline" connectionString="data source=.\Skyline;initial catalog=Cust
  <add name="SkylineMembership" connectionString="data source=.\Skyline;initial ca
  <add name="ADServiceWindows" connectionString="LDAP://eprint.local/OU=eprint,DC=
</connectionStrings>
<system.web>
  <sessionPageState historySize="15" />
  <browserCaps>
```

Make a note of the following:

- **Data Source** (This is the name of the SQL Server where the database is stored).
- **Initial Catalogue** (The name of the Database)
- **Username**
- **Password**

Running a Manual Backup

On occasions a customer may be asked for a copy of the Skyline databases to investigate a problem. This backup procedure will create backup files that can be emailed to the support team for further investigation. To backup the SQL database you will need to have installed the free Microsoft SQL Server Management Studio Express.

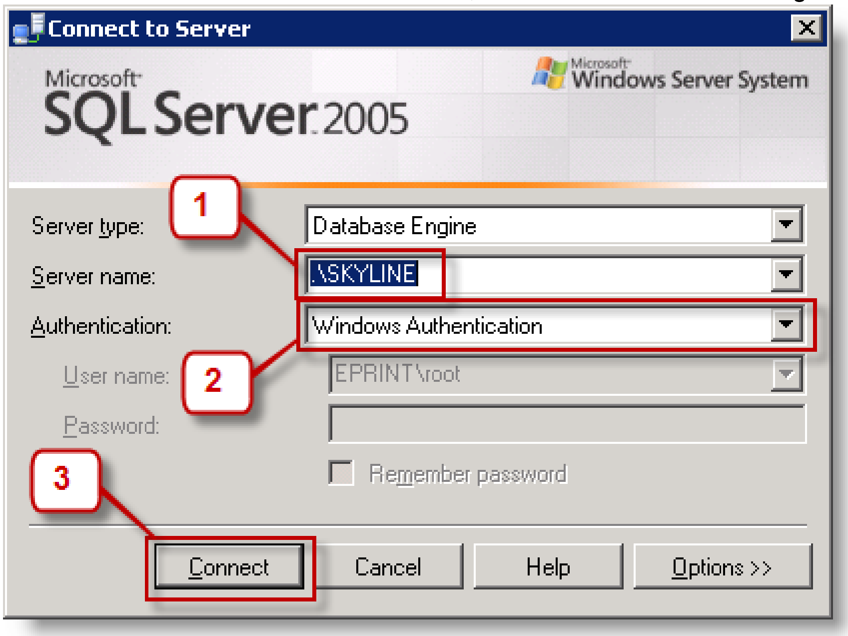
By default, the Skyline SQL server is installed on the same PC as the website, but the SQL server may have been moved to another PC after the installation. To find out where the current SQL server is located, you will need to log in to the PC where the website is installed and open a file called web.config in the root of the website. This is in C:\Skyline\wwwroot by default, but may have been moved. If the database has been moved the backup procedure needs to be carried out on the PC where the database is located.

Note: It is strongly recommended that Skyline databases is backed up on a regular basis.

To run a manual backup:

1. Take the website off line 235 .

2. On the PC where the database is located, start the SQL Server Management Studio.

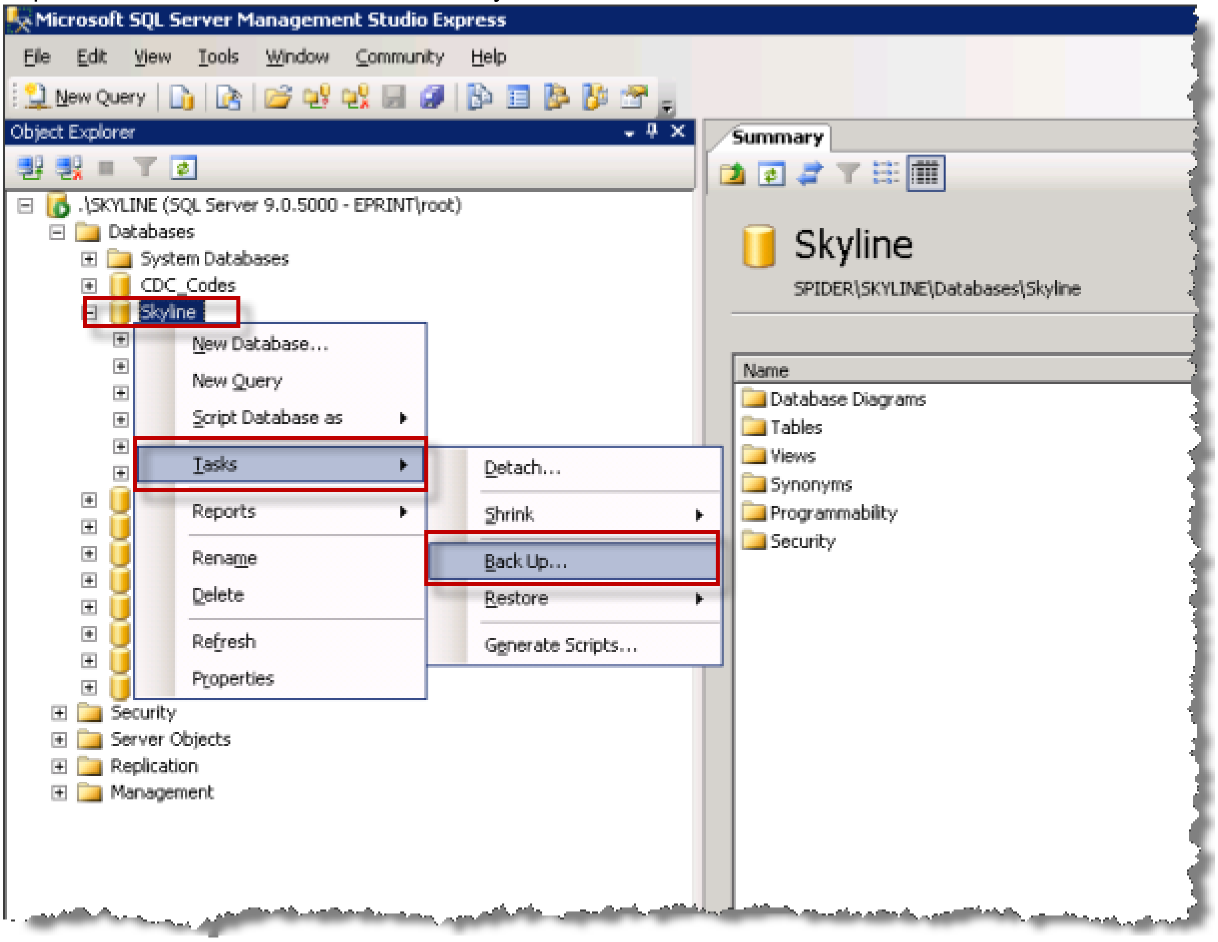


1. The server name should be set to the name and instance of the SQL Server used by Skyline

2. Make sure that the authentication is set to **Windows Authentication**.
   This documentation only refers to a SQL Server that allows you to authenticate with Windows Authentication. If this is not possible, then you will need to seek assistance from a local Database Administrator.

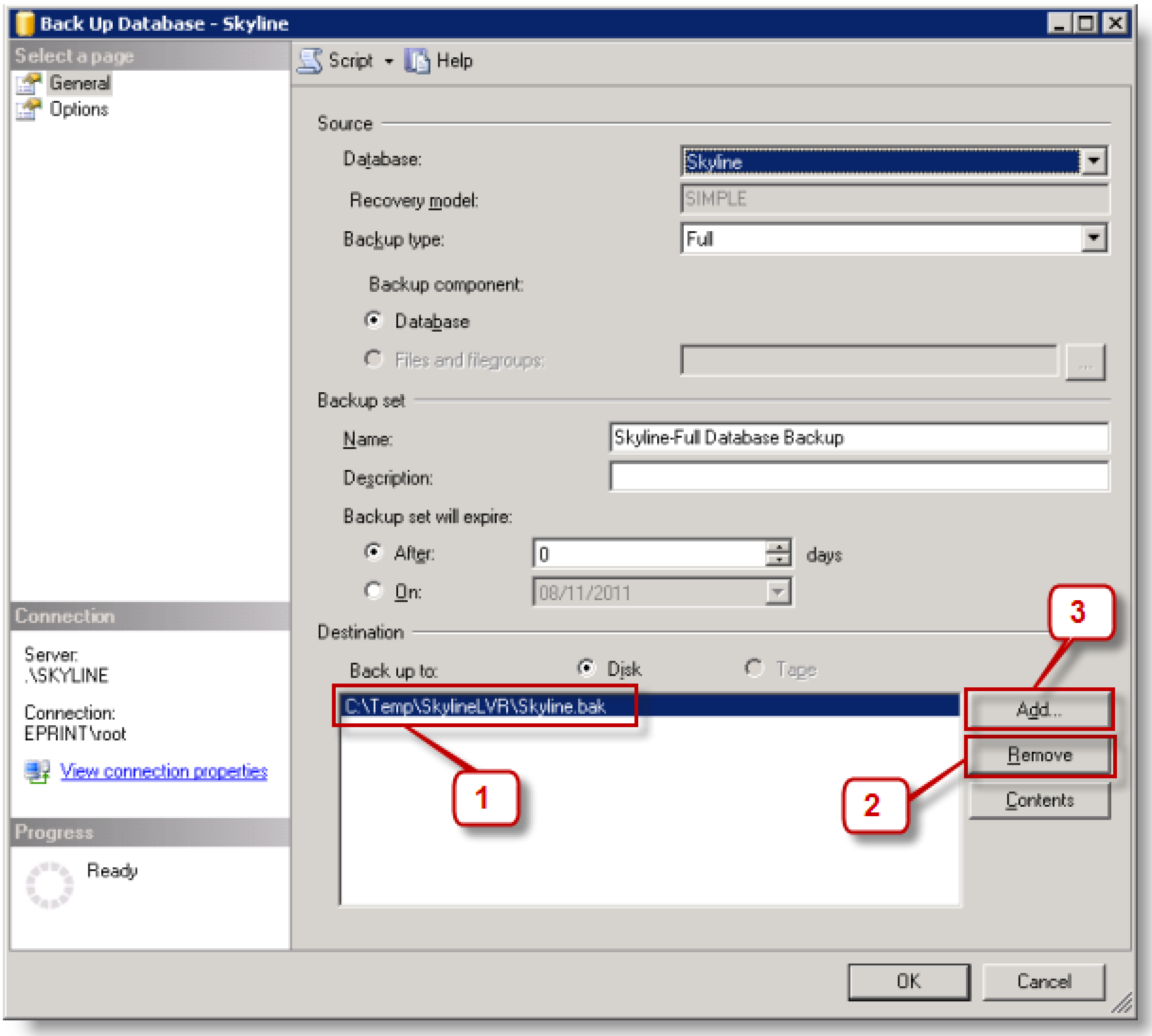
3. Click **Connect**.

3. Expand the Databases node to see the Skyline database.



1. Right click the Skyline database and select **Tasks** > **Backup**.

4. The Back Up Database - Skyline window opens. Any existing backup locations and names need to be removed.

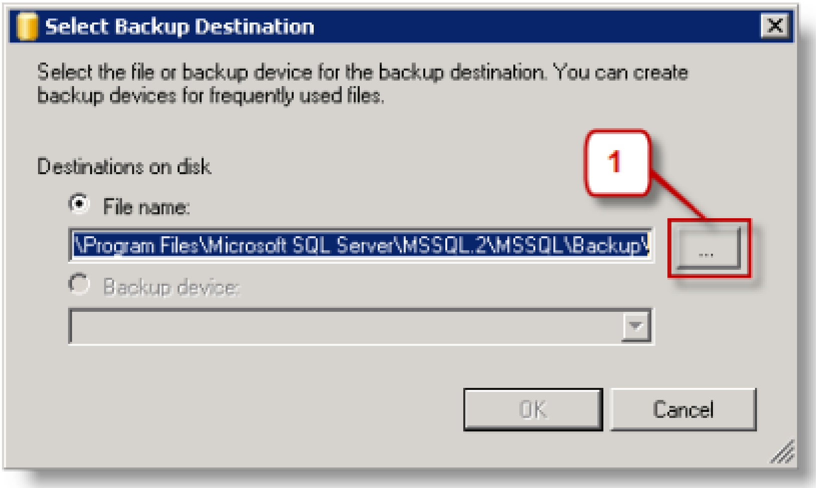


1. Select the backup location to be removed.

2. Click **Remove**.

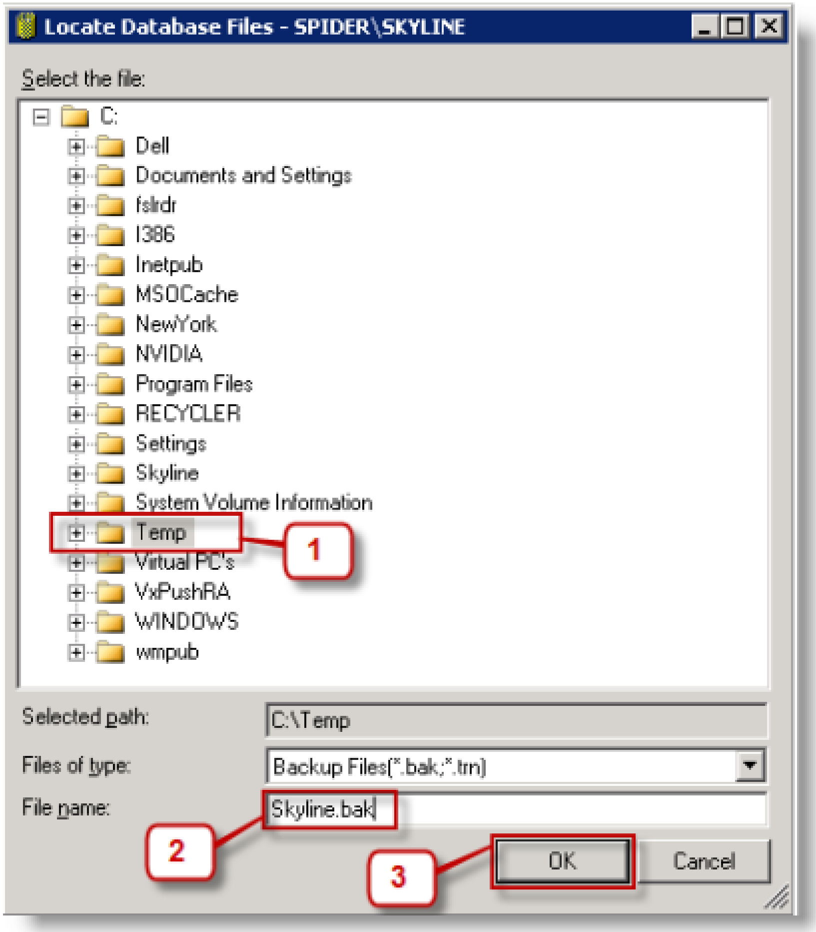
3. You need to add a location for your new backup when the backup location is blank. Click **Add**.

5. The Select Backup Destination window opens.



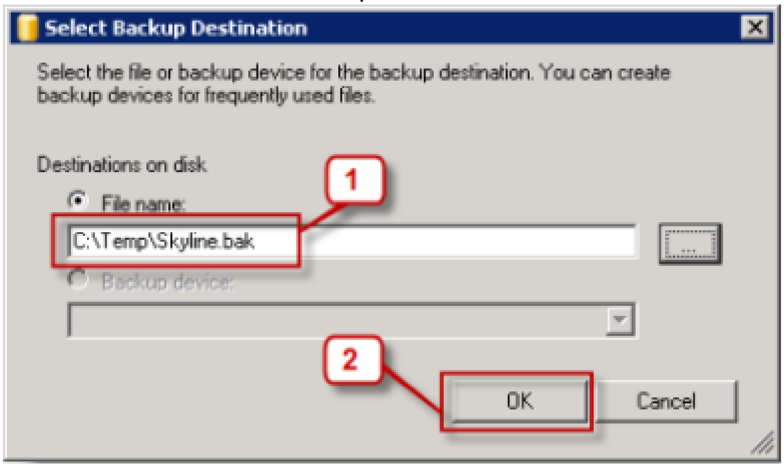
1. Click **Browse** to select the location of the backup files.

6. The Locate Database Files window opens.



1. Select a backup location. In the example the location selected is the Temp directory.
2. Enter the backup file name Skyline.bak to identify the name of the database being backed up. Make sure that you type the file extension .bak.
3. Click **OK** to continue.

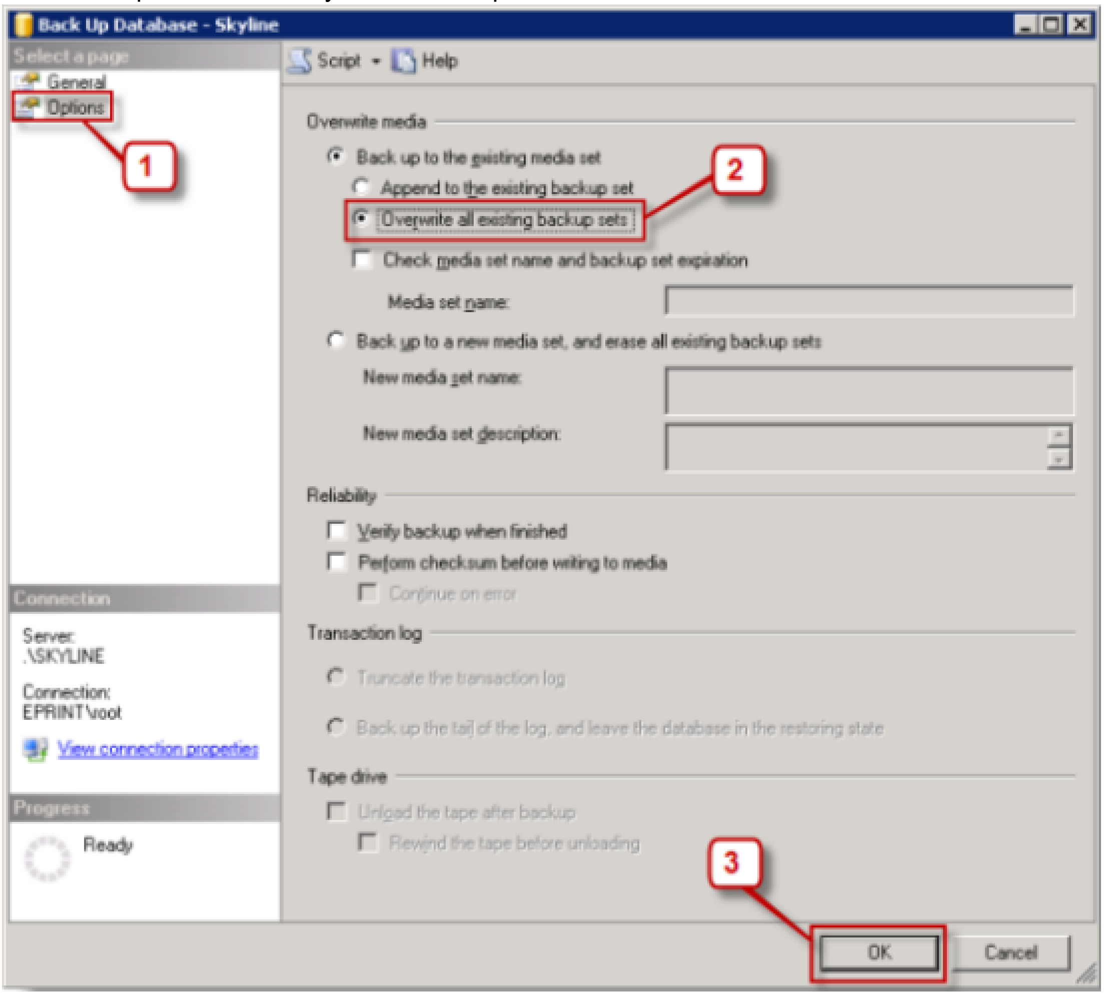
7. You return to the Select Backup Destination window.



1. The backup name and location that you have just entered are showing.

2. Click **OK**.

8. The Back Up Database - Skyline window opens.

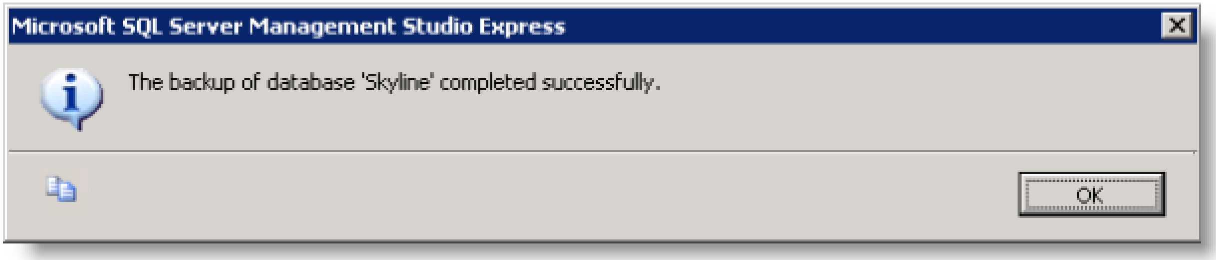


1. Select **Options**.

2. In the Overwrite media section select **Overwrite all existing backup sets**.

3. Click **OK** to start the backup.

9. When you receive a message **The backup of database 'Skyline' completed successfully**. Click **OK** to continue.



10. Repeat the backup process for the SkylineConverter and SkylineMembership databases. Once all the Skyline databases have been backed up, you should have 3 files in the backup location.

    - Skyline.bak
    - SkylineConverter.bak
    - SkylineMembership.bak

Accessing SQL Service through a Firewall

For Skyline to be able to reach the databases on an external SQL server the relevant ports on this server must be open. On the external SQL server, the default port used is 1433. If the Windows Firewall is running in the SQL server or an external firewall is used, the relevant ports must be opened.

More information can be found on the Microsoft website.

- TCP Ports Needed for Communication to SQL Server Through a Firewall
- How do I open the firewall port for SQL Server on Windows Server 2008?
- How to: Configure a Windows Firewall for Database Engine Access

Amending Skyline Email Settings

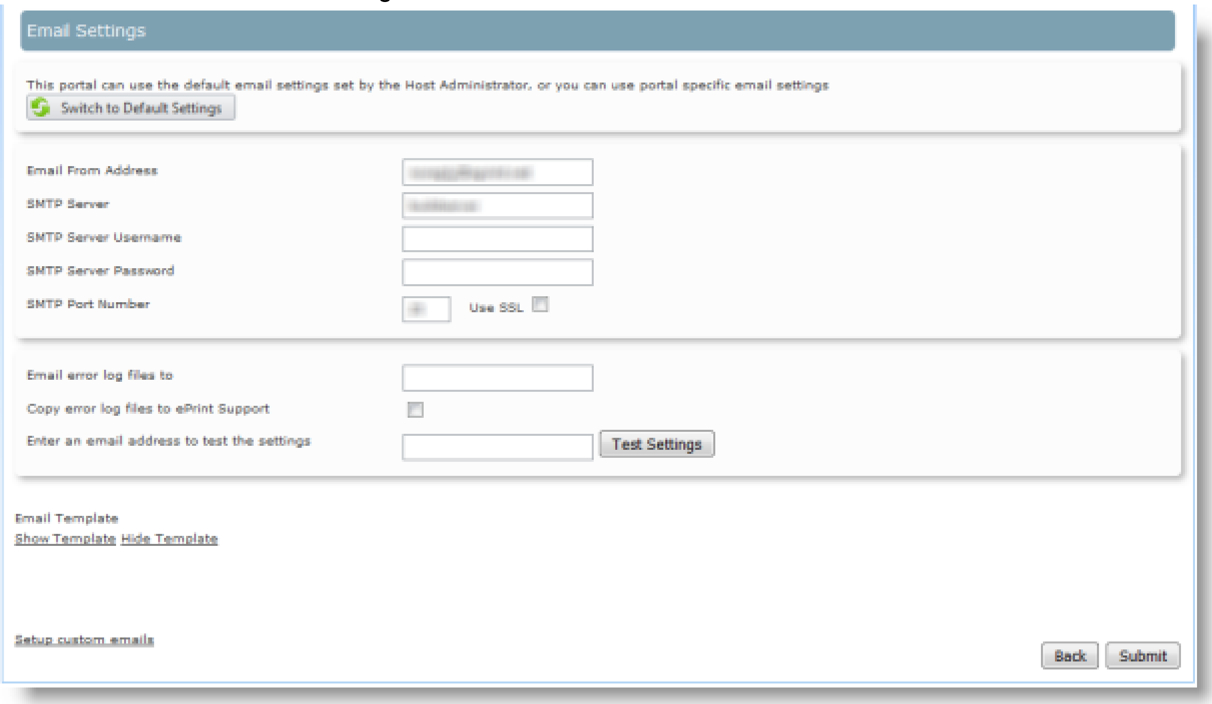
You are able to enter the email addresses that are used when the Skyline system generated emails are sent. For example, an email can be sent to tell a user that a new quote has been received.

To change the email settings:

1. Log in with Administrator rights and go to **Admin**.

2. In the Configuration section click **Email Settings**.

3. Details of the current email settings are listed.



Amend the fields as required and then test the settings.

Amending System Generated Emails

You are able to change the content of Skyline system generated emails. There is a limit of 200 characters on the subject line and 2000 characters in the email content.

To change the email settings:

1. Log in with Administrator rights and go to **Admin**.

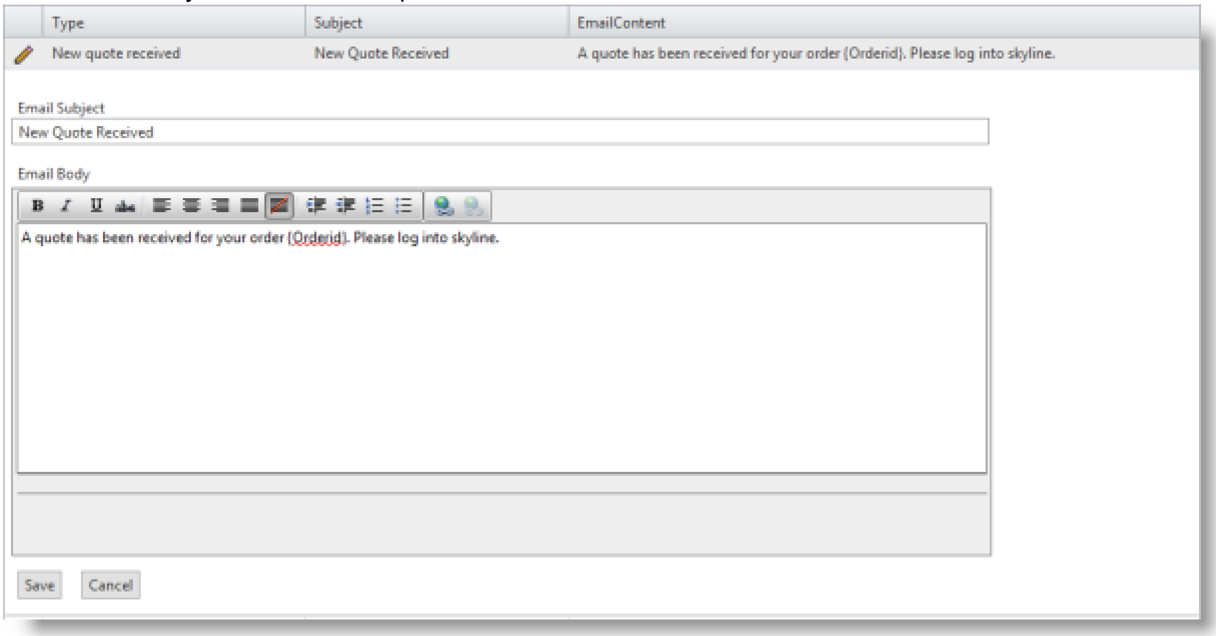
2. In the Configuration section click **System Emails**.

3. A list of the system generated emails is shown below containing the default wording.

Type	Subject	Email Content
New quote received	New Quote Received	A quote has been received for your order. Please lo into Skyline
Password Change	Password Request[45]	A new password has been requested. If you did not request a new password, please ignore this email. Your password will not be changed yet been changed. To reset your password please click the following link: {ChangePasswordLink}
New quote requests	New Quotes Requests	You have a new quote request. Please go to {NewQuotesLink}
Email when price is zero	Order placed with no price set	Order number {0} for product {1} has been placed by the user {2}. The price for this product has been calculated as zero, probably because the cost of one of the components has not been set
Email to user when set Inactive after registration	Your new account needs to be activated[30]	Your new account has been created but it needs to be activated before you can log in. You will receive an email when your account has been activated.
Email to user when set Active	Your new account has been activated[30]	Your new account has now been activated. You can now log in with the username '{username}' and password that you used when creating your new account.
Email to Administrator when a new user set Inactive	A new user has registered[30]	A new user '{username}' has registered but their account has not been activated. Log in to the Admin - Users page to activate this user.
Email to new users when created by an Administrator	Your {portal_name} user account[10]	A user account has been created for you on the Skyline portal {url}. Your login details are: Username: {username} Password: {password} You can change your password to something more memorable on the Preferences page http://

Type	Subject	Email Content
		{url}/UserAdmin/Default.aspx
Activation email sent to new Skyline Cloud Printer users	Activate your account	Click Activate to activate your account on the website Activate

4. Click by the type of system email that you want to amend. The example below shows the email that will automatically be sent when a quote is sent to a user.



5. Amend the email as required then click **Save** to accept your changes.

Moving the Skyline Database

The standard Skyline installation program installs the databases on the C drive of the server. This section shows how to move the two databases that Skyline uses to different drives of severs.

Moving the Skyline database to another SQL server can simplify the database backups and improve the performance of Skyline. The Skyline database can be moved to a Microsoft 2008rd, 2012 or 2014 SQL server.

To move the Skyline database from the Skyline server to your own server:

1. Take Skyline offline 235 .

2. Backup the databases - Skyline & Skyline Membership.

3. Restore the database backups on your own SQL server. Skyline does not need it's own SQL Instance.

4. Create a new user for accessing the Skyline & Skyline Membership databases and make this user the owner of the databases.

5. Tell Skyline where the database have been moved to by editing the file web.config in the website root directory. In the section starting with <Connection Strings> replace the setting for data source, initial catalogue, username and password for the Skyline and SkylineMembership databases.

Fonts and the PDF Converter

When documents are uploaded to Skyline, the PDF converter will first open the file in the application that was used to create it then use the application to print the document to PDF. If the document contains a font that is not loaded on the Skyline server then the application will attempt to replace it with a similar font, sometimes with unexpected results. Although nearly 400 fonts are available to use by default, on occasions a customer may require that a font be added to the Skyline server.

Note: Only True Type fonts can be added.

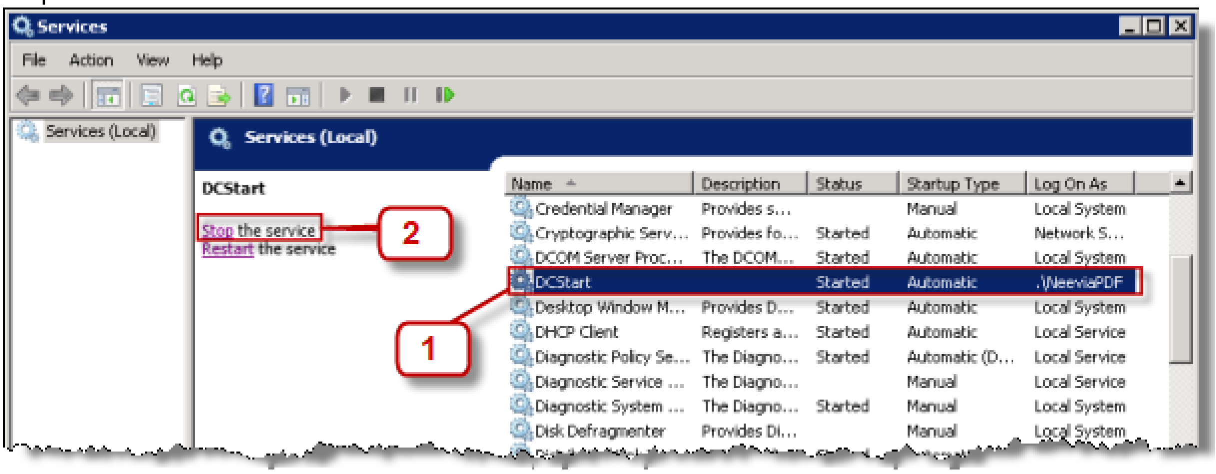
To add fonts for the PDF document converter to the Skyline Server:

1. Install the new font on the Skyline server in the usual way.

2. Create a Word document that uses the new font. The document will be used to test the document converter so it needs to be on the Skyline server.

3. Open Windows Services by **Start** > **Administrative Tools** > **Services**.

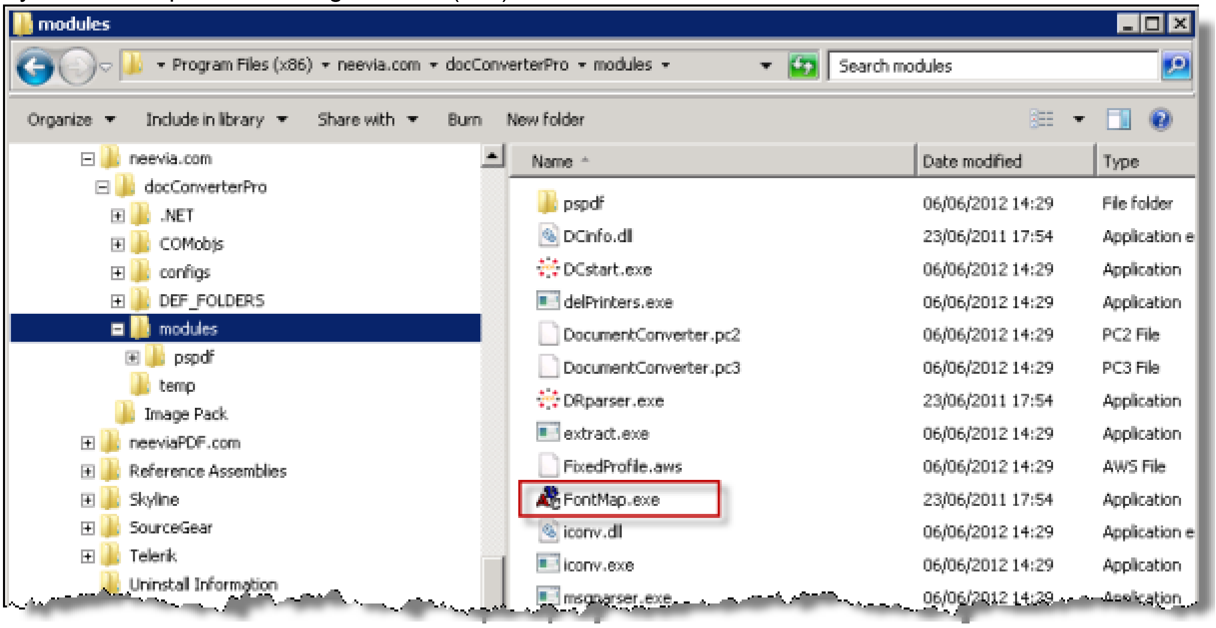
4. Stop the service named DCStart.



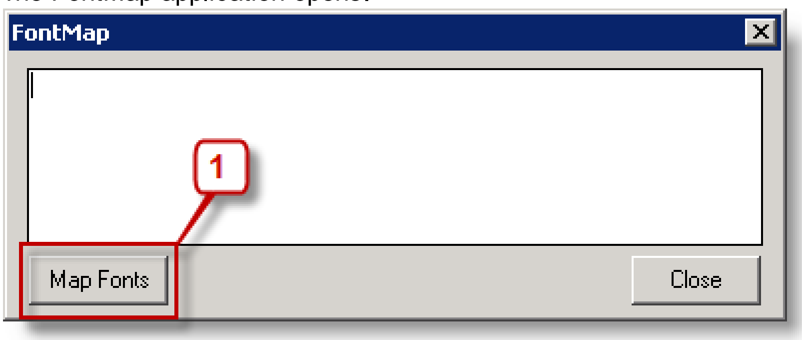
1. Select the service DCStart.

2. Click **Stop the service**.

5. Open the directory where the PDF Converter is installed and locate the file FontMap.exe. Double click **Fontsmap.exe** to run the application.
By default the path is C:\Program Files(x86)\Neevia.com\docConverterPro\modules.

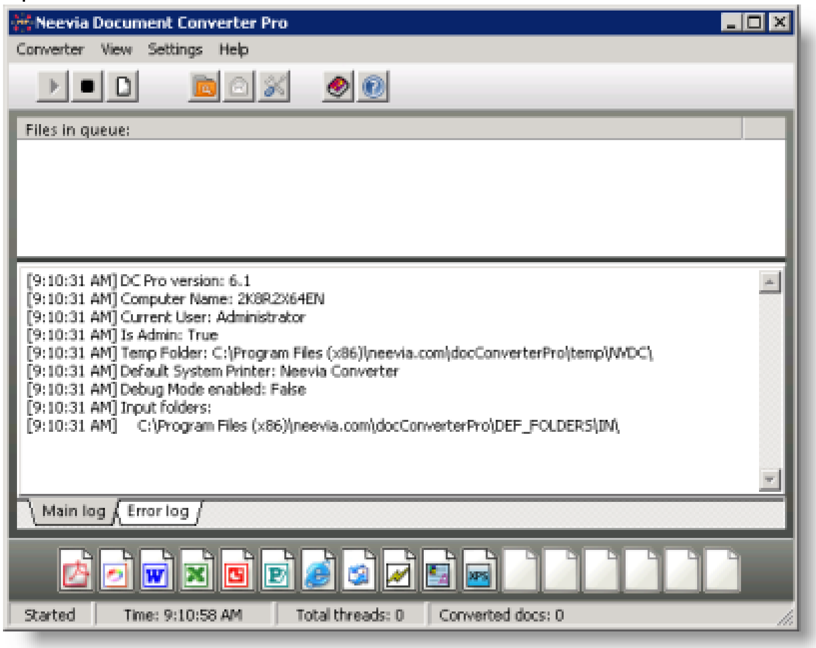


6. The FontMap application opens.



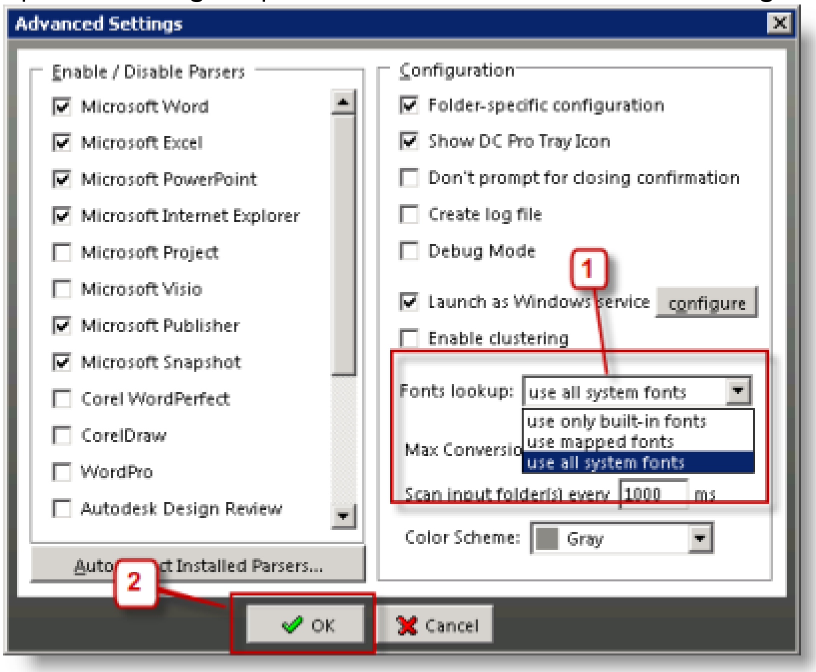
1. Click the button **Map Fonts**. When all the fonts have been mapped the application automatically closes.

7. Open the Neevia Document Converter.



1. **Start > All Programs > Neevia Document Converter > Neevia Document Converter Pro**. If nothing happens make sure that the program is not already open.

8. Open the **Settings** drop down menu and select **Advanced Settings**.



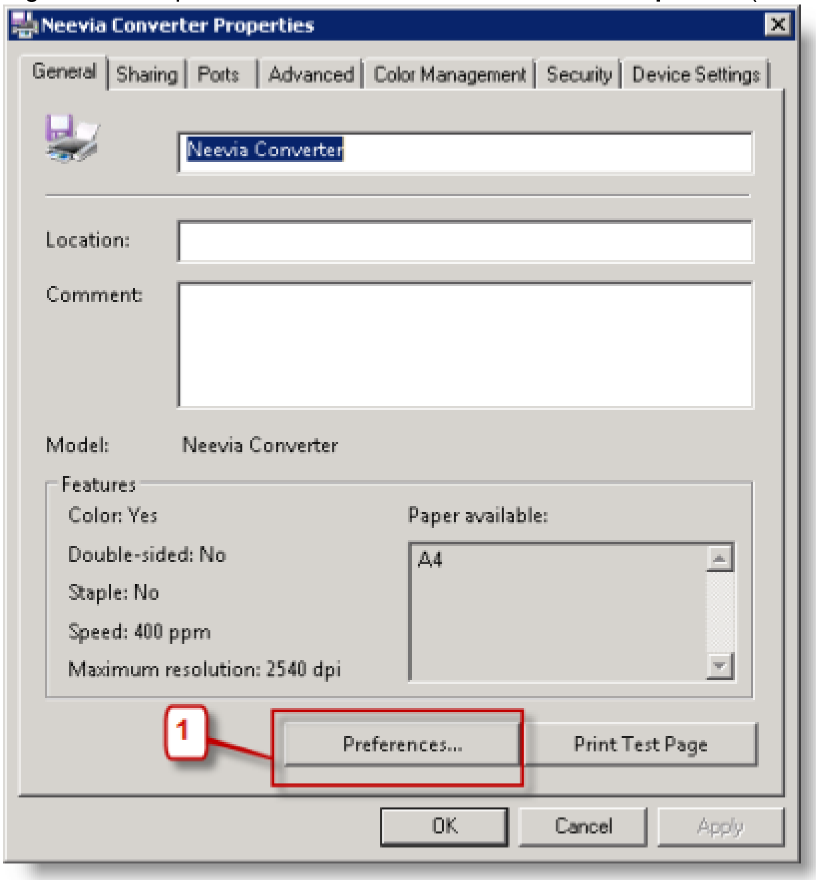
1. Select the font look up **use all system fonts**.

2. Click **OK** to save the setting then close the window.

9. Close the Neevia Document Converter program.

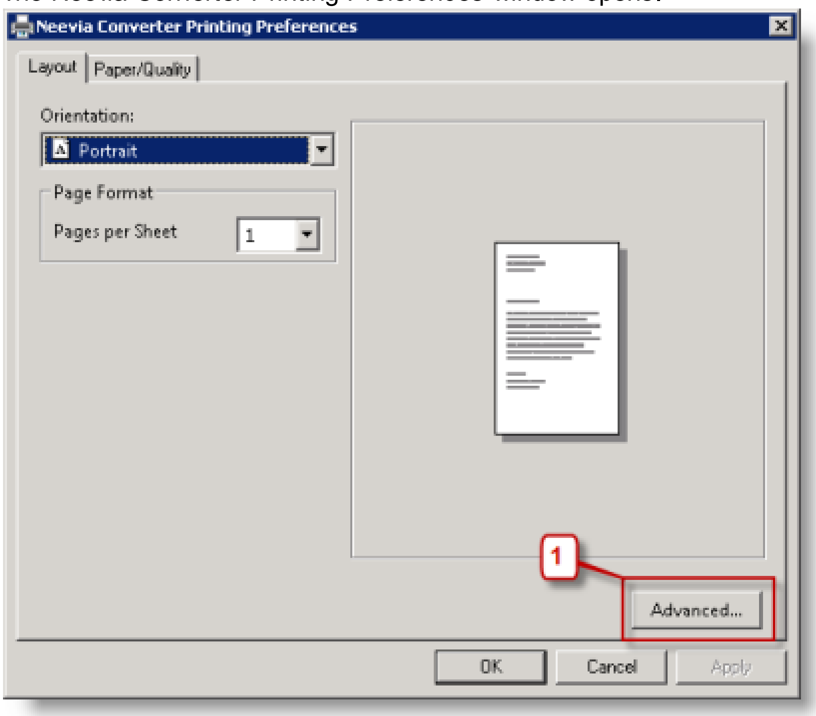
10. Open the Printers folder.

11. Right click the printer **Neevia Converter** and select **Properties** (Printer Properties in Windows 2008).



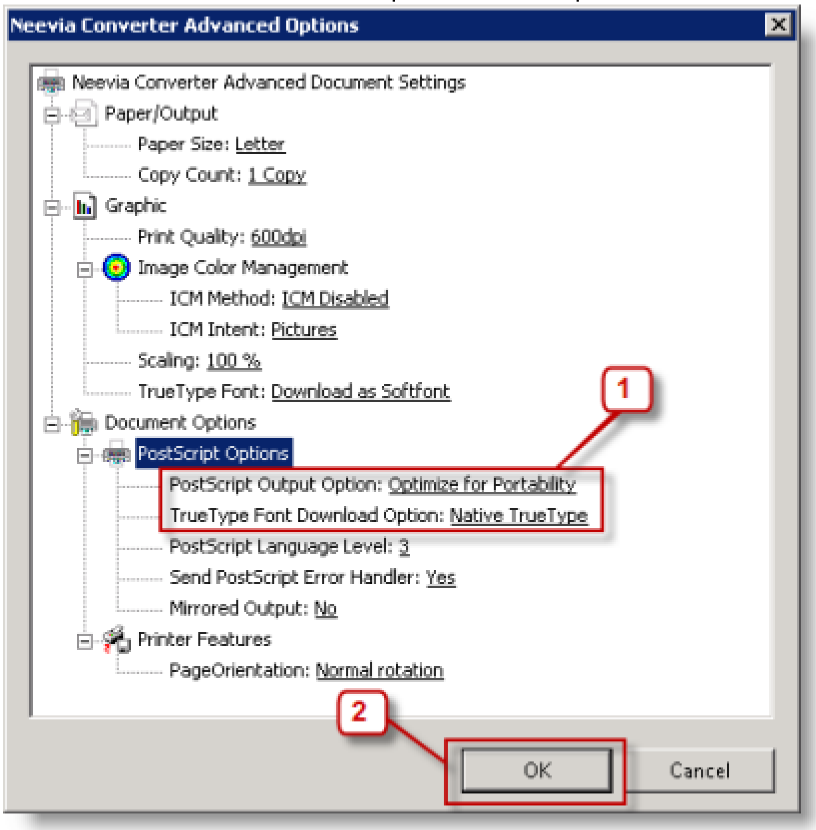
1. Select **Printing Preferences**.

12. The Neevia Converter Printing Preferences window opens.



1. Click **Advanced**.

13. The Neevia Converter Advanced Options window opens.



1. Select the PostScript Output Option **Optimize for Portability** and the TrueType Font Download Option **Native TrueType**.

2. Click **OK**.

14. Open Windows Services by **Start** > **Administrative Tools** > **Services** and rrestart the service named DCStart.

15. Open the Neevia Document Converter. If nothing happens make sure that the program is not already open.

16. Drag and drop the Word document created with the new font into the Document Converter Pro window. This will create a PDF of the document in the same folder as the original. Check that when the document is converted to PDF that the new font is showing correctly.

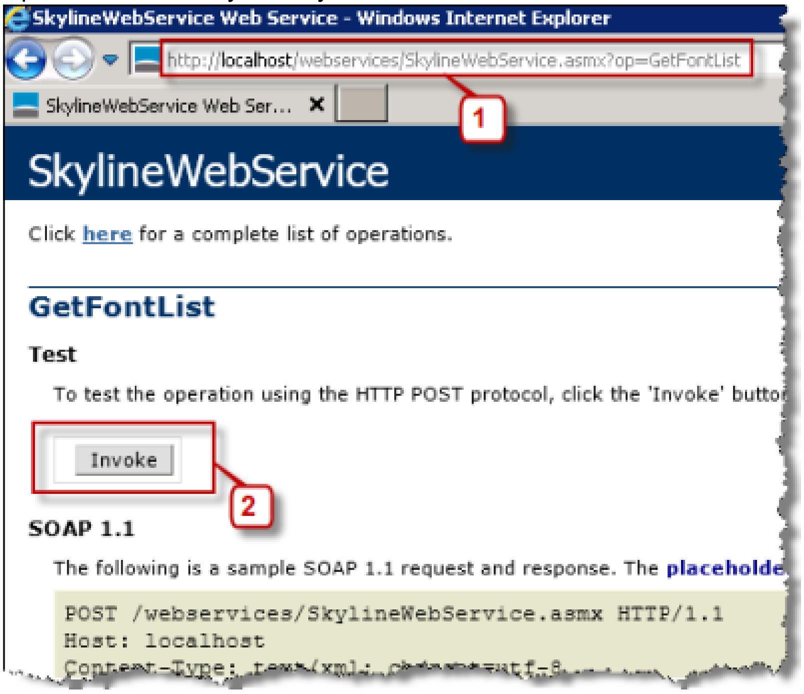
If the fonts are not showing correctly, try re-booting the server and then running step 16 again.

Default List of Fonts

There is a list of default fonts that are supported by Skyline.

To see the list of fonts installed:

1. Open a browser on your Skyline server.



1. Entering the URL http://localhost/webservices/SkylineWebService.asmx?op=GetFonstList
2. Click **Invoke**. A list of all the fonts supported by Skyline is shown.

Agency FB	Aharoni	Algerian	Andalus
Angsana New	AngsanaUPC	Arabic Transparent	Arial
Arial Black	Arial Narrow	Arial Rounded MT Bold	Arial Unicode MS
Baskerville Old Face	Batang	BatangChe	Bauhaus 93
Bell MT	Berlin Sans FB	Berlin Sans FB Demi	Bernard MT Condensed
Blackadder ITC	Bodoni MT	Bodoni MT Black	Bodoni MT Condensed
Bodoni MT Poster Compressed	Book Antiqua	Bookman Old Style	Bookshelf Symbol 7
Bradley Hand ITC	Britannic Bold	Broadway	Browallia New
BrowalliaUPC	Brush Script MT	Calibri	Californian FB
Calisto MT	Cambria	Cambria Math	Candara
Castellar	Centaur	Century	Century Gothic
Century Schoolbook	Chiller	Colonna MT	Comic Sans MS
Consolas	Constantia	Cooper Black	Copperplate Gothic Bold
Copperplate Gothic Light	Corbel	Cordia New	CordiaUPC
Courier New	Curlz MT	David	David Transparent
DilleniaUPC	Dotum	DotumChe	Edwardian Script ITC
Elephant	Engravers MT	Eras Bold ITC	Eras Demi ITC
Eras Light ITC	Eras Medium ITC	Estrangelo Edessa	EucrosiaUPC
Felix Titling	Fixed Miriam Transparent	Footlight MT Light	Forte
Franklin Gothic Book	Franklin Gothic Demi	Franklin Gothic Demi Cond	Franklin Gothic Heavy
Franklin Gothic Medium	Franklin Gothic Medium Cond	FrankRuehl	FreesiaUPC
Freestyle Script	French Script MT	Garamond	Gautami
Georgia	Gigi	Gill Sans MT	Gill Sans MT Condensed
Gill Sans MT Ext Condensed Bold	Gill Sans Ultra Bold	Gill Sans Ultra Bold Condensed	Gloucester MT Extra Condensed
Goudy Old Style	Goudy Stout	Gulim	GulimChe
Gungsuh	GungsuhChe	Haettenschweiler	Harlow Solid Italic
Harrington	High Tower Text	Impact	Imprint MT Shadow
Informal Roman	IrisUPC	JasmineUPC	Jokerman
Juice ITC	KodchiangUPC	Kristen ITC	Koestler Script

Latha	Levenim MT	LilyUPC	Linotype Univers 430 Regular
Lucida Bright	Lucida Calligraphy	Lucida Console	Lucida Fax
Lucida Handwriting	Lucida Sans	Lucida Sans Typewriter	Lucida Sans Unicode
Magneto	Maiandra GD	Mangal	Marker Felt Thin Plain
Marker Felt Wide Plain	Marlett	Matura MT Script Capitals	Microsoft Sans Serif
MingLiU	Miriam	Miriam Fixed	Miriam Transparent
Mistral	Modern No. 20	Monotype Corsiva	MS Gothic
MS Mincho	MS Outlook	MS PGothic	MS PMincho
MS Reference Sans Serif	MS Reference Speciality	MS UI Gothic	MT Extra
MV Boli	Narkisim	Niagara Engraved	Niagara Solid
NSimSun	OCR A Extended	Old English Text MT	Onyx
Palace Script MT	Palatino Linotype	Papyrus	Parchment
Perpetua	Perpetua Titling MT	Playbill	PMingLiU
Poor Richard	Rockwell Condensed	Rockwell Extra Bold	Rod
Rod Transparent	Script MT Bold	Segoe UI	Showcard Gothic
Shruti	SimHei	Simplified Arabic	Simplified Arabic Fixed
SimSun	Snap ITC	Stencil	Sylfaen
Symbol	Tahoma	Tempus Sans ITC	Times New Roman
Traditional Arabic	Trebuchet MS	Tunga	Tw Cen MT
Tw Cen MT Condensed	Tw Cen MT Condensed Extra Bold	Univers LT 45 Light	Verdana
Viner Hand ITC	Vivaldi	Vladimir Script	Webdings
Wide Latin	Wingdings	Wingdings 2	Wingdings 3

Using HTTPS Websites

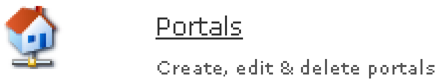
A Skyline portal can be set up to use HTTPS. As all Skyline portals use the same IIS website, the procedure for installing an SSL Certificate is probably different to the conventional method.

Notes:

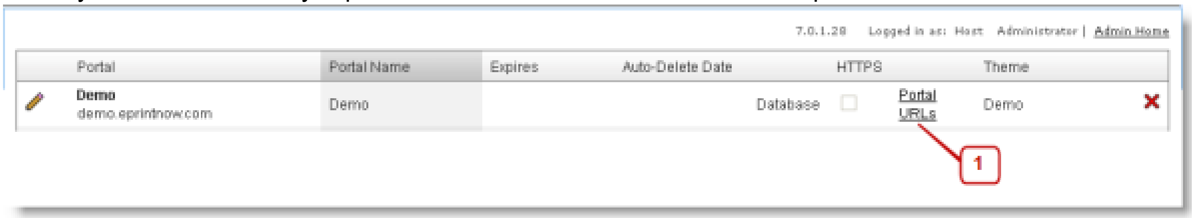
- IIS should not be configured to redirect HTTP traffic to HTTPS. This is done automatically by the Skyline portal when it is configured to use an SSL Certificate.
- You can not use a self signed SSL certificate as it is signed by the same entity whose identity it certifies.

To configure Skyline to use HTTPS:

1. Buy and install a HTTPS Certificate for the website URL that Skyline is being run on.
   - If Skyline is installed on your own server, you will need to buy & install on the Skyline server an SSL Certificate for the URL that your portal is running on.
   - If you are using a hosted portal please contact ePrint. You will need to pay an additional monthly premium for an HTTPS portal on a hosted setup.
2. Log in to Skyline with a username that has Host Admin privileges and go to **Admin**.
3. In the Portals section click **Portals**.



4. When you use HTTPS only 1 portal URL can be associated with each portal.



   1. Click the link **Portal URLs** associated with the portal that you want to apply HTTPS to.

5. A list of all the URLs associated with the portal are listed.

   1. Add the skyline website URL that has the certificate.
   2. Remove any other website URLs listed using the red cross.
   3. Click **Back** when finished.

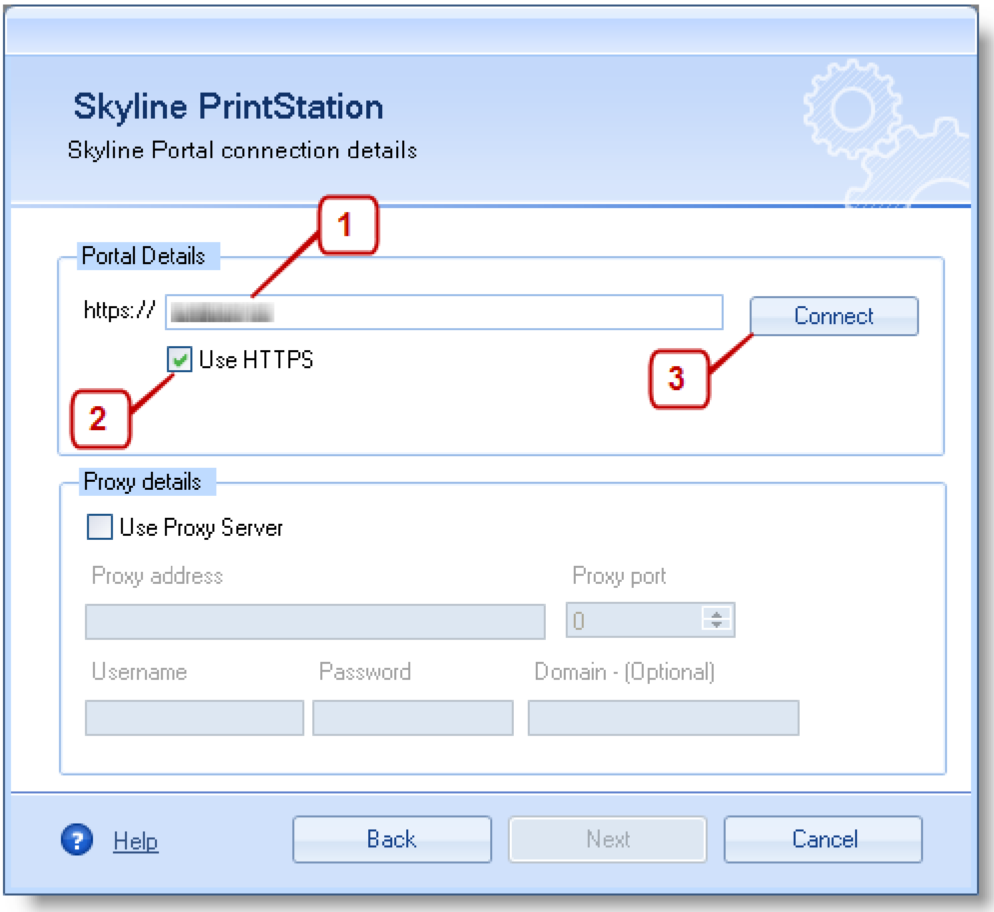
6. Click the pencil associated with the portal to edit the details.

   1. Select the option **HTTPS**.

   2. Click to save the change.

7. Restart the website by entering the command **IISRESET** at the command prompt on the Skyline server.

8. Re-install PrintStation.
When you have re-installed PrintStation the program will automatically start. As it is the first time that it has started since the installation you are taken through a series of steps to configure the software. When you reach the step requesting the portal connection details make sure that the option to use HTTPS is selected.



   1. Enter the HTTP address for Skyline.

   2. Select the option **Use HTTPS**.

   3. Click **Connect** to test that the portal details are correct. If the portal details have been verified the Next button becomes available.

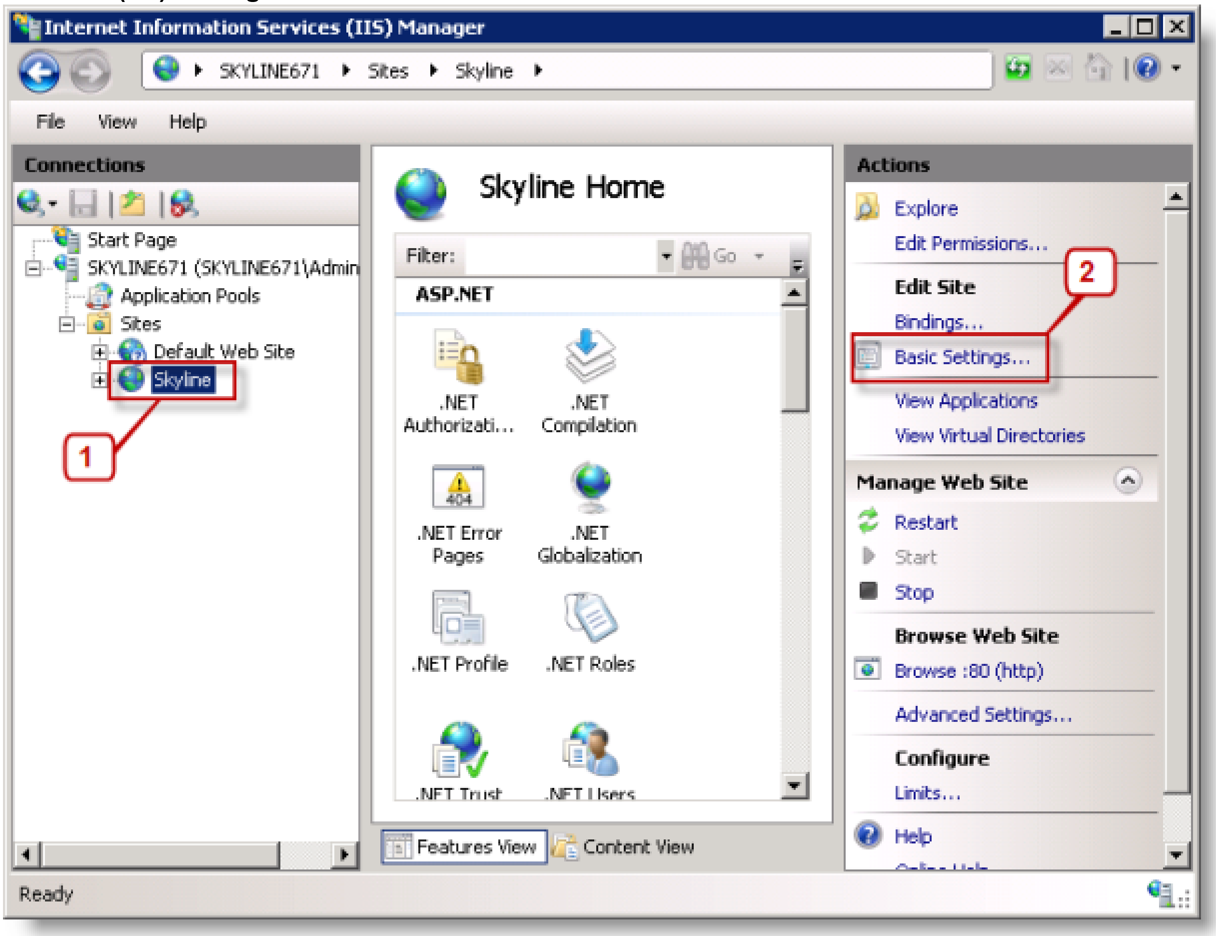
HTTPS should now be completed.

Restoring a Database

You can associate a new database with an existing version of Skyline. This is a useful action when you need to test a problem with a customer's data. This will add a new database and not overwrite an existing database. Make sure that the Skyline version of the original database and the new database to be associated are the same.

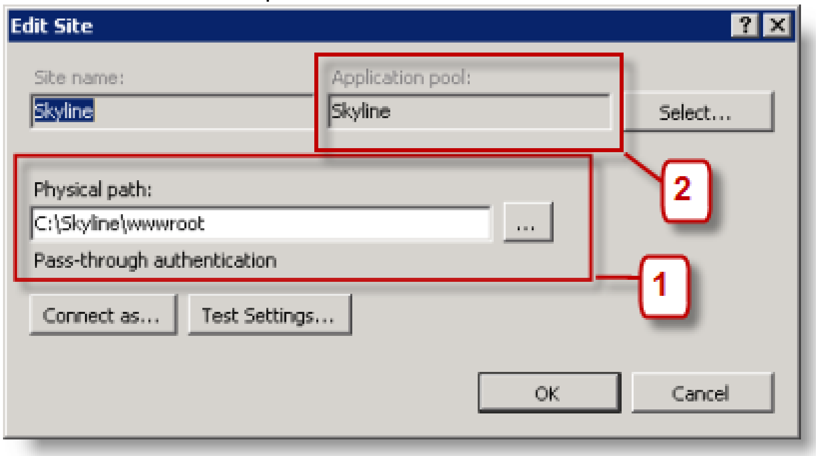
To restore a database:

1. You need to confirm the physical location of your Skyline website. To do this open **Internet Information Services (IIS) Manager**.



1. Select the **Skyline** website.
2. Click **Basic Settings**.

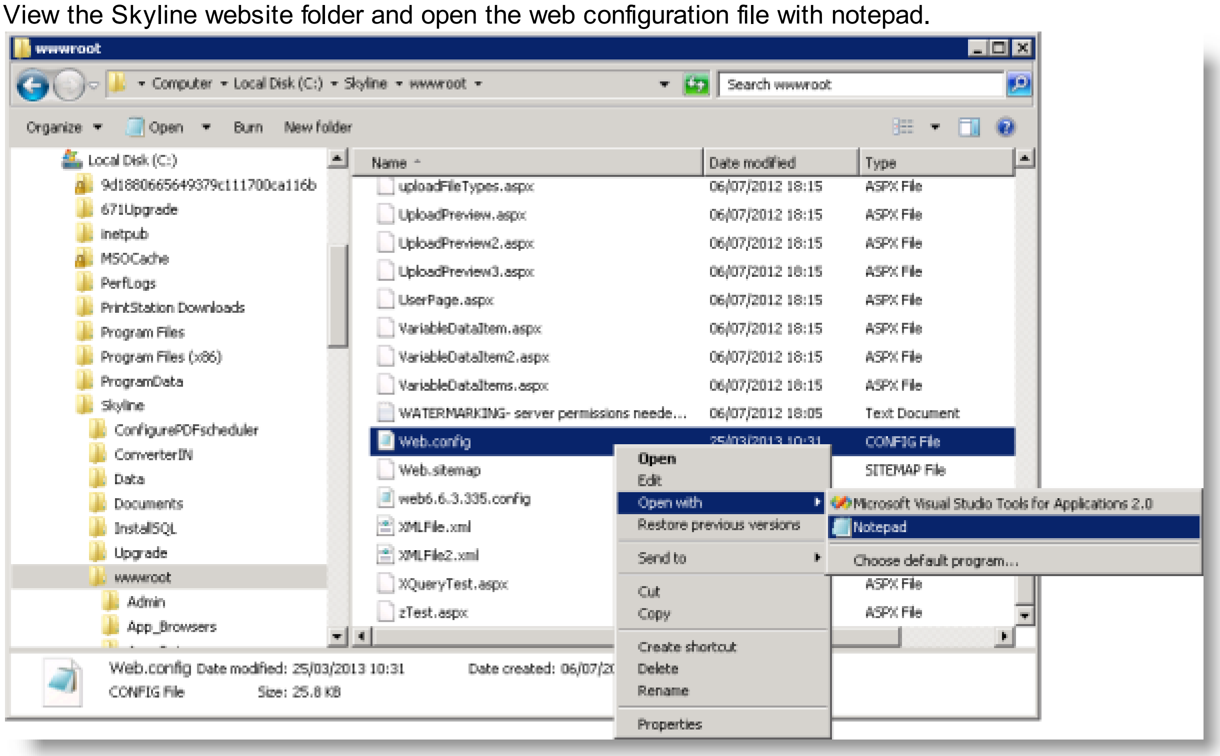
2. The Edit Site window opens.



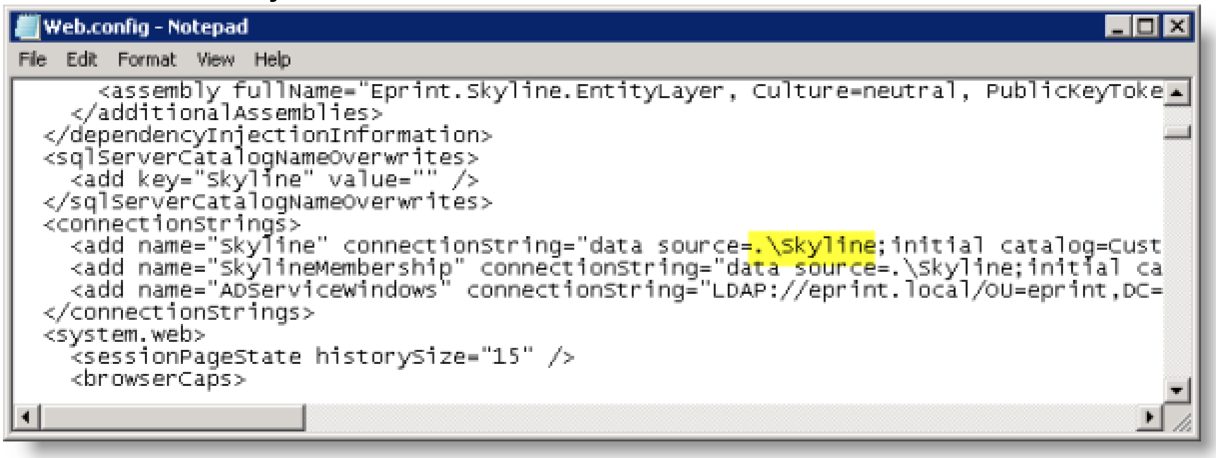
Make a note of:

1. the physical path of the website. By default it is C:\Skyline\wwwroot.
2. the name of the application pool that the website uses. This is needed during an upgrade procedure.

3. View the Skyline website folder and open the web configuration file with notepad.



4. In the <connectionStrings> section identify the server name and database name. In the example below the server name is **.\Skyline**.



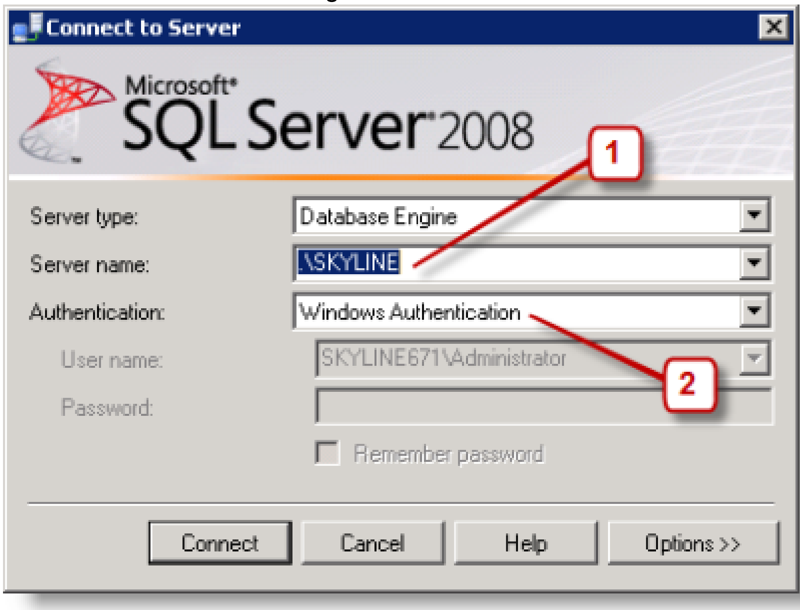

```
      <assembly fullName="Eprint.Skyline.EntityLayer, Culture=neutral, PublicKeyToke
    </additionalAssemblies>
  </dependencyInjectionInformation>
  <sqlServerCatalogNameOverwrites>
    <add key="Skyline" value="" />
  </sqlServerCatalogNameOverwrites>
  <connectionStrings>
    <add name="Skyline" connectionString="data source=.\Skyline;initial catalog=Cust
    <add name="SkylineMembership" connectionString="data source=.\Skyline;initial ca
    <add name="ADServiceWindows" connectionString="LDAP://eprint.local/OU=eprint,DC=
  </connectionStrings>
  <system.web>
    <sessionPageState historySize="15" />
    <browserCaps>
```

Make a note of the following:

- **Data Source** (This is the name of the SQL Server where the database is stored).
- **Initial Catalogue** (The name of the Database)
- **Username**
- **Password**

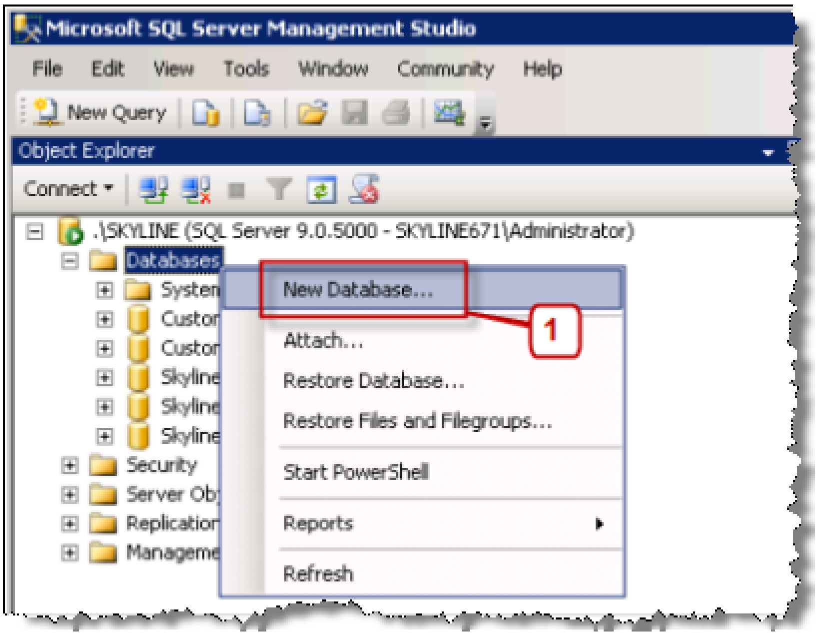
5. Copy your backup files onto the SQL Server where the new databases will be created.

6. Open SQL Server Management Studio. The server name is the name of the SQL server stated as the data source in the web.config file.



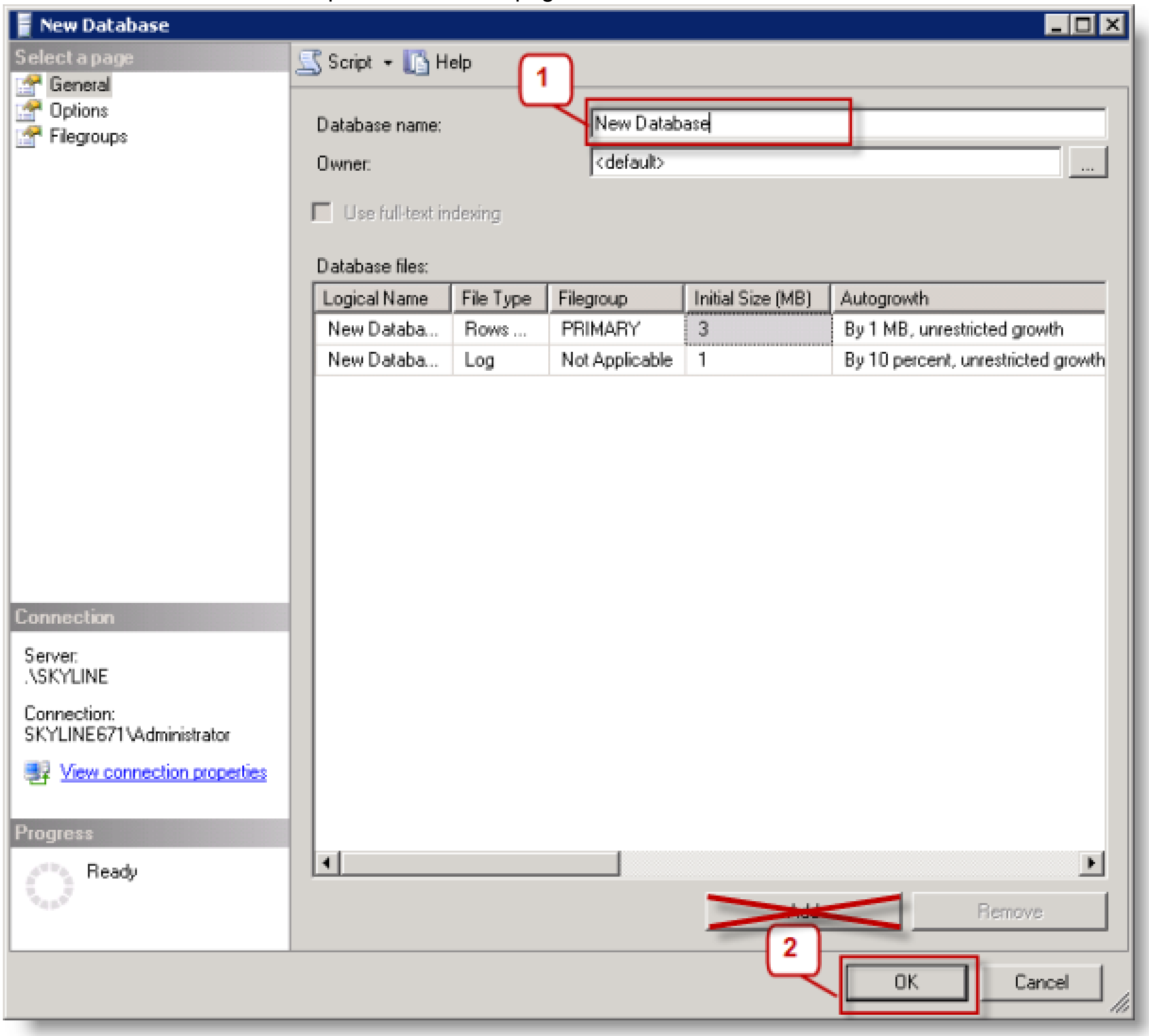
1. Enter the name of the SQL Server
2. Select the authentication type *Windows Authentication* or use your SA account log in.

7. Two new databases are going to be added (one containing the data and one the membership details). Once the databases have been created the backup data can be installed into the new databases and then these can be made you default databases. It is not recommended that you perform a restore directly into your existing databases.



1. Right mouse click **Database**, select **New Database**.

8. The **New Database** window opens. Select the page **General**.

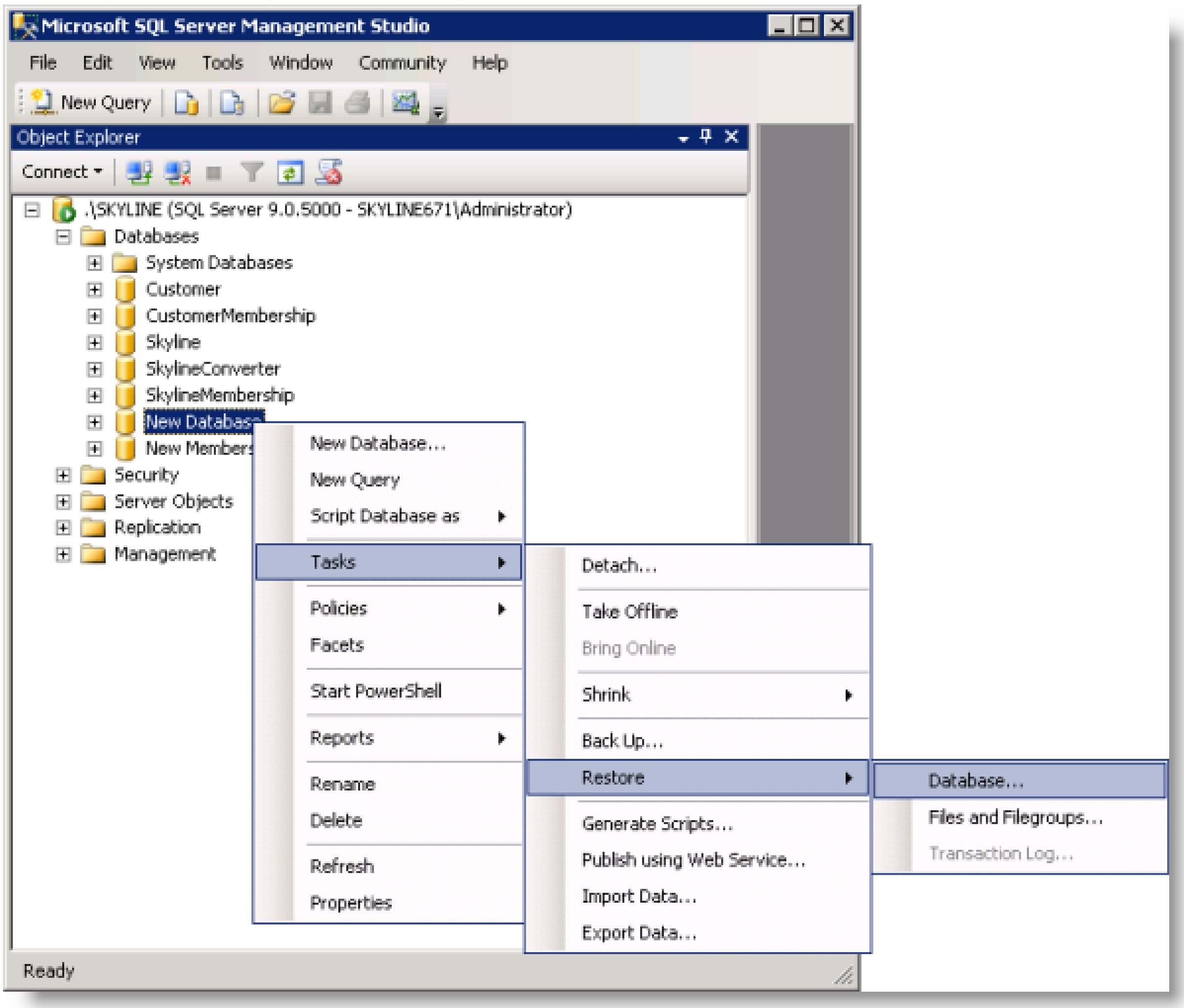


1. Enter the new database name [no spaces in the name]. **DO NOT** click Add.
2. Click **OK**.

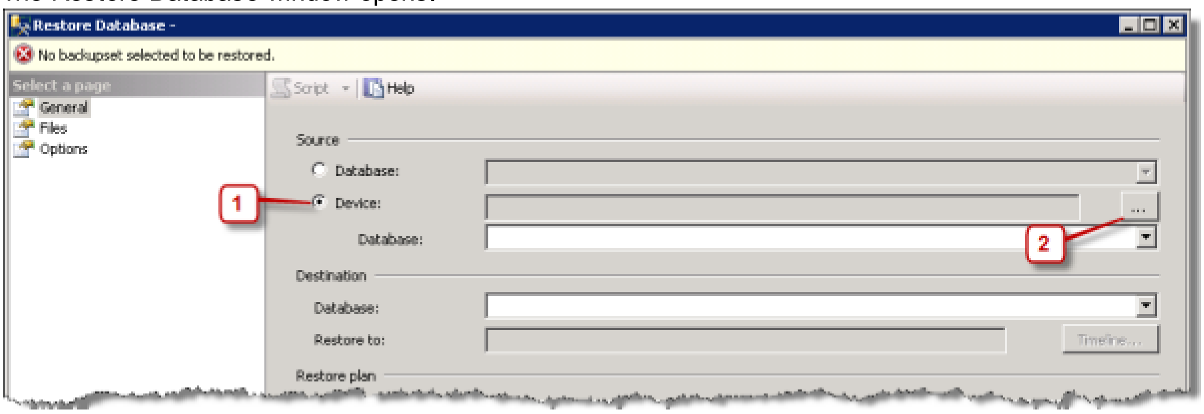
9. You need to create another a new database to restore your Skyline Membership backup into. Right mouse click **Database**, select **New Database**.

10. The New Database window opens. Enter a name for the new Skyline Membership Database then click **OK**.

11. You are now ready to restore your backup database into your new database. Right mouse click the new database, select **Tasks**, select **Restore**, click **Database**.



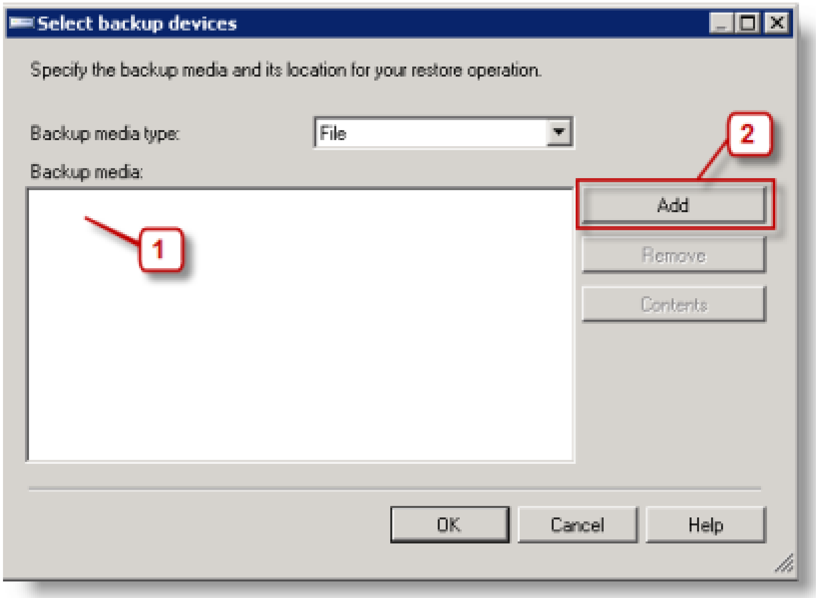
12. The Restore Database window opens.



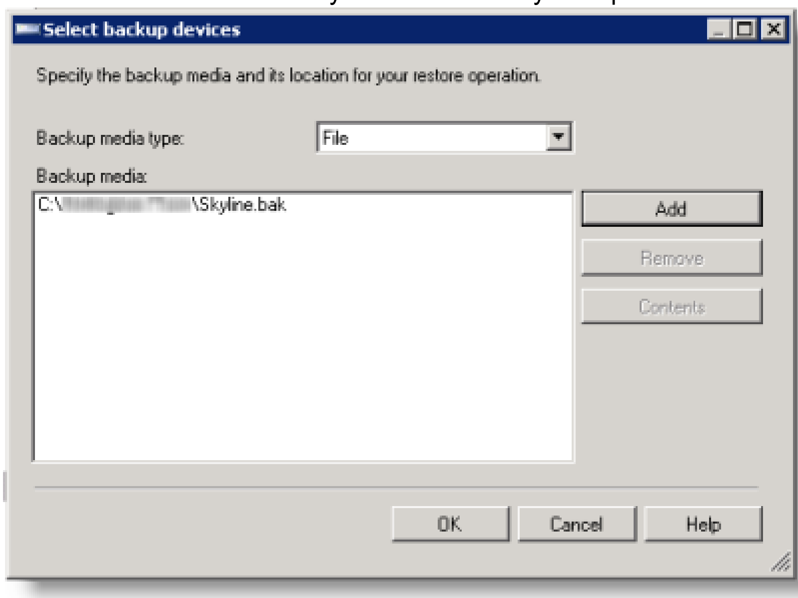
1. Select **Device**.

2. Click **Browse**.

13. The Select Backup Devices window opens.

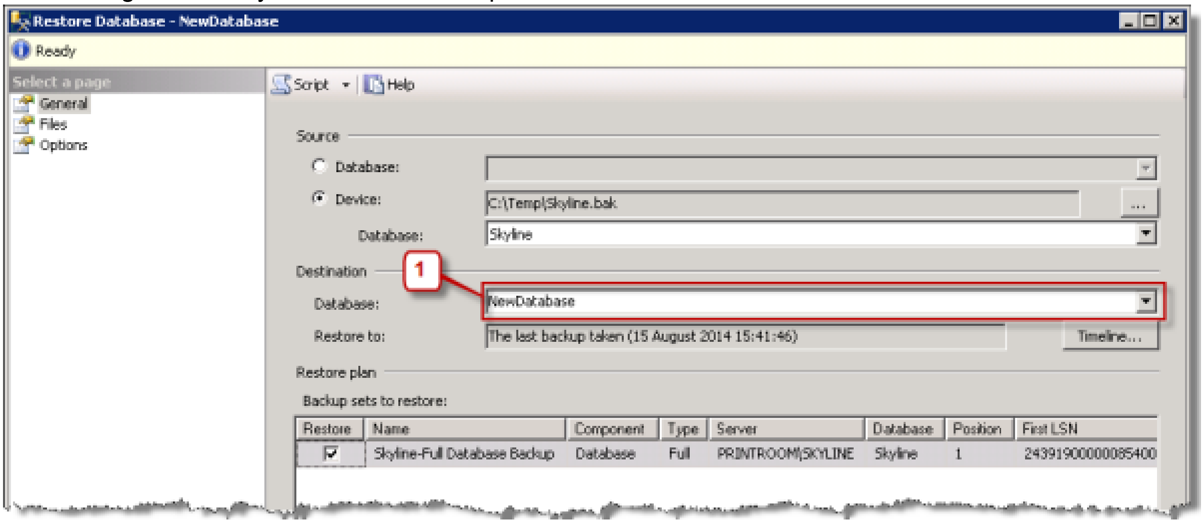


1. There should be no backup media listed. If there are any listed select them and then click Remove.
2. Click **Add**.
3. Select the location of the Skyline.bak file that you copied earlier. The file is listed



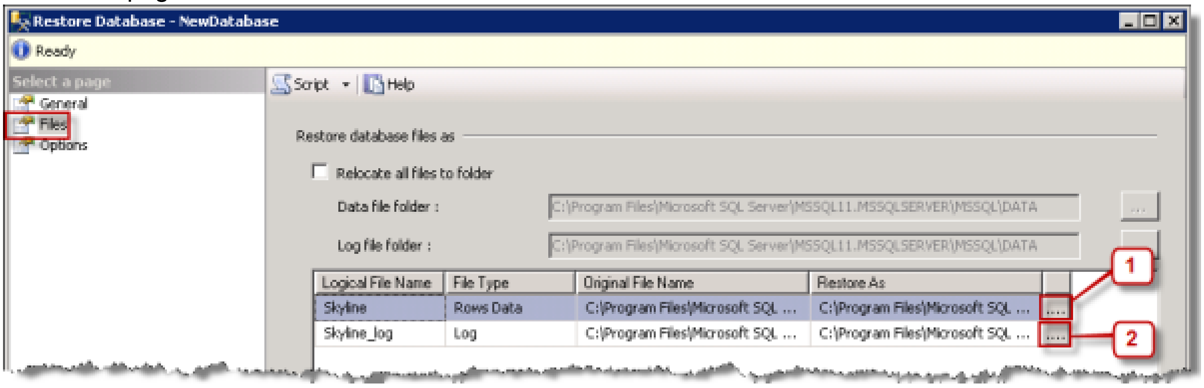
4. Click **OK**.

14. You return to the Restore Database window. As you are adding an additional database & not replacing the existing database you must NOT accept the restore defaults.



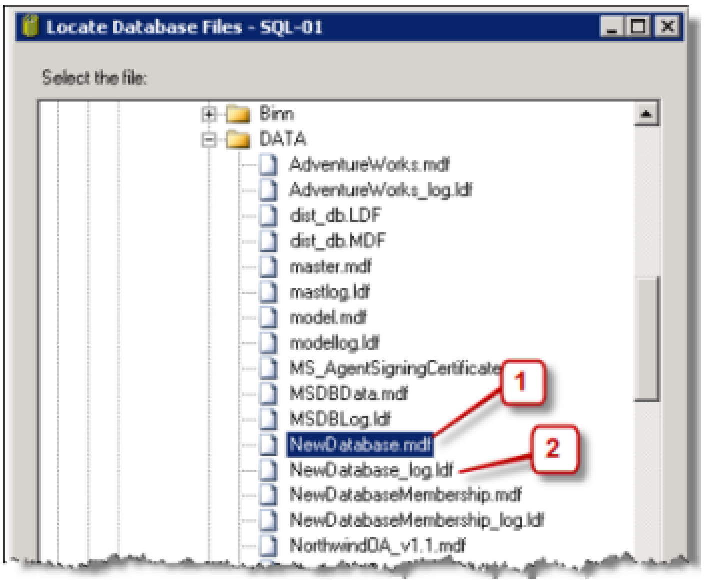
1. Change the Destination Database to the new database name.

15. Select the page **Files**. You need to set the location of the database files.

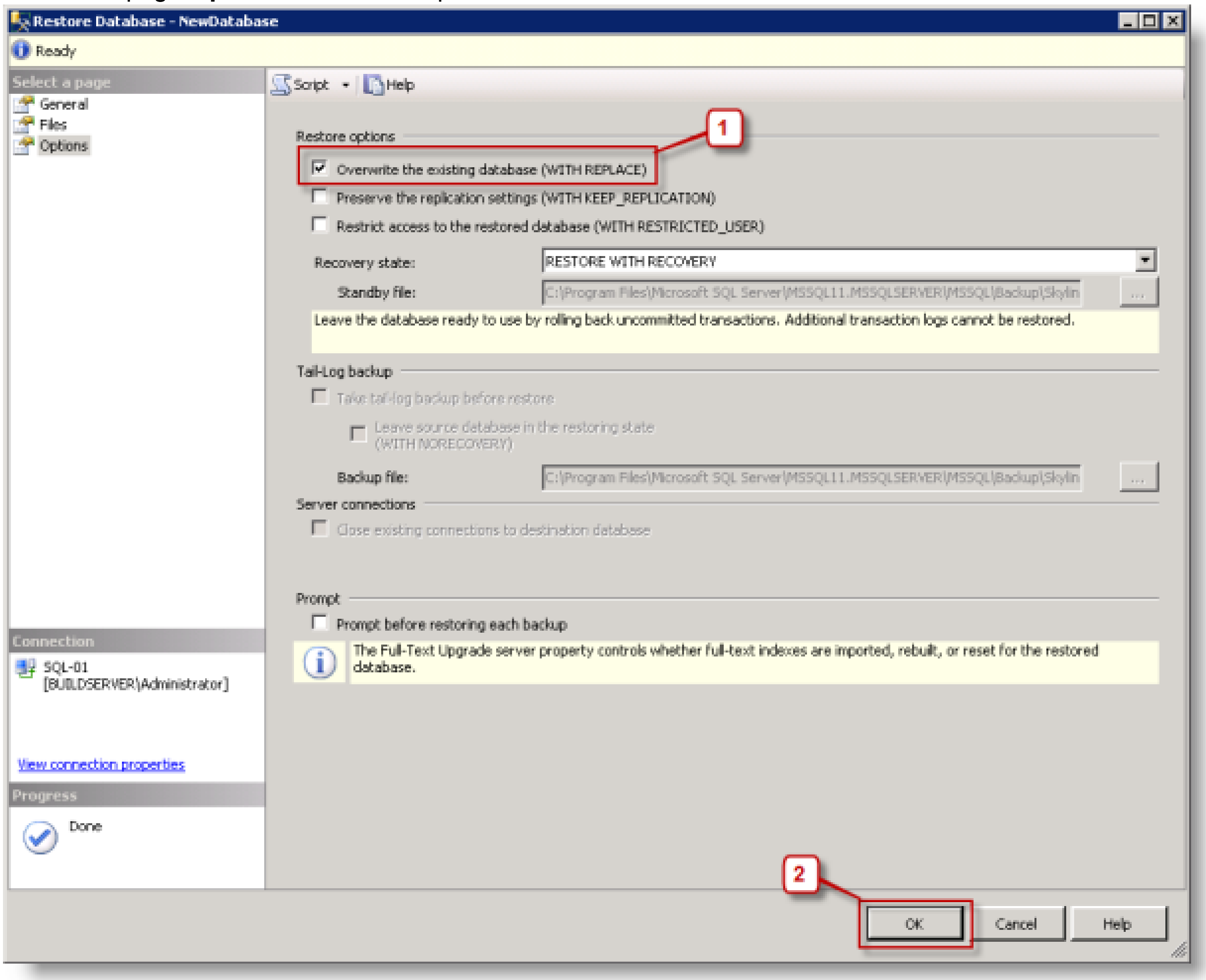


1. Click browse the locate the new mdf data location.

2. Click browse to locate the new ldf data location.

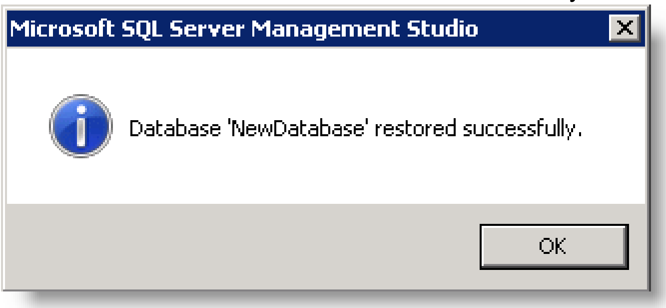


16. Select the page **Options**. The restore process can be started.



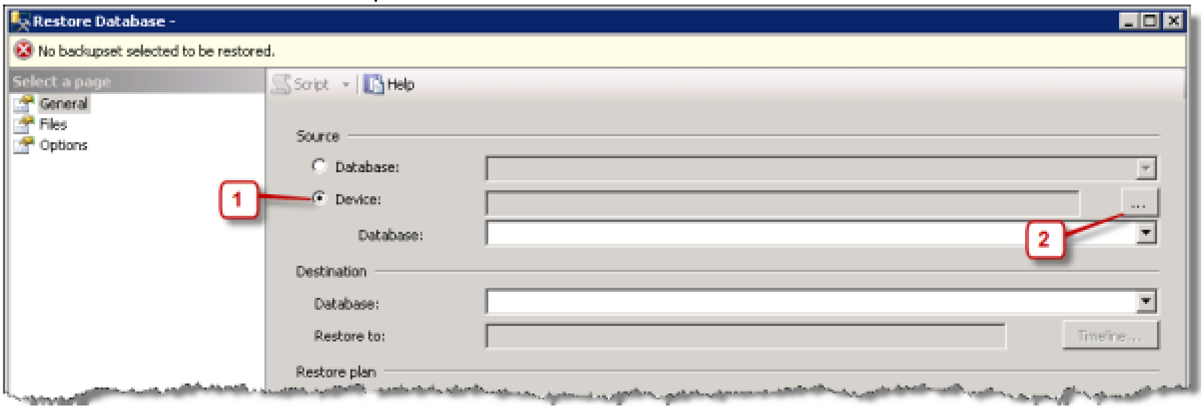
1. Select the restore option "Overwrite the existing data (WITH REPLACE).

2. Click **OK**. When the database has been restored you will see confirmation of the restore.



17. You are returned to the Microsoft SQL Server Management Studio window. The membership database needs to be restored. Right mouse click the new membership database, select **Tasks**, select **Restore**, click **Database**.

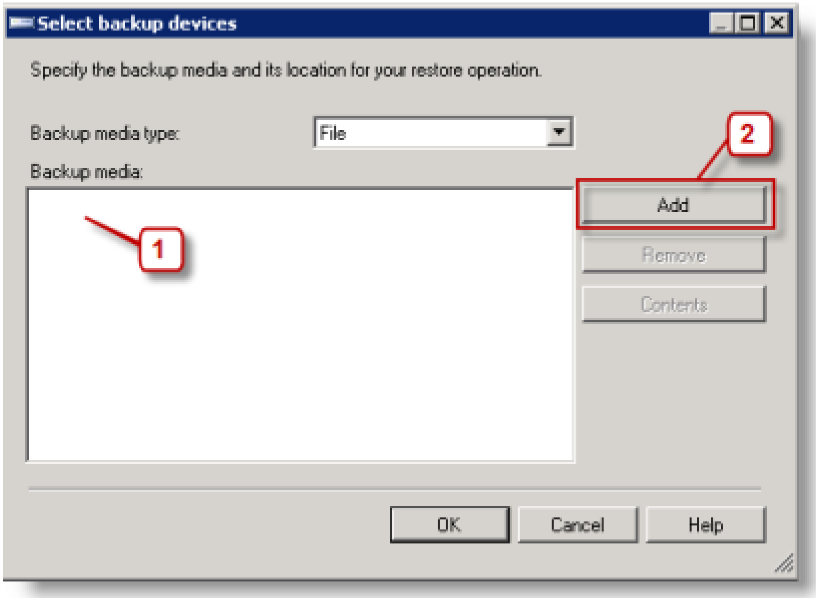
18. The Restore Database window opens.



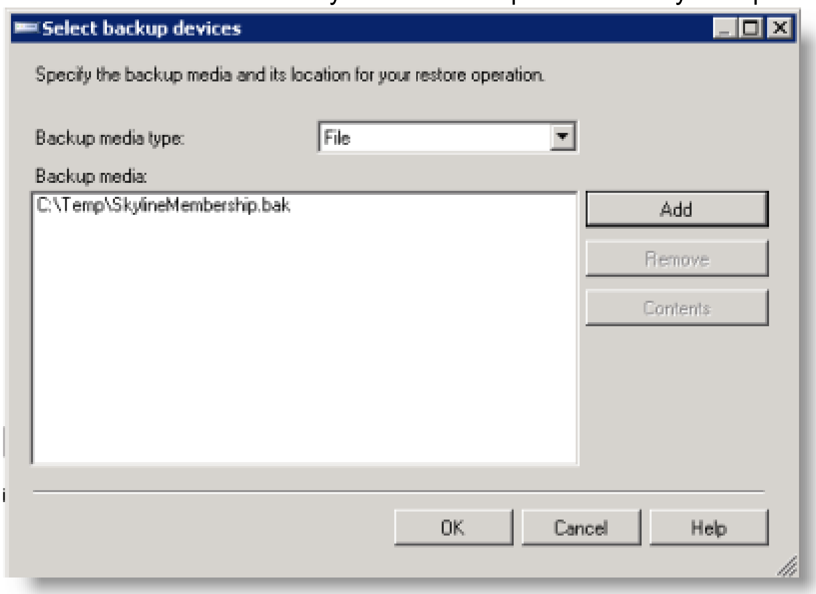
1. Select **Device**.

2. Click **Browse**.

19. The Select Backup Devices window opens.

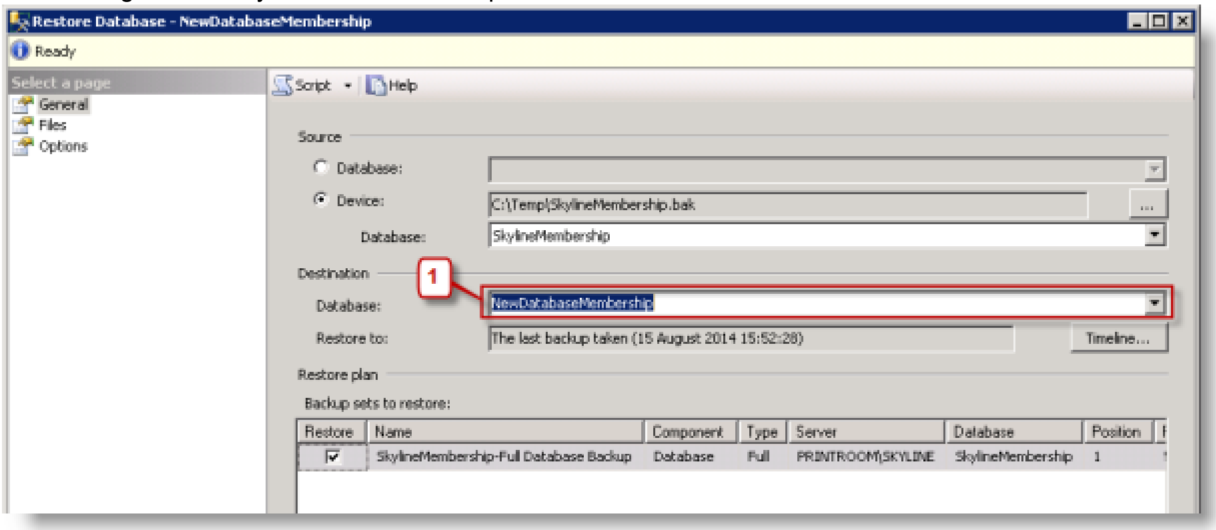


1. There should be no backup media listed. If there are any listed select them and then click Remove.
2. Click **Add**.
3. Select the location of the SkylineMembership.bak file that you copied earlier. The file is listed



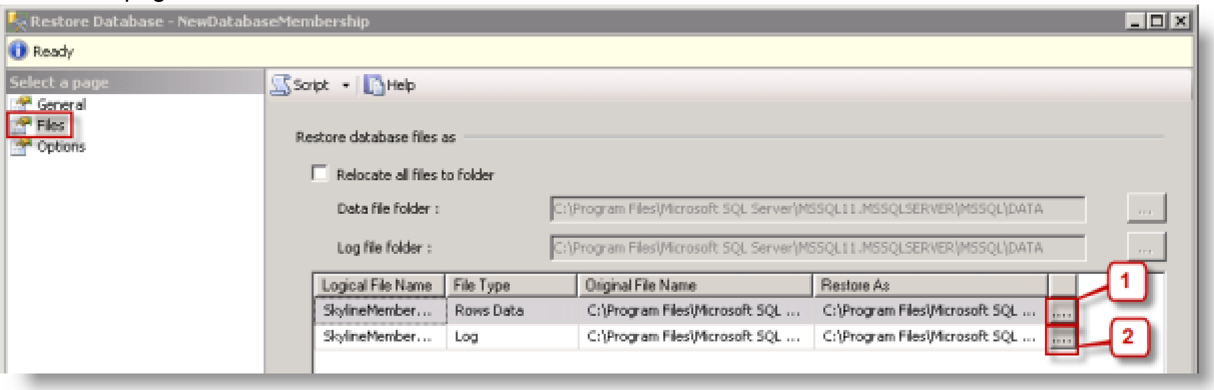
4. Click **OK**.

20. You return to the Restore Database window. As you are adding an additional database & not replacing the existing database you must NOT accept the restore defaults.

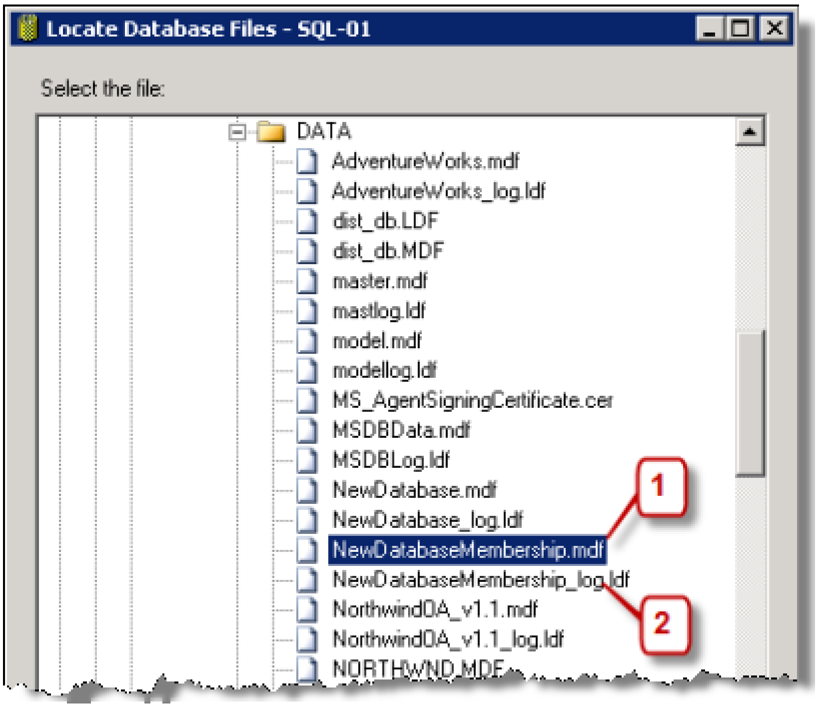


1. Change the Destination Database to the new membership database name.

21. Select the page **Files**. You need to set the location of the database files.



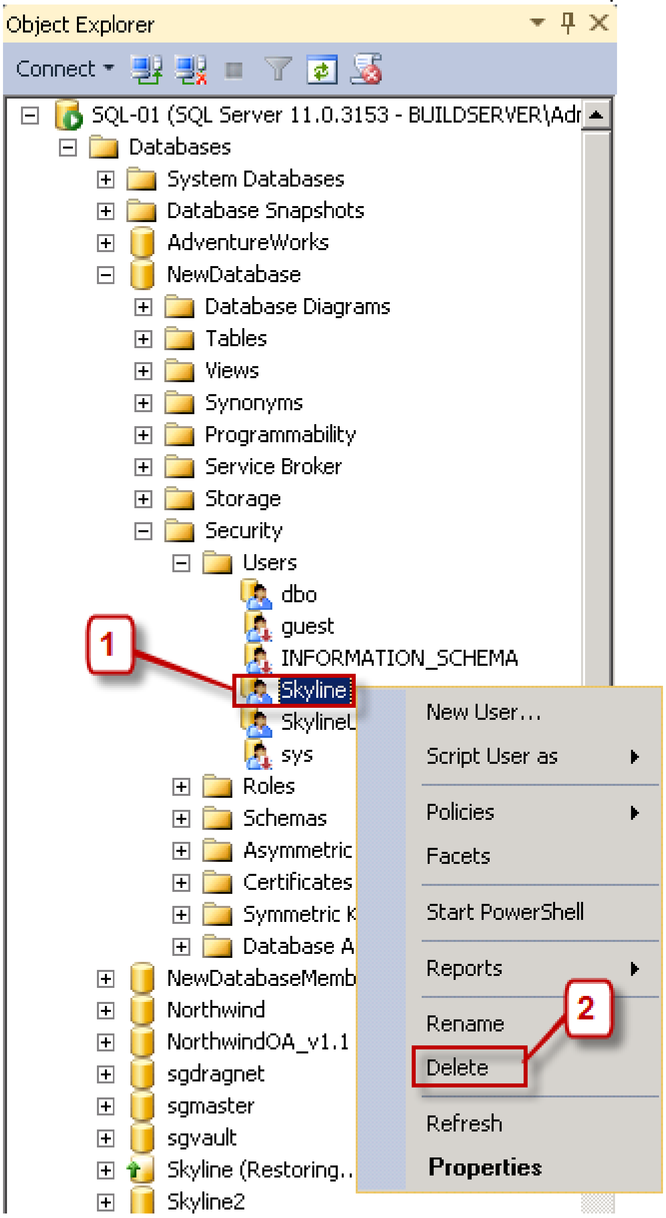
1. Click browse the locate the new mdf data location.
2. Click browse to locate the new ldf data location.



22. Select the page **Options**. The restore process can be started by selecting the restore option "Overwrite the existing data (WITH REPLACE).

23. Click **OK**. When the database has been restored you will see confirmation of the restore.

24. When the database was restored the log on details for the user Skyline were also restored. As you will want to use your existing Skyline log in details the restored Skyline user details need to be deleted in both the NewDatabase and NewDatabaseMembership databases.



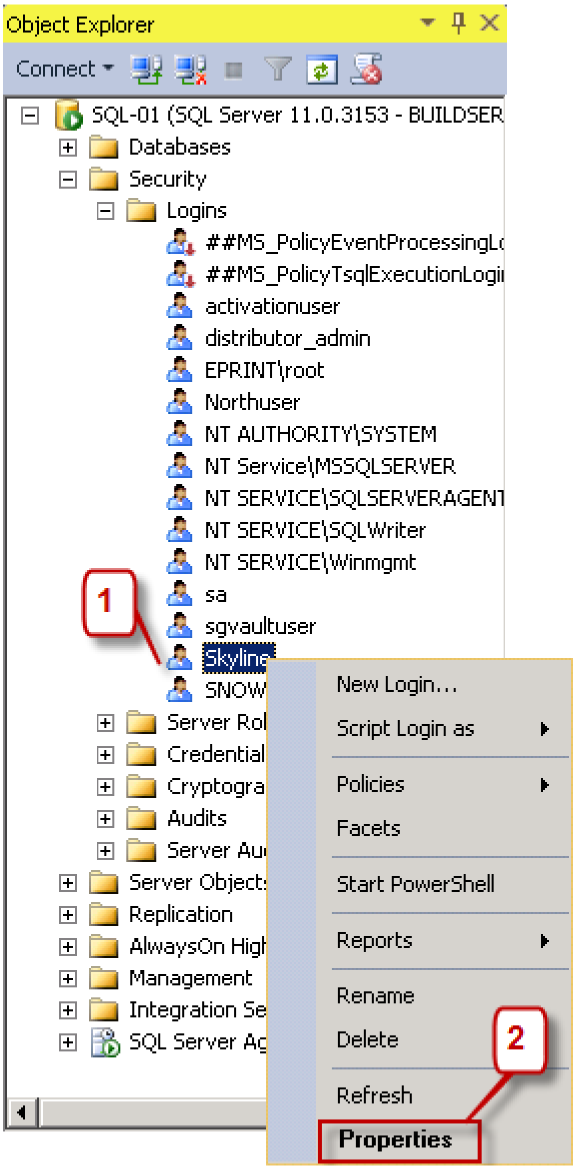
1. Locate the user Skyline in the NewDatabase [Databases - NewDatabase - Security - Users]

2. Right mouse click the user and select Delete.

3. Locate the user Skyline in the NewDatabaseMembership [Databases - NewDatabaseMembership - Security - Users]

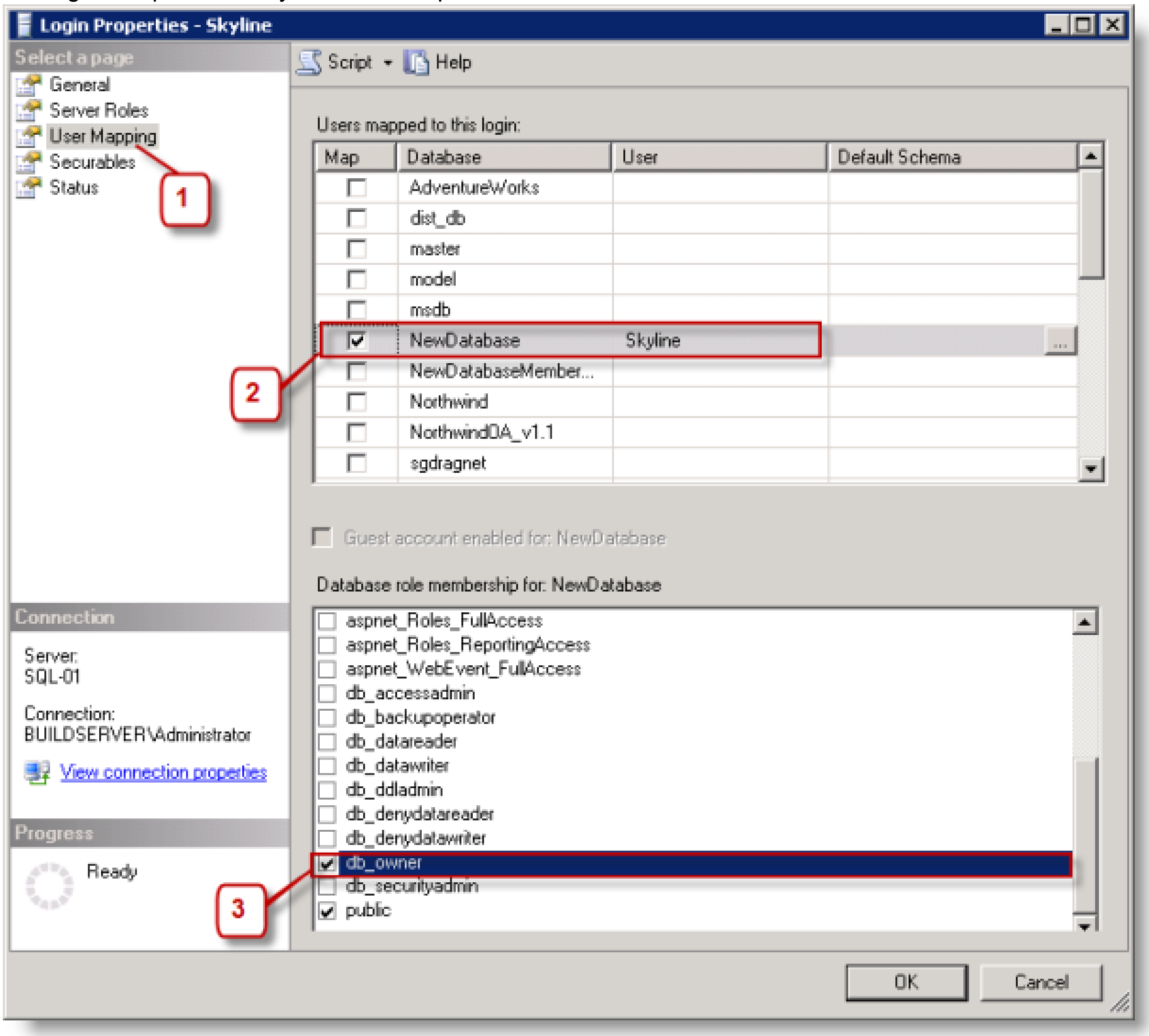
4. Right mouse click the user and select Delete.

25. Your existing Skyline user needs to be mapped to the NewDatabase.



1. Locate the Skyline Log in [Security - Logins]
2. Right mouse click the Skyline user and select Properties

26. The log in Properties - Skyline window opens.



1. Select User Mappings.
   If you get the message "One or more databases are inaccessible and will not be displayed in list" click OK.

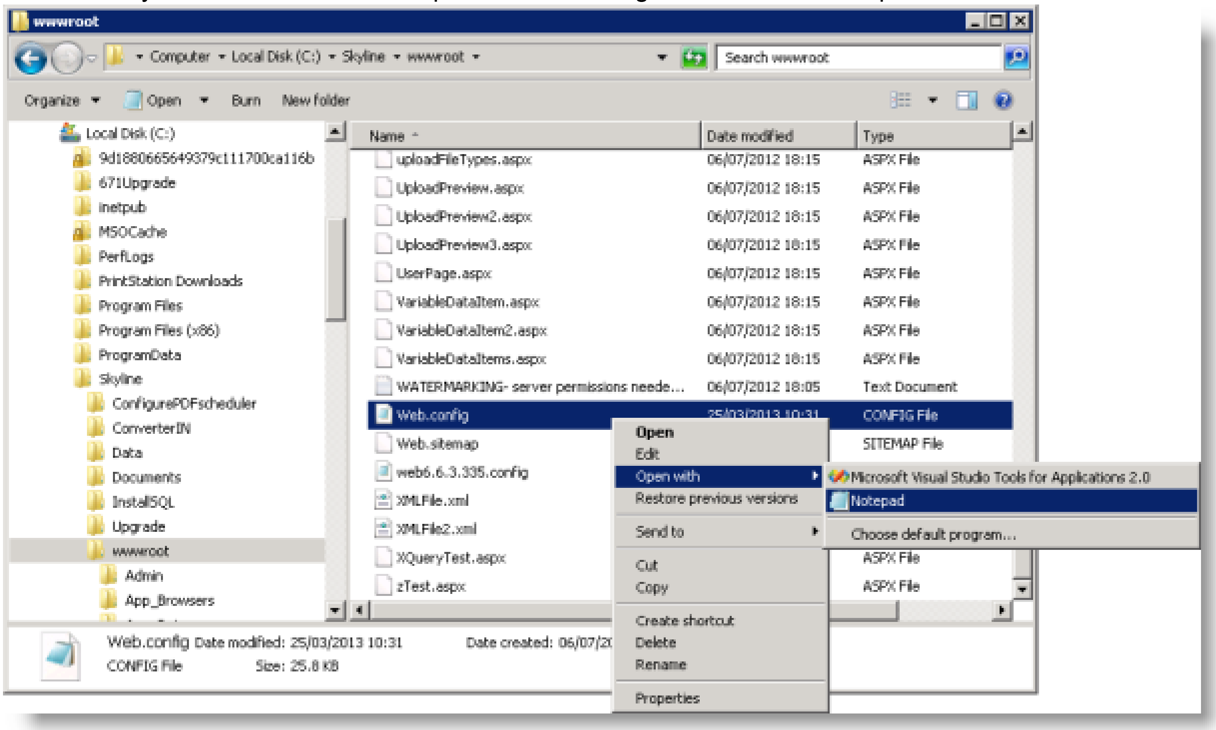
2. Select the option to map to the NewDatabase.

3. Select the database roll membership for the NewDatabase as **db_owner**.

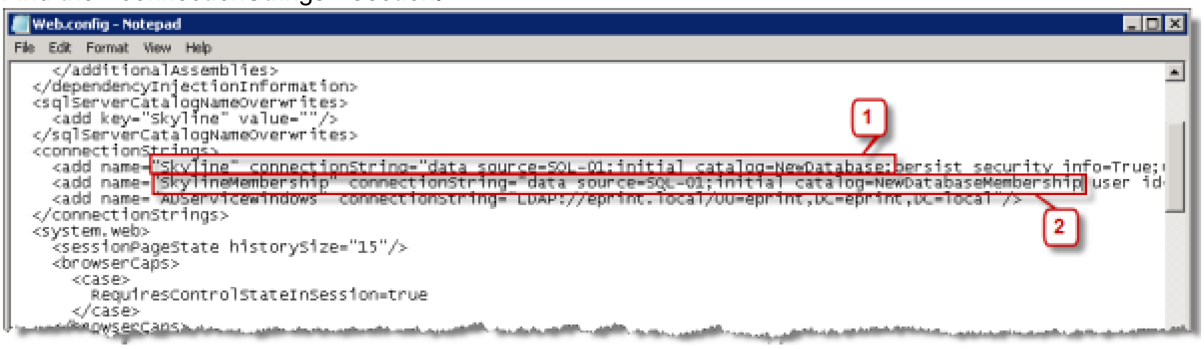
4. Select the option to map to the NewDatabaseMembership.

5. Select the database roll membership for the NewDatabaseMembership as **db_owner**.

27. View the Skyline website folder and open the web configuration file with notepad.



28. Find the <connectionStrings> section.

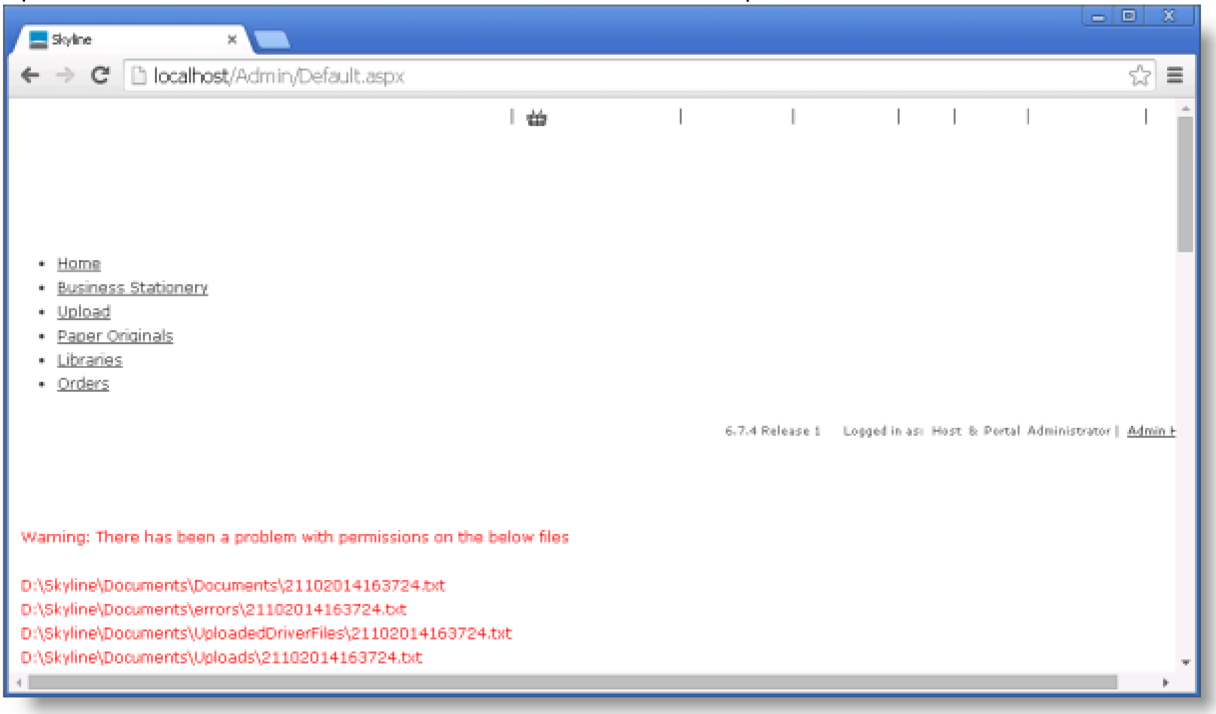


1. Change the initial catalog name to the new database name for Skyline.

2. Change the initial catalog name to the new membership database name for SkylineMembership

29. Restart the website by entering the command IISRESET at the command prompt on the Skyline server.

30. Open a web browser on the web server and enter the address http://localhost.



You need to make the following changes:

1. Apply a portal theme 208 .

2. Change the directory locations for documents. This directory locations that need to be reset are indicated by the warning message.

   - Open the list of portal Default Configurations in the Admin page and update;
     Document Directory
     Document Error Folder
     diver.directory
     Upload - Directory

3. If you want to use PrintStation with the new database you will need to associate a PrintStation with the new portal 215 .

4. Add a user 10 and assign roles 24, if required.

5. Amend the email settings 247 , if different.

31. Restart the website by entering the command IISRESET at the command prompt on the Skyline server.

Purge Utility

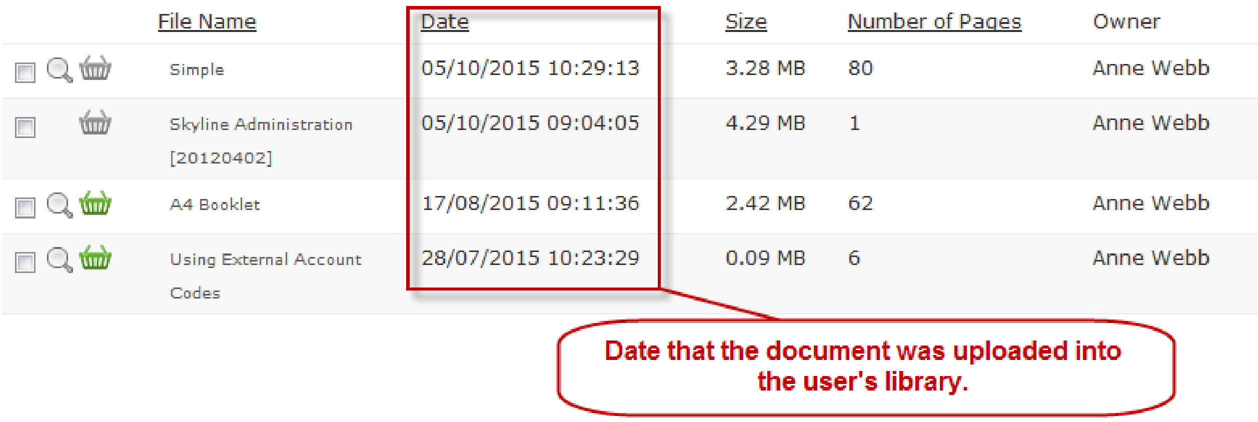
We would suggest that the utility is used to purge documents and orders that are older than 90 days. Skyline has been designed as a system for ordering documents and should not be used as a document storage area. If the purge utility is not run then the databases can become overloaded or full causing the software to slow down or completely fail.

Reports should be run before starting the purge utility and the results exported to CSV. Data which is older than the specified purge time scale is not available to be reported on.

If you are using the hosted system the purge utility is automatically run to remove any documents and orders older than 90 days.

When the purge utility is run the following will happen:-

- When a document is uploaded into a user's library the date that the document was uploaded is recorded. When the purge utility is run any documents older than the specified purge time scale will be removed. If a document has been re-ordered within the purge time scale then it will not be deleted.



	File Name	Date	Size	Number of Pages	Owner
	Simple	05/10/2015 10:29:13	3.28 MB	80	Anne Webb
	Skyline Administration [20120402]	05/10/2015 09:04:05	4.29 MB	1	Anne Webb
	A4 Booklet	17/08/2015 09:11:36	2.42 MB	62	Anne Webb
	Using External Account Codes	28/07/2015 10:23:29	0.09 MB	6	Anne Webb

- Documents in shared libraries are not affected by the purge, regardless of their upload date.
- The orders tab lists all the orders that have been placed by the user. Any orders that are older than the specified purge time scale will be removed from the list, irrespective of their status. This means that reports will not contain details of any orders that are older than the specified purge time scale.
- In PrintStation all jobs where the date submitted is older than the specified number of days and have the status "Completed" will be changed to the status Archived. If your PrintStation has been configured to show completed jobs the orders older than the specified number of days will no longer be shown. Completed orders older than the specified number of days will also disappear from the orders tab of the user.
- Any job marked as deleted will be removed if older than the date specified.

A certain understanding of network servers and basic command line usage is required to run the utility.

To run the purge utility:

1. Locate your Skyline database237 and then take a backup of the database.

2. log in to the Skyline server and locate your Skyline website236.

3. Download the purge utility from http://download.eprint.net/Utilities/ and unzip the file in to the directory c:\skyline.

4. Open Explorer and locate the file SkylinePurge.exe.

5. At the command prompt type **C:\Skyline\SkylinePurge "c:\skyline\wwwroot" 90 -all**.

   Where:

   - **C:\Skyline** is the folder location of the SkylinePurge.exe file
   - **SkylinePurge** is the name of the exe file.
   - **"c:\skyline\wwwroot"** is the location of your Skyline website
   - **90** is data older than the number of days specified will be purged.
   - **-all** means that you will delete old records and documents, remove deleted orders, set completed orders to archive status, delete all old preview images, delete orphaned documents and clean the database.

   c

   Other switches that can be used instead of **-all** are:

-orders	only delete orders older than the specified number of days.
-documents	only delete documents older than the specified number of days.
-deleted	remove all orders that have the status "deleted"
-completed	for all orders older than the specified number of days change orders with the status "Completed" to "Archived"
-thumbnails	delete all thumbnail images for documents that have been previewed
-orphaned	delete all orphaned documents that are no longer in the database
-clean	clean the databases of all orphaned records.

Please refer to the section Skyline Update Utility281 for details on how to run the update procedure if you receive the message "The database needs to be upgraded before running the Skyline Purge utility. Please run the Skyline Update utility first".

Skyline Update Utility

When the purge utility is run the version of your Skyline database is checked. If the current version of the database is not being run you will see the message "The database needs to be upgraded before running the Skyline Purge utility. Please run the Skyline Update utility first". You need to update the Skyline database using the Skyline Update utility which can be downloaded from our website.

To update the Skyline database:

1. Open Explorer and locate the file SkylineUpdate.exe.

2. At the command prompt type **C:\Skyline\SkylineUpdate Skyline Fred 789**

   Where:

C:\Skyline	is the folder location of the SkylineUpdate.exe file
SkylineUpdate	the name of the exe file.
Skyline	the name of the SQL Instance
Fred	the SQL username. Read, write and change access level required.
789	the SQL password.

4. When updated you will see a message "Skyline database has been updated to version xxx". You are now ready to run the purge utility again.

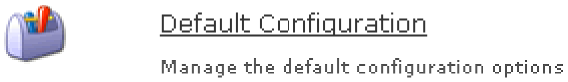
Document Storage on a Mapped Drive

Document thumbnails can sometimes be missing in the Library page when the document store is on a mapped drive. To prevent this happening document thumbnails can be copied to a folder in the local directory which is cleared when Skyline if restarted.

To copy thumbnails to a local directory:

1. Log in with Host rights and go to **Admin**.

2. In the Portals section click **Default Configuration**.



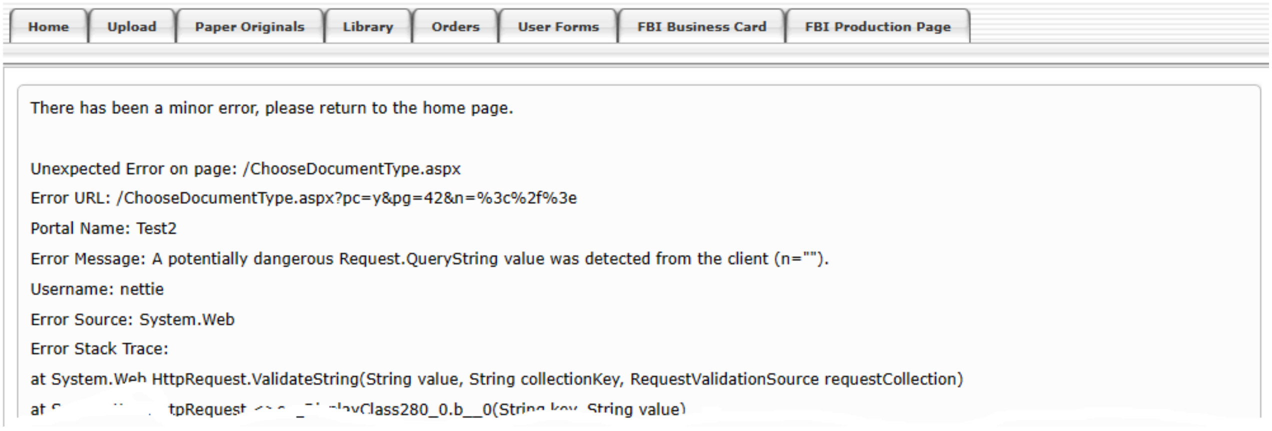
3. Find **Library - Cache document thumbnails** in the list.

4. click ✏ to set the option as **True** so that the document thumbnails are copied to the local wwwroot \ThumbnailCache directory.

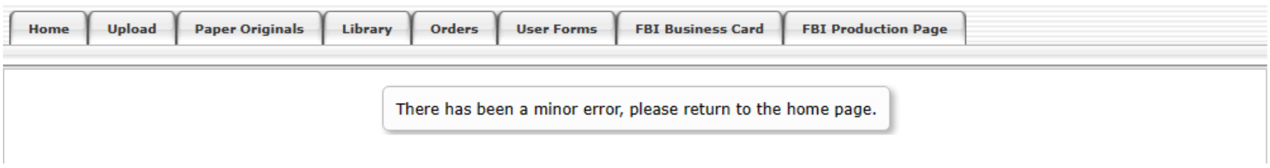
5. Click 💾 to save the setting.

Viewing Errors

If a program error happens, users should be shown the friendly error page. The portal configuration **Global Errors - Show Friendly Error Messages** needs to be checked that the setting is True.



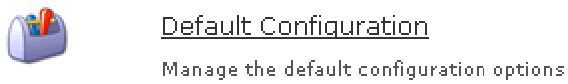
Example of a Global Error Message



Example of a friendly error message.

To check the error setting:

1. Go to Admin. In the Portals section click Default Configuration.



2. Find the setting **Global Errors - Show Friendly Error Messages** and make sure that it is set to **True**.

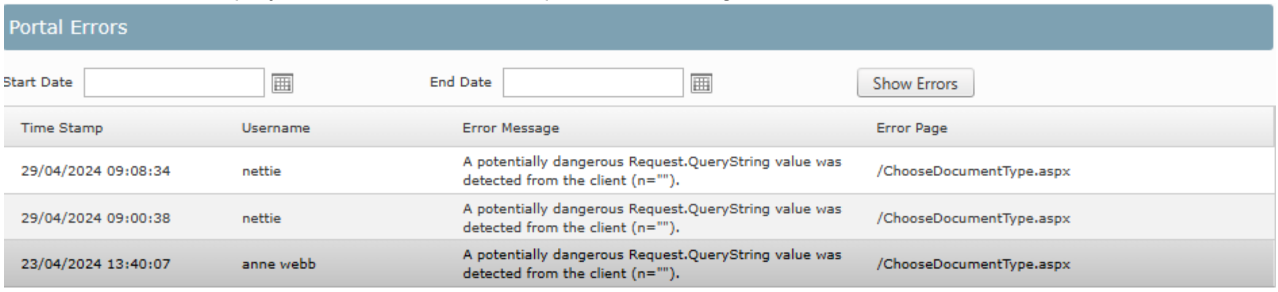
You can view the error by using View Error Details.

To view any error details:

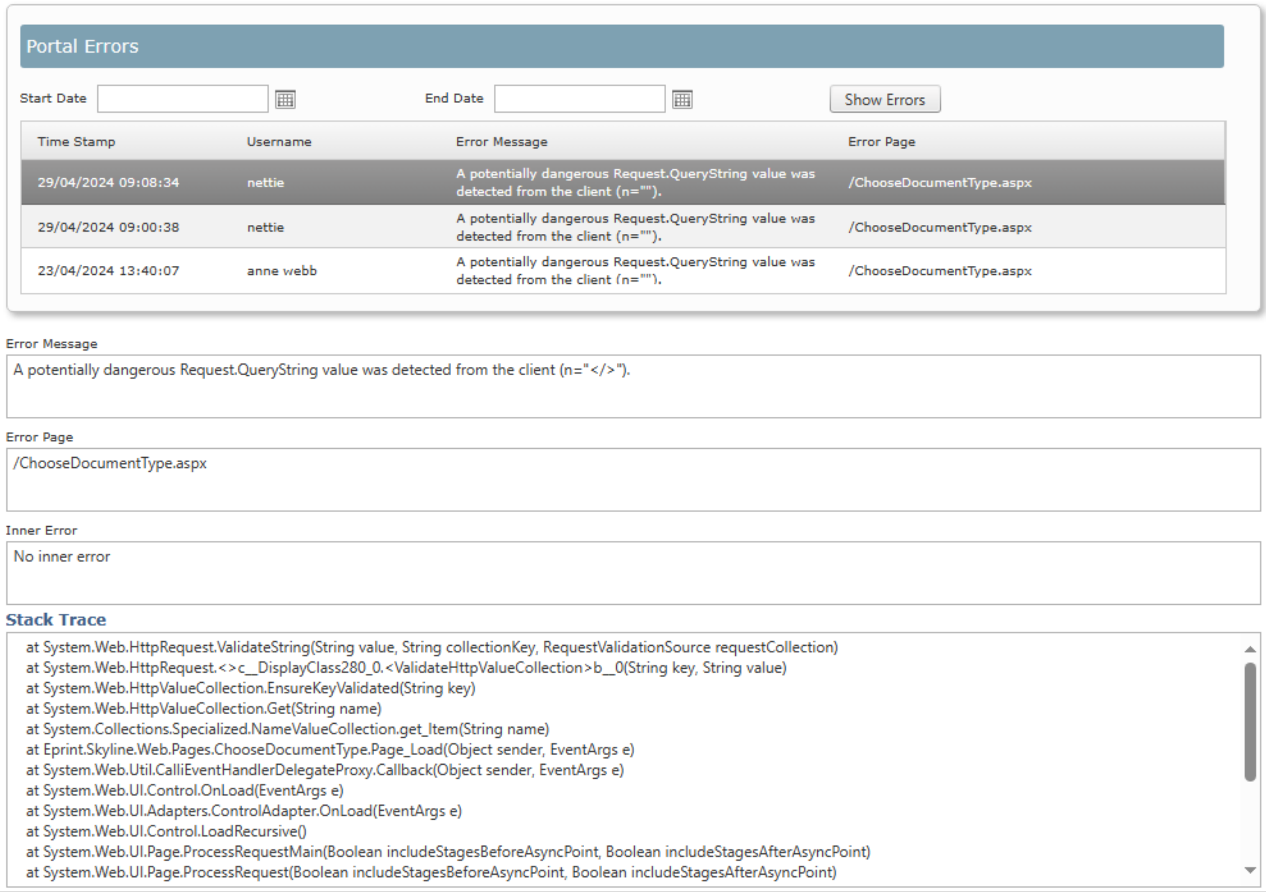
1. Log in to Skyline and go to **Admin**.

2. In the Configuration section select **View Error Details**.

3. A list of errors is displayed. You can select a specific date range if there are a lot of errors.



4. Select an error to see the specific details.



Example of the error information available

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