Skyline Manual

Version: 7.6.0.8

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Introduction

Thank you for your purchase of Skyline, a set of Web-to-Print applications designed to open up the opportunities available to Printers in the world of eBusiness.

Skyline helps you develop a simple to use but sophisticated on-line presence that enables you to offer different media, services and complete products within your own Skyline web page. This manual will guide you through the steps to successfully install and configure the system, create web pages, input media and create products and set prices. Along the way you will discover many other features available in this advance software product to further develop your service.

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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^{□306} 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^{□27}.

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.

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].

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[47] 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[33] 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**.

    Users
    Manage users for current Portal

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.

> Your account has been successfully created.
>
> [Continue]
>
> An email has been sent to the new user with the login details

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**.

> **System Emails**
> Edit the subject and text of 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.

> | Email to new users when created by an Administrator | Your {portal_name} user account | 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://{url}/UserAdmin/Default.aspx |
> |---|---|---|
>
> Email Subject
> `Your {portal_name} user account`
>
> Email Body
>
> **B** *I* U ~~a~~ ...
>
> 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://{url}/UserAdmin/Default.aspx
>
> P > RemoveElement
>
> [Save] [Cancel]

When new users have been added they need to be activated. The icon ![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**.

    Users
    Manage users for current Portal

3. Load all users that are not approved.

4. Click ![pencil] 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.

    System Emails
    Edit the subject and text of 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**.

> Portal Configuration
> Manage the configuration options for this portal

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

> Username [   ] *
> Password [   ] *
> ☐ Remember me next time
> [Log In]
> Register as New User
> I forgot my password

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

> System Emails
> Edit the subject and text of 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**.

    Users
    Manage users for current Portal

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".

Username	Brian Dawson
Password	●

This User has been set as inactive. Please contact your administrator.

Log In

Register as New User

I forgot my password

To suspend a selected user account:

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

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

   Users
   Manage users for current Portal

3. All the users are listed. Click ✏ to edit the user that you want to suspend.

4. In the example Theresa Green was selected.

   | ✏ | Theresa Green | annette.webber@eprint.net | 09/12/2019 17:07:28 | Approver, User |

   Theresa Green

   ☐ Not Approved ❶ ①

   ☐ Send email to Reset Password

   ② Email: annette.webber@eprint.net   Portal URL to use in email: localhost ▼

   ✔ Update   ✖ Cancel   🗑 Delete User and ALL user data

   1. Select **Not Approved** ❶.

   2. Click ✔ Update .

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

➕ Add a new user	All Users ▼	🔄 Load	💾 Export to CSV				
Username	Email		Last Login Date	Orders	Roles		Not Approved
there ▼	▼						
✏ Theresa Green	annette.webber@eprint.net		09/12/2019 17:07:28	1	Approver, User		❶

   |◀ ◀ 1 ▶ ▶| Page Size: 15 ▼   1 items in 1 pages

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 <u>Removing User Roles</u>[43] or on suspending user accounts see <u>Suspending Users</u>[35] . 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**.
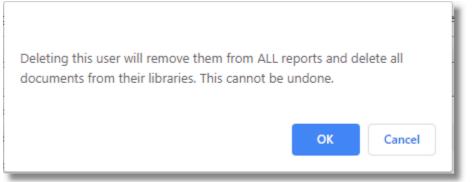
3. Select the user in the list. In the example Anne Webb has been selected.

     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[649] .

To create a User Group:

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

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

    User Groups
    Create user groups and assign users to the 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 ![arrow]. 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 ![Save] 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[39], Editor[41], Manager[40], Approver[41], Staff[41] and User[40].

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.

Users

Users — Manage users for current Portal

Roles — Manage user roles for current Portal

Products

Select Products — Manage and assign products for your portal

Manage Template Permissions — Manage the permissions on templates created in TemplateManager

Content

Custom Pages — Add, Edit & Remove custom website pages

Selected Custom Pages — Assign custom website pages to portals

Tabs — Add edit tabs

Orders

Select Address Form — Assign a delivery form to a portal

Select Delivery Form — Assign a delivery form to a portal

Order Statuses — Create, edit & delete order statuses

External Accounts — Create external accounts connections

Portal External Accounts — Assign accounts to a portal

Accounts — Add, amend and delete internal account codes

Order Numbers — Set a start order number for a portal

Accounts and Pricing — Setup your accounts and payment provider

Approval Options — Setup the options available to approvers

User Accounts — Allocate accounts to users

Approval Users — Allocate users to approvers

Configuration

Skyline Driver Settings — Add and update the Skyline driver settings

License Settings — Add and Renew License

Uploaded Document Types — Add and Update Uploaded Document Types

Email Settings — Add and update email settings

System Emails — Edit the subject and text of system emails

Portals

Portal Configuration — Manage the configuration options for this portal

Portal Watermark — Select watermark file for portal

Website Languages — Add edit Website Languages

Portal URL's — Create and delete websites in the current portal

Administrators are also able to <u>manage shared libraries</u>[369] from their own library page.

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 <u>global products</u>[525] 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.

ℹ 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**.

    Roles
    Manage user roles for current Portal

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[35] .

To remove roles from a user:

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

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

   Roles
   Manage user roles for current Portal

3. A list of all the Roles available 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 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⊔47 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⊔ 48 to activate their account.

- User accounts can be created⊔42 by a Skyline administrator.

- Users log in to Skyline with their existing corporate user name and password⊔74.

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⊔53 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⊔56 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⊔54.

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 ⊔62.

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**.

    🛒 View Basket (0) | Preferences | Downloads | Edit | Admin | Management | Logout

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

    🔧 Portal Configuration
    Manage the configuration options for this portal

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[39] . 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**.

   Portal Configuration
   Manage the configuration options for this portal

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[728] . 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**.

    Portal Configuration
    Manage the configuration options for this portal
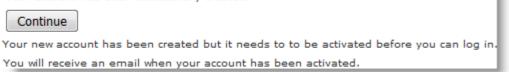
3. Find **Registration - New Users Must Be Approved** in the list.

    - 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**.

System Emails
Edit the subject and text of system emails

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

Email to Administrator when a new user set Inactive	A new user has registered	A new user '(username)' has registered but their account has not been activated. Log in the the Admin - Users page to activate this user.

Email Subject

A new user has registered

Email Body

A new user '(username)' has registered but their account has not been activated. Log in the the Admin - Users page to activate this user.

P > RemoveElement

Save   Cancel

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**.

Users
Manage users for current Portal

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.

System Emails
Edit the subject and text of 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[47] or an administrator creates a new user[28] . 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**.

    🛒 View Basket (0) | Preferences | Downloads | Edit | Admin | Management | Logout

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

    🔧 Portal Configuration

    Manage the configuration options for this portal

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[728] . 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□ 56 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**.

   Portal Configuration
   Manage the configuration options for this portal

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□ 728 . 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**.

🛒 View Basket (0) | Preferences | Downloads | Edit | Admin | Management | Logout

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

Portal Configuration
Manage the configuration options for this portal

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[728]. 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 option⁵⁴ .

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 option⁷²⁸. 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.
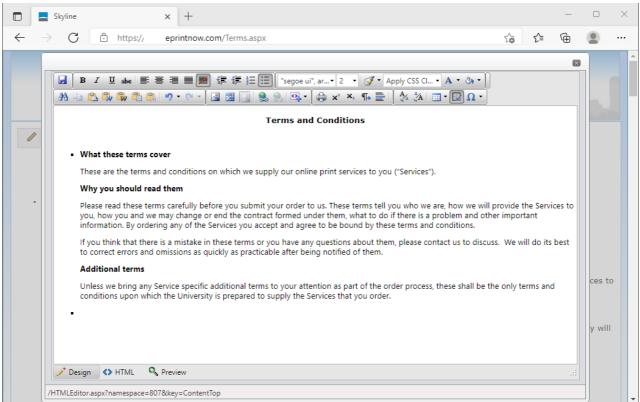
Example of a Login window with the Terms and Conditions option

To add the Terms and Conditions option:

1.   Login to Skyline with Editor◻39 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.

🖉	↩	Login - Show Terms and Conditons Checkbox	True
🖉		Login - Terms and Conditons Cookie Expiry	A year
🖉		Login - Terms and Conditons Link Text	I have read and accept the Terms and Conditions

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.

Due to an upgrade this website will be unavailable from midnight Friday 14 to 06:00 Saturday 15 December.

Username | Anne Webb

Password | •

Log In

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.

You can now place an order for printing dissertations.

Username | Anne Webb

Password | •

Log In

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.

Due to an upgrade this website will be unavailable from midnight Friday 14 to 06:00 Saturday 15 December.

You can now place an order for printing dissertations.

Username | Anne Webb

Password | •

Log In

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 728 . 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.
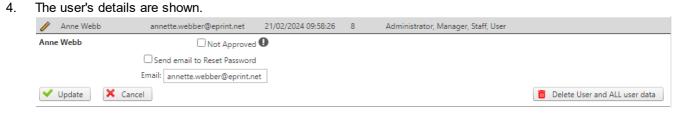
To reset a user's password:

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

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

Users
Manage users for current Portal

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

4. The user's details are shown.

| ✏ | Anne Webb | annette.webber@eprint.net | 21/02/2024 09:58:26 | 8 | Administrator, Manager, Staff, User |

Anne Webb   ☐ Not Approved ⚠
                ☐ Send email to Reset Password
         Email: annette.webber@eprint.net
✔ Update   ✖ Cancel   🗑 Delete User and ALL user data

   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.

Password Request

Support
To ✔ Annette Webber   ☺ ↩ ↩↩ → 📧 ⋯
                                                                      11:02

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:
Reset 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.

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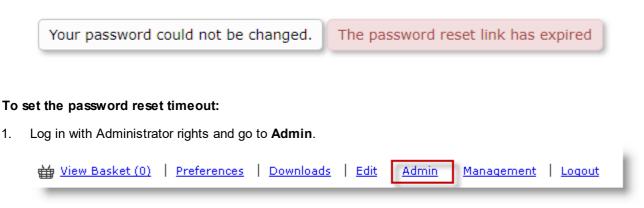
2. The wording in an email sent to a user when they request a new password can be amended. To amend the wording click ✏ to edit the **Password Request** email.

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.

Your password could not be changed.   The password reset link has expired

To set the password reset timeout:

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

🛒 View Basket (0) | Preferences | Downloads | Edit | Admin | Management | Logout

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

Portal Configuration
Manage the configuration options for this portal

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[728]. 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[71] . There is also a facility to enter a regular expression[72] 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[67]

- numbers[68]

- special characters[69]

- upper-case characters[70] .

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[313] but does not enter enough characters an error message will be displayed. The password will not have been changed.

Change your password

New passwords must meet the meet the password policy requirements

• It must be at least 4 characters in length

Current Password [   ]

New Password   [   ]

Confirm Password [   ]

[Update Password]

To set a minimum password length:

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 **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[728]. 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 [313] but enters a password that does not include any numbers an error message will be displayed. The password will not have been changed.

Change your password

New passwords must meet the meet the password policy requirements

• It must include at least one number

Current Password

New Password

Confirm Password

Update Password

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.

   Portal Configuration
   Manage the configuration options for this portal

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 [728]. 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[313] but the new password that does not include any special characters an error message will be displayed. The password will not have been changed.

Change your password

New passwords must meet the meet the password policy requirements

- It must include at least one of the following characters !$%^&*()_-+=@~#<,>.?

Current Password [   ]
New Password   [   ]
Confirm Password [   ]
[Update Password]

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.

   Portal Configuration
   Manage the configuration options for this portal

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[728]. 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[313] 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.

    Portal Configuration
    Manage the configuration options for this portal

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[728]. 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,

Change your password

New passwords must meet the meet the password policy requirements

- Your password needs to be changed every 30 days

Current Password

New Password

Confirm Password

Update Password

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.

   Portal Configuration
   Manage the configuration options for this portal

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](#) 728 . 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[313] but enters a password that does not meet the criteria an error message will be displayed. The password will not have been changed.

Change your password

The password does not meet the specified complexity requirements

Current Password   [   ]
New Password   [   ]
Confirm Password   [   ]
[Update Password]

To enter a password regular expression:

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 **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.

Change your password

New passwords must meet the password policy requirements
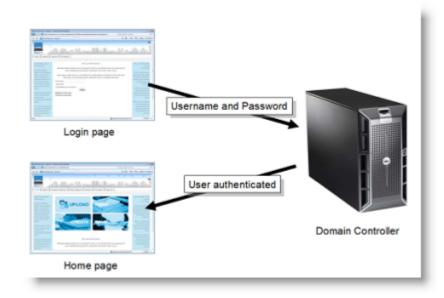
- It must be at least 3 characters in length
- It must include at least one number
- It must include at least one of the following characters !$%^&*()_-+=@~#<,>.?
- It must include at least one uppercase character
- Your password needs to be changed every 30 days

Current Password   [   ]

New Password   [   ]

Confirm Password   [   ]

[Update Password]

To configure **Password Regular Expression** for all portals associated with Skyline use the default configuration option[728] . 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 [81] .

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 [75] .

2. Check error settings [76] .

3. Add domain name [77] .

4. Test LDAP Settings [78] .

5. Configure Network Authentication [80] .

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.

   <u>Default Configuration</u>

   Manage the default configuration options

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;passw ord=Skyline" providerName="System.Data.SqlClient" />
     <add name="SkylineMembership" connectionString="data source=.\Skyline;initial catalog=SkylineMembership;user id=Skyline;passw ord=Skyline;packet size=4096; Enlist=false;" providerName="System.Data.SqlClient" />
     <add name="ADServiceWindow s" 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 -->
       <add name="Database" connectionStringName="SkylineMembership" requiresQuestionAndAnsw er="false" applicationName="/" type="Eprint.Skyline.Web.Pages.ApplicationProvider" requiresUniqueEmail="false" minRequiredPassw ordLength="1" minRequiredNonalphanumericCharacters="0" passw ordStrengthRegularExpression="" maxInvalidPassw ordAttempts="999" />
       <!--<add name="Netw ork" attributeMapUsername="sAMAccountName" requiresQuestionAndAnsw er="false" type="System.Web.Security.ActiveDirectoryMembershipProvider, System.Web, Version=2.0.0.0, Culture=neutral, PublicKeyToken=b03f5f7f11d50a3a" connectionStringName="ADServiceWindow s"/>-->
     </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.

   🛒 View Basket (0) | Preferences | Downloads | Edit | Admin | Management | Logout

)

2. In the Portals section click Default Configuration.

   Default Configuration
   Manage the default configuration options

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

   Portal Configuration
   Manage the configuration options for this portal

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.

Portals
Create, edit & delete 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 [floppy disk icon] 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**

Portals
Create, edit & delete 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 ProductManager

2.   The Skyline ProductManager automatically opens with a log in screen. Click to change the portal details.
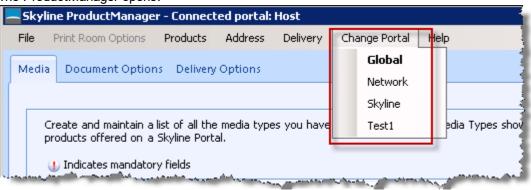
3.   The connection details window opens. Enter the localhost machine name or IP address and click **Connect**
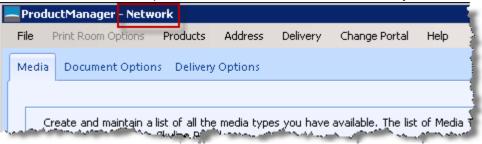
4.   Enter the user name **SkylineHost** and password **SkylineH0$t**, then click **Log in**.

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.

Portal Configuration

Manage the configuration options for this portal

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[728] . 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.
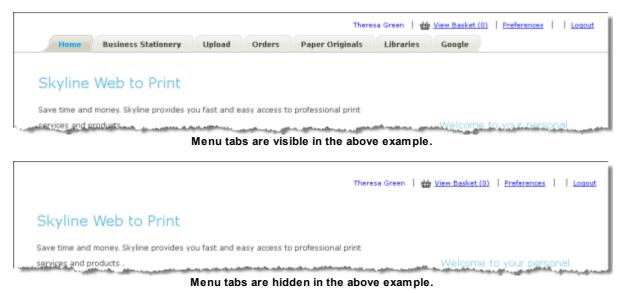
The features that are available for your users will depend how you have chosen to setup your portals.

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**.

Portal Configuration

Manage the configuration options for this portal

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[728] . 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](#)□ 89 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**.

    Portal Configuration
    Manage the configuration options for this portal

3. Find **Look And Feel - Tab Style** in the list.

    - Select the tab style you require. [Examples](#)□89 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](#)□ 728 . 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**.

    Tabs
    Add edit 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[315].

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.

The PDF Converter is not running

Support
To ✓ Annette Webber

09:31

The DCStart service in not running on the Skyline webiste
The Skyline PDF Converter service in not running on the Skyline webiste
The Skyline PDF Scheduler service in not running on the Skyline webiste

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.

    Default Configuration
    Manage the default configuration options

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**.

Uploaded Document Types
Add and Update 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**.

Portal Configuration

Manage the configuration options for this portal

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[728] . 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**.

Portal Configuration

Manage the configuration options for this portal

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[728]. 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**.

    Portal Configuration

    Manage the configuration options for this portal

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[728] . 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.

Paper Originals

allows you to provide finishing instructions via Skyline for a hard copy document mailed to the print Room. Providing your instructions this way gives you access to all the document finishing options available and ensures your requirements are clearly understood.

Document Name

Number of Pages

Next ▶

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**.

    Portal Configuration

    Manage the configuration options for this portal

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**.

    Portal Configuration

    Manage the configuration options for this portal
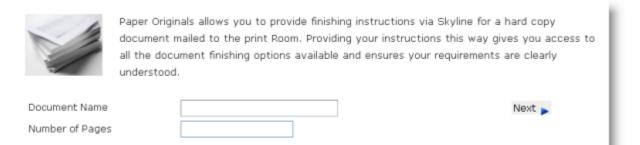
3. Find **Paper Originals - Missing Information Error** in the list.

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 .

Paper Originals allows you to provide finishing instructions via Skyline for a hard copy document mailed to the print Room. Providing your instructions this way gives you access to all the document finishing options available and ensures your requirements are clearly understood.

Document Name [   ]   Next ►
Number of Pages [   ]

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**.

     Portal Configuration
     Manage the configuration options for this portal

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.

         Paper Originals allows you to provide finishing instructions via Skyline for a hard copy document mailed to the print Room. Providing your instructions this way gives you access to all the document finishing options available and ensures your requirements are clearly understood.

         You do not have permission to order using paper copies

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**.

   Portal Configuration
   Manage the configuration options for this portal

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 [728]. 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**.

    Portal Configuration
    Manage the configuration options for this portal

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 [728] . 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**.
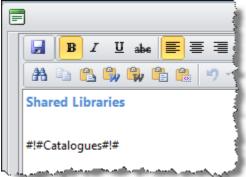
6.   Refresh the web page by going to the home page and then returning to the Libraries page. There is a blank column on the right of the page.

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.

ℹ️ **Note:** When Skyline is first installed the default configuration option◻ 728 **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**.

     Portal Configuration
     Manage the configuration options for this portal

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**.

     Portal Configuration
     Manage the configuration options for this portal

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**.

    Portal Configuration

    Manage the configuration options for this portal

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 728 . 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**.

    Portal Configuration
    Manage the configuration options for this portal

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[728]. 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**.

Portal Configuration
Manage the configuration options for this portal

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**.

Portal Configuration

Manage the configuration options for this portal

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 ProductManager⁵⁸⁷ .

ⓘ If the Checkout Mode¹¹⁷ 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**.

   Portal Configuration
   Manage the configuration options for this portal

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 option⁷²⁸ . 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][312]. 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**.

    Portal Configuration
    Manage the configuration options for this portal

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][728]. 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 ProductManager⁵⁸⁷ .

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**.

    Portal Configuration

    Manage the configuration options for this portal

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[164] 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[728] . 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 [214] can be configured and the start number specified [213]. 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 [220].

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:
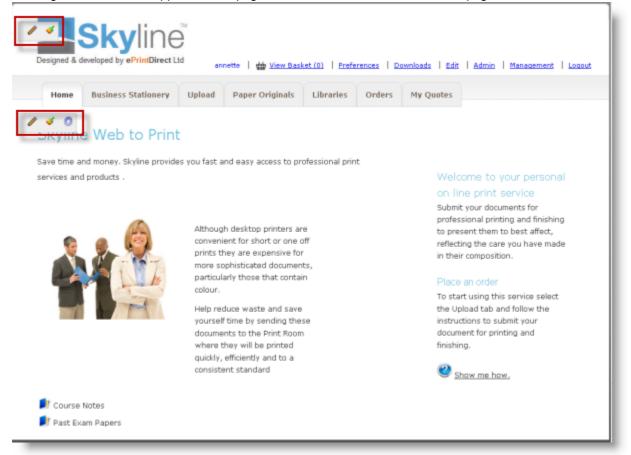
- Change the contents[119] of the Home web page.

- Show an external web page[122], for example allow access to the companies Intranet.

- Apply specific portal themes[226].

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.
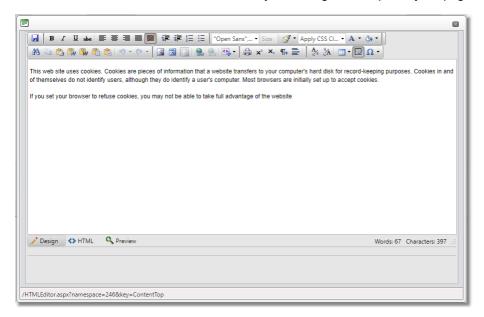
To amend the home page:

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**.

   Custom Pages
   Add, Edit & Remove custom website pages

3. A list of any existing pages will show.

   Add new custom page 1

   Back

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

4. A new field appears.

   Corporate Intranet 1

   Back Submit 2

   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.

   Add new custom page

   Corporate Intranet ✕

   Back

6.   Click the **Admin** link.

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

Selected Custom Pages
Assign custom website pages to portals

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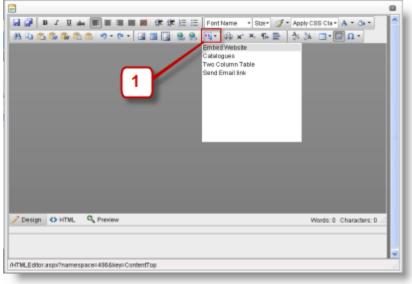
    1. Select **Hide Left Column** and **Hide Right Column**.

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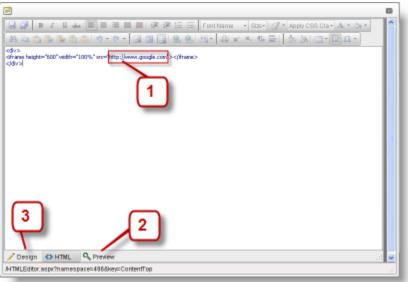
    1. Click **Insert Code Snippet** and select **Embedded Website** from the drop down menu.

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.
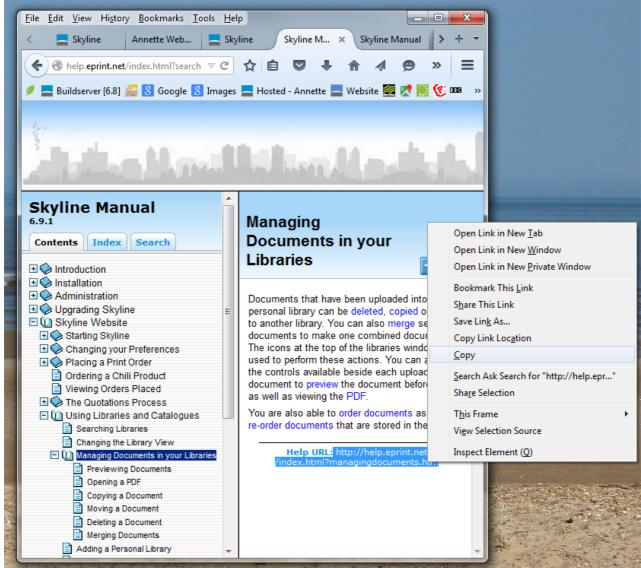
Adding Links to the Online Manual

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 <u>website languages</u>¹³¹ 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**.

    Portal Configuration

    Manage the configuration options for this portal
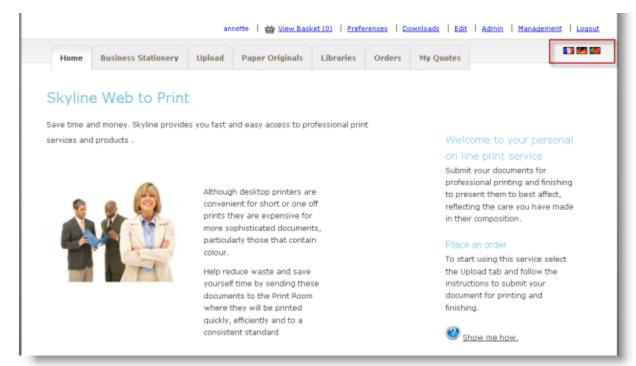
3. Find **Look And Feel - Language** in the list.

4. To amend this option click ✏ and enter the required language code. For more details refer to the <u>Language Country Codes</u>⁷⁵⁵ listed in the appendix.

5. Click 💾 to save the setting.

To configure **Look And Feel - Language** for all portals associated with Skyline use the <u>default configuration option</u>⁷²⁸. 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**.

Website Languages
Add edit 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[150] 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.

This record was opened by Mary Bud on 12 June 2018 11:57 and cannot be changed while it is locked.

OK

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.

Reason for Approval or Rejection

✔ Approve   ✖ Reject   🔓 Unlock

.

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 [143] - 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 [144] - amend the account code, name or description.

- Recalculate prices [145] - 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 [146] - 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 approvers [152].

In some cases you might have users that will not require their orders to be approved. You can make the user exempt [157] 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 approvers [152].

ℹ️ 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[147] .

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[151] 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**.

    Roles
    Manage user roles for current Portal

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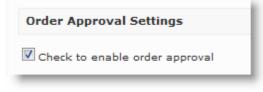
By default approval is not turned on. Approval needs to be enabled and the required settings selected.

To select the approval settings:

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

2. In the Orders section click **Approval Options.**

   Approval Options
   Setup the options available to approvers

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

4. Click [Save]

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[□ 152] for more information. If Approvers are able to select their own users a Select Users button is available in their Approval page.

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

When an approver clicks Select Users 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 [132] .

To select the Approval Level:

1.   Select the option from the drop down list.

2.   Click Save .

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 [Select Users]. The Assign Users to Approvers window opens. Level 1 approvers have ① next to their name and level 2 approvers have ②.

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 [Set].

Select Warning Time Period

The status of orders waiting for approval can be viewed using the [Approval Status report](#)[383]. 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 Save .

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 Save.

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 Save 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 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 Save .

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 Calculate Price . When amendments have been made they are not saved until Save 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 Save .

If an approver can edit the customer details they can amend the information fields shown below. 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 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.**
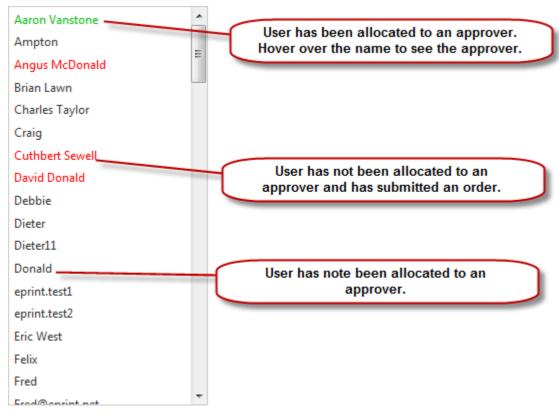
   Approval Users
   Allocate users to approvers

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.
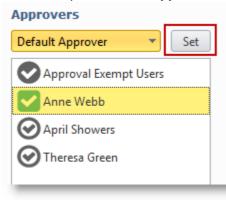
Example of the message seen by default approver

To create an Default Approver:

1. Select the Approver.

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

3. Click Set .

To remove a Default Approver:

1.   Select the Approver.

2.   Select the option **Approver** from the drop down list.
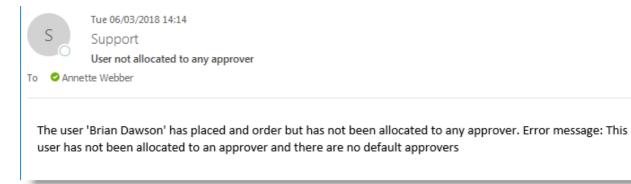
3.   Click Set .

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 [Save].

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 [Save].

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 [Save].

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[595] to set the pricing.

- Additional fields[569] 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[162] from the shopping basket page.

- You need to select a payment method of either Account[161] , Stripe[207] or WPM Education[209] .

If you have enabled the account code feature[161] you can configure the account information required to suit your accounting requirements including:

- Making an account code mandatory[200] .

- Providing a list of internal account codes[173] .

- Linking Skyline to an existing account code database[174] .

- Validate a manually entered account number[167] .

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[341] .

To Activate Colour Analysis:

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 - 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**.

Portal Configuration
Manage the configuration options for this portal

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[207] or WPM Education[209] 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**.

    Portal Configuration
    Manage the configuration options for this portal

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 728 . 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[167] .

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.

Enter your account code:

Account Code

Account Name

Account Description

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[117] 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**.

   Accounts and Pricing
   Setup your accounts and payment provider

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[173] or extracted from an external database[174] 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**.

Accounts and Pricing

Setup your accounts and payment provider

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 database[173] or extracted from an external database[174] 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.

Account Code ▼		Search

	Account Code	Account Name	Account Description
☐	1	Example name 1	Example Description 1
☐	2	Example name 2	Example Description 2
☐	3	Example name 3	Example Description 3
☐	4	Example name 4	Example Description 4
☐	4	Example name 5	Example Description 5
☐	4	Example name 6	Example Description 6
☐	7	Example name 7	Example Description 7
☐	8	Example name 8	Example Description 8
1 2 3 4			Page 1 of 4, items 1 to 10 of 40.

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**.

Accounts and Pricing

Setup your accounts and payment provider

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.

ℹ️ 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 👤ℹ️ **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 [173] or change existing ones [173].

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.

Use this page to create accounts to be displayed to and selected by users for any given job/document.

	Account Code	Description	Detail	
✎	FF2e	Finance Annual Report	Example account	✖
✎	IT1	IT Manuals	Example account	✖
✎	S1	Sales Department	Example account	✖
✎	TT2	Test Account	Example account	✖

To add a new account code:

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

	Account Code	Description	Detail	
💾✖				
✎	FF1	Finance Departments		✖
✎	FF2	Finance Annual Report		✖
✎	IT1	IT Manuals		✖
✎	IT2	IT Help Brochures		✖
✎	S1	Sales Department		✖
✎	S2	Sales Easter Promotion		✖

Back

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 <u>updating external accounts</u> 182 .

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**.

   External Accounts
   Create external accounts connections

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 Queries¹⁷⁸ 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**.

    Portal External Accounts
    Assign accounts to a portal

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.

    ☐ External SQL Example
    ☐ new
    ☐ Excel Example
    ☑ Eprint Accounts

    New connection has been selected

    Cancel   Save

12. The connection needs to be tested. Make sure that you have enabled the account codes[161] 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**.
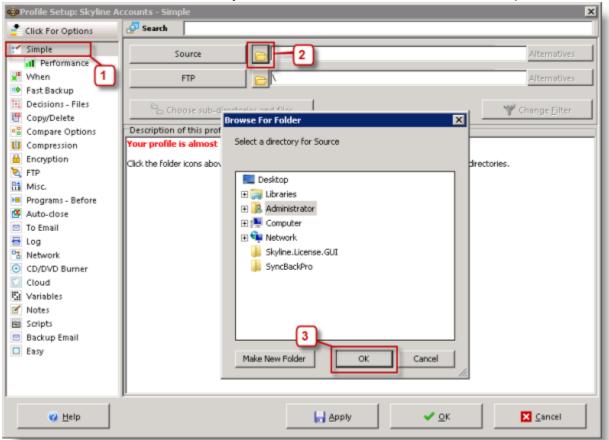
13. The settings are tested. When complete you will receive the message that the FTP server was logged into.

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.

Accounts and Pricing
Setup your accounts and payment provider

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**.

   Accounts and Pricing
   Setup your accounts and payment provider

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.

Please check the order details below and confirm your order

✖ Cancel Order

Quantity	Document	Product	Pages	Price
25	PrintStation	A4 Plastic Comb Binding	66	92.00
			Delivery	10.00
			Priority	5.00
			Total	107.00

Confirm Order ▶

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**.

Accounts and Pricing
Setup your accounts and payment provider

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 CostManager⁵⁹⁵ 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 Order³³² 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**.

    Accounts and Pricing
    Setup your accounts and payment provider

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⬚ 588 . 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[334] 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**.

Accounts and Pricing
Setup your accounts and payment provider

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[588] . The amended labels will appear on the confirmation page. The field will only show if options is completed in the delivery form.

Pricing	CostManager ▼		
Please select Payment Provider	WPM Education ▼		
Delivery Costs Label	Delivery	Priority Costs Label	Priority
Client ID	8216	Pathway ID	27

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**.

    Portal Configuration
    Manage the configuration options for this portal

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[545].

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[606].

3. Assign the product to the required portal. For more information, please refer to the section on Adding Products to a Portal[552].

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[512] 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[330].

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[445].

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](#)⊡ 213 .
  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](#)⊡ 214 .
  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](#)⊡ 216 .
  When an job order is placed on PrintStation the order is listed in the [Orders web page](#)⊡ 339 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**.

    Order Numbers
    Set a start order number for a portal

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

    Last Order Number 60000

    Back Submit

4. Click **Submit**.

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

    Last Order Number 60000

    Your order number details have been saved

    Back Submit

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[213].

To amend the order number format:

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 **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[728]. 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**.

    Portal Configuration

    Manage the configuration options for this portal

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[118] 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[217] when a job status is changed. You can also configure the wording shown for the status displayed in the Orders web page.

> ℹ 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[330] 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.

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.
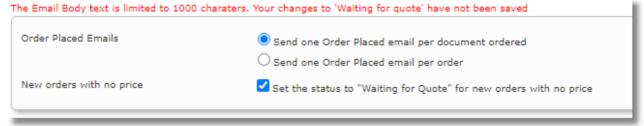
Amending Status Emails

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[515] 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**.

   Order Statuses
   Create, edit & delete order statuses

3. Details of all the System Statuses are listed. Click 🖉 by the type Query Outstanding.

	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.

OrderID
DocumentName
Product name
Pages
Copies
Status
Price
BillingCode
RequiredDate
SubmittedDate
Delivery method

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**.

Order Statuses

Create, edit & delete 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.
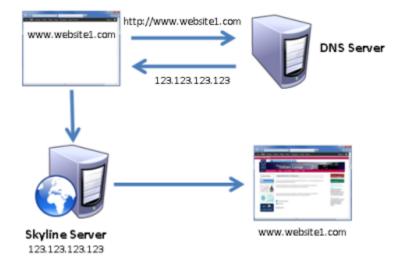
Configuring Skyline Portals

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.

```
Administrator: Command Prompt

C:\>nslookup skyline-example.co.uk
Server:   UnKnown
Address:  192.168.0.2

*** UnKnown can't find skyline-example.co.uk: Non-existent domain

C:\>_
```

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**.

   Portal URL's
   Create and delete websites in the current portal

3. A list of associated websites is shown.

   New Website URL
   www.Website1.com
   [Add]

   [Back]

   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**.

Portals
Create, edit & delete 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.

Add A New Portal

Portal Name		Portal URL	
Admin UserName		Admin Email	
Admin Password		Confirm Password	
Apply look & feel from			
Expiry Date			

Back   Add

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**.

   Themes
   Create, edit & delete portal 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[226] .

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**.

    Portal Themes
    Select a theme for a portal

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 ⬜728 . 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**.

@   Email Settings
      Add and update 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**.

   Portal Configuration
   Manage the configuration options for this portal

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[728]. 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**.

    Portal Configuration
    Manage the configuration options for this portal

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**.

    Default Configuration
    Manage the default configuration options
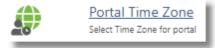
3. Find **Upload - Directory** in the list.

    - 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**.
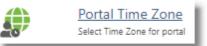
3.   Select the required time zone for the portal and click **Set**

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**.
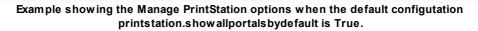
6.   Select the required time zone for all portals and click **Set**

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**.

    Manage PrintStation(189/1000)
    Administer PrintStation Options

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**.

Default Configuration
Manage the default configuration options

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**.

    Manage PrintStation(189/1000)
    Administer Print Station Options

3. Click the red cross associated with the PrintStation PC to release the allocated PrintStation license.

    Logged in as: Host & Portal Administrator | Admin Home

    Number of items per page 10 ▼

PrintStation PC	Assigned Portals	
	Skyline	✖
	Skyline	✖
	Skyline	✖

    You have downloaded 3 PrintStation(s). You are licenced for 999.

    Add/Remove a Portal To A PrintStation

    PrintStation   DEV-03 ▼
    Portal   Network ▼

    Remove   Add

    Back

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'.
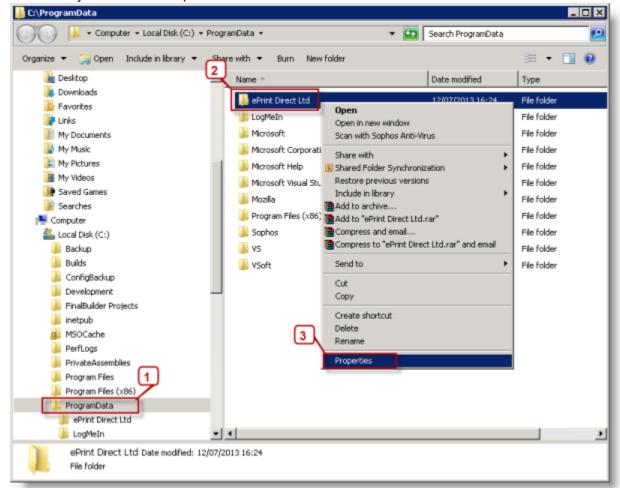
ⓘ **Note:**
   The directory C:\Skyline\PrintStation is created automatically during the installation process..

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 <u>**Everyone**</u> 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**.

    Publisher Server
    Connect Skyline with a Publisher server

3. Enter the required Skyline Publisher server details

    Connect to Skyline Publisher Server

URL	http://publisher.eprintnow.com/chili	Use Proxy	☐
Environment	Admin	Proxy Address	
Username	Admin	Proxy Port	
Password	••••••••••	Proxy Username	
Confirm Password	••••••••••	Proxy Password	
		Bypass Proxy Server for Local Addresses	☐

    Save

    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 Save , 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.

    Skyline Publisher Environments

    To make products designed with the Skyline Publisher available to users, you need to link a Skyline Portal with a Skyline Publisher Enviromnent.
    Click on the edit icon below to link a Portal to a Skyline Publisher Environment

	Portal Name	Publisher Environment
✎	Annette	Paul
✎	Apricot	Not Linked
✎	Cambridge	Not Linked
✎	Dorset	Not Linked
✎	LDAP	Not Linked
✎	Renfrewshire	Not Linked
✎	SteveD	Not Linked

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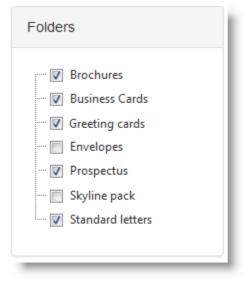
1.   Log in with Administrator rights and go to Admin.

2.   In the Publisher section click **Publisher Folders**.

Publisher Folders
Select Publisher Folders to display

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**.

    Publisher Products
    Assign products to Publisher documents

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**.
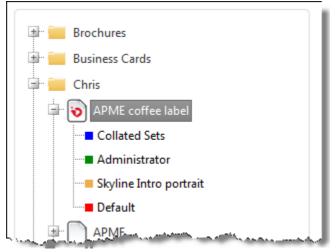
5. Select the PDF Setting. If there is a PDF setting that is frequently used that setting can be selected by default. Select the PDF setting and click **Make Default**.

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[258].
  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[253].
  If you are doing an upgrade[669] or doing a manual backup[258] you need to take the Skyline website offline. This will prevent changes to the database during the backup.

- Accessing SQL Service through a Firewall[264].
  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[265].
  You are able to enter the email addresses that are used when the Skyline system generated emails are sent.

- Moving the Skyline Database[268].
  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**.

License Settings
Add and Renew License

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**.

License Settings
Add and Renew License

8. Click [Select] and select the new **skyline.lic** file.

9. Click [Upload] to upload your new license.

10. When the new license has been uploaded click [Reset Skyline website]. 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 669 or running a manual backup 258 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 254. Renaming this file will change to Skyline homepage to a holding page shown in the example below.
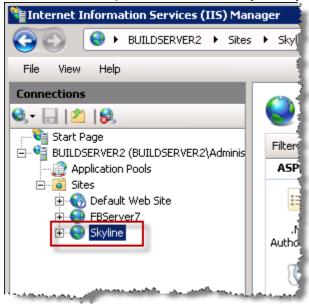
Locating your Skyline Website

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.
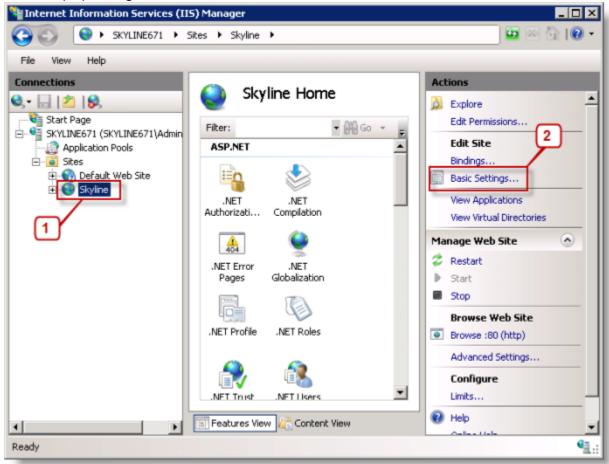
Locating your Skyline Databases

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**.

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.
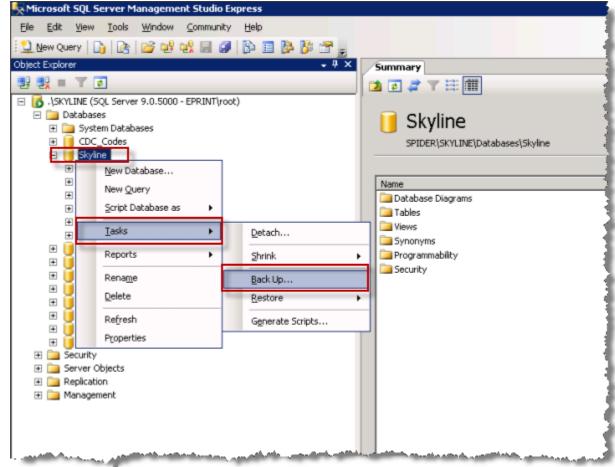
To run a manual backup:

1.   Take the website off line[253].

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**.
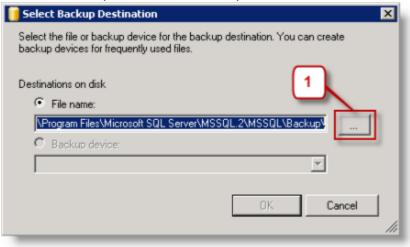
4.   The Back Up Database - Skyline window opens. Any existing backup locations and names need to be removed.

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**.

     Email Settings
     Add and update 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**.

   System Emails
   Edit the subject and text of 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[63]	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[48]	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[48]	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[48]	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[28]	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://

Administration | 267

Type	Subject	Email Content
		{url}/UserAdmin/Default.aspx
Activation email sent to new Skyline Cloud Printer users	Activate your account[626]	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 [253] .

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.
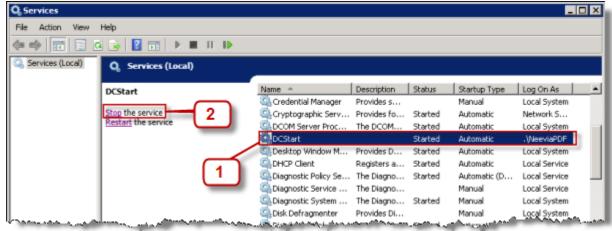
Fonts and the PDF Converter

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.
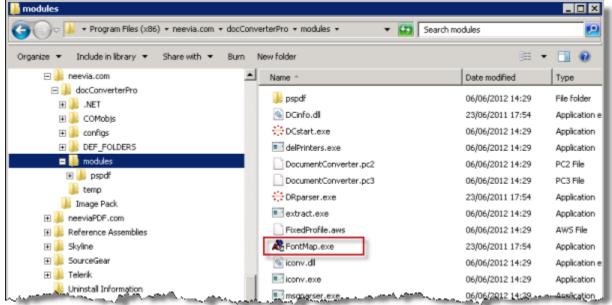
1. Select the service DCStart.

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).
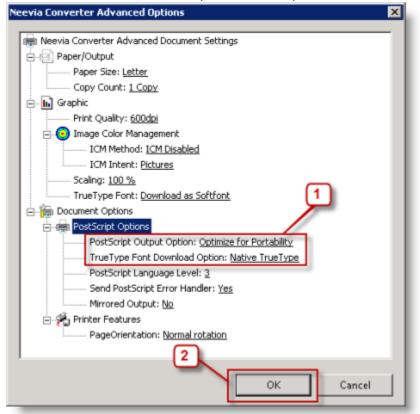
    1. Select **Printing Preferences**.

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.
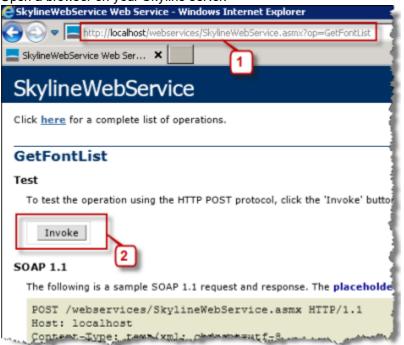
Default List of Fonts

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**.

    Portals
    Create, edit & delete 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 PrintStation⁵⁰⁵.
   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.
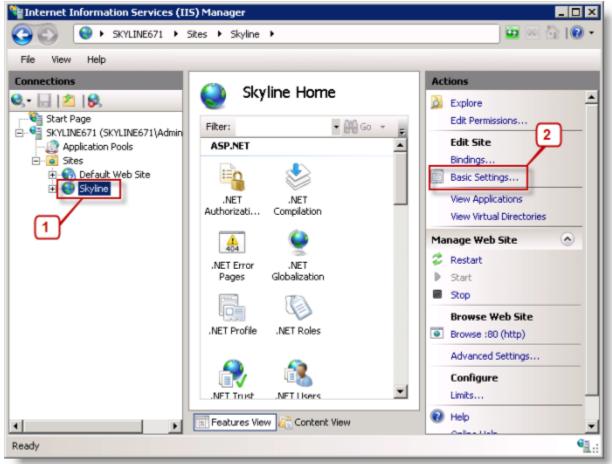
HTTPS should now be completed.

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**.

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.
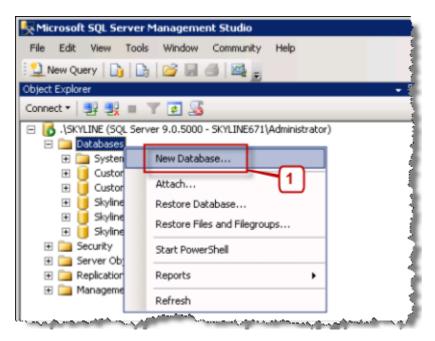
1. Enter the name of the SQL Server

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](#)⬚ 226 .

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](#)⬚ 233 .

4. [Add a user](#)⬚28 and [assign roles](#)⬚42 , if required.

5. Amend the [email settings](#)⬚ 265 , 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

Date that the document was uploaded into the user's library.

- 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 <u>Skyline database</u>⬚²⁵⁵ and then take a backup of the database.

2. log in to the Skyline server and <u>locate your Skyline website</u>⬚²⁵⁴ .

3. Download the purge utility from <u>http://download.eprint.net/Utilities/</u> 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.

ℹ️ Please refer to the section <u>Skyline Update Utility</u>⬚²⁹⁹ 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**.

Default Configuration
Manage the default configuration options

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.

　　Default Configuration
　　Manage the default configuration options

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**.

   View Error Details
   View the details of any errors logged in the database

3. A list of errors is displayed. You can select a specific date range if there are a lot of errors.

   Portal Errors

Start Date		End Date		Show Errors

Time Stamp	Username	Error Message	Error Page
29/04/2024 09:08:34	nettie	A potentially dangerous Request.QueryString value was detected from the client (n="").	/ChooseDocumentType.aspx
29/04/2024 09:00:38	nettie	A potentially dangerous Request.QueryString value was detected from the client (n="").	/ChooseDocumentType.aspx
23/04/2024 13:40:07	anne webb	A potentially dangerous Request.QueryString value was detected from the client (n="").	/ChooseDocumentType.aspx

4. Select an error to see the specific details.

   Portal Errors

Start Date		End Date		Show Errors

Time Stamp	Username	Error Message	Error Page
29/04/2024 09:08:34	nettie	A potentially dangerous Request.QueryString value was detected from the client (n="").	/ChooseDocumentType.aspx
29/04/2024 09:00:38	nettie	A potentially dangerous Request.QueryString value was detected from the client (n="").	/ChooseDocumentType.aspx
23/04/2024 13:40:07	anne webb	A potentially dangerous Request.QueryString value was detected from the client (n="").	/ChooseDocumentType.aspx

   Error Message

   A potentially dangerous Request.QueryString value was detected from the client (n="</>").

   Error Page

   /ChooseDocumentType.aspx

   Inner Error

   No inner error

   Stack Trace
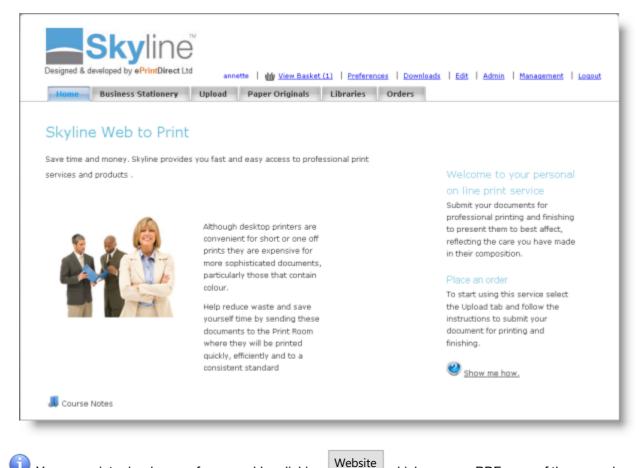
   at System.Web.HttpRequest.ValidateString(String value, String collectionKey, RequestValidationSource requestCollection)
   at System.Web.HttpRequest.<>c__DisplayClass280_0.<ValidateHttpValueCollection>b__0(String key, String value)
   at System.Web.HttpValueCollection.EnsureKeyValidated(String key)
   at System.Web.HttpValueCollection.Get(String name)
   at System.Collections.Specialized.NameValueCollection.get_Item(String name)
   at Eprint.Skyline.Web.Pages.ChooseDocumentType.Page_Load(Object sender, EventArgs e)
   at System.Web.Util.CalliEventHandlerDelegateProxy.Callback(Object sender, EventArgs e)
   at System.Web.UI.Control.OnLoad(EventArgs e)
   at System.Web.UI.Adapters.ControlAdapter.OnLoad(EventArgs e)
   at System.Web.UI.Control.LoadRecursive()
   at System.Web.UI.Page.ProcessRequestMain(Boolean includeStagesBeforeAsyncPoint, Boolean includeStagesAfterAsyncPoint)
   at System.Web.UI.Page.ProcessRequest(Boolean includeStagesBeforeAsyncPoint, Boolean includeStagesAfterAsyncPoint)

   Example of the error information available

Skyline Website

You use the Skyline website to submit documents for production. When you have started Skyline the main window will be similar to the one shown below. Different themes can be applied and not all the tabs or links will be made available to all users. The actual look and feel of the screen will depend on how your system has been configured.

ℹ️ You can print a hard copy of a manual by clicking [Website] which opens a PDF copy of the manual. You can then download or print the document.

Starting Skyline

When you use Skyline for the first time you will be told how to log in. There are several ways that you will be able to log in for the first time.

- Some users will have been set up so that they can log in using their corporate user name and password.

- Other users will have their accounts created for them and their new passwords and log in details will have been emailed to them.

- Users may be able to register as a new user[306] and create their own account.

To open Skyline:

1. Open your default internet browser, e.g Internet Explorer and browse to your webpage.

2. At the log in window enter your details.

Username	Anne Webb
Password	●

☑ Remember me next time

Log In

Register as New User

3. Click **Log In**. The Skyline main window opens.

To open Skyline using Azure:

1. Open your default internet browser, e.g Internet Explorer and browse to your webpage.

2. At the log in window click **Sign in with Microsoft**.

3. Enter your details and click **Next**.

4. Enter your password and click **Next**. The Skyline main window opens.

 If you selected to remain logged in to reduce the number of times that you have to sign into Microsoft you can use the **Sign out of Microsoft** button when you want to close your session.

Register as a New User

If Skyline has been configured so that new users can register their details the Register as New User link will be visible. If this is not an option that has been selected, the link will not be available.

To register as a new user:

1. Open your default internet browser (for example, Internet Explorer) and type the web address in the address field.

2. At the log in page select the link **Register as New User**.

3. Enter your details and click **Create User** to continue. If there are criteria set for your password the details are shown on the registration screen.

4. Your user account will be created. You will receive a message telling you if your account needs to be approved before you can use it. Click **Continue**.

5. You are returned to the Log in window. If your account doesn't require approval enter you user name and password to start using Skyline.

Using the Forgotten Password Link

When you log in you need to enter your Username and Password. If you have forgotten your password you can request a replacement using the forgotten password link. If you can not see the link, your setup has been configured so that his option is not supported. If you can not see the link please contact your administrator regarding your forgotten password.

To reset your password:

1. Click the **I forgot my password** link.

2. Enter your username and click **Send me password reset instructions.**

3. You will see a message stating that an email has been sent to you. Click **Finish**. You are returned to the log in window which can now be closed.

4. Open you email account and view the email sent from Skyline. It will look similar to the one shown below. Click the **Reset Password** link contained in the email.

Password Request

S Support
To ✔ Annette Webber
11:02

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:
Reset Password
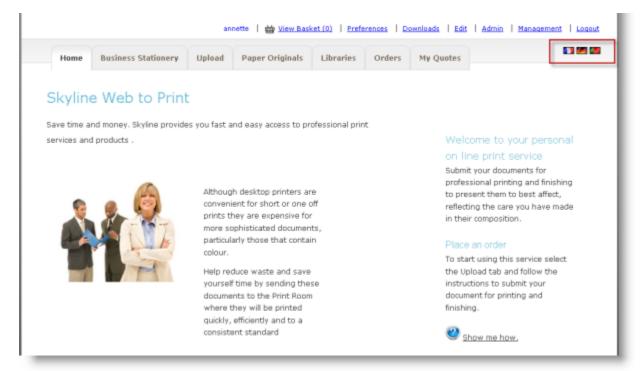
5. You will be able to enter a new password then click on the **Change Password** button. You will be taken to your Login page and be able to login with your new password.

New Password

Confirm Password

Change Password

Changing your Preferences

You can update your personal account details at any time after your initial log in. To view the preferences that you can update click the preferences link at the top of the window. You can update your email address[311] , change your password[313] and enter a delivery address[312] for printed items you order.

Depending on the way your particular system has been configured, you might have a choice of languages. If your Skyline Portal has been set up for multiple language selection you can select a language by clicking on the nationality flag in the top right hand corner of the Skyline Portal.

All text and graphics are language specific. When a Skyline Portal is used in more than one language different content such as text and graphics has to be added for each language. Below is an example of the home page being displayed in French where some of the text and graphics are missing.

Changing your Email Address

You can change your email address once you have logged into Skyline. The email address will be used for all system messages once it has been submitted.

To change your email address:

1. Log in and go to **Preferences**.

2. Select **Email**.

3. Enter your new email address details. Click **Update Email Address** to save your new details.

4. Confirmation is shown that you have successfully changed your email address. Click **Back** to close the window and return to the Preferences window.

Changing your Delivery Address

You can change or update your address details. These details are used when you place a print order.

Skyline doesn't support apostrophes (' or ') in the address. If they are entered they will appear as an error in PrintStation.

To change your delivery address:

1. Log in and go to **Preferences**.

View Basket (0) | Preferences | Downloads | Edit | Admin | Management | Logout

2. Select **Delivery**.

    Delivery
    Change your Address Details

3. Enter your new address details. Any field names shown in red indicate that the field is mandatory.

Back

Title	
Name	Theresa Green
Company Name	ePrint Direct Ltd
Address 1	Unit 3, Gateway 1000
Address 2	Stevenage
County	Hertfordshire
Postal Code	SG12 8FP
Phone Number	+44(0) 1438 842420

Save

4. Click **Save** to save your new details. The page will close you will return to the Preferences page.

Changing your Password

The change password screen allows you to change your password whenever you like. However, if you log in to Skyline using your corporate user name and password you will not be able to see this option.

To change your password:

1. Log in and go to **Preferences**.

    ⛪ View Basket (0)   Preferences   Downloads | Edit | Admin | Management | Logout

2. Select **Password**.

    🔒 **Password**
        Change your password

3. The Change your password form opens.

    Change your password

    New passwords must meet the meet the password policy requirements

    | | | **1** |
    Current Password [   ]
    New Password   [   ]
    Confirm Password [   ]
    [Update Password]   **2**

    1. Enter your current and new password details.

    2. Click **Update Password**. You are returned to the home page if you have successfully changed your password.

ℹ️ If you enter an incorrect current password you will be notified of your error.

Change your password

The Current Password entered is not correct

Current Password [   ]
New Password   [   ]
Confirm Password [   ]
[Update Password]

Placing a Print Order

There are several ways that you can order printed documents using Skyline.

- The easiest way is to simply upload[315] the document that you wish to have printed and choose from the finishing options that are displayed.

- You can also order items that are stored in libraries[345] .

- There may be times that you do not have an electronic copy of items that you want printed. If this is the case you can use the Paper Originals[327] web page to place an order.

Using Upload

You can upload a document that you wish to have printed. You can then order the document and choose from the finishing options that are displayed.

The Upload web page allows you to select documents from your own files and order them on-line or save them to your own personal library. The documents are converted into a high resolution PDF and the conversion also provides a thumbnail image to help with identification. If you already have a PDF version of your document this can be uploaded and no further conversion takes place although the thumbnail is still provided.

If you are not sure of the file formats that you can upload click the link Supported File Formats. A window opens listing all the supported document types.

DocumentType	Extension
Bitmap Image	.bmp
Microsoft Word	.doc
Microsoft Word 2007 and 2010	.docx
GIF Image	.gif
JPG Image	.jpeg
JPG Image	.jpg
adobe	.PDF
PNG Image	.png
Microsoft PowerPoint	.ppt
Microsoft PowerPoint 2007 and 2010	.pptx
Microsoft Publisher	.pub

Example of the Supported File Formats Window

To upload a document:

1. Log in and click the **Upload** tab.

2. Click **Select** to locate the document/s that you want to have printed.

Upload Your Document to Print

Select

Proceed   Supported File Formats

Your documents are being converted.

Position	File Name
No records to display.	

3. The documents are uploaded.

- During the upload process they are shown with a yellow progress bar.

  Document being uploaded

- Documents that can not be uploaded as they are not of a supported file format show with a red dot. Any files that are shown with a red dot can be removed from the upload list by clicking the word Remove.

  Example of a file format of document not supported.

- If you upload a document by mistake you can remove the document from the uploaded list by clicking the word Remove associated with the document.

4. When all the documents have been uploaded click **Proceed** to process the documents and load them into your personal library.

Ordering Documents

Documents are stored in your personal library. They can be ordered as soon as they are uploaded or at another time.

To order a document:

1. Click the **Libraries** tab.

2. Locate the document that you want to print.

1. Click the Order 🛒 by the document that you want to order.

   If you get the message "You must preview your document before continuing" click 🔍 next to the document that you want to preview. For more information see the section on previewing documents 🗐349.

3. The first step of the ordering process is to select the document type. The options available will be dependent on the options that your print room has specified. If there are some products that are not suitable for the document the products will be unavailable. The products can be organized into different categories if portal pricing is used. Click on each category tab to see the options available.

1. Click the **Proceed** link corresponding to the type you require

4. You will now be offered some further options for the product you have chosen. For example, you may be offered a choice of paper colour or print in colour or mono print.

1. Select the options for the product that you have selected.

2. Enter the number of document copies required.

3. Click **Next** to continue placing the order.

5. A quotation for the job may be displayed depending on the arrangements that you have with your print provider. You can change the quantity of documents that you want printed. Click ⟳refresh to update the price. Click **Next** to continue placing the order.

6.   The delivery address information is automatically completed if you have entered a <u>delivery address</u>[312] . You can amend the address if you require the documents to be delivered to a different location. Field names showing in red are required fields.

1. Check the delivery address and amend the details if required.

2. Click **Next** to continue placing the order.

7.   The shipping requirements form opens.

1. Enter the delivery instructions and any additional information. Compulsory fields are labelled in red.

2. Click **Next** to continue placing the order.

8. You may be asked to specify or select an account code. This feature is only available if the accounts features[158] have been selected for your portal. If you do not see the account page proceed directly to the next step.

1. Select the required account code. You can use the search facility to locate an account code.

2. Click **Next** to continue placing the order.

9. Check your order details and if the details are correct click **Confirm Order** to complete the order process. If the Smart Calendar is used you will need to select a delivery date before you can continue placing the order.

Document Type   Product Options   Basket   Address   Shipping   Account   Confirm

✖ Cancel Order

Please select a date

Select date required

June 2020

◀◀ ◀   ▶ ▶▶

	Mon	Tue	Wed	Thu	Fri	Sat	Sun
	25	26	27	28	29	30	31
	1	2	3	4	5	6	7
	8	9	10	11	12	13	14
	15	16	17	18	19	20	21
	22	23	24	25	26	27	28
	29	30	1	2	3	4	5

○ Date available

● Reduced printing capacity

● Printroom very busy

● Closed - Contact printroom

● Closed or date in the past

Quantity	Document	Product	Pages	Price
1	Manual	Collated	918	78.03

Total   78.03

Confirm Order ▶

10. Your order confirmation is now shown and an order number provided together with details of the cost if pricing is being used. The Print room will now receive your document and may (dependent on configuration settings) send you an email confirming receipt. If the option Approval[132] has been turned on you will see a message that the document will not be printed until the document is approved.

Skyline can be configured to automatically send an email[217] to the person who placed the order to confirm that their order has been placed. An example email is shown below. The wording can be amended to suit the requirements of your organisation.

Example Email that is received when an order has been placed.

Ordering Multiple Documents

If you want to print several documents with the same binding requirements you can place just one order for all the documents that you want printed.

To order multiple documents in the same order:

1.   Click the **Libraries** tab.

2.   Select the documents that you want printed.

> 1. Each of the selected documents are shown by a tick in the selection box.
>
> 2. Click the **Order** button in the toolbar.

3.   The Document Type Window opens.

> 1. Click the **Proceed** button to select the product to be used. You can only choose one product which will be applied to all the documents you are ordering.

4. The Product Options window opens. Select the options for the product that you have selected and enter the Quantity of documents required. Click **Next** to continue placing the order.

5. The Basket window opens. A quotation for the job may be displayed depending on the arrangements that you have with your print provider. Amend the quantity that you require for any of the documents you have ordered. You do not have to enter the same quantity for each one. If prices are displayed click 🔄 to update the prices. Click **Next** to continue placing the order.

6. The Address window opens. The delivery address information is automatically completed if you have entered a delivery address [312] . You can amend the address if you require the documents to be delivered to a different location. Check the delivery address and amend the details if required. Click **Next** to continue placing the order.

7. The shipping requirements form opens. Enter the delivery instructions and any additional information. Click **Next** to continue placing the order.

8. You may be asked to specify or select an account code. This feature is only available if the accounts features [158] have been selected for your portal. If you do not see the account page proceed directly to the next step. Select the required account code. You can use the search facility to locate an account code. Click **Next** to continue placing the order.

9. Check your order details. If the details are correct click **Confirm Order** to complete the order process.

10. Your order confirmation is now shown and an order number provided together with details of the cost if pricing is being used. The Print room will now receive your document and may (dependent on configuration settings) send you an email confirming receipt. If the option Approval [132] has been turned on you will see the message that the document will not be printed until the document is approved.

Skyline can be configured to automatically send an email [217] to the person who placed the order to confirm that their order has been placed. An example email is shown below. The wording can be amended to suit the requirements of your organisation.

Order Placed
Build Server
To: Annette Webber

Your order number 9388 for 6 copies of Skyline TemplateManager [20120305] has been placed 25/04/2012.

Product name: 2 Hole Ring Binding
Number of pages: 24
Date required: 05/02/2012 12:00:00

Example Email that is received when an order has been placed.

Re-ordering a Document

When you have placed an order for a document you can re-order the documents with the same document type and product options at any time.

To re-order a document:

1. Click 🧺 adjacent to the document that you want to re-order.

2. The first page of the order and product details are shown.

1. Enter the quantity you require.

2. Click **Add To Basket** to proceed with the order.

3. Your existing document type and product options have been selected.

Document	Product	Quantity	Price	Pages	Edit	
Manual	A4 Plastic Comb Bound	4	142.72	602	Edit	✖

Next ▶

1. Click **Next** to continue placing the order.

4. The delivery address information is automatically completed if you have entered a delivery address[312]. You can amend the address if you require the documents to be delivered to a different location. Click **Next** to continue placing the order.

5. Enter the delivery instructions and any additional information. Click **Next** to continue placing the order.

6. You may be asked to specify or select an account code. This feature is only available if the accounts features[158] have been selected for your portal. Enter the correct account code of select it from the list of available account codes. Click **Next** to continue placing the order.

7. Check your order details. If the details are correct click **Confirm Order** to complete the order process.

Please check the order details below and confirm your order

✗ Cancel Order

Quantity	Document	Product	Pages	Price
12	Print Room Manual	A4 Plastic Comb Binding	124	71.04

Total 71.04

Confirm Order ▶

8. Your order confirmation shows your order number and details of the cost if pricing is being used. The print room will now receive your document and may (dependent on the portal configuration settings) send you an email confirming receipt.

Ordering Paper Originals

When you do not have an electronic copy of a document you can submit job tickets with a reference to a physical hard copy or paper original. Using Paper Originals you can provide finishing instructions via Skyline for a hard copy document mailed to the print room. You will have access to all the document finishing options available and your requirements should be clearly understood.

To place an order for a paper original:

1. View the **Paper Originals** web page.

    1. Enter the document name and the number of pages.

    2. Click **Next** to continue.

2. The print room will offer you different document types or products that your document can be printed as. Select from the range of products being offered for your document.

3. You will now be offered some further options for the product you have chosen.

    1. Select the product options required

    2. Enter the quantity of documents required.

    3. Click **Next** to continue

4. A quotation for the job may be shown, depending on the arrangements that you have with your print provider. Click **Next** to continue.

Document	Product	Quantity	Price	Pages	Edit	
Operational Procedures - Ver 1.4	A4 Booklet	25	↻ 27.00	36		✖

5. Amend the address information if required. Click **Next** to continue.

6. Enter any specific delivery instructions. Click **Next** to continue.

7. Account codes can be applied to your order. This feature is only available if the Skyline Portal you are using has been configured to show the accounts page.

8. You now have the option to Confirm or Decline the order. If all the information is correct click **Confirm Order** to place the order.

9. Your order confirmation is now shown and an order number provided. Together with details of the cost if pricing is being used. The Print room will now receive your document and may (dependent on configuration settings) send you an email confirming receipt.

Ordering Documents in Zip Files

Large documents can be placed in zip files and ordered using Skyline in the usual way. When you upload a zip file you will need to enter the number of pages in the documents to be able to cost and continue placing the order.

If you order multiple documents you will not be able to enter the number of pages in the Zip file. This will mean that the cost for printing the contents of the Zip file will not be generated. It is recommended that each Zip file is ordered separately so that the number of pages can be entered.

To order a document in a Zip file:

1. Click the **Libraries** tab.

2. Click [Order 🛒] associated with the zip file that you want to order.

3. The Document options page opens.

   1. Enter the number of pages in the document contained in the zip files.

   2. Click Save.

4. Select from the range of products being offered for your document and click **Proceed** associated with the required product.

5. The Product Options window opens. Select the options for the product that you have selected and then enter the Quantity of documents required. Click **Next** to continue placing the order.

6. The Basket window opens. A quotation for the job may be displayed depending on the arrangements that you have with your print provider. Amend the quantity that you require for any of the documents you have ordered. You do not have to enter the same quantity for each one. If prices are displayed click 🔄 to update the price. Click **Next** to continue placing the order.

7. The Address window opens. The delivery address information is automatically completed if you have entered a delivery address[312] . You can amend the address if you require the documents to be delivered to a different location. Click **Next** to continue placing the order.

8. The shipping requirements form opens. Enter the delivery instructions and any additional information and click **Next** to continue placing the order.

9. You may be asked to specify or select an account code. This feature is only available if the accounts features[158] have been selected for your portal. If you do not see the account page proceed directly to the next step.

10. Check your order details. If the details are correct click **Confirm Order** to complete the order process.

11. Your order confirmation is now shown and an order number provided together with details of the cost if pricing is being used. The Print room will now receive your document and may (dependent on

configuration settings) send you an email confirming receipt. If the option Approval[132] has been turned on you will see the message that the document will not be printed until the document is approved.

Skyline can be configured to automatically send an email[217] to the person who placed the order to confirm that their order has been placed.

Requesting a Quotation

Some orders will need to be priced manually as they have special requirements. You can request a quotation which can be priced up in the print room and the quotation sent out via PrintStation. You will receive an email telling you that you have a quotation waiting for you. You can then either accept the quotation and the order is placed on PrintStation or you can reject the quotation and the order is marked as deleted.

To request a quotation.

1. Place an order in the usual way using the product designed for requesting a quotation. All price fields will be blank during the process. When you have placed the order details will appear in your Orders tab where the status will show as 'Waiting for Quotation'.

PDF	Job Ticket	Document	Order Number	Order Date	Required Date	Status	Quote	Delete
🅿	View	Testing Notes for Additional Fields	0000117	30/07/2024 14:05		Waiting for quote		❌
🅿	View	Administration	0000113	30/07/2024 11:01		Order Placed		❌
	View	Manual	0000112	30/07/2024 10:55		Order Placed		❌

2. You will also receive an email telling you that your order has been placed and another one stating that your order is waiting for a quote. If your order contains a zip file you may see the order status change to Downloaded before you receive notification of a quotation. This can happen on any orders you request a quotation for as the print room operator is likely to view the document that you have sent before they can create a quotation.

3. You will receive another email when a quotation has been sent. Within the email there may be a link for you to use to go to your Orders tab in Skyline or you can just view your Orders tab. The order status will show as Quotation Sent with a value and there will be a green tick available.

PDF	Job Ticket	Document	Order Number	Order Date	Required Date	Status	Quote	Delete
🅿	View	Testing Notes for Additional Fields	0000117	30/07/2024 14:05		Quote sent 25.00	✅	❌
🅿	View	Administration	0000113	30/07/2024 11:01		Order Placed		❌
🅿	View	Manual	0000112	30/07/2024 10:55		Order Placed		❌

4. Click [View] to open the Job Ticket. The quotation is shown in the price estimate section.

5. To accept the quotation click or to decline the quotation click . If you accept the quotation the order will be marked with the status 'Order Placed' and be processed by the Print Room. If you reject the quotation the order will be marked with the status deleted and will not show in your list of orders.

Using Stripe to Pay for an Order

When Skyline has been [configured to accept Stripe](#)^{□ 207} payments for orders you are automatically directed to the Stripe site when you place an order. If you [request a quotation](#)^{□ 330} you are not required to pay using Stripe until you have accepted the quotation.

To make a payment using Stripe:

1. [Place your order](#)^{□ 314} in the usual way.

2. After entering your address and delivery details you will be taken to the Stripe summary page. Click **Pay now** .

Document	Product	Pages	Copies	Price
CostManager	Collated Sets	30	4	360.00
ProductManager	Portrait Staple	64	12	318.72
			Sub total	678.72

		Order Total	678.72
Pay Now			

3. You are taken to the Stripe checkout page. A summary of your order is shown.

ePrint direct   TEST MODE

Pay Skyline
£678.72

CostManager 30 pages, 4 copies	£360.00
ProductManager 64 pages, 12 copies	£318.72
Subtotal	£678.72
Add promotion code	
Total due	£678.72

Powered by stripe | Terms   Privacy

Pay with card

Email

Card information
1234 1234 1234 1234   VISA
MM / YY   CVC

Name on card

Country or region
United Kingdom
Postal code

☐ Save my info for secure 1-click checkout
Pay faster on Skyline and thousands of sites.

Pay

Note:

If you click **Pay now** by mistake you can return to the Skyline website by clicking ePrint direct. You will be returned to the Skyline website and view a confirmation that the order had not been placed. Click the **View Basket** link if you want to continue placing the order.

> There was a problem processing the card payment. The order has not been placed. Please click on the <u>View Basket</u> link and try again

4.   Enter you card details and click the Pay button. Your card details are processed.

![Note icon] **Note**:

If you have a promotional code enter the code and click the Apply button which will show. The new total will be displayed as shown in the example below. Your order will show in Skyline with the original estimated price without the discount applied.

Subtotal	£678.72
🏷 20OFF ✕ 20% off	-£135.74
Total due	£542.98

5.   After successful completion of the card details verification you are returned to the Skyline window which shows details of your order. A confirmation email that your order has been placed will be sent to your registered email address. It will not include the Stripe payment details.

Your order has been placed

Order Number: 0002686

Document	Product	Pages	Copies	Price
CostManager	Portrait Staple	28	12	18.48
ProductManager	Collated	64	4	14.08
			Total	32.56
			Priority	0.50
			Delivery	6.60
			Order Total	**39.66**

All order notifications will be sent to your registered email address which is: ▓▓▓▓▓▓▓▓▓▓▓▓▓▓

![Note icon] **Note**:

If a promotional code can be applied to the order the price of the order will not be displayed, just confirmation that your order has been placed. This happens even if you have not used a promotional code. No confirmation email is sent.

Your order has been placed

Order Number: 0000134

Using WPM Education to Pay for an Order

When Skyline has been [configured to accept WPM Education][209] payments for orders you are automatically directed to the WPM site when you place an order.

To make a payment using WPM:

1. [Place your order][314] in the usual way. After entering your address and delivery details you will be taken to the summary page. Click ⎡ Pay now ⎤.

Document	Product	Pages	Copies	Price
CostManager	Comb Bound	28	1	4.11
Website	Comb Bound	94	1	7.49
ProductManager	Comb Bound	64	1	6.09
			Total	17.69
			Priority	0.50
⎡ Pay now ⎤			**Order Total**	**18.19**

2. You are taken to the WPM Education payment website. Complete the required details and confirm your payment. When confirmed you are returned to the Skyline Website with a summary of your order displayed.

    Your order has been placed

    Order Number: 0002765

Document	Product	Pages	Copies	Price
CostManager	Comb Bound	28	1	4.11
Website	Comb Bound	94	1	7.49
ProductManager	Comb Bound	64	1	6.09
			Total	17.69
			Priority	0.50
			Order Total	**18.19**

3. You will also receive an email from WPM confirming your payment. You might also receive a summary email if your Skyline system has been configured to send an order placed email.

Order Placed

S   Support
To   Anne Webb

Thank you for your order 0002765 placed 24/09/2019. A summary of your order is detailed below.

Document	Copies	Pages	Price
ProductManager	1	64	6.09
Website	1	94	7.49
CostManager	1	28	4.11
Priority			0.50
Total			**18.19**
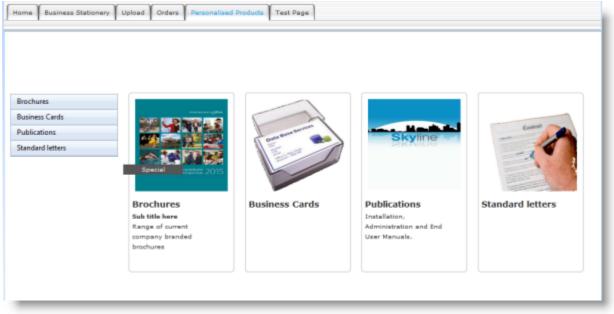
Example of an Order Placed email sent from Skyline.

Ordering a Product

To order a Skyline Publisher product:

1. Click the **Products** tab.

2. Locate the document that you want to print by viewing the contents of a folder.

1. Click **Select** by the required product.

3. A preview of the product is shown together with any variable fields.

    1. Amend the variable data as required.

    2. Click **Save**.

    3. A message will appear stating that "Document was Saved". Click **OK**.

    4. Click **Next** to continue placing the order.

4.   Select the required product options.

1. Select your required product options

2. Enter the quantity you require

3. Click **Next**.

5.   The Basket window opens. A quotation for the job may be displayed depending on the arrangements that you have with your print provider.

1. Amend the quantity that you require for any of the documents you have ordered. You do not have to enter the same quantity for each one.

2. If prices are displayed click 🔁.

3. Click **Next** to continue placing the order.

6.   The Address window opens. The delivery address information is automatically completed if you have entered a [delivery address]⃞³¹² . You can amend the address if you require the documents to be delivered to a different location.

1. Check the delivery address and amend the details if required.

2. Click **Next** to continue placing the order.

7.   The shipping requirements form opens.

1. Enter the delivery instructions and any additional information.

2. Click **Next** to continue placing the order.

8. You may be asked to specify or select an account code. This feature is only available if the accounts features[158] have been selected for your portal. If you do not see the account page proceed directly to the next step.

    1. Select the required account code. You can use the search facility to locate an account code.

    2. Click **Next** to continue placing the order.

9. Check your order details.

    1. If the details are correct click **Confirm Order** to complete the order process.

10. Your order confirmation is now shown and an order number provided together with details of the cost if pricing is being used. The Print room will now receive your document and may (dependent on configuration settings) send you an email confirming receipt. If the option Approval[132] has been turned on you will see the message that the document will not be printed until the document is approved.

Skyline can be configured to automatically send an email[217] to the person who placed the order to confirm that their order has been placed. An example email is shown below. The wording can be amended to suit the requirements of your organisation.

Order Placed

Build Server

To: Annette Webber

Your order number 9388 for 6 copies of Skyline TemplateManager [20120305] has been placed 25/04/2012.

Product name: 2 Hole Ring Binding
Number of pages: 24
Date required: 05/02/2012 12:00:00

Example Email that is received when an order has been placed.

Viewing Orders Placed

You are able to see a list of all the orders that you have made and their current status in the Orders web page. The Status of the order is [automatically updated](#)□ [118] . The price shown does not include any additional costs that apply to an order e.g. delivery costs.

Note: When an order is [deleted in PrintStation](#)□ [463] it is also removed from the users Orders tab.

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 of the Orders Web Page

When viewing you orders you can:

1. You can delete any order if there is a ✖ by the order. You will asked to confirm that you want to delete the order.

test2.eprintnow.com says

Are you sure you want to delete this order?

OK   Cancel

2.   Click to open the document PDF.

3.   Click by the side of the document name to see the specific order details. A new window opens detailing the products selected and the delivery address. There is an option to print the job ticket if a hard copy is required. If the order is updated in PrintStation the job ticket will be updated with the changes. Only the Original Price will remain unchanged.

4.   The width of the columns can be amended to suit the text that they are showing.

5.   You can accept a quotation by clicking . For more information please refer to <u>Requesting a Quotation</u> 🗋 330.

6.   If you use Approval there is an additional column showing if your order is awaiting approval of has been approved or declined. The example below shows the Approval column.

PDF	Job Ticket	Document	Order Number	Order Date	Required Date	Status	Approval	Quote	Delete
📄	View	Administration	0000113	30/07/2024 11:01		Order Placed	Awaiting approval		✖
📄	View	Manual	0000112	30/07/2024 10:55		Order Placed	Approval not required		✖

Colour Analysis

If colour analysis in turned on [159] analysis of the document can happen during the document upload procedure. The analysis will find the number of pages that contain colour so that the cost of printing the document can then be more accurately calculated. Only pages that contain colour will be charged at the colour click cost when the document is printed in colour. The true cost is only calculated on body pages as front and back cover pages are calculated as specified in the product.

ℹ️ Colour analysis is not available for Zip files or paper orders. Also, products that contain impositions are not costed using colour analysis.

The number of pages that contain colour is shown on the library page together with the total number of pages in the document.

Once a document has been uploaded into a library click [Colours] to show the analysis.

Colour Analysis

Page	Cyan %	Magenta %	Yellow %	Black %	Analysis
1	21.54	20.84	21.98	14.13	Colour
2	0	0	0	0	Monochrome
3	0	0	0	1.64	Monochrome
4	0	0	0	0	Monochrome

Example showing the results when colour analysis is run on an uploaded document.

The Original Job Ticket will also show the colour split which means that PrintStation users can view the colour split in the Original tab.

When colour analysis is turned on you have the choice of 3 colour analysis models.

1. **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

2. **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

3. **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

Running Colour Analysis

You may find documents in your library that have not been colour analysed. If you create a new document by merging documents then the colour analysis will not have been run for the new document. Also, you might find documents in shared libraries which have not been analysed. You can order a document without manually running the colour analysis and during the ordering process colour analysis will automatically run. However, you are only able to see the summary results on the ordering page and not the full analysis.

Example of a document before colour analysis has been run.

To run the analysis:

1. Click [Analyse ▲]. Analysis of the document will start which can take a little while if it is a large document.

2. When complete you will be able to the results on screen.

Colour Analysis

Page	Cyan %	Magenta %	Yellow %	Black %	Analysis
1	21.54	20.84	21.98	14.22	Colour
2	0	0	0	0	Monochrome
3	0	0	0	3.72	Monochrome
4	0	0	0	0.53	Monochrome
5	6	6.17	6	2.45	Colour
6	4.08	4.05	4.02	1.55	Colour

3. Click [Back] to return to the Libraries page. The document will show in the library with the colour analysis results.

4. If you want to view the colour breakdown of the document click [Colours].

Using Libraries

Skyline is supplied with flexible library features to meet with a range of customer requirements.

📁 Personal Libraries hold details of files that you have uploaded, including a PDF of the original file. If you have placed an order for the document in the past, the job ticket details for your last order are also stored. You can create more than one Personal Library so that you can store related documents in appropriately named libraries. Once you have uploaded a document it will be displayed in your library and can be moved into any of your personal libraries.

📂 Shared Libraries are the same as personal libraries but you have given other users access to your documents. Users are able to view or print documents in a shared library. Only the owner of the document is able to delete, merge or move it unless hey choose to give access rights. However, an Administrator can create a document which has a job ticket□ 366 where by users will only be asked how many copies that they require. They will be unable to select how the document will be printed. The shared libraries are shown in a box if they are shared to a group.

Changing the Library View

You can use the Library View option to choose the way that documents in your libraries are displayed. There are 4 different views to choose from. The initial view a new user will see can be selected for each portal. For more information, see the section on setting the default library view[101] .

Examples of the different layouts are shown below.

Thumbnail View of the Library

Detals View of the Library

List View of the Library

Catalog view of the Library

Searching Libraries

You can search for documents in all the shared libraries that you have access to. Searches can be performed on both the names of documents and their descriptions.

To search for a document:

1. Open your **Library** web page.

2. Enter your search requirements.

    1. Enter the details of the document that you are searching for. You can enter the document name or part of the document description.

    2. Click the search button.

3. The results of your search are listed.

    1. You can place an order for the document using Order .

    2. The name of the Library that the document is stored in is shown. If you want to see all the documents in the selected library click the green arrow.

Managing Documents in your Libraries

Documents that have been uploaded into your personal library can be [deleted]□ ³⁵², [copied]□ ³⁵¹ or [moved]□ ³⁵² to another library. You can also [merge]□³⁵³ selected documents to make one combined document. The icons at the top of the libraries window are used to perform these actions. You can also use the controls available beside each uploaded document to [preview]□ ³⁴⁹ the document before printing as well as viewing the [PDF]□ ³⁵⁰.

You are also able to [order documents]□ ³¹⁷ as well as [re-order documents]□ ³²⁵ that are stored in the library.

Previewing Documents

When you preview a document you will be able to see a number of pages. The number of pages depends on how your system has been configured. You system administrator will have [configured the system]□ ¹⁰⁷ to show the first 10, 20, 50 or all paged in the document. You can view the whole document by [opening the PDF]□ ³⁵⁰ associated with the document.

To preview a document in your library:

1. Click 🔍 next to the document that you want to preview.

2. The preview window opens showing the document. The number of pages that can be viewed depends on the configuration of your software.

Example showing a Documnet Preview of a 98 page document. The number of pages that are available to preview are the first 50.

Opening a PDF
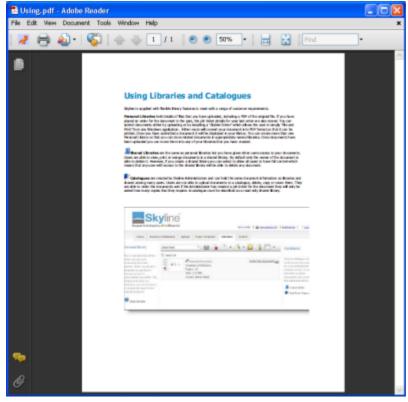
To open a document in your library as a PDF:
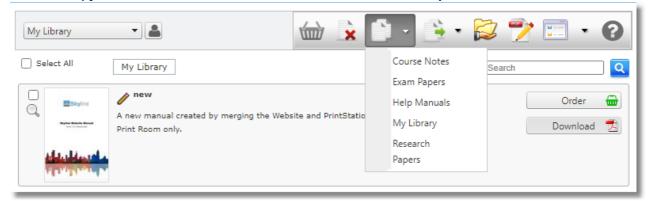
1. Click either 📄 or [Download 📄] next to the document that you want to view.

2. The selected document opens in the PDF viewer window. Use the controls in the window to view the document. Close the window to return to Skyline.

Copying a Document

To copy a document to another library:

1. Select a single document or multiple documents by entering a tick ✅ in the selection box for each document.

2. Click the **Copy Selected** icon. A list of Personal and shared libraries that you have access to is listed.
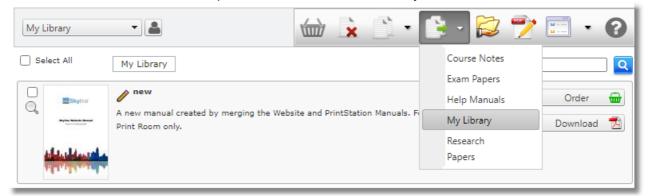
3. Select the library that you want to copy the selected documents into. The document will be available in the original library as well as the selected library.

Moving a Document

To move a document to another library:

1. Select a single document or multiple documents by entering a tick ☑ in the selection box for each document.

2. Click the **Move Selected** icon. The personal and shared libraries that you have access to are listed.
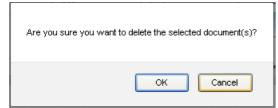
3. Select the library that you want to move the selected documents into. The document will be moved from the original library into the selected library.

Deleting a Document

To delete a document from your library:

1. Select a single document or multiple documents by entering a tick ☑ in the selection box for each document.

2. Click ❌ **Delete Selected**.

3. You will be asked to confirm the deletion.

4. Click **OK**. The selected documents will be deleted.

Editing Documents

You can edit a document you have uploaded into your library by adding blank pages or deleting specific pages. You can also use the edit feature to [merge documents](#)□ 358 in either your own library or in a shared library.

ⓘ   Each document must contain less than 100 pages.

To edit a document:

1.   Select the required document by entering a tick ☑ in the selection box for the document.

2.   Click 📄 **Edit**.

3.   The Edit Document page opens.

4.   Enter a title for the edited document.

5.   Preview the document by flipping through the pages.

6.   You can use the navigator buttons to go to a specific section of the document or a specific page.

Example of using the Navigator button to view the end of the book.

Example of using the Page button to view pages 23 & 13

7. You can add a blank page into your document by selecting the page that you want to insert the blank page either before or after.

Inn this example a blank page will be inserted before page 13.

8. Click [Add] to add the blank page.

Example showing the blank page inserted before page 13.

9. Click [Reload Preview] to update the preview at the top of the page.

Example showing the blank page inserted before page 13.
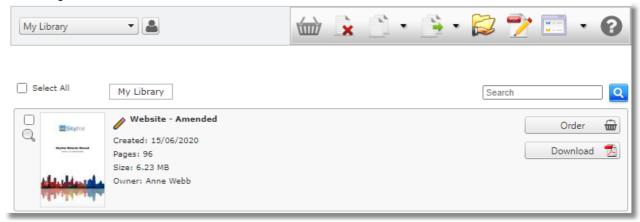
10. To remove pages from a document select the page to be removed in section at the bottom of the page then click [Delete selected pages].

In the above example page 2 has been removed. The number of pages has also been updated from 97 to 96.

11. Name sure that you have entered a new name for you document and click [Save].

12. The edited document is sent to the PDF Conversion Queue and will then be available in the same library as the original documents.

Example showing the amended document that has been saved into the library. The date created and number of pages is updated automatically

Merging Documents

You can use the edit feature to merge documents in either your own library or in a shared library. Using a shared library several users can upload, merge and print documents for a common project. Any permitted user can merge documents together in a shared library. This allows several users to work on separate parts of documentation for a project. The different parts can be merged into one document and submitted for printing.

Each document must contain less than 100 pages.

To merge documents:

1. Select the documents you want to merge using the individual document selection box. Do not use the Select All option. Then click ![edit icon]. The time taken to creating the thumbnails will depending on the size of the documents that you have selected to merge.
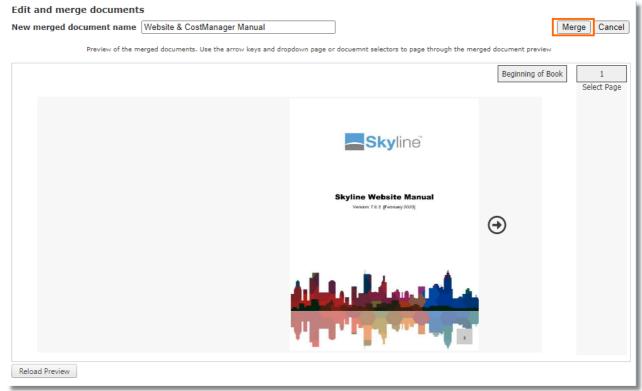
2. Enter a name for your new merge document.

3.   If required you can amend the order that the documents will be merged using the arrows in the bottom section of the page.

4.   [Edit the documents]⬚ ³⁵³ as required by adding blank pages or removing pages.

5.   After any changes click **Reload Preview** to update the preview at the top of the page.

6. When you are happy with the changes made click [Merge] to create and save the new document. The new document is sent to the PDF Conversion Queue and will then be available in the same library as the original documents.

Note:
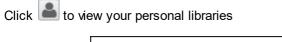
Very occasionally a merge will fail due to a problem with a PDF. If this happens an error message will show stating that there was a problem. Click the **Cancel** button and review your PDF's to correct the error.
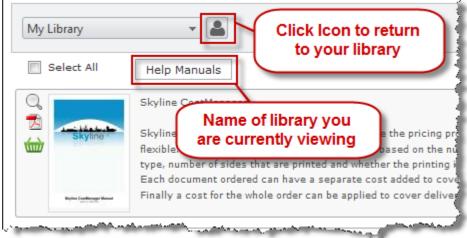
Invalid PDF files

There was a problem merging these documents. Please check that the PDF's are valid

Adding a Personal Library

If you have access to Libraries you may be able to create your own libraries. You can create more than one Personal Library so that you can store related documents in appropriately names libraries. Once documents have been uploaded you can move them into any of your libraries that you have created.

Click [icon] to view your personal libraries

To add a new personal library:

1. Click [icon] to manage your personal libraries.

2. Enter a name for your new library. In the example below we have entered the name 'Help Manuals'. Click **Add**.
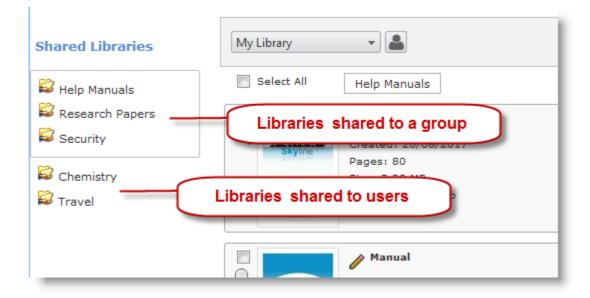
3.   The new library is added as a personal library; it is not available for any other users.

Manage Personal Libraries			
Add a new library			
Library Name [_____] [Add]			
📁 **My Personal Libraries**			
Library Name			Default
Help Manuals	Share Library		☐ 🗑
My Library			☑ 🗑
📁 **My Shared Libraries**			
Shared Library Name			
Predefined documents	Manage Catalogue Permissions		🗑

Sharing Libraries

If you have been given access to a shared library, the shared library will be listed separately on the libraries web page. Click on any of the shared library names to view the documents that they contain.

When the owner of a library chooses to share the library they can give users full access. Anyone given access is able to choose how to print the document but they are not able to delete any documents in the shared library. They will also be able to move or copy other documents into the shared library. If the product choices for the document has been pre-defined³⁶⁶ then only the owner of the document can change those choices.

Owners of the shared folder are able to amended any job tickets and delete any documents that other users have uploaded into their shared library. The person who uploaded the document will also have control over the document. Everyone else who can see the folder will be unable to delete the document.

Creating a Shared Library

A shared library is a personal library that you have given selected users access to. Users are able to view and order documents in a shared library. By default only the owner of the library is able to add documents to a shared library. If you select the option 'Give users full access' users will be able to also add documents in the library. Only the user who added the document or the owner of the library are able to delete documents.

Before you can create a shared library you need to have created a personal library. For details on how to create a personal library see the section Adding a Personal Library[361].

To share a personal library:

1. Open your **Libraries** web page and click 🖼 to manage your personal libraries.

2. In your list of personal libraries click the link **Share Library** next to the library that you want to share.

3. Select how you want your documents listed. You can choose to show the documents by the date that they were submitted. Alternatively you can order the documents alphabetical by the document name.

4. Select the users that need access to the library that you have created.

1. Select how you want your documents listed. You have a choice of showing the documents ordered alphabetical on the document name. You could alternatively order the documents by the date that they were submitted.

2. You can select individual users from the list shown or search for them if the list is too long. You can also choose to share it to all users of a specific role by selecting the role.

3. If you select the option 'Give users full access' the users will be able to add documents to the library. When finished click the Back button.

5. When you have selected who to share the library with the icon by the library name changes from 📁 to 📁. The Library will be listed in the section **My Shared Libraries**.

1. If you want to change the users who have access to your shared library, click **Manage Catalogue Permissions** to change the permissions.

Adding Pre-defined Documents

When a shared library has been created documents can be added with a pre-defined product options so that users can just order the number of documents required.

To add documents with a pre-defined product:

1. Open your Library and select the documents to be added.

2. Click ![icon] to **Move** the selected documents and select the shared library that you want to move the selected documents into.

3. View the library that you moved the documents into.

4. (Optional) The documents can be renamed and a brief description added.

    1. Change the view to "Catalog View".

    2. Click ✏ associated with the document.

    3. Amend the document name and add a description of the document. When finished click **Save**

    4. The updated details are shown in Catalog View

5. The job ticket for the document needs to be defined.

   1. Click ![cart icon] associated with the document to view the product options.

   2. Click **Proceed** associated with the product that is used to produce the document.

   3. Complete any product options that are required then click **Next**.

   4. When you view the Basket page where the quantity of documents to be ordered is entered, click the **Libraries** web page.
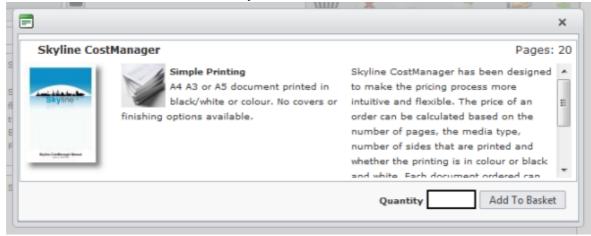
6.   You need to check that the document defined job ticket is available to the users.

1. Log into Skyline as a user with access to the shared library.

2. View the library. The basket associated with the amended document will be green.

3. Click 🛒 associated with the document that you have just updated. You just enter the quantity of documents to be ordered and add then to your basket.

Shared Library Administration

An administrator is able to add or remove users or roles to any shared libraries. They are also able to transfer ownership of the shared library to another user.

To assign/remove users from a shared library:

1. Log in with administrator rights.

2. View your libraries page.

3. Click 📁 to view the Manage Personal Libraries page. A list of shared libraries that belong to other users is shown at the bottom of the page.

Manage Personal Libraries				
Add a new library				
Library Name [_____] [Add]				
📁 **My Personal Libraries**				
	Library Name		Default	
✏️	My Library		☑	🗑
📁 **My Shared Libraries**				
	Shared Library Name			
✏️	Help Manuals	Manage Catalogue Permissions		🗑
✏️	Predefined documents	Manage Catalogue Permissions		🗑

📁 Shared libraries belonging to other users			
Shared to users			
Library Name	Owner Username		
Brochures	Nettie	Manage Catalogue Permissions	
SharedAzure Library	annette.webber@eprint.net	Manage Catalogue Permissions	
Shared to user roles			
Library Name	Owner Username	Role Name	
Project Alpha	Nettie	Approver	Manage Catalogue Permissions
Project Alpha	Nettie	Manager	Manage Catalogue Permissions
SharedAzure Library	annette.webber@eprint.net	Administrator	Manage Catalogue Permissions
Travel Brochures	Nettie	User	Manage Catalogue Permissions

4.   Click the **Manage Catalogue Permissions** link associated with the library that you want to amend the assigned users or roles.

5.   Select the users that need access to the shared library. You can select individual users from the list shown or search for them if the list is too long. You can also choose to share it to all users of a specific role by selecting the role. Users or roles can be deleted as required.

6.   When finished click **Back** to return to the Manage Personal Libraries page.

There may be occasions when the ownership of a shared library needs to be transferred to another person.

To transfer library ownership:

1. Log in with administrator rights.

2. View your libraries page.

3. Click 📁 to view the Manage Personal Libraries page. A list of shared libraries that belong to other users is shown at the bottom of the page.

4. Click the **Manage Catalogue Permissions** link associated with the library that you want to transfer library ownership of.

1. Select the new owner from the drop down list.

2. Click **Transfer**.

5. Click **OK** when asked to confirm transfer of ownership of the library.

6. You are returned to the Manage Personal Libraries window. The library will be listed in the 'Shared Libraries belonging to other users' section with the new owners name.

Note: If you need to delete a shared library that belongs to another user simply transfer the ownership of the library to yourself. The library is then listed in the 'My Shared Libraries' section. You are then able to delete the library using the delete icon 🗑.

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[150] 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.

This record was opened by Mary Bud on 12 June 2018 11:57 and cannot be changed while it is locked.

OK

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.

Reason for Approval or Rejection

✔ Approve   ✖ Reject   🔓 Unlock

.

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[143] - 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[144] - amend the account code, name or description.

- Recalculate prices[145] - 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[146] - contact details

- Additional Fields[569] - Approvers will be able to edit the Additional Field values if they have "Allows approvers to select their own users" checked on the Admin / Approval Settings page

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 approvers [152].

In some cases you might have users that will not require their orders to be approved. You can make the user exempt [157] 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 approvers [152].

ⓘ 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 [147] .

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 [151] can be changed to suit your requirements.

If approval is being used the user's will see notification when they place an order that the document will not be printed until the request is approved or rejected. The wording is can be altered, for more information see Configuring Checkout Message [150]

Your order was successful.

Order Number: 0005287

Documents will not be printed until they are approved.

All order notifications will be sent to your registered email address which is: annette.webber@eprint.net

	Quantity	Document	Product	Pages	Price
🖶	6	SkylineManual	A4 Plastic Comb Bound	902	313.08

If you have been assigned the role of Approver you will see an Approval tab. You will need to decide what jobs are sent for processing further by either being sent to the PrintStation or to a second level approver. Jobs can also be rejected. All the orders that have been placed are listed on the Approval web page. Details of the selected order are shown at the bottom of the screen. The price shown does not include any shipping costs. If there is no PDF icon showing the option to view the PDF's[147] needs to be enabled.

If an order is placed which contains a zip file you are able to open the zip file and view the document before approving or rejecting the order. To open the zip file double click ⬚.

Example of an order placed for a Zip file

If an order is placed for a paper original document the preview image is shown as a stack of paper. You will be unable to view the document.

Example of an order placed for a paper original.

Using Approval

To approve or reject an order:

1. View the Approval web page and select the order that you want to review. The details associated with the order are shown at the bottom of the screen.

2. Click on each tab to see specific information regarding the delivery and customer details.

Overview Tab

Details

Customer Details

History

Date Changed	Status Name	Print Station Name	Username
19/12/2023 10:22:22	Order Placed		

(Tabs: Overview | Details | Customer Details | History | Notes | Additional Fields)

Notes

(Tabs: Overview | Details | Customer Details | History | Notes | Additional Fields)

User Notes

Your Notes (Not visible to user)

Additional Fields

(Tabs: Overview | Details | Customer Details | History | Notes | Additional Fields)

Further Information

Additional Field	Value
Course Subject	Computing & Informatics
Course Code	TFD-8954-0003

Select an Additional Field to edit the Value
Course Subject

Computing & Informatics ▼

Any changes made need to be saved before selecting another field.

3. If you need to see the contents of the document click ⬇ to download the document. This option will only be available if the option Approvers can download the document PDF[147] has been selected.

4. Enter a reason for approval or rejection if appropriate. If you are using a two level approval system select the person Click the **Approve** button to pass the order to the PrintStation or a level 2 approver. Select **Reject** to prevent the job order being processed.

Example with single level approval.

Example with 2 level approval.

Skyline is configured to automatically send an email to the person who placed the order to confirm that their document has been approved. An example email is shown below.

Example of an email confirming that the order has been approved

Selecting Users
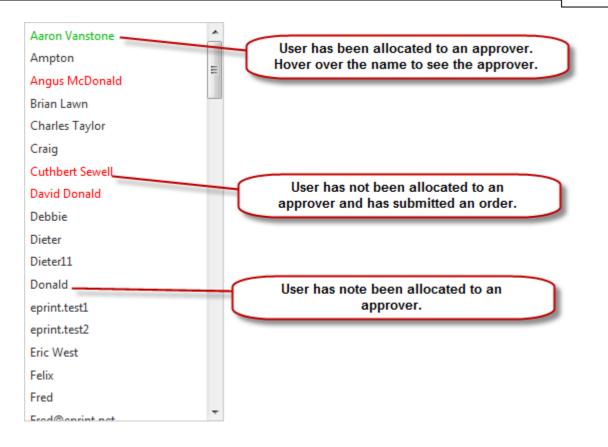
Depending or your requirements Approvers can be assigned users or they can select the users that they will manage. If they are able to select their own users a select users button is available on their Approval page.

When an approver clicks they will see a list of users allocated to them as well as a list of users. They are able to select and remove users from their allocated users 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

To allocate a user to an approver:

1. Highlight the user or a group of users by using the CTRL key.

2. Click [◄] to add the selected users.

3. Click [Save].

Viewing Approval Status

The Approval Status report lists all the documents that are waiting to be approved and also the last 100 documents that were declined. When the options for approval are selected you are able to set the warning thresholds .

If a user has more than one approver then any orders that they place are listed under both approvers.

Example of the Approval Status Report.

To view the Approval Status Report:

1.   Log in with Manager rights and go to **Management**.

2.   In the Reports section click **Approval Status**.

Approval Status

Management Facilities

The role of Manager provides access to the Management page.

Example of the options available on the Management page.

Reports

Reports allow a manager to interrogate jobs that have been printed. When a report has been created the report data can be exported for further analysis in your own system or into Excel. For more information on presenting the exported data using Excel refer to the section <u>Using Exported Data in Excel</u>[390] .

The type of reports available are divided into 2 types.

- <u>Table Reports</u>[386] - You can create your own reports as a one off report or one that is saved and run when required.

- Legacy Reports are reports that were created using the old version of the Table Reports (prior to version 6.9.6). All existing reports can be run and amended as required but no new ones can be created.

- <u>Approval Status</u>[383] - A report that displays the number of orders awaiting approval and details about the order.

Using Table Reports

To run a report:

1. Log in with Manager rights and go to **Management**.

2. In the Reports section click **Table reports**.

      Table reports

3. Select the report name and click **Load**. The report will be loaded and a description of the report is displayed.

4. Select a date range for the report.

5. Click

6. The report will be displayed at the bottom of the screen. The data created when you run a report can be exported so that it can be manipulated to produce any management reports required. When you have created a report you can export the report details as a comma separated file. You can then import the data into a program of your choice. You can export the data directly to Excel or as a CSV file that can be opened in other programs, including Excel. Refer to the section Using Exported Data in Excel⬚ 390 for more information.

   1. Amend the CSV separator if required then click Export to CSV.

   2. Select what program to open the report with. In the example the program used was Microsoft Excel.

Opening Orders printed from Print Services.csv

You have chosen to open:

🗎 **Orders printed from Print Services.csv**

which is: Microsoft Excel Comma Separated Values File (24.8 kB)
from: http://buildserver.eprintoffice.net

What should Firefox do with this file?

◉ Open with [Microsoft Excel (default)   ▼]

○ Save File

☐ Do this automatically for files like this from now on.

[OK]   [Cancel]

Creating a New Report

New reports can easily be made and kept for future use.

To create a new report:

1. Log in with Manager rights and go to **Management**.

2. In the Reports section click **Table reports**.

    Table reports

3. Enter a name for your new report and a brief description.

    Reports

    Chris report ▼ [Load]

    Report Name

    Example Report [Save] [Delete]

    Report Description

    Details of the report fields selected can be entered in this area.

    Variables can be added to the description. See online manual for help

    Variables can be added to the description.

    •   **[PortalName]** will be replaced by the name of the portal where the order was placed.

    •   **[yyyy]** The year as a four-digit number.

    •   **[yy]** for the last two digits of the year.

    •   **[MM]** The month, from 01 through 12.

    •   **[MMM]** The abbreviated name of the month.

    •   **[MMMM]** The full name of the month.

    •   **[dd]** The day of the month, from 01 through 31.

    •   **[ddd]** The abbreviated name of the day of the week.

    •   **[dddd]** The full name of the day of the week.

    •   **[HH]** The hour, using a 24-hour clock from 00 to 23.

    •   **[hh]** The hour, using a 12-hour clock from 01 to 12.

    •   **[mm]** The minute, from 00 through 59.

    •   **[ss]** The second, from 00 through 59.

    •   **[DateStamp]** The date the report is run.

    •   **[TimeStamp]** The time the report is run

4. Select the fields that you want to include. The fields are divided into 6 sections. To see the field available click on the cross. If you want to select all the fields in the section click in the check box next to the section heading. If only certain fields are required, just click in the check box next to the required field.

5. Click the **Save** button to save your report.

6. Select a date range and run your report. If you decide that different fields are required in the report you can amend the report as required. Just remember to save the report when you have selected the fields.

Using Exported Data in Excel

When you have created a report you can export the report data and use Excel to present the data in a number of ways.

To use Excel to present your data:

1. When you have run your report select the option "Export to CSV".

2. Open the file with Excel.

3. The exported data will be shown in Excel ready for you to apply formatting and present the data as required.

Sub-totals

The Excel feature Subtotal was used on the exported data to show the total number of pages printed for each product type during the period selected when the report was run.

		A	B	C	D	E
	1	Product Name	OrderId	Document Pages	Account Code	Total Printed Pages
+	4	A4 Booklet Total				128
+	25	A4 Plastic Comb Binding Total				1715
+	34	Business Card Total				15
+	38	Printing Double Sided and Stapled Total				420
+	77	Simple Printing Total				19570
−	78	Grand Total				21848
	79					

Example showing the use of the Excel feature Sub-total

This feature can be used to provide sub-totals as required from your exported data. Another example is shown below giving details of costs for each user.

		A	B	C	H
	1	OrderId	Account Code	Price	Username
+	122			1907.65	admin Total
	123	3056	312	£0.15	AndyB
	124	3058	312	£0.20	AndyB
	125	3057	517	£0.09	AndyB
	126	3054	517	£1.62	AndyB
	127	3053	517	£1.20	AndyB
	128	3055	517	£2.31	AndyB
−	129			£5.57	AndyB Total
+	327			£12,719.38	Anne Webb Total
+	351			£516.14	Shanda Leer Total
+	375			£534.76	Tester Total
+	397			£169.41	Theresa Green Total
+	403			£20.46	user Total
+	407			£120.84	Wanda Total
−	408			£15,994.21	Grand Total

Pivot Tables

Pivot tables can be used to summarize the exported data. Data can be sorted and grouped and the count of items or a sum can be shown. Before creating a pivot table you need to be clear on what you want to show. In the example below the total number of pages printed for all account codes is shown. Using the pivot table you could show just the pages printed for each of the account codes.
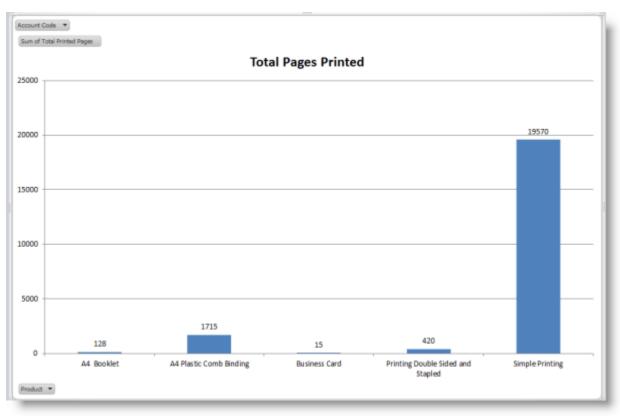
	A	B
1	Account Code	(All) ▾
2		
3	Product ▾	Sum of Total Printed Pages
4	A4 Booklet	128
5	A4 Plastic Comb Binding	1715
6	Business Card	15
7	Printing Double Sided and Stapled	420
8	Simple Printing	19570
9	**Grand Total**	**21848**

Pivot Table Example showing all the account codes

Depending on the data you export you can use pivot tables to show pricing breakdowns. The example below shows the price of an order grouped by account code. A total price for each account code is shown. You can also show the orders against each account code. The example shows the information for a single user called "admin". Using the filter you could select other users of show details for all users.

	A	B	C
1	Username	admin ▾	
2			
3	Account Code ▾	OrderId ▾	Sum of Price
4	⊟ 101	871	£ 3.96
5		872	£ 0.72
6		1929	£ 0.11
7		1931	£ 0.11
8		1981	£ 1.21
9	**101 Total**		£ **6.11**
10	⊞ 121		£ 171.05
11	⊞ 188		£ 0.66
12	⊞ 269		£ 77.57
13	⊞ 312		£ 512.91
14	⊞ 425		£ 412.42
15	⊞ 517		£ 726.93
16	**Grand Total**		£ **1,907.65**

Pivot Table example showing orders placed,
grouped by Account Code

Pivot Table Chart - When you have created a pivot table you can easily display the data graphically.

Example of a chart produced from the pivot table.

Using Reports - Further Information

There are several fields in the reports that contain values. Listed below are some details to help clarify what the different price fields contain as well as some other notes.

ℹ Any changes made to pricing after the order has been placed can not be guaranteed to be included in the reports.

Order Price = Document Price + Delivery Cost + Priority Cost

Calculated by adding the Document price for each job in the order with 1 delivery cost and 1 priority cost (these costs are per order not per job). If there are several jobs in an order the value of ALL the jobs are included in the Order Price, including ones that have not been printed yet.

Delivery Cost

The cost of the delivery method selected when the order was placed. This is a one off cost applied to the order irrespective of the number of documents ordered and cannot be changed after the order has been received by PrintStation.

Priority Cost

The cost of the priority selected when the order was placed. This is a one off cost applied to the order irrespective of the number of documents ordered and cannot be changed after the order has been received by PrintStation.

Additional Cost

Not currently used

Document Price

The price that is showing in the PrintStation. This will show any amendments made in PrintStation that have been made to the job cost.

Original Price

The price of the order when it was originally placed. Does not include any delivery or priority costs.

Printed Price = Document Price or Price entered in Generic Print

Normally the same as the original price unless the price has been amended in PrintStation. There is a field on the generic form that a specific price for the printing can be entered. This price is not used in the Order Price calculation.

Notes

1. If a job is printed twice the order price will NOT include the cost of the second print. The highlighted values in the example below are included in the Order Price.

Order Number	Order Price	Delivery Cost	Priority Cost	Additional Cost	Document Name	Document Price	Original Price	Printed Price
0000130	197.7500	30.0000	100.0000		PrintStation	16.8200	16.8200	16.8200
0000130	197.7500	30.0000	100.0000		Website	17.0500	17.0500	17.0500
0000130	197.7500	30.0000	100.0000		Website	17.0500	17.0500	2.0000
0000130	197.7500	30.0000	100.0000		Administration	33.8800	30.6200	33.8800

2. If a partial re-print is run and the pricing in the Generic Form is amended the order price will NOT include the Printed Price.

3. General Observation.
    When using Stripe the order number is assigned when you open Stripe to make payment. If you do not complete the task the order number is not reused. This means that in some circumstances there are missing order numbers in PrintStation and therefore Management Reports.

Live Orders

Managers are able to view the Live Orders page where a manager can see a list of all the orders placed. Orders that have been placed but are awaiting approval or a quotation are not shown. If jobs with a certain status e.g. completed have been configured not to show on the PrintStation you can still view the jobs using the Live Orders.

Note:

If you think that orders are not being received at the PrintStation, check the Live Orders page to see if orders are being sent. If there is a problem with your PrintStation receiving job orders, the orders will be visible here even if they are not showing in the PrintStation. In the unlikely event that this happens, please contact support helpdesk@eprint.net.

Additional Fields are not currently available to view using Live Orders.

Changes should not be made to live orders if you are using pricing on Additional fields.

Managers can use the Live Orders page to amend an order if the system has been configured to enable them. Any amendments made will be shown in the PrintStation.

To enable Managers to edit live jobs:

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 **Managers Can Edit Live Job Details** in the list.

    -   If the option is set as **True** Mangers can edit jobs from the Live Orders web page.

    -   Managers are unable to edit jobs if the setting is **False**.

4. To amend this option click .

5. Click to save the setting.

To configure **Managers Can Edit Live Job Details** for all portals associated with Skyline use the default configuration option 728 . 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.go

Viewing Live Orders

To view live orders:

1. Log in with Manager rights and go to **Management**.

2. In the Orders section click 🗑 **Live Orders**.

3. You can use the shortcut ☑ to load all the orders. If you want to only see orders that have been printed click the shortcut 🖨. If you click the shortcut 🖨 you will see orders that have been printed more than once.

Example of the Live Orders web page

Use the fields a the top of the page to select a range of orders to view by specifying a date range and order status. When the requirements have been entered click [Load]. Dates refer to the date that the order was submitted. Any potential orders with the status Waiting for quote and Quote sent will not be displayed as the order is not confirmed until the quotation has been accepted.

Example of the different statuses available

You can search for a specific order by selecting a search field and entering a value. If you are searching for an order number you must enter the whole order number and not just part of it e.g. 0002446 and not 2446. Make sure that you select the correct date range remembering that the date refers to the date that the order was placed. Click [Load] to list all the orders that match your requirements. Search is not case sensitive.

Example of a search result.

To view the original job ticket click associated with an order.

If an order has showing it means that the order has been printed. A means that the order has been printed more than one. Hover your mouse over the icon and an indicator will show the number of times that the order had been printed.

Click associated with an order to view further details. Details regarding the order are shown at the bottom of the page.

Example of the details of an order

If the portal configuration **Managers Can View Live Job PDFs** is true the PDF associated with the job can be viewed.

To enable Managers to view the PDF for a live jobs:

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 **Managers Can View Live Job PDFs** in the list.

   - If the option is set as **True** Mangers can view the PDF associated with the job from the Live Orders web page.

   - Managers are unable to view PDF's if the setting is **False**.

4. To amend this option click .

5. Click to save the setting.

To configure **Managers Can Edit Live Job Details** for all portals associated with Skyline use the default configuration option[728] . 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.go

Specific details of the order can be viewed on the Details tab. If any Custom Document Option fields are used in the product they are shown in the lower half of the table. For more information see the section on creating a product[545] .

Example of the Details tab information.

The customer details are shown on the Customer Details tab. The field names are the default field names used when creating the Address Form in ProductManager. If fields are not displaying the expected details please review the Address Form configuration[585].

Example of the Customer Details tab information.

The history of the order is shown on the History tab.

Example of the History tab information.

Printing details are shown in the Printing tab.

Example of the Printing tab information.

The notes tab will contain any user notes that are part of the Product. There is also a section where you can enter any notes regarding the order. The person who placed the order will not see these notes.

Example of the Notes tab information.

Changing the Status of Live Orders

Managers can use the Live Orders page to change the status of an order. Any amendments made will be shown in the PrintStation

To change the status of an order:

1.   Select the order and click ✎ to view the order details.

2.   View the available statuses. If you change the status of an order to any status marked with an * the order is marked as printed and the details will appear in reports.

3.   Select the required status then click [Change].

   ℹ️ A change in status will trigger an automatically generate email to be sent if the system statuses have been configured to send an email when a job status is changed in PrintStation. For more information see the section Changing the Wording in a Status Email ☐ 512 .
   The asterisk by the status name means that the order will be recorded as being printed and appear in the reports. The printer used is recorded as **Marked as Printed**. You are not able to select a specific printer.

4.   The order will be updated to the new status. The change to the order is also shown in the PrintStation

Removing a Printed job from Reports

Managers can use the Live Orders page to remove a printed job from reports. Any amendments made will be shown in the PrintStation.

To remove a printed job from reports:

1. View the details of the order. A job that has been printed will have 🖶 associated with the order. If the print icon is red then the order has been printed more than once. Hover your mouse over the 🖶 and an indicator will show the number of times that the order had been printed.
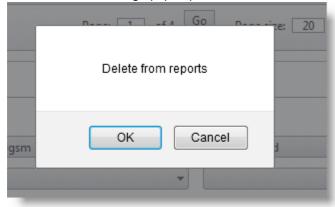
2. View the Printing tab. Select the record that you want to delete and then click **Delete from reports** to remove the record of the job from the reports. This will not change the status of the job, just remove the printed information from the reports. If a job has not been printed then the button is not available.

3. A confirmation message pops up. Click **OK** to delete the job from the reports.

4. The print icon will be removed from the order.

Deleting an Order

Managers can use the Live Orders page to delete an order. Any amendments made will be shown in the PrintStation.
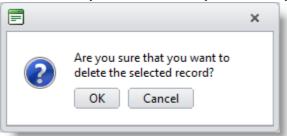
To delete an order:

Deleting a job only removes it from the list of current job and If a job is deleted it will no longer show on the user's Orders web page, or on any PrintStation. However, if a job has been printed it will still show up in reports.

1.   View the details of the order.

2.   Use the scroll bar to view the end of the record then click 🗑 .

3.   Click **OK** when you are asked "Are you sure that you want to delete the selected record?"

4.   The order will be deleted from both PrintStation and the user's order list.

Restoring a Deleted Order

Managers can use the Live Orders page to amend an order. Any amendments made will be shown in the PrintStation.

To restore a deleted order:

1. Find the order to be restored and view the order details.
    Select **Show Deleted Jobs** from the Status drop down menu. Make sure that you select the correct date range remembering that the date refers to the date that the order was placed and not the date that the order was printed or deleted. Use the search fields to locate your required order.

2. Change the status of the order to Order Placed.

3. Click [Change] to update the status of the order.

Changing Order Details

ℹ   **Note**: Changes should not be made to live orders if you are using pricing on Additional fields.

To change the product options on an order:

1.   Click 📄 to view the details of the order.

2.   The selected product options are shown on the overview tab. You can amend any of the options by making a different selection from the drop down menu. If lamination is an option it can be selected or deselected using the associated tick box.

3.   Click **Calculate Price** to update the price of the order to reflect any changes made.

4.   When finished click **Save**. Any changes made will be shown in the PrintStation.

To change the order information:

Information provided when the order was placed can be updated as required. This includes account details, date required and number of copies which are on the Overview tab. Information on the details tab for both the customer and order can also be amended as required.

1. Click to view the details of the order.

2. Make the amendments as required. You can add notes which are not visible to the end user are shown in the PrintStation in the Pricing Tab.

3. If a change to the order will affect the price click to update the price of the order to reflect any changes made.

4. When finished click . Any changes made will be shown in the PrintStation.

Reviewing Unprinted Completed Jobs

Live Orders has a new filter ▨ called **Show Missing Jobs**. This filter will enable you to find jobs that were not included in the reports when they were marked as In Production, Printed or Complete, as shown in the image below. Completed jobs without a printer symbol will not appear in the reports. If any of the jobs should have been included in the reports they can be reassigned to the PrintStation.

To re-assign orders to the PrintStation:

1. Create a [new custom status](#)⁵¹⁷ e.g. "Missing Jobs".

2. [Change the status](#)⁴⁰² of these jobs to the new custom status. The missing jobs can now be viewed on the PrintStation.

3. Open PrintStation and change the status of the "Missing Jobs" to Completed. When prompted to include the job in the reports select the required printer.

4. The jobs will be marked as Printed and now appear in the reports

Skyline PrintStation

PrintStation is a Windows PC application that is normally installed in the print room where the print production occurs. The print room operator uses it to manage incoming jobs, amend requests, preview documents, keep the customer updated and direct work to output devices. Shown below is the layout of Skyline PrintStation.

More than one PrintStation can be licensed and these may be located in a single print room or anywhere in the world. This allows multiple print rooms to share work or direct jobs to particular locations.

PrintStation accesses the Skyline SQL database for job ticket information and the associated PDF downloaded prior to production. All information remains on the central database and can be accessed by any authorized PrintStation for further production.

Notes:

Details on associating a PrintStation with a portal[233] and Transferring a PrintStation License[235] can be found in the Administration section.

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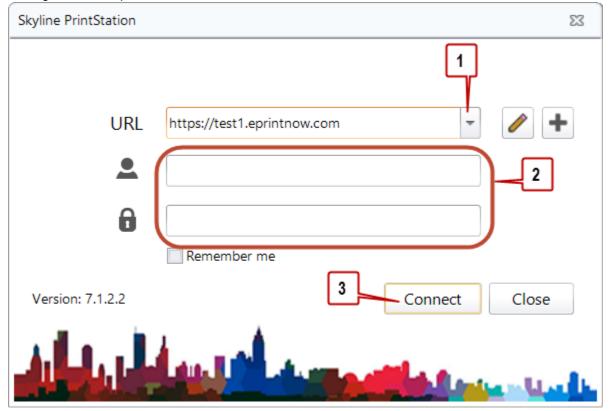
Starting PrintStation

Once the PrintStation has been installed it can be used to manage incoming jobs, amend requests, preview documents, keep the customer updated and direct work to output devices. You will be unable to log into PrintStation unless you have the user role Staff assigned to your account.

When you first start or reset PrintStation it will be automatically detected if you are running http or https. There are no settings that need to be changed.

To open PrintStation:

1. Click .

2. The log in window opens.

1. Select the PrintStation that you want to open.

2. Enter your Username and Password. This is the same log in that you use to access the Skyline Portal.

3. Click Connect to start PrintStation. PrintStation can now be used to manage your print requests.

If you have more than one PrintStation you can add the URL of each PrintStation to the login window. You can then select which PrintStation you want to open without having to enter the URL each time.

If you need to amend any of the connection details click the Edit button to open the portal connection window for the selected PrintStation and make the required changes.

To add a new PrintStation:

3.   Click .

4.   The log in window opens.

5.   Click to add a new PrintStation.

6.   The Skyline Portal Connection window opens. Details of the portal that the new PrintStation will use need to be entered.

1.   If your setup uses a proxy server you need to enter the proxy details so that access to the Skyline website is available. If you do not use a proxy server, leave these fields blank.

2.   Enter the HTTP or HTTPS address for Skyline then click **Connect** to test that the portal details are correct. The program will automatically detect if you are using HTTP or HTTPS connection.

3.   If the portal details have been verified the Next button becomes available. Click **Next** to continue.

Skyline Manual

7. The Log In with Microsoft window opens.

1. Select **Enable Microsoft Login** and click **Next** if you use Azure Login.

   OR

2. If you do not use Azure login click **Next**.

Version: 7.6.0.8

8. All the configuration details required for the PrintStation have been entered. Click **Finish** to exit the configuration.

Setup complete

Back   Finish   Cancel

9.   The log in window opens.

1.   Select the PrintStation that you want to open.

2.   Enter your Username and Password. This is the same log in that you use to access the Skyline Portal.

3.   Click Connect to start PrintStation. PrintStation can now be used to manage your print requests.

Access Not Granted

If you try to log in into PrintStation and see the error message "Username or Password incorrect" it could mean that you have mistyped your username or password. If these have been entered correctly the role of Staff might not been associated with your account. Please contact your Skyline administrator to request that your account details are updated.
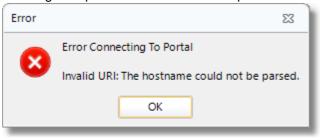
Example of access not granted.

If you enter an incorrect portal name one of the following error messages will be displayed, depending on the error.

- Spelling the portal name incorrectly.

- Pressing the space bar at the end of the portal name.

New Version Available Message

If you open PrintStation and during log in you see the message "New version available" it means that your current copy of PrintStation is not compatible with your Skyline website and needs to be updated.

Make sure that if there are any previous versions of PrintStation installed that they are removed. Use the Add/ Remove Programs facility in Control Panel to remove any existing version.

 From version 7.1.0 you can install PrintStation without having to uninstall the previous version.

To update PrintStation:

1. Log in with Management Permissions and go to **Downloads**.
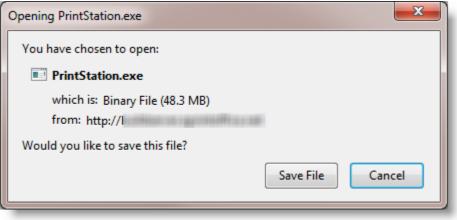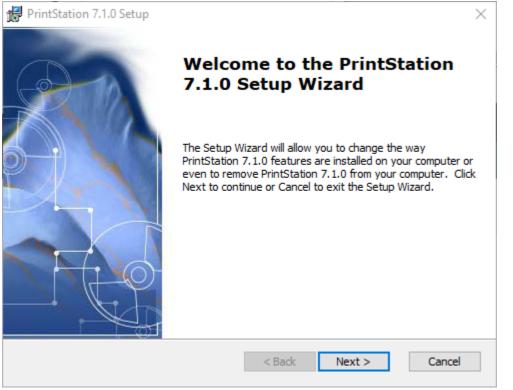
2. Click **PrintStation**.

3. The **Opening PrintStation** window opens. Click **Save File**. The PrintStation installation file is saved to your computer.

4. Click the icon on the toolbar to display the downloads and select **PrintStation**.

5.	The PrintStation Installation wizard opens. Click **Next** to continue.

6.	At the License Agreement window click **I accept the license agreement**. Click **Next** to continue.

7. At the Destination Folder window it is recommended that you accept the default folder location. Click **Next** to continue.

8. The PrintStation can now be installed. Click **Next** to begin the installation.

9. It should only take a few minutes to install PrintStation. When the installation is complete click **Finish**.

10. Open PrintStation.

11. Details of the portal that PrintStation will use needs to be entered.

1. If your setup uses a proxy server you need to enter the proxy details so that access to the Skyline website is available. If you do not use a proxy server, leave these fields blank.

2. Enter the HTTP or HTTPS address for Skyline then click **Connect** to test that the portal details

are correct. The program will automatically detect if you are using HTTP or HTTPS connection.

3. If the portal details have been verified the Next button becomes available. Click **Next** to continue.

12. The Log In with Microsoft window opens.

Log In with Microsoft
Azure Active Directory

☐ Enable Microsoft Login

Back   Next   Cancel
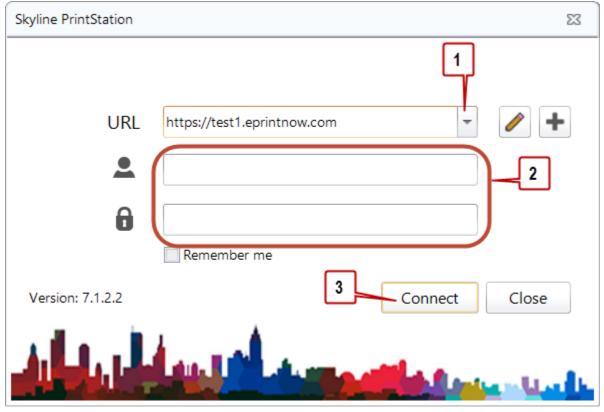
1. Select **Enable Microsoft Login** and click **Next** if you use Azure Login.

    OR

2. If you do not use Azure login click **Next**.

13. All the configuration details required for the PrintStation have been entered. Click **Finish** to exit the configuration.

Setup complete

‹ Back   Finish   Cancel

14. The log in window opens.

1. Select the PrintStation that you want to open.

2. Enter your Username and Password. This is the same log in that you use to access the Skyline Portal.

3. Click Connect to start PrintStation. PrintStation can now be used to manage your print requests.

15. Select the language that PrintStation should operate in.

   1. Click **Languages**. Select the required language from the drop down list.

The PrintStation Window

The PrintStation is the reception area for incoming jobs. It allows you to examine the customer's document and finishing requirements before you commit it to production. The basic layout of the on demand printing window is shown below.

The button will ensure that all the selected fields fill the orders pane width. In doing so, it disables the horizontal scroll bar. Click to re-enable the scroll bar.
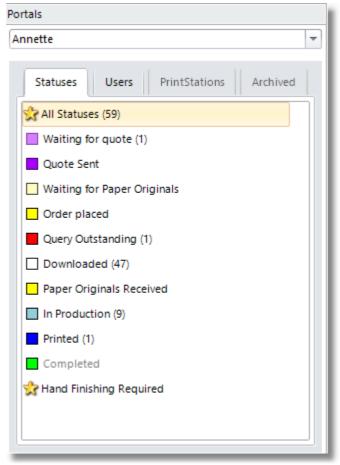
The On Demand Printing Window

The Portals Pane

If your PrintStation is associated with more that one Portal you can select the portal in the Portals pane section. If you have only one portal you will automatically be viewing the jobs that have been sent to that portal.

Statuses Tab

Portals Pane - Statuses Tab

The Statuses tab lists all the different statuses that the job orders can be marked as. [Custom statuses](#)[517] are indicated with a star symbol. The standard statuses are shown with the colour associated with the status. If a status is selected, only job orders at that status are listed in the Orders pane. The number in brackets indicates the number of jobs that are listed in PrintStation for that status. The value is only updated when the PrintStation is refreshed.

A status name shown in light grey indicates that the status is hidden from PrintStation. In the example above any order with the status Completed will not be visible in the PrintStation.

Users Tab

Portals Pane - Users Tab

The Users tab in the portals pane displays all customer's names and the number of jobs that they have sent for production. The customers are shown in alphabetical order. If you select a specific customer just the orders received from that customer are shown in the Orders Pane^{425} . The users are only shown in the list if they have placed orders. The number in brackets indicates the number of jobs that are listed in PrintStation for the user which is only updated when PrintStation is refreshed. All job statuses that are displayed in the PrintStation are included in the figure.

PrintStations & Archived Tabs

Not currently used.

The Orders Pane

Job orders are listed in status groups with a summary of key information. The information listed will depend on the fields that have been [selected to be displayed]⁵⁰² in the Orders pane. You may re-arrange this information to suit your needs by selecting a field header and dragging it to the preferred position. You can also order the information by clicking on a field header to sort the data into either ascending or descending order. From this window you can [process the orders]⁴³⁵ received. When you select a job order the toolbar buttons applicable will become active.

		OrderID	Document Name	Username	Status	Product	Copies	Submitted date	Price
▲ Order Placed									
		0000117	Testing Notes for Additional Fields	Anne Webb	Order Placed	Quotation	2000	30/07/2024 14:16:00	25.0000
		0000113	Administration	Anne Webb	Order Placed	Collated Sets	2	30/07/2024 11:01:00	29.7000
		0000111	Manual	Anne Webb	Order Placed	Simple Printing	4	30/04/2024 14:03:00	1523.8800
		0000111	WorldWide Escorted Tours	Anne Webb	Order Placed	Simple Printing	4	30/04/2024 14:03:00	219.1200
▲ Downloaded									
		0000112	Manual	Anne Webb	Downloaded	Collated Sets	1	30/07/2024 10:55:00	43.6700
		0000111	Word (6 pages) Mono	Anne Webb	Downloaded	Simple Printing	4	30/04/2024 14:03:00	9.9600
		0000111	TUI Iceland	Anne Webb	Downloaded	Simple Printing	4	30/04/2024 14:03:00	59.7600
		0000110	Glasgow Poster	Nettie	Downloaded	Poster	1	27/02/2024 14:59:00	1.0500
▲ In Production									

The icons provide a visual details about the order.

📥	Document not downloaded	📕	PDF downloaded
📁	Zipped Document	📄	Paper Original Document
■	Document to be printed in colour	■	Document to be printed in monotone
■	Document covers different colour to the body		

Colours indicate the status of the order

■	Awaiting Download	■	In Production
■	Downloaded	■	Printed
■	Query Outstanding	■	Complete
■	Waiting for Quote	■	Quote Sent
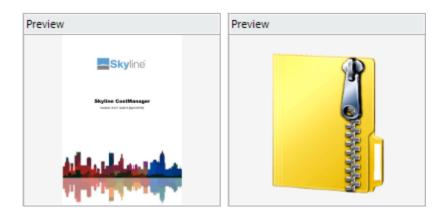
The Preview Pane

The customer's document, now converted into a PDF, can be downloaded when you are ready for production. Before the document has been downloaded the preview pane can not display a preview of the document, as shown in the example below. If a Paper Original is orders you will see the same preview pane when the order is selected.

When a document has been downloaded a preview is displayed, as shown in the example below. If the file is a zip file it will show a zip file image, as shown below.

The Detail Pane

Once a job has been selected the order information is displayed in the Details Pane. By default the Overview tab is displayed with further details available in the other tabs. You can select which tab $^{\square\,495}$ is shown at the front in the Details Pane.

Example of the Details Pane

At the bottom of the Detail Pane there is a summary of the order you are viewing which includes the order number. You are also able to easily print any tickets required using the option Production Ticket.

Example showing the summary information displayed at the base of the Details pane

The Overview tab shows the details of the order, including any notes added by the user when the order was placed. Changes can be made to any of the fields apart from the User Notes.

Example of the Overview Tab

Some changes might affect the price of the order so use to calculate the new price. Any changes made are not saved until you click . If you make any changes and do not save the changes you are warned that the changes have not been saved.

Example of the warning message that is displayed if you select another order without saving changes on your current selected order

The Details tab displays the account information and any imposition requirements. The staff notes show information entered by a manager viewing the order in Live Orders[396] and any change notes added by PrintStation operatives. If no change notes are added just the date and time will be shown when any changes are saved.

Any custom fields in the product will show in the right hand section of the tab. If you have no custom fields in the product, no field will show in that area of the tab.

Example of the Details tab in the Details Pane. The custom document fields at the rights of the pane will display the names you have entered in ProductManager. If no custom fields are used then this area of the pane will be empty.

The Delivery Tab contains details of the contact details and delivery requirements for the order. The information will vary as it depends on the information that is required when the user places an order. The information is from the Delivery form and Address form created in ProductManager. The PrintStation operative can make changes if required and use to save the changes.

Example of the Delivery tab in the Details Pane

The history tab shows the history of the order process as well as the printing details if required.

Example of the History Tab in the Details Pane.

You are able to select the information shown in the History tab.

To Select the Fields to be shown in the History Tab:

1. From the **Setup** drop down menu select **Fields to Display**.

2. The **Select the Fields to Display** window opens. Select the **History** Tab

3. The fields available to display in both the Status Changes and Printing sections are displayed. Select the fields required then click **Save**.

The Job Ticket tab contains details of the order before any changes were made. If changes are made to the quantity required or additional fields⁵⁶⁹, the changes are shown in the job ticket. No changes made to the paper type, printed sides etc are updated on this form.

If the price is updated the Price Estimate shows the updated price and the Original Price is not changed. .

Example of the Job Ticket Tab in the Details Pane

This tab is only shown if you use the Approval process¹³². Details of the dates that the order was placed and subsequently approved, together with any notes made by the approvers are shown.

Example of the Approval tab in the Details Pane

If the licensed feature which enables [additional fields](#)[569] to be added to a product is used there will be an Additional Fields tab visible in the Detail Pane. When you select an order any additional fields that have been added to the product used by the order are listed. All the information can be updated from this tab except the information selected in a date picker field which cannot be changed.

Example of fields displayed in the Additional Fields tab.

The Output Pane

Your output devices that are available to your PrintStation are displayed. The available printers are shown in the Printers tab.

If the job is to be forwarded to another process you will have folders made available. The available folders are shown in the Folders tab.
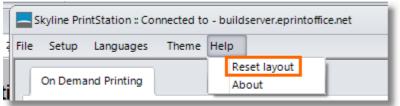
Resetting PrintStation Layout

The different panes that can be viewed in the On demand printing window can be moved and hidden as required. You can always quickly and easily return to the default layout using the Reset Layout option.

To reset the layout of PrintStation:

1.   From the **Help** drop down menu select **Reset Layout**.

2.   A window opens asking you if you want to proceed with resetting the layout. Click **OK**.

3.   PrintStation will close. Re-open PrintStation and the layout will have reverted to the default.

Processing Orders

Any new job tickets sent to your PrintStation are shown in the Orders pane[425]. Your PrintStation can be configured to be automatically check for new orders[492].

To show the new orders in the orders pane:

1.   Click ⟳ Refresh in the Orders pane toolbar.

When the job orders are processed their status is changed. This can happen automatically, for example when you download the PDF or you can manually change the status[459] of the order. The status of a job order is shown in the Status field but there is also a coloured bar indicating the status.

The work flow should be similar to the one illustrated above.

- The Status "Query Outstanding" can happen at any stage before completed.

- If you manually change the status of a job order to printed, you will need to enter the print information which is required for reports.

- Custom statuses[517] can be created and used as required. By their very nature they can be applicable at any stage of the process.

- The Statuses 'Waiting for Quote' and 'Quote Sent' may be used in some organisations. An order will be received and a quote sent. When the quotation is accepted the order is placed and can then be processed in the usual way.

Searching Orders

You can search all the fields within the orders grid. All the fields that you have [displayed in the Orders grid](#)□502 will be searched by default. If you only want to search a specific field you can select the field from the

available list by clicking ⚙ ▾. The first three fields will always be blank as they are the first three fields in the grid which cannot be searched on but are always in the grid.

Example showing the fields which can not be searched

To use the Search facility simply start typing the word/number you are looking for into the search field. The search will start immediately and return the number of matches, as shown in the example below.

ⓘ If you cannot see the search field click 🔍 Search to view that search facility.

Example.

In this example a search is run to find all the documents that were included on order 002509.

1. The number 2 is entered. All instances of the number 2 are highlighted in yellow. You can see that the highlighted record contains the 1st of 534 matches.

2. The number 5 is entered. All instances of the numbers 25 are highlighted in yellow. You can see that the highlighted record contains the 1st of 123 matches.

3.   The number 0 is entered. All instances of the numbers 250 are highlighted in yellow. You can see that the highlighted record contains the 1st of 35 matches.

4.   The number 9 is entered. All instances of the numbers 2509 are highlighted in yellow. You can see that the highlighted record contains the 1st of 15 matches.

5.   If the highlighted record is not the required record, use the [▲] [▼] buttons to scroll through all the matching records.

Downloading Documents

Any new orders sent to your PrintStation are shown in the Orders pane[425] under the heading Orders Placed.

To download a document:

1. Select the new order listed in the section **Order Placed**.

2. Click ⬇ to download the PDF associated with the order. The PDF will be downloaded & the order moved into the job status Downloaded.

- The 📄 icon will be displayed next to the job and the job moved to the Downloaded status.

- A thumbnail image of the document is be displayed in the Preview pane.

ℹ **Note**:

- Skyline can be configured to automatically send an email[217] to the person who placed the order to confirm that their document has been downloaded.

Using Download All

You can use ⬇⬇ Download All to download all the orders displayed in the Orders pane☐ ⁴²⁵ . The orders displayed will vary depending on your selection in the Portals Pane☐ ⁴²³ .

ℹ️   The orders with the statuses "Query Outstanding", "Waiting for Quote" or "Quote Sent" will not be downloaded when Download All is used. The documents can be downloaded as required on an individual basis.

To download all the documents for a specific user:

1.   Select the user who's documents you want to download in the portals section. All the orders placed for the selected user are shown in the Orders grid.

2.   Click ⬇⬇ Download All . All the orders for the selected user will be downloaded. The progress is shown in the Orders grid.

Reviewing the PDF

When the document has been downloaded you can review the PDF.

To review the PDF, select the order then:

1.   Select the order then click the button in the Orders pane toolbar.

Requesting More Information

When the PDF has been reviewed you might decide that the job cannot be printed until the originator has been consulted. This could be due to a number of factors. For example, if the graphics quality in the original was poor or a large selection of colours you might want to consult the person who placed the order before proceeding.

When you have a query regarding a job order you should change the status[459] of the order to Query Outstanding. You can then contact the person who placed the order for more information.

PrintStation can be configured to send an automatic query email[217] message requesting that the person who placed the job order to contact the print room. Check with the system administrator to find out if your PrintStation has been configured to generate an automatic message when a job status is changed to Query Outstanding.

Example of an automatically generated email.

1. A job order is downloaded by a PrintStation user. When the person who placed the order views their orders they can see that the document has been downloaded.

PDF	Job Ticket	Document	Order Number	Order Date	Required Date	Status	Quote	Delete
📄	View	CostManager	0000122	05/08/2024 09:52		Downloaded		
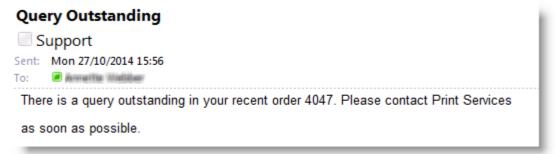
2. The PrintStation operator has a query regarding the job order. They change the job order status[459] to Query Outstanding.

▲ Query Outstanding								
📄	■	0000122	CostManager	Anne Webb	Query Outstanding	Collated Sets	200	05/08/2024 09:52:00

3. The person who placed the order can see when they view their orders that a query email has been sent.

PDF	Job Ticket	Document	Order Number	Order Date	Required Date	Status	Quote	Delete
📄	View	CostManager	0000122	05/08/2024 09:52		Query Outstanding		

4. When the person who placed the job order opens their email they will be able to see the automatically generated email and respond accordingly.

Query Outstanding

☐ Support

Sent: Mon 27/10/2014 15:56

To: ▨ Annette Webber

There is a query outstanding in your recent order 4047. Please contact Print Services

as soon as possible.

Example of an automatically generated email message when the status is changed to Query Outstanding.

Adding notes to a status email

Any information entered in the User Notes area in the Overview tab in PrintStation can be included in a Status Email. Any PrintStation user can add notes to this area which then can be included in a Status Email. This could be especially useful when you have a query regarding an order.

Any text entered in the User Notes area which is saved can be included in a Status Email

Configuration Required

The field User Notes needs to be added to the status email. For information on how to do this see the section on Changing the Wording in a Status Email[512].
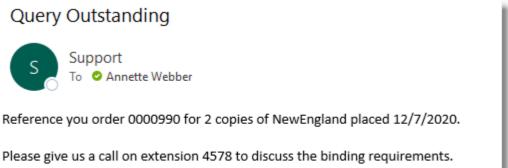
Example of a Query Outstanding email containing the UserNotes field.

To Send notes in a status change email.

1. Enter the required notes in the User Notes section on the Overview tab. If you need to start a new line of text press CTRL Enter.

2. Click **Save Changes**.

3. Change the Status of the email to **Query Outstanding**. An email will to sent to the owner of the order, an example is shown below.

Example Query Outstanding Email

Quotation Requests

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.

To send a quotation:

1. Quotation requests will show in PrintStation with the status 'Waiting for Quote'. Select the order and view the details. You will not be able to use the **Calculate Price** button. Enter a value in the price field and save your changes. Add any notes as required when the changes are saved.

2. Change the status of the order from 'Waiting for Quote' to 'Quote Sent'. When the status is changed an email is sent to the user telling them that they have received a quotation. They are then able to accept or reject the quotation from their orders page.

- **Accepted Quotation** - If the user accepts the quotation an order is placed with the same order number and the order can be processed in the usual way. Only one quotation can be accepted at a time.
  The history of the quotation is shown on the History tab of the new order.

Details entered about the quotation when the details were saved show in the Staff Notes area.

- **Rejected Quotation** - If the user rejects the quotation the order status is changed to 'Deleted; and removed from the PrintStation.

Amending the Order Details

You can amend the job order details before you download the document or after it has been downloaded. All the order information in shown in the Detail Pane[427] . When you review the request there may be queries or you may receive a request for an amendment to the order. Details contained within the tabs can be updated.

To amend an order:

1. Make the changes required in the tabs and update the price if necessary. Click ⊟ Save Changes .

2. Enter details explaining why the change was made.

1. Details entered in this window are shown in the Details tab[429] .

2. Click **Save** to continue.

3. View the **Details** tab. The change has been made to the order and the notes are shown so that any changes can be tracked. Even if no details were entered the date, time and user name is recorded.

4. (Optional) If you require the change to be confirmed by the customer change the status to **Quote Sent**. When the status is changed an email is sent to the user telling them that they have received a quotation. They are then able to accept or reject the change. Only price changes are shown on the Orders Web page. Any other amendments need to be agreed before the status is changed.

- Accepted Quotation.
  If the user accepts the quotation the order the original order is changed to 'Deleted' and a new order is placed containing the quotation information.

- Rejected Quotation.
  If the user rejects the quotation the order status is changed to 'Deleted; and removed from the PrintStation

Changing the Price of an Order

When an order is sent to the PrintStation there may be a price associated with the order. Occasionally the price of printing a document needs to be amended due to requests from the customer. Pricing can be amended by Managers using Live Orders[406] or by the PrintStation operatives.

Example 1 - Cost of Producing the Document

> After a conversation with the customer a change to the requirements of producing the document is agreed. For example, laminating might be required or a different media type used during production. The price of the order needs to be amended & the customer will see the amended price on their orders page. Any management reports will include the amended price.

To amend the cost of producing a document:

1. Select the job to be printed & view the Overview tab[428] .

Example of the Overview tab in the Details Pane

2. Change the order requirements, for example the number of copies. Then update the price of the order using [Calculate Price] to calculate the new price.

3. Any changes made are not saved until you click [Save Changes].

4. The Notes window opens.

Enter your reasons for changing the order together with any other notes then click **Save** to confirm the change.

5.   (Optional) If you require the price change to be confirmed by the customer change the status to **Quote Sent**.
       When the status is changed an email is sent to the user telling them that they have received a quotation. They are then able to accept or reject the quotation. Only price changes are shown on the Orders Web page. Any other amendments need to be agreed before the status is changed.

- Accepted Quotation.
  If the user accepts the quotation the order status is changed to 'Order Placed' and the order can be processed in the usual way.

- Rejected Quotation.
  If the user rejects the quotation the order status is changed to 'Deleted; and removed from the PrintStation

6.   The cost of producing the document will be updated in the PrintStation Orders pane when PrintStation is refreshed. The customers Original order details will also be updated to show the new price for producing the document. Any management reports that are run will also contain the updated price.

Example 2 - Re-printing a document.

After the order has been printed the customer requested a partial copy of the document. Any management reports will include the amended price (printed price) for the second print run as well as the cost of the original print (Original Price). The customer will not automatically be notified of the change to the cost of the producing the document.

ℹ️ If there is no cost to the customer associated with the re-print and you do not want the printing recorded in the Management reports you can use the Proof Print⧉ 455 option.

To amend the cost of re-printing a document:

1. Select the job to be printed.

2. In the **Output** pane click the printer that you want to use to print the document.

3. The message "This document has already been printed. Do you want to Print it again?" is displayed. Click **Yes**.

4. The printer window opens.

1. Amend the price of the document. You can enter the value 0 if there is no charge for the re-print.

2. Amend any other details e.g. the quantity of documents to print & then click **Print**. The document is printed & the amended price is recorded.

Changing Additional Fields

If the feature Additional Fields is used, the field details can be amended if needed via the Additional fields tab. The information that can be changed in shown in the **Edit Additional Field** section. Pricing can be applied to fields that are either tick boxes or drop down choice fields. If prices are set for these fields the order price will need to be updated as well.

Example of fields displayed in the Additional Fields tab.

To amend Additional Fields which are priced:

1.   Confirm with the customer the details that need to be changed. The options in this example can be viewed by clicking on the down arrow.

2.   Select the required option and click **Save Changes**.

3.   The Notes window opens. Enter details of why the change is required and press **Save**.

4.   This Additional field has pricing associated with the choices. View the **Overview** tab and click **Calculate Price**.

5. The price is updated with the new cost which reflects the change made in the Additional Fields tab. Any

   changes made are not saved until you click 💾 Save Changes .
   The Notes window opens.

   Notes

   Please enter any change notes here

   Amended the quantity from 100 to 10 and calculated the new
   price.

   Cancel   Save

   Enter your reasons for changing the order together with any other notes then click **Save** to confirm the change.

Running a Test Print

If you want to do a test print of a document there is a facility called Proof Print available. Any orders printed via the proof print feature are not recorded in the management reports and are therefore not chargeable to the customer.

To run a test print:

1.   Select the job to be printed.

2.   Click ⊘ Proof Print in the Orders pane toolbar.

3.   The Proof Print window opens. Select the printing options you require and click Print to run the test print.

Printing an Order

When the PDF has been reviewed you can send the document to a printer.

To print a document:

1. View the list of orders with the status **Downloaded**.

    1. Select the job to be printed.

    2. In the **Output** pane click the printer that you want to use to print the document.

2. The printing window opens. Review the order details and make any changes as required. The Document Finishing tab contains any Custom Document Options that you included in the Product.

    ⓘ Be aware that if you select the option **Print Document in Monochrome** the document may be produced in colour if your printer overrides the PrintStation command.

3.	Click **Print** to send the document to the printer. During the printing window will keep you informed of the process.

4.	The document is printed. The icon colour changes to which shows that the job has been printed and the job status is now In Production. The job may still be displayed in the Downloaded status group but will be automatically moved to the In Production group when the screen is refreshed.

Reprinting an Order

If you have printed a job order you can still re-print the order if you need to. The cost of the order will be included again in the management reports. In Live Orders the re-printed order will show with a red printer icon

indicating that the order has been printed more than once. If you do not want to charge for the second print you can remove the printed job from the reports[403] . Alternatively you could use the Proof Print facility[455] to re-print the order. Any orders printed via the proof print feature are not recorded in the management reports and are therefore not chargeable to the customer.

If the Order has already been printed any changes to the status will not let you record how the job was printed. If you need the job to be re-printed and the details included in the report you need to use a printer within the Skyline system or have a new order raised.

To re-print an order:

1. Select the order to be re-printed and select the printer.

2. The message "This document has already been printed. Do you want to Print it again?" may be displayed if your system has been configured to display a warning[496] . Click **Yes** to print the document.

PrintStation

This document has already been printed. Do you want to Print it again?

Yes   No

3. The printer window opens. Enter the required information and click **OK** to print. The History tab[430] in the Details pane is updated to show that the job order has been re-printed.

Reprinting Completed Orders

If an order has been completed you can reprint all of the order or a specific part of the order.

If completed orders are not displayed within PrintStation you can find them using the feature Live Orders[396] which is available on the website. Find the required order and change the status to **Order Placed**. The order can then be reprinted from within PrintStation.

If the Order has already been printed any changes to the status will not let you record how the job was printed. If you need the job to be re-printed and the details included in the report you need to use a printer within the Skyline system or have a new order raised.

To reprint a completed order from PrintStation:

1. Locate the order with the status Completed.

2. Change the status of the order to **Order Placed**.

3. Reprint the order. As the order has already been printed you will be asked "Do you want to record how this job was printed so that it is included in the reports?"
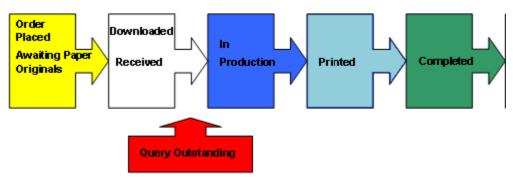
Changing the Status

The status of a job will be automatically updated in the following situations:-

Original Status	Action	Updated Status
Order Placed	Download the order	Downloaded
Downloaded	Print the document from PrintStation	In Production
Query Outstanding	Print the document from PrintStation	In Production

When the document has been processed by sending the job to a printer outside the Skyline environment or when a job is completed, the status of the job order needs to be updated.

It is good practice to follow the normal work flow when changing the status of a job order. If you do change the status when a document has not been printed from Skyline you will be asked to enter the details of where the document was printed.

When a job order status is updated, Skyline can be configured to send an automatic email[217] to the client. The status can also be automatically updated on the user's Orders web page.

If the Order has already been printed any changes to the status will not let you record how the job was printed. If you need the job to be re-printed and the details included in the report you need to use a printer within the Skyline system or have a new order raised.

To change the status of the selected job:

1. View the list of orders and select the job that you want to change the Job Status of.

1. Click **Status** and select the status that you require in the list. The status shown in the Orders pane will be updated as well as the history table shown in the Details pane.
   OR
   Right mouse click on the order to display the status list.

   If a status is shown in blue it means that any jobs changed to that status are not shown on the PrintStation.

2. The status of the job will be updated.
   When you change the status of a job order that has not been printed to In Production, Printed or Completed. You will be asked to enter details of the printer that the job order was produced on.

To change the status of a job order that has not been printed:

1. Select the job order and click **Status**. Select the status In Production, Printed or Completed.

2. You will be asked "Do you want to record how this job was printed so that it is included in the reports?"

1. Click **Yes** - continue at step 3.
   If the job was a stock item click Yes as you are able to select the printer as "Stock Item - Not Printed". The job details will then be included in reports.

   Click **No**.
   If you do not want to record that the job has been printed.

2. You are asked to confirm that the job details will not be included in any reports.

   Click **OK** to change the job status as selected and the job details not included in any reports. If required an email indicating the status change is sent out to the customer.

   Click **Cancel** to make no status changes.

3. The Printer information window opens. Enter the details of the printer that was used to print the job order. If the order was not printed but the items were taken from stock select the printer name "Stock Item - Not Printed" When all the details have been entered click **Save**.

4. The job order will be moved to the selected group and the status changed. If required an email indicating the status change is sent out to the customer.

Changing the Status of Multiple Orders

You can select multiple jobs and change their status if their original status is the same. When a job order status is updated, Skyline can be configured to send an <u>automatic email</u>[217] to the client. The status can also be automatically updated on the user's Orders web page.

To change the status of multiple jobs:

1.   View the list of orders.

   1.   Select the required job orders. To select non-adjacent jobs hold down the CTRL button and click on each job.

   2.   Click **Status** and select the status that you require in the list. The status shown in the Orders pane will be updated as well as the history tab in the Details pane..

Notes:

If you select a job order that is of a different status a message will tell you that you can only select multiple jobs that have the same Status. When you click OK, the last job is deselected.

If you are changing the status when the job order has not been printed you will have to enter details of the printer that the job order was produced on.

Rejecting Orders

When the PDF has been reviewed you might decide that the job cannot be printed. If you are unable to print the job you need to delete the job and if necessary notify the person who placed the order. When a job is marked as deleted it will still be visible in your PrintStation unless the Printed Status has been configured to be hidden from the PrintStation.

To reject an order:

1. Select the job order to be rejected.

2. Click 🗑 in the toolbar to delete the job order.
   OR
   Right mouse click the job to be deleted and select the option 🗑 **Delete** from the menu.
   OR
   Click ⭐ Status ▾ in the toolbar and select the option 🗑 **Delete** from the menu.

3. The Confirm window opens.

   [Confirm dialog: "Are you to sure you want to delete selected document(s)?" with OK and Cancel buttons]

   1. Click **OK** to delete the selected job order. The Job order status will be changed to Deleted.

PrintStation can be configured to send an automatic email message[217] stating that the job order has been deleted. Check with your system administrator to find out if your PrintStation has been configured to generate an automatic message when a job order is deleted.

ℹ️ **Note**
When an order is deleted in PrintStation it is also removed from the users Orders tab[339].

Example of an automatically generated email.

1. A job order is downloaded by a PrintStation user. When the person who placed the order views their orders they can see that the document has been downloaded.

PDF	Job Ticket	Document	Order Number	Order Date	Required Date	Status	Quote	Delete
📄	View	Manual	0000123	05/08/2024 11:50		Order Placed		❌
📄	View	CostManager	0000122	05/08/2024 09:52		Downloaded		

2. The PrintStation operator has decided that the order is no longer required. It could be that an order was sent in by mistake and the user has requested that the order is not printed. The job order is deleted and is no longer visible at the PrintStation.

3. The person who placed the order can receive a deletion email. Their order is no longer listed.

4. When the person who placed the job order opens their email they will be able to see the automatically generated email informing them that the order has been deleted.

Deleting Multiple Orders

You can select multiple jobs and delete them if their original status is the same. When a job is marked as deleted it will still be visible in your PrintStation unless the [Printed Status has been configured](#)[518] to be hidden from the PrintStation.

To delete multiple jobs:

1. View the list of orders.

    1. Select the required job orders.

    2. Click **Delete**.

2. The Confirm window opens.

    1. Click **OK** to delete the selected job order. The Job order status will be changed to Deleted.

 Notes:

- If your select a job order that is of a different status a message will tell you that you can only select multiple jobs that have the same Status. When you click OK, all the jobs are de-selected.

- PrintStation can be configured to send an [automatic email message](#)[217] stating that the job order has been deleted. Check with your system administrator to find out if your PrintStation has been configured to generate an automatic message when a job order is deleted.

Processing Paper Original Orders

Any new job tickets sent to your PrintStation are shown in the Orders pane□⁴²⁵. The □ icon indicates that an electronic copy of the document is not available but paper originals will be produced.

To process a paper original order:

1.   The new order is listed in the group Awaiting Paper Originals.

2.   When you have received the paper copies you can change the status to Paper Originals Received and process the order according to the order details received.

3.   When the job order has been printed you need to change the status□⁴⁵⁹ to Completed.You will be asked "Do you want to record how this job was printed so that it is included in the reports?" Click **Yes**.

   ⓘ   If you select No you will be asked to confirm that you do not want to include the job in any of the reports. The job order will be moved to the Completed group and the status changed to **Completed**.

4.   The Printer information window opens. Enter the details of the printer that was used to print the job order. If the order was not printed but the items were taken from stock select the printer name "Stock Item - Not Printed" When all the details have been entered click **Save**.

5.   The job order will be moved to the Completed group and the status changed to **Completed**.

Processing ZIP Files
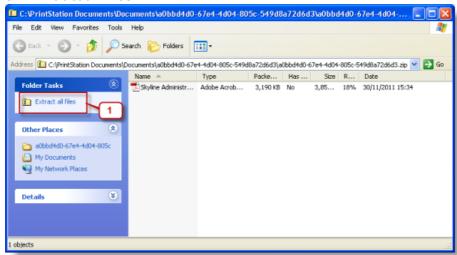
Job orders can be placed that are ZIP files. When you receive the job order you will not know that it is a ZIP file until the order is downloaded. When a ZIP file is downloaded the icon changes to 📔. You need to process the ZIP file before it can be printed.

To process a ZIP file:

1. View the list of orders. The job order has been downloaded and the icon shows that it is a ZIP file.

2. The method of extraction will depend on your version of windows and computer setup. The process explained is a guideline on what to expect.

    1. Double click the ZIP icon to extract the files.

    2. Click **Extract all files**.

3. The Welcome to the Compressed (zipped) Folders Extraction Wizard window opens. Click **Next** to continue.
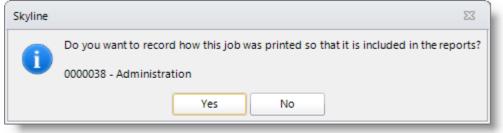
4. The Extraction Wizard window opens. Select a folder to extract the file into. Click **Next** to continue.

5. The Extraction Complete window opens. Click **Finish**.

3. The contents of the zip file have been extracted to the location you specified.

4. Process the order according to the order details received. You will not be able to print the order directly from PrintStation.

5. When the job order has been printed you need to change the status⁴⁵⁹ to Completed on PrintStation.

   1. You will be asked "Do you want to record how this job was printed so that it is included in the reports?" Click **Yes**. If you select No you will not be able to change the status of the job,

   2. The Printer information window opens. Enter the details of the printer that was used to print the job order. If the order was not printed but the items were taken from stock select the printer name "Stock Item - Not Printed" When all the details have been entered click **Save**.

   3. The job order will be moved to the Completed group and the status changed to **Completed**.
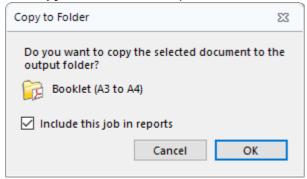
Using Folders

When the PDF has been reviewed and downloaded you can send a copy of the document to a folder. If the job is to be forwarded to another process you will have folders made available. When PDF documents are copied to a folder you can navigate to the folder's location and retrieve the document. You will be able to identify the job order as the PDF will contain the document name and the job order number. When a folder is created it is assigned a specify output format.

- **PDF Only** - Select if you have a PDF that needs to be worked on.

- **PDF with XML** - Two files are transferred into the folder, the PDF and a XML copy of the Job Ticket

- **Automate** - Used in conjunction with Automate.

- **PDF with CSV** - Two files are transferred into the folder, the PDF and a CSV copy of the Job Ticket.

To move a document to a folder:

1. Select the job to be moved.

2. In the Output pane click the folder that you want to send the document to.

3. The **Copy to Folder** window opens.

1. If you do not want the job to show in the reports remove the tick next to **include this job in reports**.

2. Click **OK** to move your selected document to the folder.
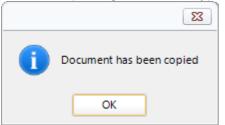
4.   The **Generic Printer** window opens

Select the output folder from the listing then click **Save**

5.   The document will be saved in the specified folder with the document name, Order Number & a unique identifier. Depending on the folder type selected, the Job ticket may also be saved.

6.   The status of the job order will automatically be changed to In Production.

Printing Tickets

Printing a Job Ticket

When an order is sent to the PrintStation all the order information is shown in the Job Ticket tab. If required you can print the job ticket.

To print the job ticket:

1. Select the job and view the Job Ticket tab.

2. Click **Print Job Ticket**.

3. The Print window opens. Select your required printer and click **Print** to print the job ticket.

Printing Production Tickets

To print a Production Ticket but not the order:

1.   Select the required order and click **Production Ticket** in the Orders toolbar.

2.   The **Print Job Report** window opens. Select the required printer & make sure that the report to print is the required one.

3.   Click **Print** to produce your report.

 If the standard job ticket is printed before the order is downloaded in the PrintStation there will be no preview image on the ticket.

You can configure your system to automatically print a Job Ticket when printing jobs using PrintStation. This can only be configured if you are using generic printers.

To automatically print a job ticket:

1. Select **Setup** > **Printers** from the drop down list.

2. The Printers window opens. Double click the installed generic printer to open the Printers window.

1. Select the required job ticket & paper tray required.

2. Select the option **Print the selected Job Ticket when using this printer** and click **Update**.

3. Each time you print a job from PrintStation using the generic printer the selected job ticket will be printed as well as the job.

You can also select to print a job ticket on an ad hoc basis when you are printing orders by selecting the option **Print Ticket** in the Print window. You do need to set up each printer with the required Job Ticket and paper tray details before this will work.

To print job tickets as required:
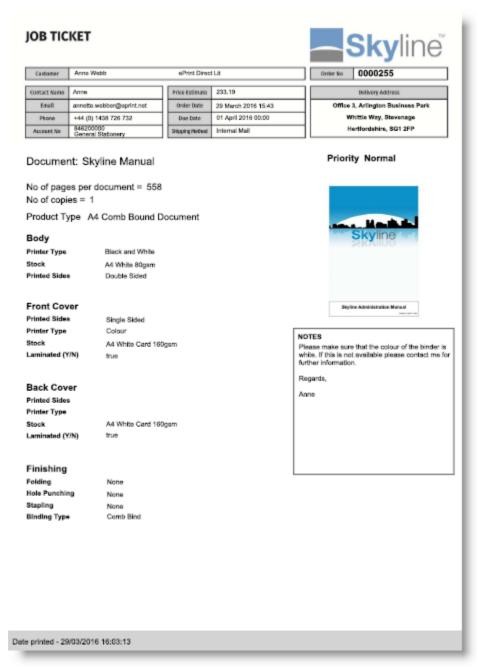
1. Select **Setup** > **Printers** from the drop down list.

2. The Printers window opens. Double click the installed generic printer to open the **Printers** window.

1. Select the required job ticket & paper tray required.

2. Click **Update**.

Standard Job Ticket Example

A standard job ticket can be produced for a specific order or automatically printed when an order is printed via PrintStation. For an explanation of where the information is stored see Standard Job Ticket Fields[734] in the appendix.

Example of a standard job ticket.

Delivery Note Example

For an explanation of where the information is stored see Delivery Ticket Fields[738] in the appendix.

DELIVERY NOTE

Delivery Address

ePrint Direct Ltd
Office 3 Gateway 1000
Arlington Business Park
Stevenage, Hertfordshire

Date		Order No	0005126
Shipping Date	27 May 2016 00:00	Shipping Method	I'll pick it up

Item Code	Item Description	Total
A4 Plastic Comb Bound	Skyline Manual No of pages per document = 558	3

Thank you for your order

Please check all items carefully and notify us of any descrepancy within 24 hours of delivery.

Items Received by:

Signed ....   Print ....   Date ....

Customised Job Tickets

A Job Ticket and Delivery Note are supplied by default. You can request changes to the layout and content so that the job tickets provide the appropriate information for your business. The fields containing information will depend on the way Skyline is operating. For example, account code details will never contain information if you use a payment provider as account codes are not supported with payment providers.

Listed below are all the available fields that can be included in a customised ticket.

- Order number, Document Name, Thumbnail image, Current Status

- All fields that are in the Overview pane.

- All the fields in the Details tab except for the Imposition field. The 6 custom fields will only show if you use custom product options[541].

- All the fields in the Delivery tab.

- The field name and field value in the Additional Fields tab if this option is available.

- Some details contained in the Printing section in the History tab. If the document has been printed more than once then only the top row details are used in the ticket. The field Printer Used is not currently available for tickets.

- The Approval date and Approver's name can be included in the customised job tickets if required.

If you have been sent a customised job ticket or other report you need to copy the TRDX file to the Reports folder so that it will be available from your PrintStation.

To install a customised report:

1. Copy the TRDX file into C:\Skyline\PrintStation\Reports.

2. Open PrintStation and make sure that the new report is available.

Setting Up PrintStation
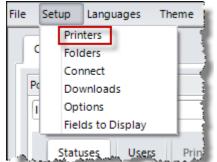
Printers

Adding a Printer

You can add printers to your PrintStation as well as [delete details of printers](#)⁴⁸² that are no longer available. You can only add generic printers.

To add a printer:

1. Select **Setup** > **Printers** from the drop down list.

2. The Printers window opens.

1. Click **Add printer**.

3. The Printers window opens.

1. Select the installed printer.

2. Select the printer type from the drop down list.

3. Add the name that will be displayed to the users.

4. (Optional) Select a [Job ticket][472] to be automatically printed and the paper tray required.

5. (Optional) Select the option **Print the selected Job Ticket when using this printer**. Leave this field unselected if you want the operator to be able to print a [job ticket][472] from this window on an ad hoc basis.

6. Click **Add** to add the printer to your Skyline PrintStation. You return to the Printers window and the printer is added to the list of available printers. Click **Close** to close the Printer window.
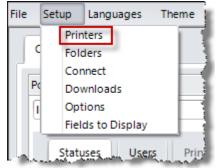
Removing a Printer

You can delete printers from your PrintStation that are no longer available.

To delete a printer:

1.   Select **Setup** > **Printers** from the drop down list.

2.   The Printers window opens.

    1. Select the printer to delete.

    2. Click **Remove**. The selected printer is removed from the listing.

    3. Click **Close** to close the Printers window.

Editing a Printer
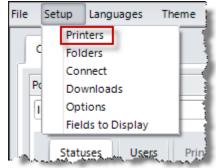
Once a printer has been added you can change any details by editing the printer. If a printer is no longer available then a ⚠ is shown next to the printer. The printer can be removed from the listing as it is no longer available. Simply select the printer and then click [Remove].

To edit a printer:

1.   Select **Setup** > **Printers** from the drop down list.

2.   The Printers window opens.

1. Select the printer to be edited.

2. Click **Edit**.

3.   The Printers window opens. Amend details as required and then click **Update**.

Folders and Groups
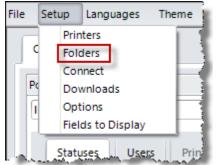
Adding a folder

You can output jobs to either printing devices or folders if the job is to be forwarded to another process. When you add a folder you need to specify the output format.

- **PDF Only** - Select if you are creating a folder for a PDF that needs to be worked on.

- **PDF with XML** - Two files are transferred into the folder, the PDF and a XML copy of the Job Ticket

- **Automate** - A folder is created which is used in conjunction with Automate.

- **PDF with CSV** - Two files are transferred into the folder, the PDF and a CSV copy of the Job Ticket

To add a folder:

1. Select **Setup** > **Folders** from the drop down list.

2. The Folder Details window opens. Click **New folder**.

3.   The Add new Folder window opens.

1. Enter a name for the folder. For example, if you need to change a PDF into a folded booklet layout you could create a folder called Booklet to transfer any jobs that required this work to be completed before being printed.

2. Select the Output Format.

   - **PDF Only** - Select if you are creating a folder for a PDF that needs to be worked on.

   - **PDF with XML** - Two files are transferred into the folder, the PDF and a XML copy of the Job Ticket

   - **Automate** - A folder is created which is used in conjunction with Automate.

   - **PDF with CSV** - Two files are transferred into the folder, the PDF and a CSV copy of the Job Ticket

3. Click **Browse** to specify a location that the folder should be saved.

4. Click **Add** to create your new folder.
   If you have selected a folder that is already associated with an existing output folder you will receive an error message. Click **OK** and click **Browse** to specify a different location.

4. The Folder Details window opens listing your new folder. All folders are listed under the output format selected and as you can see in the example below you can have more than one folder for each output format.

Example Folder Details Window.

Editing Folders

Once you have created a folder you can update and edit the folder as required.

1. Select the folder that you want to amend.

2. Click **Edit Folder**.

3. The Edit Folder window opens. Amend as required then click **Save**. Any changes made will be saved.

Removing Folders

You can output jobs to folders if the job is to be forwarded to another process. Folders can be removed if they are no longer required.

To remove a folder:

1. Select **Setup** > **Folders** from the drop down list.

2. The Folder Details window opens.

1. Select the folder that you want to remove.

2. Click **Remove Folder**.

3. Confirm the deletion.

4. The selected folder is no longer listed.

Creating Folder Groups

A new Layout tab allows you to create groups. These are plain folders that you can name and drag the folders into. You can create groups within groups (within groups…). When you add a group, it is added to the bottom of the list of folders and you can drag it where you want it, and drag folders into it.

- If you edit a folder name, location or type, then the folder stays in the group you put it but will show the new name

- hovering over a folder icon will show a tool tip with the output location for that icon.

If you use the **Reset Layout** button you will remove all the groupings created and return to just a list of folders.
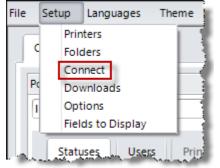
Amending Portal Connections

Your PrintStation displays the Skyline portals from which it is receiving jobs. There may be just one or multiples depending on your organisation.

To change your portal connection:

1. Select **Setup** > **Connect** from the drop down list.

2. The Connect to portal window opens.

1. Enter the portal URL and then your username and password.

2. Click **Connect** to connect to the different portal.

Amending Download Options

You can select where you want to store downloaded documents as well as selecting options that relate directly to how you handle orders.

To amend your download options:

1. Select **Setup > Downloads** from the drop down list.

2. The Download Options window opens.

1. Click **Browse** to select the location that you want the downloaded documents to be saved.

2. If you want to automatically check for new orders select the option **Check for new jobs every:** and select the time period.

3. If you want to be notified when new orders are received select the pop-up option **Enable** and complete the POP-up notification details. By default this option is selected. The **Close Pop-Up after:** option is not selected by default which means that the pop-up notification will remain open until the user closes it. You can amend the pop-up message as required.

Example POP-up New Job Message

4. Click **Save** to save your selected options.

Options

Amending Pricing Options

Prices are displayed by default to 4 decimal places. You can select the display the price to 2 decimal places, though the prices will still be calculated to 4 decimal places.

To amend the number of decimal places displayed:

1. From the **Setup** drop down menu select **Options**.

2. The Order options window opens.

1. Select whether you want prices to be displayed to 2 decimal places or 4 decimal places.

2. Click [Save] to save your selection. Pricing will shown with your selected number of decimal places after the orders have been refreshed.

Deleting Unused Documents

If you are finding that it is taking a long time to load the documents in the Orders grid this is probably because you have a lot of unused documents stored. These documents are from orders that are no longer displayed on the PrintStation as they have been complete. When you open PrintStation you are probably getting the following Message.

The unused documents can be manually deleted by choosing clicking **Clean**. You can also use the option **delete Unused Files** from the **File** drop down menu. This will speed up the loading of the Orders grid. Alternatively you can configure PrintStation to automatically delete the unused orders at startup.

To Automatically delete unused files:

1.   From the **Setup** drop down menu select **Options** and view the **General** Tab.

2.   Select the option to **delete unused documents at start up**.

3.   Click [Save]. Any unused documents will automatically be deleted each time you start PrintStation.

Changing the Default Details Pane View

Once a job has been selected the order information is displayed in the Details Pane. There are 5 pages in the Details pane (Overview, Details, Address, History and Original). You are able to select which of the pages should be on view when you start PrintStation. By default the Overview pane is displayed.

To select the Front Tab:

1.   From the **Setup** drop down menu select **Options**.

2.   The Order Options window opens.

1.   Select the tab required. The Accounts tab is not available as it is as optional tab and is only available if Approval is used.

2.   Click [Save] to save your selection.
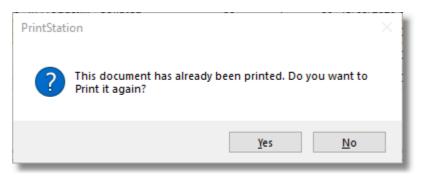
Reprinting a Document Warning

You can select to warn users when they print an order that has already been printed. If you warn users a warning will show if they try to print an order that has already been printed. The order can still be printed or the print procedure cancelled.

To select whether a warning is shown when users reprint an order:

1.   From the **Setup** drop down menu select **Options**.

2.   The Order options window opens.

1. Select the option "Warn users when reprinting a document" if you want users to be warned when they reprint an order.

2. Click ![Save] .

Showing Error Messages

There may be times when you may be asked to turn on the error messages in PrintStation and to run the program in Debug Mode. This should not be done without instruction as it can slow down the operation of PrintStation.

To show error messages in PrintStation:

1. From the **Setup** drop down menu select **Options**.

2. The Order options window opens.

3. Select the options required and then click [Save].

Changing the Status Order
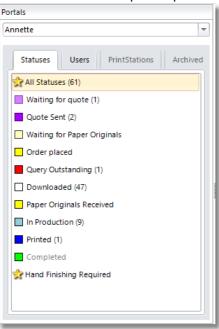
You can change the order that the statuses are displayed in PrintStation. If you create your own status you are able to move the display position in the listing. The default statuses can also be ordered as required.

To change the order that the statuses are displayed:

1.   From the **Setup** drop down menu select **Options**.

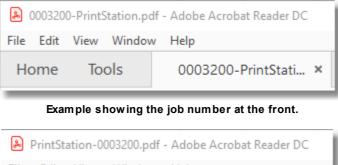2.   The Order options window opens. Click the **Status Display Order** tab.

3.   Select the status to be moved and click ⬆ or ⬇ to move the status to the correct location.

4.   Click Save to save your changes.

5.   The status order in the portals pane will be updated when you click ↻ Refresh .

The Status order is shown in the list of statuses in the portals pane.

Amending the Job Number

When an order is printed via Acrobat the job order number can be shown either at the front of the file name or at the end. See the examples shown below.

Example showing the job number at the front.

Example showing the job number at the end.

To select the position of the Job Number:

1. From the **Setup** drop down menu select **Options**.

2. You can amend the location of the job number in the document file name.

1. In the **Printing** tab select to add the job number to either the front or the end of the document name.

2. Click [Save] to save your selection.

You can also remove the job number from the file.

To Remove the Job Number:

1. From the **Setup** drop down menu select **Options**.

2. You can remove the job number in the document file name.

1. In the Printing tab select not add the job number to the document name.

2. Click [Save] to save your selection.

Record all Printing by Default

You can select to have all printing recorded by default. There will be no option to not include the printing in the reports. If a print is required which is not required in the reports you can use the [Proof Print option](#)455.

To record all printing by default:

1. From the **Setup** drop down menu select **Options**.

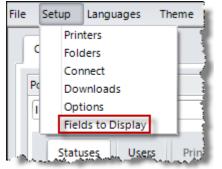2. Select the option **Record all printing by default** then click **Save** to save your selection.

Selecting Fields to Display in the Orders Pane

You can select the fields that you want to display in the Orders Pane so that only the fields that are relevant to you are displayed.

To select the fields to display:

1. From the **Setup** menu select the option **Fields to Display**.

2. The Field to Display window opens. Select or deselect the fields that you require then click **Save**.

- **Document Name** - The name of the document that has been ordered.

- **Username** - The person who has placed the print order.

- **OrderID** - The unique order number for the print job.

- **Pages** - The number of pages in the document.

- **Copies** - The number of copies of the document that are required.

- **Total Pages** - The number of pages in each document multiplied by the number of copies of the document required.

- **Status** - The stage of the order process is indicted by the status.

- **Product** - The type of document production required. The available options are configured in ProductManager⬚ⁱ⁾. .

- **Submitted Date** - The date that the Order was placed.

- **Required Date** - The date that the user has requested that the order is completed by.

- **PrintStation** - The PrintStation that has downloaded the document.

- **Priority** - The urgency of the order.

- **Price** - If pricing is applicable, the price of the order placed is shown.

- **Name Prefix** - Information from the Delivery Address section of the ordering process.

- **First Name** - Information from the Delivery Address section of the ordering process.

- **Surname** - Information from the Delivery Address section of the ordering process.

- **Phone Number** - Information from the Delivery Address section of the ordering process.

- **Email Address** - Information from the Delivery Address section of the ordering process.

- **Company Name** - Information from the Delivery Address section of the ordering process.

- **Street** - Information from the Delivery Address section of the ordering process.

- **City** - Information from the Delivery Address section of the ordering process.

- **Region** - Information from the Delivery Address section of the ordering process.

- **Post Code** - Information from the Delivery Address section of the ordering process.

- **Account Code** - Information from the Accounts section of the ordering process.

- **Account Number** - Information from the Accounts section of the ordering process.

- **Account Description** - Information from the Accounts section of the ordering process.

- **Delivery** - Information from the Delivery section of the ordering process.

- **Binding** - Information from the Product Options section of the ordering process.

- **Folding** - Information from the Product Options section of the ordering process.

- **Stapling** - Information from the Product Options section of the ordering process.

- **Hole Punching** - Information from the Product Options section of the ordering process.

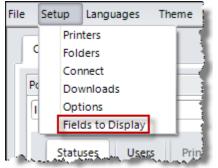- **Printer Type** - Information from the Product Options section of the ordering process.

Selecting Fields to Display in the History Tab

You can select the fields that you want to display in the History tab^{430} which is in the Details Pane. You can then show the fields that are relevant to you.

To select the fields to display:

1. From the **Setup** menu select the option **Fields to Display**.

2. The Field to Display window opens. Click the **History** tab.

3. Select the fields required and then click **Save**.

Configuring PrintStation

Installing PrintStation

PrintStation is a Windows PC application that is normally installed in the print room where the print production occurs. It is a separate application which receives and manages your portals print jobs. When Skyline is upgraded you may need to install PrintStation again.

ℹ️ From version 7.1.0 you can install PrintStation without having to uninstall the previous version.

To update PrintStation:

1. Make sure that if there are any previous versions of PrintStation are removed. Use the **Add/Remove Programs** facility in **Control Panel** to remove any existing version.

2. Log in with **Management** Permissions and go to **Downloads**.

🛒 View Basket (0) | Preferences | Downloads | Edit | Admin | Management | Logout

3. Click **PrintStation**.

🖨️ PrintStation
Download and install Printstation
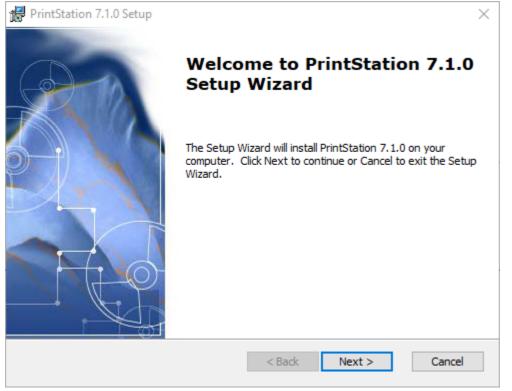
4. The Opening PrintStation window opens. Click **Save File**. The PrintStation installation file is saved to your computer.

Opening PrintStation.exe

You have chosen to open:

📄 **PrintStation.exe**

which is: Binary File (48.3 MB)

from: http://

Would you like to save this file?

Save File | Cancel

5. Click the icon on the toolbar to display the downloads and select **PrintStation**.

6.   The PrintStation Installation wizard opens. Click **Next** to continue.

7.   At the License Agreement window click **I accept the license agreement**. Click **Next** to continue.

8. At the Installation Folder window it is recommended that you accept the default folder location. Click **Next** to continue.
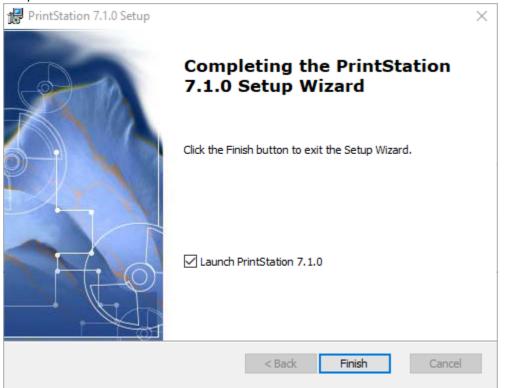

9. The PrintStation can now be installed. Click **Install** to begin the installation.

10. It should only take a few minutes to install PrintStation. By default the option to start PrintStation is selected. Remove the selection if you do not want PrintStation to automatically start. Click **Finish** to complete the installation.

When PrintStation opens for the first time you need to add some additional information.

1. When the setup wizard starts click **Next**.

2. Details of the portal that PrintStation will use needs to be entered.

1. If your setup uses a proxy server you need to enter the proxy details so that access to the Skyline website is available. If you do not use a proxy server, leave these fields blank.

2. Enter the HTTP or HTTPS address for Skyline then click **Connect** to test that the portal details are correct. The program will automatically detect if you are using HTTP or HTTPS connection. If the portal details have been verified the Next button becomes available. Click **Next** to continue.

3. The Log In with Microsoft window opens.

1. Select **Enable Microsoft Login** and click **Next** if you use Azure Login.

   OR

2. If you do not use Azure login click **Next**.

4. All the configuration details required for the PrintStation have been entered. Click **Finish** to exit the configuration.
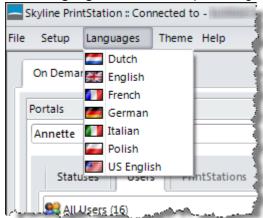
5. The Connect to Portal window opens.

1. Enter your Username and Password. This is the same log in that you use to access the Skyline Portal.

2. Click **Connect** to start PrintStation.

6. Select the language that PrintStation should operate in.

1. Click **Languages**. Select the required language from the drop down list.

Changing the Wording in a Status Email

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[515] 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. A pop up messages appears as well as an error message at the top of the window. The email remains open so you can change your text.

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**.

    Order Statuses
    Create, edit & delete order statuses

3. Details of all the System Statuses are listed. Click ✏ by the type Query Outstanding.

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.

Order Placed Email

If you send an Order Placed email you can choose to send one email for each document ordered or one email containing all the documents ordered.
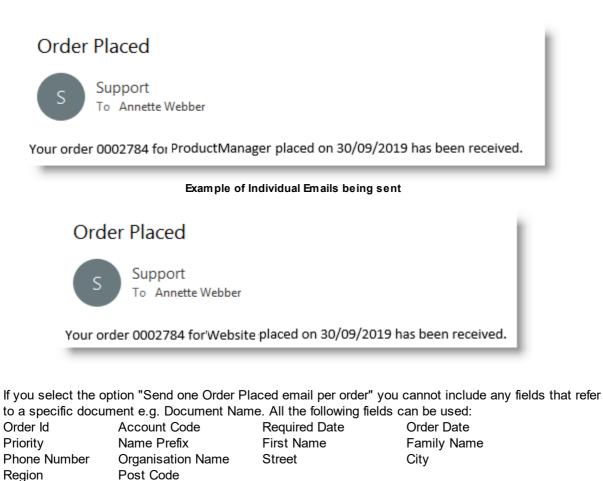
Order Placed

S Support
To Annette Webber

Your order 0002782placed on 30/09/2019 has been received.

Document	Copies	Pages	Price
Website	7	94	36.19
ProductManager	7	64	24.64
Priority			0.50
Total			61.33

Example of one email sent for multiple documents.

Order Placed

S Support
To Annette Webber

Your order 0002784 for ProductManager placed on 30/09/2019 has been received.

Example of Individual Emails being sent

Order Placed

S Support
To Annette Webber

Your order 0002784 for Website placed on 30/09/2019 has been received.

ℹ️ If you select the option "Send one Order Placed email per order" you cannot include any fields that refer to a specific document e.g. Document Name. All the following fields can be used:

Order Id	Account Code	Required Date	Order Date
Priority	Name Prefix	First Name	Family Name
Phone Number	Organisation Name	Street	City
Region	Post Code		

To amend the Order Placed email:

1. In the Orders section click Order Statuses.

   Order Statuses
   Create, edit & delete order statuses

2. Select the required Order Placed Email.

   7.0.1.0   Last Upgrade: 2019 S

   Order Placed Emails   ◉ Send one Order Placed email per document ordered
                          ○ Send one Order Placed email per order

   System Statuses

3. Click ✎ by the type Order Placed and update the status settings as required.

   If you enter a field that is invalid you will get a warning message when you try to save the status setting.

   Invalid field name in email   ✕

   ⚠ When sending one email per order, the
       email body should not contain any of the
       following fields: {DocumentName},
       {ProductName}, {Pages}, {Copies} or {Price}

                                                          OK

Creating a Custom Status

You can create a job status that is applicable to your working environment.

To create a custom job statuses:

1. Log in to Skyline with Administrator rights.

2. Click **Admin**.

3. In the Orders section click **Order Statuses**.

   Order Statuses
   Create, edit & delete order statuses

4. Details of all the System Statuses are listed. Complete the details in the System Status section then click **Create New Status**.

5. You can amend the new status position in the status listing in PrintStation as required. For more information see .

ⓘ After any changes to the Order Statuses PrintStation should be restarted so that the changes take effect.

Hiding Specific Job Statuses

When the status of a job is updated it will remain visible on the PrintStation. PrintStation can be configured to hide jobs with a specific status, for example jobs that have been marked as deleted.

The system statuses Archived and Deleted will not be shown on the PrintStation even if selected in the System Status listing. The option to Email User is not supported for either of theses statuses.

To hide specific job statuses in PrintStation:

1. Log in to Skyline with Administrator rights.

2. Click **Admin**.

View Basket (0) | Preferences | Downloads | Edit | Admin | Management | Logout

3. In the Orders section click **Order Statuses**.

Order Statuses
Create, edit & delete order statuses

4. Details of all the System Statuses are listed. The Statuses that are visible in PrintStation are shown in the last column.

	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	☐	☐	☐

5. Click 🖉 associated with the System Status you want to hide from view in PrintStation.

6. The Status settings are shown.

1. Remove the tick by **Show on PrintStation**.

2. Click **Save**. Any order jobs with the status selected will not be visible in the PrintStation.

After any changes to the Order Statuses PrintStation should be restarted so that the changes take effect.

Creating Approval Notification Emails

You can configure Skyline to send an email when a new job is received to a nominated person, for example the print room manager.

An email is sent to the selected user when a new job is received by the PrintStation.

New Job Received
☐ noreply@eprint.net
Sent: Tue 17/06/2014 10:32
To: ☐ Annette Webber

You have a new order request. Please go to http://annette.eprintnow.com/Approval.aspx
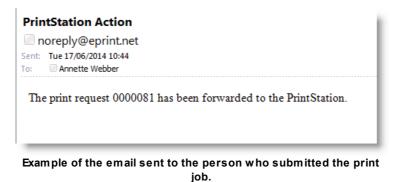
Example of email received by the nominated print room operator.

When the email is received by the nominated print room operator, the print room will not be able to process the job until the job has been viewed and acknowledged. There is a new job visible in the tab New Jobs.

Business Stationery	Upload	Paper Originals	Libraries	New Jobs	Website

Username	OrderID	Order Date		
⌄ Tony Cuthbert	0000081	17/06/2014 10:41:00	Approve	Reject

	Document	Price	Quantity	Account Code	Account Name
view	Bulletin - Convert AutoDesk Files	7.5000	25		
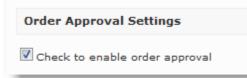
Example of the notification in the New Jobs tab.

The print room operator acknowledges the new print job by clicking Approve. An email is sent to the person who submitted the job and the print job is transferred to the PrintStation so it can be processed.

PrintStation Action
☐ noreply@eprint.net
Sent: Tue 17/06/2014 10:44
To: ☐ Annette Webber

The print request 0000081 has been forwarded to the PrintStation.

Example of the email sent to the person who submitted the print job.

To create a new print order email:

1. Firstly the option Approval needs to be turned on. Login to Skyline with Administrator rights and click the **Admin** link.

2. In the Orders section click **Approval Options.**

Approval Options
Setup the options available to approvers

3. Select the option **Check to enable order approval** to turn approval ON and click [Save].

Order Approval Settings

☑ Check to enable order approval

4. The emails that are generated need to be modified. Amend the setting of the email sent to approvers when new orders require approval.

Email to Approvers when new orders require approval
Subject: New Job Received
Message: You have a new order request. Please go the {AwaitingApprovalLink}
+ Approval Link

    1. Amend the Email Subject to **New Job Received**.

    2. Amend the body of the text to **You have a new order request. Please go the {AwaitingApprovalLink}**.

    3. Click **Save**.

5. The email received by the person who placed the order needs to be amended.

Email to users when an order is **approved**
Subject: PrintStation Action
Message: Your print request [OrderId] has been forwarded to the PrintStation
+ Order Id

    1. Amend the Email Subject to **PrintStation Action**.

    2. Amend the body of the text to **Your print request {OrderId} has been forwarded to the PrintStation**.

    3. Click **Save**.

6. The role of an Approver needs to be assigned to the person who will receive the new print job emails. Click the **Admin** link.

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

Roles
Manage user roles for current Portal

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

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

9. Select the user that will receive the new job notification emails and click **Add Selected Users** to assign the role of Approver.

10. When the selected user opens their Skyline website there will be a new tab available called **Approval**. The tab name should be changed to something more appropriate.

    1. Click the **Admin** link and in the **Content** section click **Tabs**.

      Tabs
      Add edit tabs

    2. Select the tab name **Approval**.

    3. Amend the name. In the example the Approval tab name was changed to **New Jobs**.

Portal	Language	en-gb ▾
Home		
Business Stationery		Page Name
Paper Originals		New Jobs
Upload Documents		
Libraries		Save
My Orders		
Quotes		
Approval		
Products		

    4. Click **Save** to save the name change. The tab name will be updated.

11. Test that the procedure works as required by sending a test order.

Selecting the Language

PrintStation can be operated in a number of languages.

To select a language:

1.   Click **Languages**. Select the required language from the drop down list.

Associating PrintStations & Portals

A PrintStation can be associated with more that one portal. Another portal and PrintStation can be associated if required, for example when there are 2 print rooms on one site and they each have specific users associated with each PrintStation. If a user requests a print that needs to be output on a printer that is only available at the other print room, the original PrintStation that received the order can send the order to the required PrintStation.

To associate a PrintStation and Portal:

1. Log in to Skyline website with Host privileges and go to **Admin**.

2. In the PrintStation section click **Manage PrintStation**.
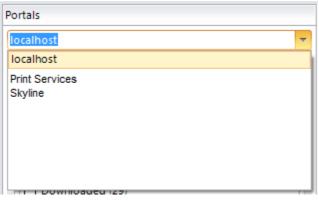
   Manage PrintStation(189/1000)
   Administer Print Station Options

3. The Administer PrintStation Options window opens.

   1. Select the PrintStation that you want to associate with your portal.

   2. Select the portal to be associated with the PrintStation.

   3. Click **Add**.

4. The selected PrintStation & Portal are associated. When you open PrintStation you will be able to see all the PrintStations associated with the portals.

Skyline ProductManager

ProductManager is integral to all Skyline installations, providing the tools required to define paper stocks, finishing options, service levels and much more. These elements are then used to construct products and create the associated job tickets that the customer completes when they place their order. A powerful feature of ProductManager is that it enables you to create product specific job tickets. The advantage of this is that the customer is presented only with choices relevant to the product they have chosen, making the completion of the ticket a quick and simple process. When ProductManager is first used the print room options need to be configured. You need to specify the available media[539], document print production[541] options and the delivery options. You can then create the products[545] that are available to be ordered.

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

Before you start to enter any media details, create any products, address forms or delivery forms you need to decide whether the products will be available globally or if they are assigned to a specific portal. When Skyline is installed it is configured to use global products. You require Host authorisation to sign on to CostManager when using global products.

⚠️ If you change from using Portal specific to Global specific products you will need to re-enter all your media paper stocks, costs before re-creating your products, address and delivery forms. The same is true if you change from using Global specific to portal specific products. Neither media details, forms or products can be copied between global or portal specific products.
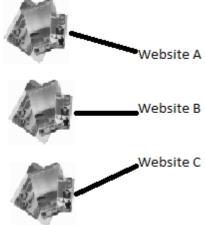
Global products are available to all portals.

This means that every portal will be using the same media, address and delivery forms as well as the same costs that have been entered into CostManager.

For each portal you can select which products are assigned to the portal. The advantage of using global products is that you only have to enter the media details and costs once.

Portal specific products can not be shared with other portals.

You need to enter the media details and costs for each portal. If you have a standard product that you want to be available on each portal then you would have to create the product on each portal. You are not able to copy products from one portal to another.

With portal specific products you can have address and delivery forms tailored for the specific portal.

Products can also be sorted into categories[553], the categories can be created for each portal.

If you are using portal specific products and you open ProductManager or CostManager with Host privileges you need to choose the portal that you want to work on.

To use portal specific products:

1. Log in to Skyline with Host rights and go to **Admin**.

2. In the Portals section select Default Configuration.

3. Set the **Global Products** to **False**.

Starting ProductManager

Once ProductManager has been installed on your computer you can start to create products. You will be unable to log into ProductManager unless you have the user role Manager assigned to your account. When global products are used you require Host or Administrative authorisation level to sign into ProductManager.

To open ProductManager:
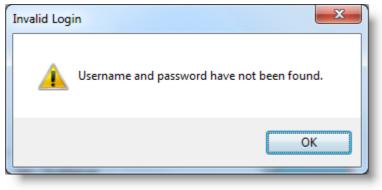
1. Click ProductManager

2. The Skyline ProductManager automatically opens with a log in screen.

1. Use the same log in that you use to access the Skyline Portal.

2. Click **login** to start ProductManager. The <u>Print Room Options</u>⌑538 window opens.

Access Not Granted
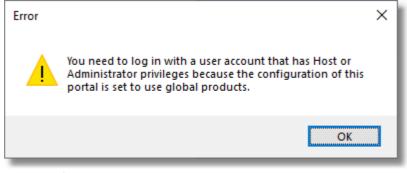
If you try to log in into ProductManager and see the message "Username and password have not been found" it means that you do not have user access to ProductManager. Please contact your Skyline administrator to request that your account details are updated.

Example of access not granted.

If Skyline has been configured to use Global products you require Host or Administrator privileges to open ProductManager. An error message will show if you try to open ProductManager without the correct privileges.

Example of trying to open ProductManager without the correct privileges
when using global products.

Version Not Compatible

If you try to log in into ProductManager and see the message "The ProductManager version is not compatible with the selected portal" it means that a new version of ProductManager needs to be downloaded.

Make sure that if there are any previous versions of ProductManager installed that they are removed. Use the Add/Remove Programs facility in Control Panel to remove any existing version. Then download and install the current version.

Updating ProductManager

After the initial installation of ProductManager there may be an occasion that you will need to install the program again e.g. after a computer upgrade.

To update ProductManager:

1. Make sure that if there are any previous versions of ProductManager are removed. Use the Add/Remove Programs facility in Control Panel to remove any existing version.

2. Log in with Management Permissions and go to **Downloads**.

3. Click **ProductManager**.

4. When you see the **Opening ProductManager** window, click **Save File**. The ProductManager installation file is saved to your computer.
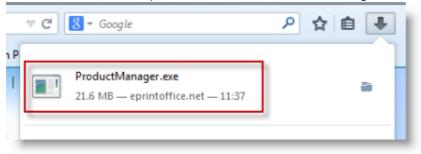
5. The Downloads window opens. Double click the ProductManager downloaded file to start the installation.

6. The ProductManager Installation wizard opens. Click **Next** to continue.

7. At the License Agreement window click **I accept the license agreement**. Click **Next** to continue.

8. At the Destination Folder window it is recommended that you accept the default folder location. Click **Next** to continue.

9. The ProductManager can now be installed. Click **Next** to begin the installation.

10. It should only take a few minutes to install ProductManager. When the installation is complete click **Finish**.

When you have completed the installation ProductManager will be installed.

To open ProductManager for the first time:

1. Click ProductManager

2. The first time that ProductManager is started after the installation it will take a few seconds for the program to be configured. A window opens similar to the one shown below.

3. The Setup window opens.

    1.   Enter your portal name.

    2.   (Optional) Select **Use Proxy Server**.

    3.   (Optional) Enter your Proxy address and Proxy port number.

    4.   (Optional) Enter your username and password.

    5.   Click **Connect**. You will receive confirmation that the portal connection was successful.

    6.   Click **OK**.

4. When the configuration is complete a log in window opens.

1. Use the same log in that you use to access the Skyline Portal.

2. Click **Log in** to start ProductManager.

Running ProductManager on a Proxy Server

If you are using a proxy server you will need to enter the proxy settings when you first open ProductManager. The settings will be remembered for when you next open ProductManager.

To enter your proxy details:

1. At the log in window click on the connection icon to open the connection details window.

2. The connections setup window opens.

1. Select **Use Proxy Server**.

2. Enter your Proxy address and Proxy port number.

3. Enter your network login username and password.

4. Click **OK**.

Starting ProductManager with https

If you are connecting to an HTTPS website you need to re-set ProductManager when it is first opened.

To use https:

1. At the log in window click on the connection icon to open the connection details window.

2. The connections setup window opens.

1. Select the option Use **HTTPS**.

2. Click **Connect** to connect to ProductManager using HTTPS & log in with your username and password. The next time you log in HTTPS is selected.

Adding Print Room Options

When ProductManager is first used the print room options need to be configured. The options can also be amended at any time. When you are in ProductManager select Print Room Options in the menu bar to view the tabs.

At the top of the screen you will see three tabs.

- Media[539] allows you to create and maintain the paper stocks available to your customers. These are used to create the products available to your customers.

- Document Options[541] displays options relating to the actual document to be created such as Printed Sides, Number of Images per Side, Binding etc.

- Delivery Options[543] provides the necessary options for creating delivery address forms and any priority options you may wish to offer to your customers

Media Tab

Media allows you to create and maintain the paper stocks available to your customers. These are used to create the products available to your customers. Selecting a media type will highlight it's properties. In the example, the properties for the media type Legal White 80gsm are shown.

ℹ️ **Note:**

The paper stocks need to be added in the print room options as a Media Type before products can be created.

To add a new media type:

1.   Enter a name for the media in the description box.

2.   Select the properties of the new media. The minimum requirements are: Type, Size, Colour and Weight.

3.   Click **Add** to save the new media type.

To add a new media type based on an existing media type:

1.   Select the existing media type that you want to base your new media on.

2.   Enter a new name for the media by changing the name in the description box.

3.   Change one or more of the selected properties.

4.   Click **Add** to save the new media type.

Further media options are available (e.g. Holes, Grading and Front and Back Coating) to enable you to create many types of stock for your products.

To add a new media options:

1. Click ✎ above the option block you want to use.

2. The selected option widow opens. Enter the details of the new media option.

- Enter a name for the media option.

- Select a value from the drop down list.

- Click **Add**. The selected value is added into your options.

3. When all the required options have been added, click **Close** to return to the Media tab.

Document Options Tab

Document Options displays options relating to the actual documents to be created such as printed sides, number of images per side, binding etc. These options can be priced as a cost per document[615] using CostManager.

Up to 20 extra options, known as Custom options, can be added if required. Custom document options can also be priced as a cost per document[615] using CostManager. In addition the cost per document price can be different for different quantities. This is known as price banding which can be applied to Custom Document options if required.

ⓘ Custom Options **MUST** be added to the Binding document part which can be renamed to suit the product.

The Production box contains values for different types of printers. These are used to provide different media pricing when adding prices to products when printed from different machines.

To add new document options:

1. Click 🖉 above the document option you want to add a new option to.

2. A window opens where the details of the option are entered.

   1. Enter a name for the document option.

   2. Select a value from the drop down list. The value can only be used once.

      ℹ️ Only use a value **ONCE**. If it is used multiple times errors will happen.

   3. Click **Add**. The selected value is added into your options.

3. When all the options have been added, click **Close** to return to the Document Options tab.

Delivery Options Tab

Delivery Options provides the necessary options for creating delivery address forms and any priority options you may wish to offer to your customers.

To add new delivery options:

1. Click ✎ above the delivery option you want to amend.

2. A window opens where the details of the option are entered.

    1. Enter a name for the delivery option.

    2. Click **Add**. The new name is added into your options.

3. When all the options have been added, click **Close** to return to the Delivery Options tab.

Managing Products

When the print room options have been configured you can create new products. Your Skyline portal is pre-configured with a simple selection of products that can be used as they are or amended to suit your requirements. Once you have created a product additional fields that are available to be added to all products can be assigned to the product. For more information please refer to the section on adding additional fields[569].

Creating a Product

When the print room options have been configured you can create new products. When the <u>products are made available</u>[552] to specific portals, end users can place an order on the print room using the new product.

If you are producing a booklet the document option **Images Per Side** must always be included in the body/ pages document part though It can be hidden from the end user. The CostManager will correctly calculate the paper costs if the options Images per slide is used when creating products for Booklets.

If you are using the pricing facility, the Body document part should always contain the following document options:

- **Media** - The paper stock that is available for the product. This option should always be at the top of the list.

- **Printed Sides** - Double sided or single sided printing.

- **Printer Type** - The user should be able to select whether the printing is colour or black and white.

To create a new product:

1. Select **Products** > **New Product** from the menu bar.
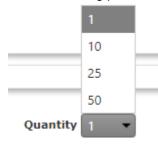
1. You need to select an image to represent the product. Click **Select Image**. The product image window opens. Select an image from the list of available images.

2. Enter a name for your new product and a brief description. The minimum and maximum number of pages can also be set to define the products displayed in the user selection in the main Skyline application.

3. (Optional) Leave blank so that any value can be entered when a user places an order.
   If you want to give a choice of how many copies can be ordered enter the required values separated by a comma. For example 1,10,25,50 would create a drop down box on the product containing just the values specified. See example below. If you wanted to enter a fixed quantity just enter a single number. The quantity required field will contain that number and the value cannot be changed when an order is being placed.

2. The components comprise of our main parts that can be selected as required along with a selectable 'Notes' field.

1. In the example the document part Front Cover had been selected. Once a part has been selected it is shown in the main area of the screen.

2. The document part Pages is then selected. You are able to add a caption for the document part, as shown in the example.

3.   The print room options $^{\square\,538}$ that have been setup can now be selected for the new product.

1.   Click the Options tab. Each of the document parts that have been selected are showing in the main area of the window.

2.   A list of the document options is shown. Each of the document options can be offered to the end user when they select the product type. Drag a document option from the list to a document part.

    If the option Laminating is used it should only be added to the Front Cover, Back Cover or Body sections.

    Custom Options **MUST** be added to the Binding document part which can be renamed to suit the product.

A window opens so that you can make specific choices regarding the option selected. For example, if you selected Media you would be able to change the caption and select the paper stock. Once you have made your selection click **Save**.

Note: If you have a section of options and Allow Blank Selection is selected there will be no option automatically selected when the end user views the product options. If you want there to be a default product selected highlight the product and click Set Default. The selected option will show in red to indicate it is the default product.

4. Each option selected is added to the document part. The option can be offered as a drop down selection or as an individual item which has conditions applied. The conditions can make the items mandatory or invisible to the user.

    - If there is no choice that the end user has to make, the option can be made invisible. To make an option invisible click . The option is shown greyed out.

    - Use to edit the option. For example, you might want to add another media choice to the option.

    - Use to delete the document option.

    - Use to amend the order that the document options will appear on the job ticket.

5. Click **Save** to save your new product.

Adding Images for Products
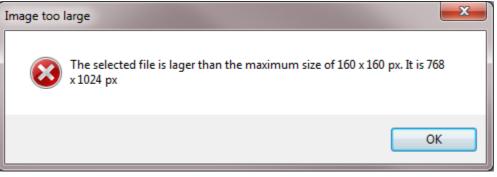
Product images are portal specific and are stored in the portal GUID in \\wwwroot\images\Products. Any images in GIF, JPEG or PNG format can be uploaded as long as they are not larger than 160 x 160 pixels.

When a user places an order and a product image is shown as a stack of books it shows that the product has no image. You need to add the image to the product.

To upload a new image:

1. Open **ProductManager**.

2. From the **Products** drop down menu select **New Product**.

3. Click [Select Image] to open the Product Images window.

4. Click [Add] to open your Windows Explorer. Locate the product image that you want to add to the portal library.

5. Click **Open** to upload the image. The file size cannot exceed 160 x 160px. If you select a file that is too big a message will show.

> **Image too large**
>
> ❌ The selected file is lager than the maximum size of 160 x 160 px. It is 768 x 1024 px
>
> [OK]

6. The image will be added to the available images.

Adding Products to a Portal

When a new product has been created the product has to be added to a Skyline portal before it will be available for the user to order.

ℹ️ **Note**:

> If products have not been added to the portal you will see an error message when you try place an order. If this happens please contact your administrator.

> Document name Skyline
>
> _____
>
> There are no products available

To add a product to a Skyline portal:

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

2. In the Products section click **Select Products**.

   Select Products
   Manage and assign products for your portal

3. A window opens showing all the products that are available to your portal users.

   1. Select the new product from the Available Products list.

   2. Click Add Selected Product to Portal.

   3. The new product will be added to the portal. Use the ⬆ Move Up or ⬇ Move Down options to arrange the products in an order that you want presented to the end user.

   4. Click Product Categories ▶ to assign products to categories[553] .

Managing Products and Categories

Products can be grouped together in categories. When an order is placed the user can view the available products in each category and select the required product. Products that are organized into categories are easier to use than a long list of all the available products. Products are assigned to one category, they can not appear in more than one category. If a product is not assigned to a category it will be listed on the web page under a tab named 'No category'.

To view Product Categories:

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

2. In the Products section click **Product Categories**.

3. A window opens showing the product categories and products available to the portal. If you have just added products to the portal^{552} you will see the same window.

To create a new Category:

1. Enter a new category name in the product category field at the bottom of the window.

2. Click to add the category.

To amend the category name:

1. Select the category.

2. Amend the category name in the product category field at the bottom of the window.

3. Click to save your changes.

To remove a category:

1. Select the category.

2. Click to remove the category. All products assigned to the deleted category will be listed in the Products not in any category column. The products will need to be assigned to another category.

To assign a product to a category:

1. Select a product category.

2. Select a product that has not been assigned to a category.

3. Click [←]. The product will be moved into the selected category.

You can select the layout of the tab settings. Depending on the number of categories that you have and the size of the names one tab setting may be preferred to another. To amend the tab settings simply select the required layout.

Left Aligned Tabs

Centre Aligned Tabs

Right Aligned Tabs

Justified Tabs

Amending Products

Your Skyline portal is pre-configured with a simple selection of products that can be amended to suit your requirements. You may also need to update products that you have configured.

To amend an existing product:

1. Select **Products** > **Manage Products** from the menu bar.

2. The Manage Products window opens. Select the product that you want to amend and click **Open**.

3. The form details for the selected product is shown. Make the amendments as required and click **Save** to update your amended product. See the example below.

For more information on amending the document options see 545 where the document options are explained.

Creating New Products From an Existing Product

You can create a new product based on a product that you have already created. This can save time if there are only slightly different choices available between two products.

To create a new product from an existing product:

1. From the **Products** drop down menu select **Manage Products** then select the product that you want to base your new product on.

2. Your selected product is opened.

3. Click **Save As**.

4. The Save As Window opens. Enter a new product name and description then click Save.

5. A copy of the original product will be saved with a new name. Make any changes in the product as required and then click Save.

Deleting Products

Media types and printing options may change. There may be some products that have been created are no longer available and the product needs to be deleted. It could be that you only want to remove the product option from a specific portal but users of a different portal will still have the product option. In this case you would want to delete the product from a portal.

To remove a product completely:

1. Select **Products** > **Manage Products** from the menu bar.

2. The Manage Products window opens. Select the product you want to delete and click **Delete**.

3. You will receive a warning if the product is assigned to a portal. Click **Yes** to complete deleting the product from the whole system.

To remove a product from a Skyline portal:

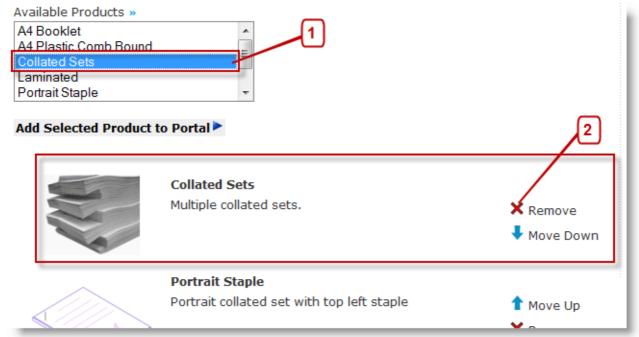1. Log in with Administrator rights and go to **Admin**.

2. In the Products section click **Select Products**.

    Select Products

    Manage and assign products for your portal
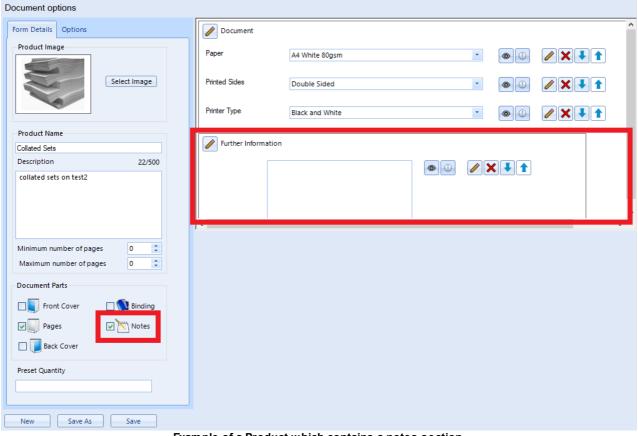
3. A window opens showing all the products that are available to your portal users.

1. Select the product from the Available Products list.

2. Click ✗ Remove associated with the product to remove it from the portal. The product will be available on any other portals that it has been assigned to.

Adding Product Notes

You can create a free text area that customers can enter information regarding their order. It is important that the notes section is added to the bottom of the product

Example of a Product which contains a notes section

When notes are added to a product they allow the customer to add information or requests regarding the order that they are placing. The notes will appear on the original job ticket.

Example showing the product notes on the original job ticket

If you use the Approval feature the product notes are shown on the Notes tab.

Example showing the product notes on the Notes tab when viewing the order for approval

Once the order is passed to the PrintStation the notes can be seen on the Overview tab.

Example showing the product notes on the PrintStation

The notes will also show when a manager views the order using Live Orders.

Example showing the product notes on the Details tab of Live Orders

If you print a standard job ticket the notes will appear at the bottom of the printout. The location of the notes may differ if you are using any customized job tickets.

Example showing the product notes on the Standard Job Ticket.

A4 Booklet Example

The example is for an A4 booklet. The printing is onto A3 paper which is folded and stapled to produce the booklet. The customer has the option of a different cover, but obviously the front and back cover will be the same media.

Points to remember:

• The document option Images Per Side must always be included in the body/pages document part though It can be hidden from the end user.

• The Body document part should always contain the document options Media, Printed Sides, Printer Type and Production.

• The option Media should always be at the top of the list.

• The option Production is usually hidden as the user is not required to select the type of printer to be used.

If you are using CostManager with the costs entered as shown below, the cost for a 40 page booklet printed double sided with a printed single sided cover would be 3:50 per copy. It has also been assumed that there are no costs per document applied for creating the booklet. If an additional handling charge is required the binding cost per document for a booklet with staples could be added.

Media Name	Colour printing per page		Monochrome printing per page		Media cost (Optional)	Laminating (Optional)	
	Double sided	Single sided	Double sided	Single sided			
A3 Booklet Card	0.0600	0.0600	0.0600	0.0600	2.0000	0.0000	✏
A3 White 80gsm	0.3000	0.3000	0.0600	0.0600	0.0300	0.0000	✏

The front and back cover cost is 2.06

A3 Booklet Card, printed single sided in colour.

Media cost is calculated by:
1 sheet of A3 booklet card is required at a cost of 2.00 per sheet
1 x 2.00 = 2.00

Printing cost is calculated by:
2 divided by 2 as images per side is 2 = 1
Printed single sided
1 x 0.06 = 0.06

The pages cost is 1.44

There are 38 pages printed double sided in black & white on A3 white paper 80gsm

Media cost is calculated by:
38 divided by 2 as images per side is 2 = 19.
19 divided by 2 being printed double sided = 9.5
Therefore 10 pages of A3 white paper 80gsm required at a cost of 0.03 per sheet.
10 x 0.03 = 0.30

Printing cost is calculated by:
38 divided by 2 as images per side is 2 = 19.
Printed double sided
Therefore 19 sides are being printed
19 x 0.06 = 1.14

A4 Comb Bound Example

In the example the user has the option of the front and back pages of the document to be produced on a different media. The cover pages can also be laminated if required.

Points to remember:

- The Body document part should always contain the document options Media, Printed Sides, Printer Type and Production. The wording can be changed for the end user e.g media shown as Paper.

- The option Media should always be at the top of the list.

- The option Production is usually hidden as the user is not required to select the type of printer to be used.

If you are using CostManager with the costs entered as shown below, the cost for a 40 page comb bound document printed double sided with a laminated printed single sided front cover & a unprinted back cover would be 4.92 per copy.

Media Name	Colour printing per page		Monochrome printing per page		Media cost (Optional)	Laminating (Optional)	
	Double sided |	Single sided	Double sided |	Single sided			
A3 Booklet Card	0.2000	0.2000	0.0300	0.0300	0.1000	0.2500	✎
A3 White 80gsm	0.0500	0.0500	0.0300	0.0300	0.0500	0.2500	✎
A4 Green Card 160gsm	0.0000	0.0000	0.0000	0.0000	0.5000	0.2500	✎

Front cover cost is 0.55
A4 white card 160gsm, colour printed single sided & laminated

    Media cost is 1 x 0.10
    Printing cost is 1 x 0.20
    Laminating cost is 1 x 0.25

Body cost is 2.17
A4 white 80gsm paper, mono printed double sided.

    Media cost is 39 divided by 2 as being printed double sided = 19.5 therefore 20 x 0.05 = 1.00
    Printing cost is 39 x 0:03 = 1.17

Back cover cost is 0.5
A4 green card 160gsm, not printed and not laminated

    Media cost is 1 x 0.5

Price Type	Cost Per Page	Cost Per Document	Cost Per Order	
	Binding			**Price**
◉ Binding	None			0.0000 ✎
○ Stapling				
○ Hole punching	Hard Cover			0.0000 ✎
○ Folding				
○ Scaling	Plastic Comb Bound			1.7000 ✎

Binding cost per document is 1.70

Using Additional Fields

If you require more information from your users when they place an order there is a licensed feature which enables additional fields to be added to a product. Once a product has been created additional fields can be added to enable the user to specify further details of their order. The additional fields are shown on the original job ticket and on a tab within the PrintStation. They can also be included in custom job tickets 477 .

If you are using Global products on multiple portals the additional fields assigned to the global product are specific to a portal.

The fields types are either text, numerical, check, drop down boxes or a calendar picker and can be made mandatory with options added for drop down lists. Customer entries in the additional fields are limited to 1024 characters.

The additional fields types are defined 571 and then added 579 to a product in the Skyline Website and will appear below the selected product when an order is being placed. The fields can be added to one or more products. Additional pricing can be applied to a product when the check 575 or drop down 576 fields are added, if required.
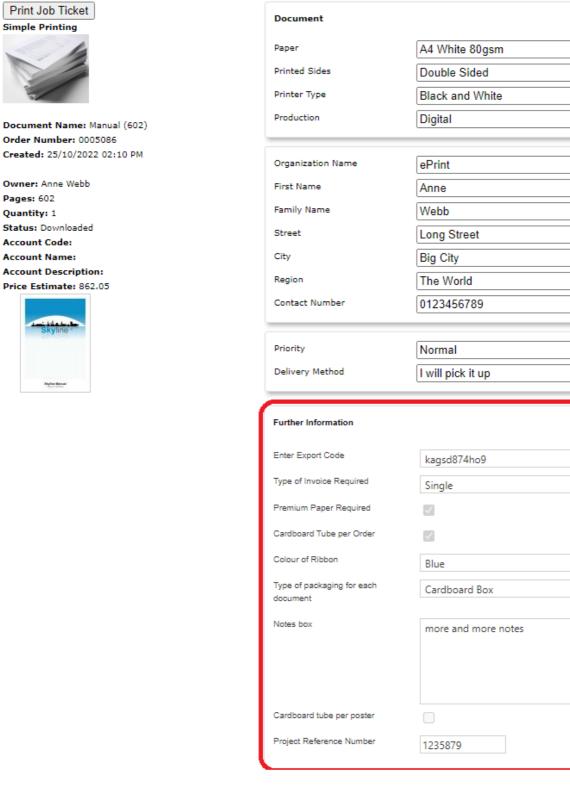
Note:

Changes should not be made to live orders if you are using pricing on Additional fields.

An example of a product with 5 different additional fields added.

Print Job Ticket

Simple Printing

Document Name: Manual (602)
Order Number: 0005086
Created: 25/10/2022 02:10 PM

Owner: Anne Webb
Pages: 602
Quantity: 1
Status: Downloaded
Account Code:
Account Name:
Account Description:
Price Estimate: 862.05

Document

Paper	A4 White 80gsm
Printed Sides	Double Sided
Printer Type	Black and White
Production	Digital

Organization Name	ePrint
First Name	Anne
Family Name	Webb
Street	Long Street
City	Big City
Region	The World
Contact Number	0123456789

Priority	Normal
Delivery Method	I will pick it up

Further Information

Enter Export Code	kagsd874ho9
Type of Invoice Required	Single
Premium Paper Required	☑
Cardboard Tube per Order	☑
Colour of Ribbon	Blue
Type of packaging for each document	Cardboard Box
Notes box	more and more notes
Cardboard tube per poster	☐
Project Reference Number	1235879

Example of a job ticket with additional field details

Defining Additional Field Types

You can define the field type for each field as required. There are 5 types of fields available - Textbox [572] , Multiline Textbox [573] , Numeric Field [574] , Checkbox [575] , Dropdown List [576] and Date Picker [578] . All fields can be assigned the same field type or any combination of types to suit your requirements.

It is recommended that you give the fields a name which describes the type of field you are creating. The fields are listed when you assign [579] a field to a product and that is where you would add a more descriptive name for the field which will appear on the product. The maximum length of the field name is 50 characters.

Each field can be used in different products.

To Define the Additional Field Types:

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

2.   In the Products section click **Additional Fields**.

   Define Addtional Field Types
   Define addtional field types for your Job Tickets

3.   The Additional Fields window opens.

Example of the Define Additional Field Types window with 37 fields that have been defined.

Defining a Text Field

To define a Text Field:

1. Select the field type **Textbox**.

2. The additional fields are displayed. Enter a Field name and any other field requirements then click **Add Field**.

- Field Name - Enter the name you want to use to identify the field.

- Empty Text - Enter text to be displayed when the field is empty

- Default Text - Text to be automatically entered but can be changed by the user.

- Make this field mandatory - Some text must be entered before the order can be placed

- Mandatory Message - Message to be displayed if the field is not completed.

Your new field has been created.

Defining a Multi Lined Field

ℹ️   A user can enter up to 1024 characters in a multi-lined text box

To define a Multi Lined Text Field:

1.   Select the field type **MultiLine Textbox**.

2.   The additional fields are displayed. Enter a Field name and any other field requirements then click **Add Field**.

- Empty Text - Enter text to be displayed when the field is empty

- Default Text - Text to be automatically entered but can be changed by the user.

- Make this field mandatory - Some text must be entered before the order can be placed

- Mandatory Message - Message to be displayed if the field is not completed.

Your new field has been created.

Defining a Numeric Field

To define a Numeric Field:

1.   Select the field type **Numeric Field**.

2.   Enter a Field name and any other field requirements then click **Add Field**.

- •   Minimum Value - The minimum value that can be entered. This field can be left blank.

- •   Maximum Value - The maximum value that can be entered. This field can be left blank.

- •   Make this field mandatory - Some information must be entered before the order can be placed

- •   Mandatory Message - Message to be displayed if the field is not completed.

Your new field has been created.

Defining a Checkbox Field

To define a checkbox:

1. Select the field type **CheckBox**.

2. Enter a Field name and any other field requirements then click **Add Field**.

- Checked by default - Select this option if the majority of the time order will be received with the option selected.

- Make this field mandatory - Not currently supported

- Mandatory Message - Not currently supported

3. Add the pricing per page, per document and/or per order, then click **Save**. The cost per page, cost per document and cost per order is included in the calculated cost for the order.

Defining a Dropdown Field

To define a dropdown field:

1. Select the field type **DropDown List**.

2. Enter a Field name and any other field requirements then click **Add Field**.

- Make this field mandatory - Select if an option must be selected before the order can be placed

- Mandatory Message - The message to be displayed if the field is not completed and the option Make this field mandatory has been selected.

2. Create the drop down entries.

    - Enter a name in the New option name field.

    - Click [+] to add the option name. When you have added all the option names click [save icon] to save your entries.

3. Select the option **Start with blank entry** if you do not want an option pre-selected. If you want an option selected by default select the option in the DropDown list and then click [Set Default]. The option selected will be the option that the order will contain unless the option is changes by the person who is placing the order.

4. Add the pricing per page, per document and/or per order for each different DropDown item. The cost per page, cost per document and cost per order is included in the calculated cost for the order.

Pricing can be added to each DropDown item

Option	Cost Per Page	Cost Per Document	Cost Per Order
Eco Bag - Free			
Plastic Bag			
Cardboard Box			
Wooden Presentation Box			

5. Click [Save] to save your requirements.

Defining a Date Picker Field

To add a Date Picker field:

1. Select the field type **Date Picker**.

2. Enter a Field name and any other field requirements then click **Add Field**.

- Allow Dates in the Past - Select if you want people to select dates in the past.

- Allow Weekends - Select if you want to include weekends in your date selection.

- Minimum Lead Time - Enter the number of days required.

- Make this field mandatory - Select if an option must be selected before the order can be placed

- Mandatory Message - The message to be displayed if the field is not completed.

Your new field has been created.

Adding Additional Fields

After Additional fields have been defined you can assign them to products. When a user orders a document and selects the product any additional fields will be made available. In the example below 3 additional fields have been added to the A4 Booklet product.

To Add Additional Fields:

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

2. In the Products section click **Assign Additional Fields**

Assign Addtional Fields
Assing Additional Fields to your Products

3. The Assign Additional Fields window opens. The number in brackets next to a product indicates how many additional fields have been assigned to the product.

NEEDS UPDATING

1. Select the product that you want to amend. A list of the all the available additional fields becomes available.

2. Select the Additional field to be added and click the arrow to add the field to the product.

3. As multiple fields can be added to a product, add any further fields as required.

4. Click **Save**.

 Note:

When an additional field is removed from a product:
   it is not removed from all previous orders for that product.
   it is **removed** from the list of fields on the Approval page. This happens even if the order was placed when the product contained the field.

Managing Address Forms

During the process to place an order a user will have to enter their delivery address details. In the example the user has to complete the name field as it is showing in red indicating that it is a compulsory field. The address details can be amended to suit your working arrangements.

You can only have one address form associated with a portal. However, if you have several portals, you can design a specific address form to be associated with each portal. The address form can be updated and saved to your portal at any time.

Creating Address Forms

Skyline is delivered with a default address form which can be [amended](#)⬜ ⁵⁸⁵ to fit your requirements. You can only have one address form associated with a portal. However, if you have several portals, you can design a specific address form to be associated with each portal.

ℹ️ **Note**:

If an address form has not been associated with the portal an error message will show when you try to place an order.

To create a new address form:

1.   Select **Address** > **New Address Form** from the menu bar.

2.   Enter a name for the new address form and brief description.

3. Click the **Options tab**. Drag and drop the required fields into the blank panel. Some of the address form options will give the user a drop down list of choices for them to select from, as shown in the example. Select the options that you want to include in the form field & click **Save**.

- When you have added all your required address fields you can use the following buttons to make any fields compulsory or make other amendments.

- If there is no choice that the end user has to make, the option can be made invisible. To make an option invisible click . The option is shown greyed out.

- If you want to make completion of the field compulsory click . The field name colour changes to red indicating that the field must be completed.

- Use to edit the option. For example, you might want to add another media choice to the option.

- Use to delete the document option.

- Use to amend the order that the document options will appear on the job ticket.

4. Click **Save** to save your new address form.

Associating an Address Form

When a new address form has been created it can be associated with a Skyline portal. Only one address form can be associated with a portal.

When a new address form is associated the users will not be able to amend their address details via the preferences link [312] until they have placed an order. When they place an order they will be required to enter their address details and may have the option to save the delivery address.

Note:

If an address form has not been associated with the portal an error message will show when you try to place an order.

Document name

_____

The system has not been configured. There are no delivery options selected. Please contact the administrator

To associate an address form to a Skyline portal:

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

2. In the Orders section click **Select Address Form**.

    Select Address Form
    Assign a delivery form to a portal

3. Select the address form that you want to be used on the portal.

    Use
    ○ Alpha Campus
    ⊙ Standard Delivery Address

    Back

Amending Address Forms

Skyline is delivered with a default address from. This can be amended to include any address fields that you require. Other address from can be created and modified at any time.

To amend an address form:

1. Select **Address** > **Manage Address Forms** from the menu bar.

2. The Open Address Form window opens. Select the address form to be amended and click **Open**.
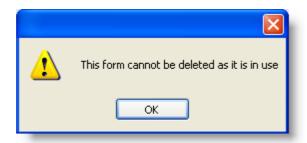
3. The form details for the selected address is shown. Make the amendments as required and click **Save** to update your amended product.

For more information on amending the address options see Creating Address Forms 582 where the options are explained.

Deleting Address Forms

There may be occasions when an existing address form is no longer required. It is good housekeeping to remove forms that are no longer in use. As only one address form can be associated with a portal, an address form can not be deleted if it is in use. If you try to delete an address form that is assigned to a portal you receive a warning message, as shown below.

To remove an address form:

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

2. In the Order section click **Select Address Form**.

Select Address Form
Assign a delivery form to a portal

3. Make sure that the address form that you want to delete is not associated with the portal.

4. Open ProductManager.

5. Select **Address** > **Manage Address Forms** from the menu bar.

6. The Open Address Form window opens. Select the address form to be deleted and click **Delete**.

7. The selected address will be removed. Click **Cancel** to close the Open Address Form window.

Managing Delivery Forms

When a user places a print order they may be required to complete a shipping delivery form. You can amend the existing form or create a new one to collect the information that you require from your customers. The form can be updated and saved to your portal at any time. You can create many shipping delivery forms but only 1 shipping delivery form can be assigned to a portal at a time.

Creating Delivery Forms

Skyline is delivered with a default delivery shipping form which can be [amended](#)[592] to fit your requirements. You can only have one delivery shipping form associated with a portal. However, if you have several portals, you can design a specific delivery shipping form to be associated with each portal.
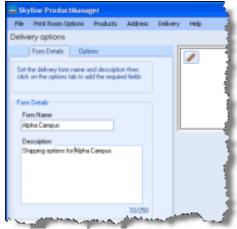
If a delivery form has not been associated with the portal an error message will show when you try to place an order.

To create a new delivery shipping form:

1. Select **Delivery** > **New Delivery Form** from the menu bar.

2. Enter a name for the new delivery form and brief description.

3. Click the **Options** tab. Drag and drop the required fields into the blank panel. Some of the delivery form options will give the user a drop down list of choices for them to select from, as shown in the example. Select the options that you want to include in the form field & click **Save**.

4. When you have added all your required delivery option fields you can use the following buttons to make any fields compulsory or make other amendments.

    - If there is no choice that the end user has to make, the option can be made invisible. To make an option invisible click ⊙. The option is shown greyed out.

    - If you want to make completion of the field compulsory click ⊙. The field name colour changes to red indicating that the field must be completed.

    - Use ✏ to edit the option. For example, you might want to add another delivery priority to the option.

    - Use ✖ to delete the option.

    - Use ⬇⬆ to amend the order that the options will appear in the delivery shipping form.

5. Click **Save** to save your new address form

Associating a Delivery Form

Delivery shipping forms can be created to offer different groups different delivery options. Local users may use a portal which offers a pick up only service, while users of offices further away may use a portal which offers postal or courier services.

When a new delivery shipping form has been created it can be associated with a Skyline portal. Only one delivery shipping form can be associated with a portal.

If a delivery form has not been associated with the portal an error message will show when you try to place an order.

Document name

_____

The system has not been configured. There are no delivery options selected.
Please contact the administrator

To associate delivery shipping form to a Skyline portal:

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

   View Basket (0) | Preferences | Downloads | Edit | Admin | Management | Logout

2. In the Orders section click **Select Delivery Form**.

   Select Delivery Form
   Assign a delivery form to a portal

3. Select the delivery shipping form that you want to be used on the portal.

   Use
   ⦿ Delivery Options
   ○ Alpha Campus

   Back

Amending a Delivery Form

Skyline is delivered with a default delivery shipping from. This can be amended to include any fields that you require. Other Delivery forms can be created and modified at any time.

To amend a delivery shipping form:

1.   Select **Delivery** > **Manage Delivery Forms** from the menu bar.

2.   The Open Delivery Form window opens. Select the delivery shipping form to be amended and click **Open**.
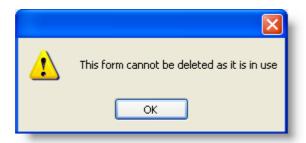

3.   The form details for the selected delivery shipping is shown. Make the amendments as required and click **Save** to update your amended product.

For more information on amending the address options see where the options are explained.

Deleting a Delivery Address

There may be occasions when an existing delivery shipping form is no longer required. It is good housekeeping to remove forms that are no longer in use. As only one delivery shipping form can be associated with a portal, a form can not be deleted if it is in use. If you try to delete a form that is assigned to a portal you receive an warning message, as shown below.

To remove a delivery shipping form:

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

2.   In the Order section click **Select Delivery Form**.

3.   Make sure that the delivery shipping form that you want to delete is not associated with the portal.

4.   Open ProductManager.

5.   Select **Delivery** > **Manage Delivery Forms** from the menu bar when you are running ProductManager.

6.   The Open Delivery Form window opens. Select the address form to be deleted and click **Delete**.

7.   The selected delivery form will be removed. Click **Cancel** to close the Open Delivery Form window.

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Skyline CostManager

Skyline CostManager has been designed to make the pricing process more intuitive and flexible. The price of an order can be calculated based on the number of pages, the media type, number of sides that are printed and whether the printing is in colour or black and white. Each document ordered can have a separate cost added to cover binding, stapling, folding etc. Finally a cost for the whole order can be applied to cover delivery & priority requests.

Sometimes a calculated price is not applicable but a fixed price for the products ordered is required. This would be a likely scenario when ordering a product created using a template, for example business cards. You can enter a fixed price[606] for a product.

Each product type can have a setup cost and tax rate applied if applicable.

Example of the opening window of CostManager

Notes:

When global products are used you require Host or Administrative authorisation level to sign into CostManager.

Only available in English at present.

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

Starting CostManager

Once CostManager has been installed the pricing details can be entered and [Skyline configured](#)□ 158 to use the prices.

To open CostManager:

1.   Click CostManager

2.   A log in window opens.

1.   Type in the name of your portal.
     If you enter an incorrect portal name you will receive an [incorrect portal](#)□ 597 error message.

2.   Enter your user name and password.
     If you enter these details incorrectly you will receive an error message stating that you have entered an [incorrect username or password](#)□ 597.

3.   Select the option 'Remember me next time' if you regularly use CostManager from the same computer.

4.   Click **Connect** to start CostManager.
     If you do not have the correct access rights to CostManager you will see an [incorrect username or password](#)□ 597 error message.

Starting CostManager with HTTPS

If you are connecting to an HTTPS website CostManager will automatically connect when it is first opened. Just enter the portal URL without any pre-fix and connect to CostManager. The prefix HTTPS:// will show in the Window title bar area. The next time you open CostManager the correct portal URL will be displayed with the prefix HTTPS.

Incorrect Username or Password

If you try to log in into CostManager and see the message "The username or password is incorrect" it means that the user name or password you have entered has not been recognized due to a spelling error or you do not have user access to CostManager.

Example of error message when an incorrect user name or password is entered.

Incorrect Portal Name

If you try to log in into ProductManager and see the message "Portal not found" it means that the portal name is not recognized. This could be because you have mis-typed the portal URL. Check that the portal URL is correctly entered and try again.

Example of error message when the portal entered is not recognised.

If portal is still not recognised check to see if you are trying to connect to CostManager via a proxy server. It could be that you need to configure CostManager to connect to use a proxy server[598].

Running CostManager on a Proxy Server

If you are using a proxy server you will need to enter the proxy settings when you first open CostManager. The settings will be remembered for when you next open CostManager.

To enter your proxy details:

1. At the log in window click on the connection icon to open the connection details window.

2. The Proxy setup window opens.

1. Select **Use Proxy Server**.

2. Enter your Proxy address and Proxy port number.

3. Enter your network login username and password

4. Click **Save**.

The proxy details are saved and you can open CostManager⁵⁹⁶ in the usual way.

New Version Available Message

If you open CostManager and during log in you see the message "A new version of the CostManager is available to download from *PortalName*" it means that your current copy of CostManager is not compatible with your Skyline website and needs to be updated.

Example of the message shown when a new version is available.

Updating CostManager

After the initial installation of CostManager there may be an occasion that you will need to install the program again e.g. after a computer upgrade.

To update CostManager:

1.   Make sure that if there are any previous versions of CostManager are removed. Use the Add/Remove Programs facility in Control Panel to remove any existing version.

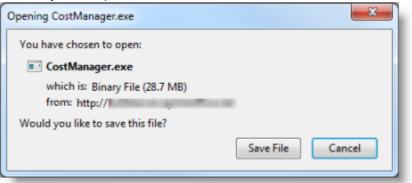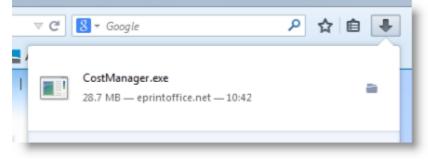2.   Log in with Management Permissions and go to Downloads.

3.   Click CostManager.

4.   When you see the Opening CostManager window, click Save File. The CostManager installation file is saved to your computer.

5.   Click the icon on the toolbar to display the downloads and select CostManager.

6. The CostManager Installation wizard opens. Click Next to continue.

7. At the License Agreement window click I accept the license agreement. Click Next to continue.
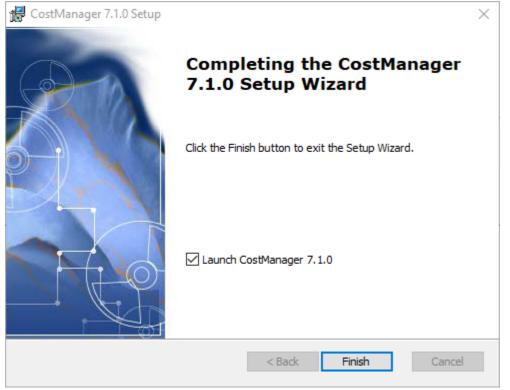
8. At the Destination Folder window it is recommended that you accept the default folder location. Click Next to continue.

9. The CostManager can now be installed. Click Next to begin the installation.

10. It should only take a few minutes to install CostManager. When the installation is complete click Finish.

When you have completed the installation CostManager will be installed.

To open CostManager for the first time:

1. Click CostManager

2. The first time that CostManager is started after the installation it will take a few seconds for the program to be configured.

3. When the configuration is complete a log in window opens.

1. Enter the name of the portal that you want CostManager to be connected too

2. Enter your Username & Password. Use the same log in that you use to access the Skyline Portal.

3. Select the option 'Remember me next time' if you will be regularly using CostManager.

4. Click Connect.

When you have successfully logged in you will see the CostManager window

Checking the Software Version

When changes are made to CostManager the software version number is updated.

To find the software version that you are currently running:

1. From the **Help** drop down menu, select **About**.

2. The **About Skyline CostManager** window opens. Your current software version number is shown.

Selecting the Pricing

All the products that have been created using ProductManager can be priced with either a fixed price or a calculated price. In addition are you can specify a setup cost and tax rate for each product. The Setup Cost and Tax rate options are not compulsory.

To specify a Fixed price:

1.   Click [pencil icon] associated with the required product.

2.   The fields can be amended.

1.   Select the option Fixed Price.

2.   Enter the price for the product type.

3.   (Optional) Enter the Setup Cost. This is a one off cost applied to the order being placed regardless of the number of copies requested.

4.   (Optional) Enter the Tax rate percentage. This is applied to the calculated or fixed price of the product. Any setup costs for the product are not included when the tax rate is calculated and added to the total cost of the order.

5.   Click [save icon] to save your changes.

Once the parts that are used to calculate the [cost of the product](#) have been entered the pricing can be applied to the product.

To specify a Calculated price:

1.   Click ![pencil icon] associated with the required product.

2.   The fields can be amended.

1.   Select the option Calculated price.

2.   (Optional) Enter the Setup Cost. This is a one off cost applied to the order being placed regardless of the number of copies requested.

3.   (Optional) Enter the Tax rate percentage. This is applied to the calculated or fixed price of the product. Any setup costs for the product are not included when the tax rate is calculated and added to the total cost of the order.

4.   Click ![save icon] to save your changes.

Calculated Prices

The parts that make up the calculated price are entered in three areas:

Cost per page⃞ 609 - Details of the cost of the paper media and printing requirements e.g. the printer to be used and whether it is being printed single sided or double sided.

Cost per document⃞ 615 - cost details of the finishing required for each document ordered e.g. stapling, binding, punching or folding.

Cost per order⃞ 617 - Any costs associated with the delivery of the order are detailed e.g the urgency of the order.

Once the costs of the product have been entered you can specify the setup cost and tax rate percentages for the specific product, if applicable.

Note:

If any details are amended or added in ProductManager they will not be seen in CostManager until the details are refreshed. To update the details in CostManager click Refresh from the File drop down menu.

Cost Per Page

Details of the cost of the paper media and printing requirements are entered for each printer type available. In the example below there are three types of printers that are available - Digital Printer, Wide Format & Offset.

Example layout of the Cost Per Page.

The media listed on the page was created in ProductManager in the Media tab.

Example of where the media is created within ProductManager

To enter the cost per page:

1.   Select the printer type that is used to produce the output.

2.   Click associated with the media that you want to price.

3.   Enter the cost of printing on the media. The actual printing cost can be entered for single sided or double sided printing as well as colour or mono printing. When a product is ordered the options to print single or double sided or in colour can be selected by the user or be pre-defined.

| Media Name | Colour printing per page | | Monochrome printing per page | | Media cost | Laminating | |
	Double sided	Single sided	Double sided	Single sided	(Optional)	(Optional)	
A3 100 gsm semi-gloss	0.7000	0.7000	0.5000	0.5000	0.0000	0.0000	✏
A3 100 gsm white	0.0000	0.0000	0.2000	0.2000	0.0000	0.0000	✏
A3 120 gsm semi-gloss	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	✏
A3 160 gsm matt	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	✏
A3 160 gsm white	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	✏

 Note:

The prices entered apply to each printed side of a document. If the costs were entered as In the example below the printing cost of a 20 page document in colour would be 20 x 0.35 (7.00 per document) if it was printed double sided and 20 x 0.40 (8.00 per document) if it was printed single sided.

| Colour printing per page | | Monochrome printing per page | |
Double sided	Single sided	Double sided	Single sided
0.3500	0.4000	0.1000	0.1500

4. (Optional) Enter the cost for a single sheet of paper media. Leave this field blank If the media cost is included in the cost of printing.
Note

Media Name	Colour printing per page		Monochrome printing per page		Media cost (Optional)	Laminating (Optional)	
	Double sided | Single sided		Double sided | Single sided				
A3 100 gsm semi-gloss	0.7000	0.7000	0.5000	0.5000	0.0000	0.0000	✏
A3 100 gsm white	0.0000	0.0000	0.2000	0	0.0000	0.0000	✏
A3 120 gsm semi-gloss	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	✏
A3 160 gsm matt	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	✏
A3 160 gsm white	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	✏

ℹ **Note:**

If the media is selected but the printer type selected is Not Printed then the media cost will still be applied as the media is supplied.

5. (Optional) If a value is entered in this field then any product will have the cost for laminating each page with that media name included in the cost of printing. Leave this field blank if the laminating cost is not applicable to the whole document.

Media Name	Colour printing per page		Monochrome printing per page		Media cost (Optional)	Laminating (Optional)	
	Double sided | Single sided		Double sided | Single sided				
A3 100 gsm semi-gloss	0.7000	0.7000	0.5000	0.5000	0.0000	0.0000	✏
A3 100 gsm white	0.0000	0.0000	0.2000	0.2000	000	0.0000	✏
A3 120 gsm semi-gloss	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	✏
A3 160 gsm matt	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	✏
A3 160 gsm white	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	✏

6.   (Optional) If there are different prices for different quantities of media used the details can be added using the banding option. Banding options only work with media that is in the body of the product[545], Click to view the banding options.

1.   Specify the 1st range.

2.   Enter the cost of printing on the media.

3.   Enter the cost of the media (if applicable).

4.   Enter the cost of laminating each page (if applicable).

5.   Click to specify the details for the next banding range. You will be unable to save the details if the last To field does not contain the value 2000000000.

7.   When complete click **Save**.

8.   When you return to Cost per Page window click to save your changes.

Examples

Example A

The cost per page has been entered using a separate printing and media cost.

Media Name	Colour printing per page		Monochrome printing per page		Media cost (Optional)	Laminating (Optional)	
	Double sided	Single sided	Double sided	Single sided			
A3 Booklet Card	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	✏
A3 white 120gsm	0.3000	0.3000	0.1000	0.1000	0.0500	0.0000	✏
A3 White 80gsm	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	✏
A4 120gsm	0.1500	0.1500	[A] 0.0500	[B] 0.0500	[C] 0.0500	0.2500	✏
A4 80gsm	0.1500	0.1500	0.0300	0.0300	0.0500	0.0000	✏
A4 Card		0.2000	0.0200	0.0200	0.1000	0.2500	✏

The cost of printing a 7 page document on A4 80gsm in monochrome single sided would cost:

- Printing cost of 7 x 0.03 [B] = 0.21 (printing cost for 7 sides)

- Media cost of 7 x 0.05 [C] = 0.35 (7 sheets of media used)

- Total cost = 0.21 + 0.35 = 0.56 (document printed single sided in monochrome)

The cost of printing a 7 page document on A4 80gsm in monochrome double sided would cost:

- Printing cost of 7 x 0.03 [A] = 0.21 (printing cost for 7 sides)

- Media cost of 4 x 0.05 = 0.20 [C] (4 sheets of media used, 3 will be printed on both sides)

- Total cost = 0.21 + 0.35 = 0.41 (document printed double sided in monochrome)

Skyline Manual

Example B

The cost per page has been entered using a combined printing and media cost.

Media Name	Colour printing per page		Monochrome printing per page		Media cost (Optional)	Laminating (Optional)	
	Double sided	Single sided	Double sided	Single sided			
A3 Booklet Card	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	✏
A3 white 120gsm	0.3000	0.3000	0.1000	0.1000	0.0500	0.0000	✏
A3 White 80gsm	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	✏
A4 120gsm	0.1500	0.1500	0.0500 [A]	0.0500 [B]	0.0500	0.2500	✏
A4 80gsm	0.4000	0.6500	0.0550	0.0800	0.0000	0.0000	✏
A4 Card					0.1000	0.2500	✏

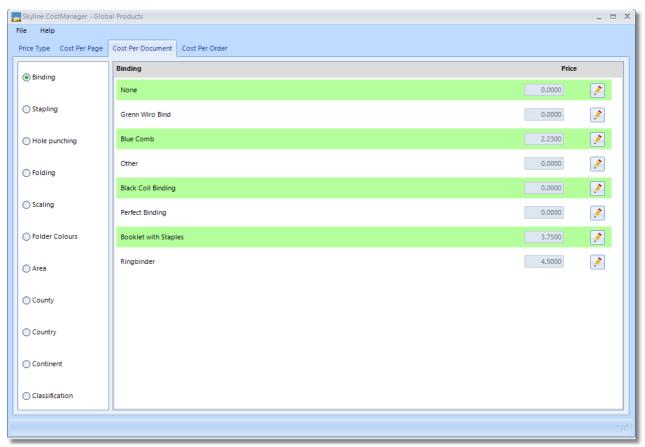The cost of printing a 7 page document on A4 80gsm in monochrome single sided would cost:

- Printing cost of 7 x 0.08 [B] = 0.56 (using 7 sheets of media and 7 sides of printing)

The cost of printing a 7 page document on A4 80gsm in monochrome double sided would cost:

- Printing cost of 7 x 0.055 [A] = 0.39 (using 4 sheets of media and 7 sides of printing)

Cost Per Document

The cost details of the finishing required for each document ordered is entered on this page. An example of the layout of the Cost Per Document is shown below.

Example layout of the Cost Per Document

The finishing requirements listed on the page were created in ProductManager in the Document Options tab
[541] . You can create up to 6 custom document options that can be costed in this section. Cost banding can also be applied to custom document options when you are using global or portal products.

To enter document finishing costs:

1. Select the finishing type from the list. In the example above the option Binding has been selected.

2. Click ![pencil icon] associated with the document finish that you want to enter the costs for.

3. Enter the cost for the finishing type.

4. (Optional) If you are pricing a Custom Document Option click ![plus icon] to add banding values.

5. Click ![save icon] to save your changes.

Cost Per Order

Any costs associated with the delivery of the order are detailed in the Cost per Order page.

Example of the layout of the Cost Per Page.

The document delivery options listed on the page were created in ProductManager in the <u>Delivery Options</u>⊐ [429] tab.

The costs are applied to the whole order irrespective of the number of documents being ordered. This means that when the cost of a document is shown in PrintStation the cost per order is not included in the price.
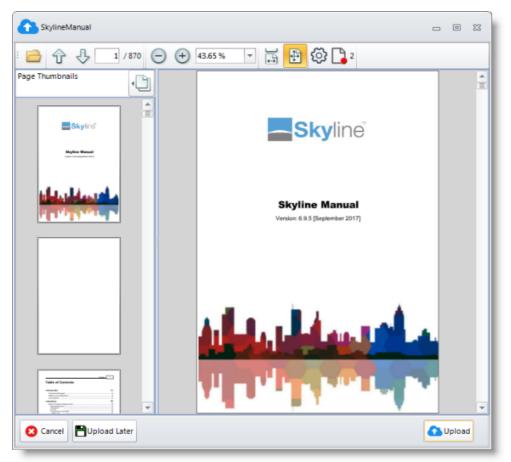
To enter a cost per order:

1. Select the type of cost - Priority or Delivery Method.

2. Click [pencil icon] to edit a particular cost.

3. Enter the cost.

4. Click [save icon] to save your amendments.
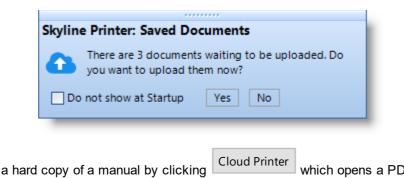
This page intentionally left blank.

Skyline Cloud Printer

The Skyline Cloud Printer enables you to send a document from any windows application to Skyline. When a you want to send a document simply select the name of the Skyline Cloud Printer from the list of available printers. A PDF is created which you can check then the document can be uploaded into Skyline and ordered in the usual way.

An example of a document being viewed with Skyline Printer before being uploaded and ordered using the Skyline website.

If you are working away from the office and do not have internet connection documents can be saved and uploaded later. Each time that you start the computer a pop-up message will remind you that there are documents waiting to be uploaded.

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

Configuring Skyline Cloud Printer Download

Entering Printer Settings

Before a Skyline Cloud Printer can be downloaded the printer settings need to be specified.

To enter your Skyline Cloud Printer settings:

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

     🛒 View Basket (0) | Preferences | Downloads | Edit | Admin | Management | Logout

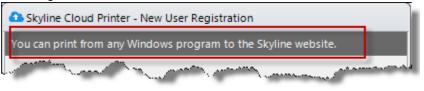2.   In the Configuration section click **Skyline Cloud Printer Settings**.

     Skyline Cloud Printer Settings
     Add and update the Skyline Cloud Printer settings

3.   Details of your Skyline Cloud Printer settings need to be entered.

Skyline Cloud Printer Settings

Printer Name	Skyline Cloud Printer **1**
Log in with Username	☑ **2**
Use SSL	☐
3	
Licence Name	**4**
Activation Code	
Website URLs	**5**
Message to new users	You can print from any Windows program to the Skyline website. **6**
7	
Existing Printer	Delete Back Save **8**

1.   Enter a name for the printer. This is the name that the user will see when they select the Skyline Cloud Printer from the print option.

2.   If your organisation wants users to log in with a user name and password select the option **Log in with Username**. If users are to log in with their email address and password, do not select this option.

3.   If you portal has been set to use HTTPS then select the option **Use SSL**.

4.   Enter the license name and activation code that you were supplied.

5.   Select the website URL that the printer is to be associated with. If there is only one URL then that URL will automatically be selected.

6.   The **Message to new users** can be amended as required. The message will appear on the New User Registration form.

This option will not be available of your portal has been set to LDAP authentication. Users will be using their corporate user name and password when configuring their Skyline Cloud Printer for the first time..

7.   If you are making changes to an exiting printer license click **Delete** to remove an existing printer settings.

8.   Click **Save** to save the new printer settings.

Show Skyline Cloud Printer Download

By default the Skyline Cloud Printer is not listed with the other products that can be downloaded. To make the Skyline Cloud Printer available the portal configuration needs to be amended.

To make the Skyline Cloud Printer download option available:

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 **Download Link Visible to Users** in the list. To make the Skyline Cloud Printer download option available the option should be **True**.

4. To amend this option click ✏.

5. Click 💾 to save the setting.

6. Click the link **Downloads**. The option **Skyline Cloud Printer** should be available.

    Skyline Cloud Printer
    Download and install Skyline Cloud Printer

LDAP Configuration Check

If your users will be using their corporate user name and password to login to Skyline they should be enabled by default. The portal configuration **Registration - New Users Must Be Approved** needs to be OFF.

To check the portal configuration:

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 **Registration - New Users Must Be Approved** in the list. The option should be **False**.

Amending the Registration Email

When a new user registers they will receive a confirmation email asking then to validate their email address. The wording can be mended as required.

To amend the Registration Email:

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

2. In the **Configuration** section select **System Emails**.

    System Emails
    Edit the subject and text of system emails

3. Click ✏ by the **Activation email sent to new Skyline Cloud Printer users** to make any changes to the email.

4. Click **Save** when the changes have been made.

Installing Skyline Cloud Printer

Once the printer settings have been entered and made available the Skyline Cloud Printer can be downloaded on any PC that requires Skyline Cloud Printer.

To install Skyline Cloud Printer:

1. Log in with Management Permissions and go to **Downloads**.

2. Click **Skyline Cloud Printer**.

   Skyline Cloud Printer
   Download and install Skyline Cloud Printer

3. Save the Zip file and then open the file. You must extract all the files before you proceed with the installation.

4. Open the folder that you have extracted the files into and double click Install Skyline Cloud Printer.msi

5. The Skyline Cloud Printer Welcome window opens. Click **Next** to continue.

6. The License Agreement window opens.

1.　Select the option **I accept the terms in the license agreement**.

2.　Click **Next** to continue.

7.　The Ready to Install the Program window opens. Click **Next** to start the installation.

8.　When the installation is complete click **Finish** to complete the installation.

9.　Restart your computer to complete the installation.

Using Skyline Cloud Printer

Creating an Account
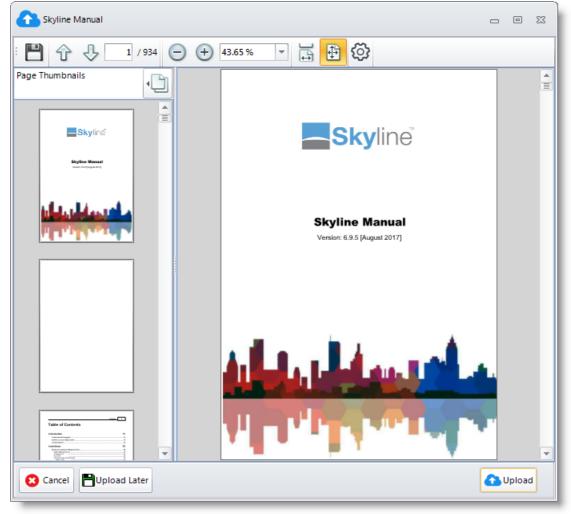
You can upload a document to be printed in your print room from any windows program. The first time you do this you will need to create account for the Skyline Cloud Printer. If you will be using your corporate user name and password to log into Skyline Cloud Printer the procedure is slightly different. Please refer to the section on Creating a LDAP Account[633] for more information.

To upload a document & send to your print room:

1. Print the document from your windows program making sure that you select the Skyline Cloud Printer. The name of the printer may not be Skyline Cloud Printer but your administrator will be able to confirm the printer name.

2. Your document will be converted into a PDF format and shown in a new window. The name of your document is shown in the title bar.

3. Click [Upload] to upload your document to Skyline. As you are using the Skyline Cloud Printer for the first time a New User window opens. Click **Login or Register**.

Skyline Cloud Printer: New User

No login information was found to enable the printer 'Skyline Cloud Printer' to send documents to http://buildserver.eprintoffice.net.

Do you want to login or register now?

Cancel   **Login or Register**

4. The New User Registration window opens.
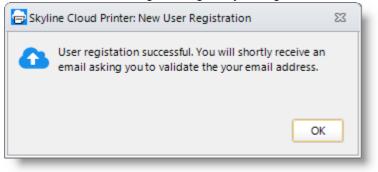
Skyline Cloud Printer - New User Registration

You can print from any Windows program to the Skyline website.

◉ Register as a new user
○ Log in existing user

Print Provider Website

http:// ***[1]***

A validation message will be sent to this address ***[2]***

@ Email address

👤 Username

🔒 Password   Confirm Password   ***[3]***

Cancel   ***[4]***   🔑 Register

1. The Skyline Website is automatically entered. Check that the information is correct.

2. Enter your email address. This needs to be an active address as you will receive notification when your skyline account is activated.

3. Enter your user name and password for your Skyline account.

4. Click **Register.**
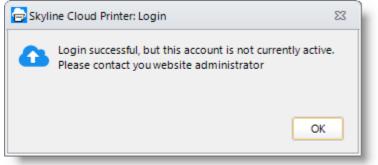
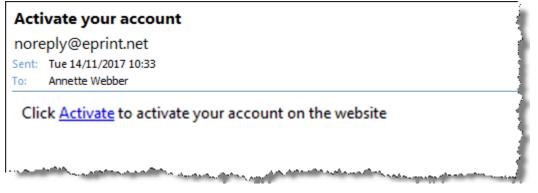5. You will receive a message stating that your registration was successful. Click **OK**.

6. You will then receive a message stating that your account is not currently active. Click **OK**.
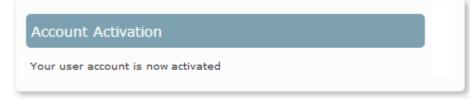

7. At the bottom of your Skyline Cloud Printer window there is a message stating 'User not Activated'. You can either leave the window open so that the document can be uploaded or click **Upload Later**.

8. View your emails. There should be an email with the subject **Activate your account**. Click **Activate**.

9. Your Skyline website opens and you will see a message stating that your account has been activated.

10. Return to your Skyline Cloud Printer window and click **Upload**.

11. Skyline is automatically opened and your document is shown on the page where you can choose the type of printing that is needed. In this example the Document type **Simple** was chosen.

12. The media type, printed sides and whether the document needed to be printed in colour or just black and white were selected. Add the number of copies of the document that you want printed and then click **OK**.

13. The costing of the document is shown if applicable. Click **Next** to continue placing the order.

14. Enter your address details and then click **Next**.

Document Type Product Options Basket **Address** Shipping Confirm

◀ Back

Name	Anne Webb
Company Name	ePrint Ltd
Address 1	2nd Floor, Gate House,
Address 2	Fretherne Rd, Welwyn Garden City
County	Hertfordshire
Postal Code	AL8 6NS
Phone Number	+44(0) 1438 726 732

☑ Save this delivery address

Next ▶

15. Enter your delivery requirements and then click **Next**.

Document Type Product Options Basket Address **Shipping** Confirm

◀ Back

Delivery Details

| Priority | Normal ▼ |
| Date Required by: | 17/11/2017 |

Next ▶

16. Review the details and if no changes are needed click **confirm Order**.

17. Your order is placed. If orders need to be approved before they can be processed this information is shown on the Confirmation screen. If your order doesn't need approval then the order is passed straight to the print room to be processed.
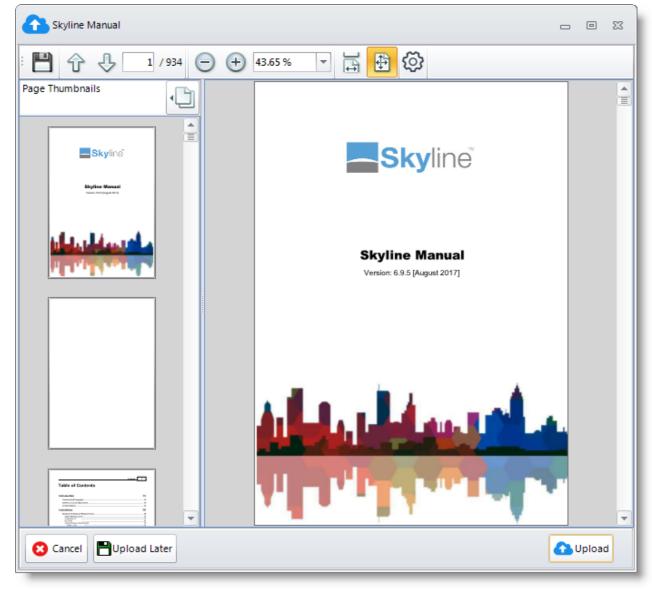
Creating a LDAP Account

If you will be using your corporate user name and password to log into Skyline Cloud Printer please follow the instructions below to create a LDAP Account.

To upload a document:

1. Print the document from your windows program making sure that you select the Skyline Cloud Printer. The name of the printer may not be Skyline Cloud Printer but your administrator will be able to confirm the printer name.

2. Your document will be converted into a PDF format and shown in a new window. The name of your document is shown in the title bar.

3.   Click to upload your document to Skyline.

4.   During the upload a progress bar is displayed showing the progress.

5.   If you have not used the Skyline Cloud Printer before you will have to log in to your Skyline website with your company username and password. As long as you do not log out of the website but just close the window, you will not need to log into to the website again.

6.   Skyline opens and your document is shown on the page where you can choose the type of printing that is needed. In this example the Document type **Simple** was chosen.

7.   The media type, printed sides and whether the document needed to be printed in colour or just black and white were selected. Add the number of copies of the document that you want printed and then click **OK**.

8.   The costing of the document is shown if applicable. Click **Next** to continue placing the order.

9. Enter your address details and then click **Next**.

    Document Type Product Options Basket **Address** Shipping Confirm

    ◀ Back

    | **Name** | Anne Webb |
    | Company Name | ePrint Ltd |
    | Address 1 | 2nd Floor, Gate House, |
    | Address 2 | Fretherne Rd, Welwyn Garden City |
    | County | Hertfordshire |
    | Postal Code | AL8 6NS |
    | Phone Number | +44(0) 1438 726 732 |

    ☑ Save this delivery address

    Next ▶

10. Enter your delivery requirements and then click **Next**.

    Document Type Product Options Basket Address **Shipping** Confirm

    ◀ Back

    Delivery Details

    | Priority | Normal ▾ |
    | Date Required by: | 17/11/2017 📅 |

    Next ▶

11. Review the details and if no changes are needed click **confirm Order**.

Document Type Product Options Basket Address Shipping Confirm

Please check the order details below and confirm your order

✗ Cancel Order

Quantity	Document	Product	Pages	Price
30	Using GotoMeeting	Simple	2	3.75

Total 3.75

Confirm Order ▶

12. Your order is placed. If orders need to be approved before they can be processed this information is shown on the Confirmation screen. If your order doesn't need approval then the order is passed straight to the print room to be processed.

Document Type Product Options Basket Address Shipping Confirm

Your order was successful.
Order Number: **0001183**

Documents will not be printed until they are approved.

All order notifications will be sent to your registered email address which is: Annette.webber@eprint.net

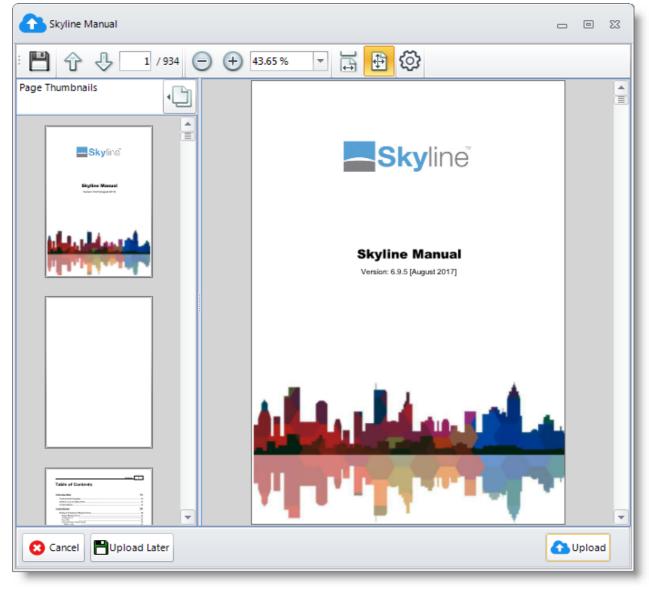|	Quantity	Document	Product	Pages	Price
🖨	30	Using GotoMeeting	Simple	2	3.75

Total 3.75

Sending a document to Skyline

To upload a document:

1. Print the document from your windows program making sure that you select the Skyline Cloud Printer. The name of the printer may not be Skyline Cloud Printer but your administrator will be able to confirm the printer name.

2. Your document will be converted into a PDF format and shown in a new window. The name of your document is shown in the title bar.

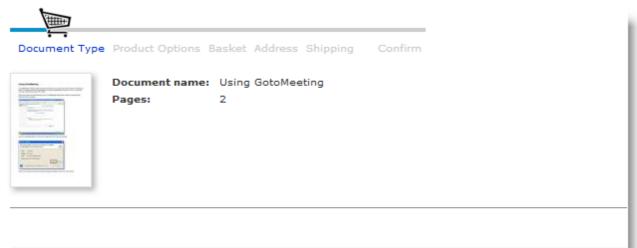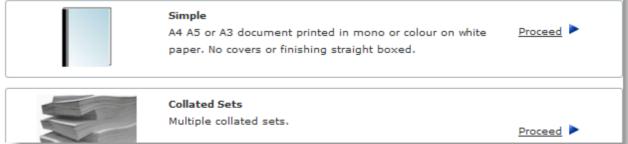Your document has been converted to a PDF. If you want to save the PDF use 💾 on the toolbar.

3.	Click to upload your document to Skyline.

4.	During the upload a progress bar is displayed showing the progress.

5.	When the document has been uploaded Skyline is automatically opened and your document is shown on the page where you can choose the type of printing that is needed. In this example the Document type **Simple** was chosen.

Document Type Product Options Basket Address Shipping   Confirm

Document name:	Using GotoMeeting
Pages:	2

Simple
A4 A5 or A3 document printed in mono or colour on white paper. No covers or finishing straight boxed.	Proceed ▶

Collated Sets
Multiple collated sets.	Proceed ▶

6. The media type, printed sides and whether the document needed to be printed in colour or just black and white were selected. Add the number of copies of the document that you want printed and then click **OK**.

7. The costing of the document is shown if applicable. Click **Next** to continue placing the order.

8.   Enter your address details and then click **Next**.

9.   Enter your delivery requirements and then click **Next**.

10. Review the details and if no changes are needed click **confirm Order**.

11. Your order is placed. If orders need to be approved before they can be processed this information is shown on the Confirmation screen. If your order doesn't need approval then the order is passed straight to the print room to be processed.

Off-Line Printing

There may be times that you want to send a document to be printed but you do not have internet connection. If that is the case you can send the document to the Skyline Cloud Printer but save it so that the document can be uploaded later.

To Save a Document to be Uploaded Later:

1. Print the document from your windows program making sure that you select the Skyline Cloud Printer.

2. Your document will be converted into a PDF format and shown in a new window. Click **Upload Later**.

3. The document is saved and the window closes.

4. When you have internet access open the Skyline Cloud Printer.
    In your Tray there is a Skyline Cloud Printer icon. Right mouse click the icon and select **Show Saved Documents** from the menu.

Alternatively:

Click your Start button and select Skyline Printer. A Skyline Cloud Printer window opens. In the toolbar click **Saved Documents**. The number beside the image indicates how many documents are saved.

5. The Saved Documents window opens. Select the document to upload and click Upload.

6. A new window opens displaying your saved document. You can now click to upload the document into Skyline and place your order.
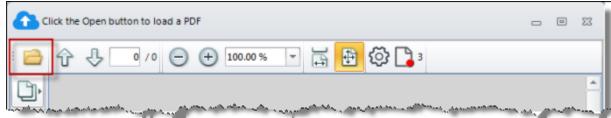
Uploading PDFs

If you have documents that are already in a PDF format you can upload them directly into Skyline Cloud Printer and then send then to the Skyline Website.

To Upload PDF Documents:

1. Open Skyline Cloud Printer from the Start menu by clicking

2. Click **Open PDF**.

3. Select the PDF that you want to upload. Only one PDF can be uploaded at a time. Click **Open** to upload the PDF into Skyline Cloud Printer.

4. The document is opened in Skyline Cloud Printer. Click to upload your document to Skyline.

5. During the upload a progress bar is displayed showing the progress.

6. When the document has been uploaded Skyline is automatically opened and you can choose the type of printing that is needed. Continue to place your order in the usual way.

Changing Your Settings

You can change your email address or your Skyline password from within Skyline Cloud Printer.

If you log into Skyline Cloud Printer using your corporate user name and password you will not be able to change your password or email address. The options described below will not be visible. If your password has changed you will need to login when you next use Skyline Cloud Printer with the new password.

To change your settings:

1. Open Skyline Cloud Printer from the Start menu by clicking
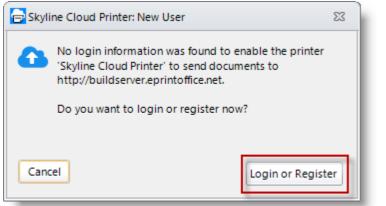
2. Click Settings ⚙.

3. The Skyline Cloud Printer Settings window opens. Click **Change Password or Email**.

4. You will be asked if you are sure that you want to change your password or email address. Click **Yes** to Continue.

5.   The preferences page of your skyline website opens. Change your [password](#)[313] and/or [email address](#)[311] as required.

6.   When you next print from Skyline Cloud Printer you will need to login the first time with your new email address or password. Click **Login or Register**.

7.   The New User Registration window opens.

   1.   Select **Log in existing user**.

   2.   Enter your user name and password.

   3.   Click **Login**.

8.   Place your Skyline Print order in the usual way.

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Skyline Forms

You can create forms that can be completed within Skyline and then the form can then be used with Skyline Automate to process the information as required. Please contact sales@eprint.net for details on how these forms can help you automate tasks

Example of a form that can be created within Skyline

Creating Cutomer Forms

To create a new form:

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

2. In the Products section click **Customer Forms**.

Customer Forms
Create and Edit Forms for Skyline Automate, workflow automation

3. The Forms Setting page opens.

1. Enter a name for the form and a brief description of the use of the form for future reference.

2. Create fields for the form by selecting the field type and adding a name and any other requirements. Details of the different field types are given on the following pages[651].

   When field details are complete click **Add to Form**. The field will be added to your form and appear in the Form Fields section. Any fields added can be moved up or down the list so that they appear in a logical order

3. Click **Save Form**. The form can then be assigned[664] as required.

Customer Field Types

Contact Request

Please complete the form to request a call from our team. The more information you can give us the better. We can then decide on the most qualified person to answer your query.

Example of a Heading and Sub-Heading

Heading

When the heading text has been entered you are able to adjust the size that the heading will be displayed using the font slider.

Heading

| Heading Text | Enter heading text |

Heading Font Size — 12px 16px 20px 24px 28px 32px

Add to Form

Sub Heading

This area provides space for instructions or other information to help the user complete the form. The Sub Heading will always appear below the Heading and can not be displayed in a different location. You do not have to use the Sub Heading but if you do only 1 Sub Heading per form is available.

Sub Heading

Sub Heading Text — Enter sub heading text

Add to Form

HTML Field Editor

Example of an image inserted at the top of a form

You can use the Html Field editor to insert pictures, links or other text to enhance your form. A company logo could be added or a divider to create visual sections on the form. This field offers the form creator great flexibility in the design and layout of the form, including changing the width between full and half page width.

Text Box

Example of a text field

A text box allows the user to enter text and numbers. There is no limit to the number of text fields that can be added to a form.

The name of the TextBox cannot be changed after it has been created and is used when processing the form. Enter the name that will show on the form i.e. the field label into the TextBox Caption field.

A message can be added underneath the text box to explain to the user the type of information that is required. Enter the text in the Help Message field to explain what details need to be entered in the field. This can be left blank.

You can enter Empty Text which will show before any information is entered. In the example above the instruction *Please enter your name* has been added.

If you want the field to automatically contain text then enter the text required in the Default Text field. This can be changed by the person completing the form if required.

If the field has been made mandatory it will show with a red asterisk. A message can be shown at the bottom of the screen if the user tries to save the form without completing the required field.

The size of the field can either be half the width of the online form (as in the example above) or be the full width of the form.

By selecting the tick field 'Hide the TextBox on the form the field will not be visible to the user.

Multiline Text Box

Please enter a brief reason for request *

Example of a multi line text box

A Multiline text box allows the user to enter text and numbers. There is no limit to the number of Multiline text fields that can be added to a form.

Multiline Text Box

Multiline TextBox Name	*TextBox Name Required*
Multiline TextBox Caption	*TextBox Caption Required*
Help Message	
Empty Text	*Text if the field is empty*
Default Text	

☐ Mandatory   Width ⦿ Half Width   Height ⦿ Standard
    ○ Full Width   ○ Large

| Mandatory Message | * |

☐ Hide the Multiline TextBox on the form

[Add to Form]

The name of the Multiline TextBox cannot be changed after it has been created and is used when processing the form. Enter the name that will show on the form i.e. the field label into the TextBox Caption field.

A message can be added underneath the text box to explain the the user the type of information that is required. Enter the text in the Help Message field to explain what details need to be entered in the field. This can be left blank.

You can enter Empty Text which will show before any information is entered. In the example above the instruction *Please enter your name* has been added.

If you want the field to automatically contain text then enter the text required in the Default Text field. This can be changed by the person completing the form if required.

If the field has been made mandatory it will show with a red asterisk. A message can be shown at the bottom of the screen if the user tries to save the form without completing the required field.

The size of the field can either be half the width of the online form or be the full width of the form (as in the example above). You can also select the height of the text box the be either Standard (as in the example above) or Large.

By selecting the tick field 'Hide the TextBox on the form the field will not be visible to the user.

Masked Text Box

Mobile Number

07___ ___ ___

Please enter the number that you us to use

Example of a masked field

The name of the Masked TextBox cannot be changed after it has been created and is used when processing the form. Enter the name that will show on the form i.e. the field label into the TextBox Caption field.

A mask can be applied to a field so that any input is formatted in the required way. There are 7 masks included as examples. You can select one of the examples or create a custom one to suit your data.

Select mask example

Uppercase letters and numbers e.g. LLL ####

Upper and lower case letters and numbers e.g. LLII ####

Any letter or number with text e.g. aaa aaa

Phone Number e.g. (+##) ##### ### ####

Mobile Number e.g. 07### ### ###

Post Code e.g. LL##LL

Fixed Options e.g.

Custom

If you select one of the examples the layout of the mask will displayed in the Masked TextBox example field so that you can test the mask.

If you create a custom mask the following 3 masks are the most commonly used ones.

L = Uppercase letter

I = Lowercase letter

= Number

Select the option **Partial entry not allowed** to prevent incomplete entries being added.

Masked Text Box

Masked TextBox Name	*Masked TextBox Name Required*
Masked TextBox Caption	*Masked TextBox Caption Required*
Help Message	
Mask Type	Select mask example ▼
Masked TextBox Example	
Mask	[Test]

☐ Mandatory   ☐ Partial entry not allowed

Mandatory Message   *

☐ Hide the Masked TextBox on the form

[Add to Form]

Check Box

Example of a check box

A CheckBox will allow the user to select an option. It is effectively as yes answer to a question if the box is selected. You can create as many CheckBoxes for your form as required.

The name of the CheckBox cannot be changed after it has been created and is used when processing the form. Enter the name that will show on the form i.e. the field label into the CheckBox Caption field.

CheckBox List

Example of a CheckBox list

A CheckBox List enables the user to select more than one option. The help message is displayed under the options, as shown in the example above.

The name of the CheckBox List cannot be changed after it has been created and is used when processing the form. Enter the name that will show on the form i.e. the field label into the CheckBox Caption field.

Dropdown List

Example of a Dropdown list

The dropdown list provides many options for the user to choose from but they are only able to select one of the options. You can select one of the options to be default so unless the user selects a different option, the default option will be used. The name of the DropDown cannot be changed after it has been created and is used when processing the form. Enter the name that will show on the form i.e. the field label into the DropDown Caption field.

Options List

Example of a Options List

An options list is similar to the dropdown list as a users can only select from one of the options listed. You can also set one of the options as being the default option. The difference between an options list and a dropdown list is the way that the choices are displayed. The name of the Option List cannot be changed after it has been created and is used when processing the form. Enter the name that will show on the form i.e. the field label into the List Caption field.

Date Picker

Example of Date Picker used in a form

Users can select a date from a calendar which is easy to use. This also ensures that all dates are formatted in the same way and there is no confusion. The date picker can be added as many times as required to a form.

The name of the Date Picker cannot be changed after it has been created and is used when processing the form. Enter the name that will show on the form i.e. the field label into the Date Picker Caption field.

File Upload

Submit Document   Allowed file types: .pdf

The maximum file size for uploads is 2GB. Only upload PDF files Uploaded files will be used in processing the data in the form and will not be available to users

Example of File Upload

There may be cases where an electronic file needs to be included with the form. You can add an upload button to the form which will upload a maximum file size of 2GB. When creating the button you need to select the type of files that you want to allow to be uploaded. There are 9 file types that can be selected for uploaded. You can also label your button with text appropriate to your form.

You can only add one File Upload button per form.

Search Box

You are able to enter information in the search field that does not match the spreadsheet. Customer forms that contain search fields can be exported and imported into a different skyline portal. You must make sure that the required Excel spreadsheet is installed on the new portal.

When creating the Excel file there are some guidelines that need to be followed.

- Calculated fields are not allowed

- Do not include any hidden columns or rows

- The Microsoft Excel XLSX file is stored in the Skyline > wwwroot > App_Data > SearchBoxFiles directory on the server.

Copy Form to Another Portal

Once a form has been created it can be copied to another portal.

To copy a form to another portal:

1. Log into Skyline with Administrator rights and load the form that you want to copy to another portal.

2. Click **Export**

3. The selected form will be saved in a zip file. It will most likely be in your downloads folder.

4. Extract the XML file from the zip file and save it in a location that you can access from the portal that you want to copy the file onto.

5. Log into the portal that you want to upload the form onto and from the Admin page select Customer Forms.

6. Click **Select XML File** and locate the XML file that you have just extracted from the ZIP file.

7. The file name will displayed. Click **Upload** to complete the process of importing the form. You will receive a confirmation message.

8. The form is can now be loaded and reviewed or assigned to a user.

Assigning Skyline Forms

Once a form has been created it can be assigned to everyone, a groups of users or specific users. The forms are displayed in the User Forms tab. The tab name can be edited[91] to display a more relevant description if required.

An example of the User Form tab containing two forms.

To Show the User Forms tab:

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 **User Forms - Show Tab** in the list.

    - If the option is set as **True** the Forms tab will be visible.

    - The option is **False** the user will not have access to the Forms tab.

4. To amend this option click 🖉.

5. Click 💾 to save the setting.

To Assign Forms to Users:

1. In the Products section click **Assign Customer Forms**.

    Assign Customer Forms
    Assign Customer Forms to Users and User Groups

2. The Assign User Forms window opens. Forms can be assigned to All Users, Selected Users or User Groups.

    Assign Customer Forms to Users and User Groups   Customer Forms ▶

    Assign selected form to: ○ Unassigned   ○ All Users   ○ Selected Users   ○ User Groups   💾 Save

    Select a form

    Birthday List
    Birthday Template
    FBI - Business Card
    FBI - Change Request
    Product request

3. To Assign a form to **All Users** select the Form and then select ○ All Users . Click 💾 Save to confirm the change.

    The form will show that is has been made available to everyone: Birthday List

4.   To Assign a form to **Selected Users** select the Form and then select . The available users will be shown in a list.

Select the required users and then click to confirm the change.

The form will show that is has been made available to everyone:

5. To Assign a form to **User Groups** select the Form and then select [○ User Groups].

    The available groups will be shown in a list. Select the required group and then click [💾 Save] to confirm the change.

The form will show that is has been made available to everyone: [Product request]

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Upgrading Skyline

When a new version of Skyline software is released you are able to register for a downloadable Upgrade Utility for your Skyline Website. Running the Upgrade Utility on your Skyline server automatically upgrades all your portals.

Notes:

1. You will require a PIN for the upgrade. Please contact helpdesk@eprint.net for your unique upgrade PIN.

2. Please allow at least 4 hours to upgrade Skyline.

3. This update procedure is not certified for Windows 2019 and ablove

4. It is strongly recommended that the SQL databases are backed up before running the utility IN ALL CASES. ePrint Direct cannot accept any responsibility for any loss of data. By proceeding with the backup, you agree that you will ensure the databases have been securely backed up before running this utility.

Confirm the Skyline Version that you are currently running:

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

2. The version is shown next to your log in details.

Locate your Skyline Website:

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 the physical path of the website. By default it is C:\Skyline \wwwroot.

Start the Upgrade Procedure

To start the upgrade procedure:

1. Browse to download.eprint.net and select the latest version. Download the Skyline Upgrade ZIP file onto your Skyline server.

2. Extract the files from the zip file.

    a. When the files are unzipped the files may be blocked. Right mouse click the .exe file and open the file **Properties**. If the Security setting states "*This file came from another computer and might be blocked to help protect this computer*", click **Unblock**.

    b. Extract the files.

3. Right mouse click **Eprint.Skyline.Upgrade.exe** and run as **Administraor**

4. The Skyline upgrade Welcome window opens.

1. Enter your upgrade PIN and click **Validate**.

5. When the PIN has been validated the Skyline Upgrade window opens. Click **Browse** and select your Skyline Website root folder[254] . In the example the default folder location has been selected.

6. Click **Check Version**. Your current version of Skyline is shown and it is checked to make sure that it can be upgraded.
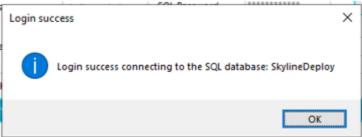
7.   Enter a folder to be used to backup the Skyline Website.

1.   Select a path for the backup folder using the **Browse** button.

> If there is another drive available it would be good practice to back the website up to the drive. When the backup runs a new folder is created in the selected location called wwwroot followed by the website version number.

2.   Test the SQL login using the **Test SQL Login** button. The details will be pre-populated so you just need to press the button to start the test.

3.   A message will show indicating that the test procedure and backup were sucessfull. Click **OK** to start the upgrade procedure.

8.   The upgrade will start. The procedure does not backup the Skyline and SkylineMembership databases. A warning window opens to indicate that the databases are not being backed up and that you should have already taken a backup of the databases.

1.   If you have not backed up your databases we recommend that you select **Quit**.

If you have backed up your databases select the option **I understand the risks of possible data loss**. Click **Continue** to resume the upgrade procedure.

9. Your upgrade will continue. The first stages of the Skyline upgrade will be to copy the current website files to the location specified. Details of how the upgrade is proceeding are displayed.

10. The Upgrade Complete window opens. Click **Finish**.

Completing the Upgrade

To complete the upgrade:

1. Check that your website has been upgraded to the new version.

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

    b. Check that the new version number is shown at the top of the page.

    What's new in version 7.6.0.8   Last Upgrade: 2025 January 15   Logged in as: Portal   Administrator | Admin Home

2. Reinstall any Skyline programs.

    a. All previous versions of the Skyline programs must be removed. Use the Add/Remove Programs facility in Control Panel to remove any existing versions.

    b. Follow the relevant installation instructions for PrintStation⬚505 , CostManager⬚600 and ProductManager⬚530 to re-install each program.

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Feature Guides

Statuses & Quotations

Any orders placed have a status assigned to describe where they are in the process. There are 12 System Statuses Types available though they do not all have to be used. Currently the type Archived is not available.

ⓘ   You can print a hard copy of a manual by clicking Feature Guide - Quotations which opens a PDF copy of the manual. You can then download or print the document.

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	Quote sent	Quote Sent	☑	☑	☑
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		☐	☐	☑

The statuses types can all be assigned a new name which is displayed on the PrintStation and an End User Name as displayed in the orders tab in the Website. For more information see <u>Amending the Status Name</u>[216] in the <u>Administration</u>[25] section.

You are also able to create Custom Statuses. For more information see <u>Creating a Custom Status</u>[517] in the <u>Skyline PrintStation</u>[409] section.

Overview of Quotes Process

An administrator will need to configure the system before quotations can be requested by a user. The quotation is sent out from the print room using PrintStation.

Configuring 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.

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[545] .

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[606] .

3. Assign the product to the required portal. For more information, please refer to the section on Adding Products to a Portal[552] .

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[512] for more information.

    If emails are not turned on then the Quotation process will not work.

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[330] .

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' an

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[445] .

Requesting a Quotation

Some orders will need to be priced manually as they have special requirements. You can request a quotation which can be priced up in the print room and the quotation sent out via PrintStation. You will receive an email telling you that you have a quotation waiting for you. You can then either accept the quotation and the order is placed on PrintStation or you can reject the quotation and the order is marked as deleted. The quotation process cannot currently be used with a third party payment provider e.g. Stripe.

To request a quotation.

1. Place an order in the usual way using the product designed for requesting a quotation. All price fields will be blank during the process. When you have placed the order details will appear in your Orders tab where the status will show as 'Waiting for Quotation'.

PDF	Job Ticket	Document	Order Number	Order Date	Required Date	Status	Quote	Delete
📄	View	Administration	0000124	05/08/2024 14:20		Waiting for quote		✖

2. You will also receive an email telling you that your order has been placed and another one stating that your order is waiting for a quote. If your order contains a zip file you may see the order status change to Downloaded before you receive notification of a quotation. This can happen on any orders you request a quotation for as the print room operator is likely to view the document that you have sent before they can create a quotation.

3. You will receive another email when a quotation has been sent. Within the email there may be a link for you to use to go to your Orders tab in Skyline or you can just view your Orders tab. The order status will show as Quotation Sent with a value and there will be a green tick available.

PDF	Job Ticket	Document	Order Number	Order Date	Required Date	Status	Quote	Delete
📄	View	Administration	0000124	05/08/2024 14:20		Quote sent 89.52	✅	✖
📄	View	Manual	0000123	05/08/2024 11:50		Order Placed		✖

4. Click [View] to open the Job Ticket. The quotation is shown in the price estimate section.

[Print Job Ticket]

Quotation

REQUEST FOR QUOTE

Document Name: Administration
Order Number: 0000124
Created: 05/08/2024 02:08 PM

Owner: Anne Webb
Pages: 270
Quantity: 43
Status: Quote sent
Account Code: IT2
Account Name: IT Help Brochures
Account Description: Test Account
Price Estimate: 89.52
Original Price: 0.00

Pages with colour: 256
Monochrome Pages: 14

Body	
Media	A4 White 80gsm
Printed Sides	Double Sided
Printer Type	Black and White

Please enter any other special requirements

First Name	Anne
Family Name	Webb
Street	Long Street

5. To accept the quotation click ✅ and place the new order. To decline the quotation click ✖ and your

order will be marked with the status deleted and will not show in your list of orders.

Sending a Quotation

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.

To send a quotation:

1. Quotation requests will show in PrintStation with the status 'Waiting for Quote'. Select the order and view the details. You will not be able to use the $\boxed{\text{Calculate Price}}$ button. Enter a value in the price field and save your changes. Add any notes as required when the changes are saved.

2.   Change the status of the order from 'Waiting for Quote' to 'Quote Sent'. When the status is changed an email is sent to the user telling them that they have received a quotation. They are then able to accept or reject the quotation.

- **Accepted Quotation**.
  If the user accepts the quotation an order is placed and the order can be processed in the usual way.
  The history of the quotation is shown on the History tab of the new order.

Date	Status	Email User	Processed By
05/08/2024 11:39:19	Order Placed	✔	
05/08/2024 11:39:22	Waiting for quote	✔	
05/08/2024 11:47:17	Quote sent	✔	Anne Webb
05/08/2024 11:49:59	Order Placed	✔	

- Details entered about the quotation when the details were saved show in the Staff Notes area.

Staff Notes (69/2000 characters)
05/08/2024 11:46:53 Username: anne webb
Aded comb binding and pricing

Account Code: IT2
Account Name: IT Brochures
Account Description: Test Account
Impositon: None

Options1
Options2
Options3
Options4
Options5
Options6

- **Rejected Quotation**.
  If the user rejects the quotation the order status is changed to 'Deleted; and removed from the PrintStation.

Using Statuses for Different Workflows

Every organisation has a slightly different work flow and uses different terminology. Skyline System statuses can be amended to reflect this need making them adaptable to numerous situations.

Order Change Management Example.

When a customer places an order the cost of the order is automatically calculated using CostManager. However there are always a few orders that have exceptions and cannot be accurately costed without intervention by the print room staff. For example a change to the existing order is required or an additional cost or discount needs to be applied. If you require changes to be approved by the customer before the order is processed you can use the System Status "Quote Sent" for the customer to approve the change.

1. Amend the System Status[216] Name "Quote Sent" to "Order Amended". This is the status that will be used in PrintStation. Also amend the End User Display from "Quote Sent" to "Amended Order". This is the status that will be used in the customers Order web page.

	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	Order Amended	Amended Order	☐	☑	☑
✏	Awaiting Paper Originals	Awaiting Paper Originals	Awaiting Paper Originals	☑	☑	☑
✏	Paper Originals Received	Paper Originals Received	Paper Originals Received	☑	☐	☑
✏	Order Placed	Order Placed	Order Placed	☑	☑	☑

2. An order is received in PrintStation and is amended by either Amending the Order Details[447] or Changing the Price of an Order[448] . Only the change in price is shown on the customers Order web page. Media changes etc will need to be verbally agreed.

3. Change the status of the order to "Order Amended".

Order Amended										
⬇	▌	0002194	Website	Anne Webb	Order Amended	Collated Sets	96	1	The World	96 06/10/2020 12:17:00
Order Placed										
⬇	▌	0002193	Texas	Anne Webb	Order Placed	Collated Sets	16	1	The World	16 06/10/2020 10:35:00

4. The customers Orders tab is updated showing that the order has been amended. Only the price change is shown on the Orders web page. Other changes will need to be discussed with the customer. They are then able to accept or reject the changes.

PDF	Job Ticket	Document	Order Number	Order Date	Required Date	Status	Quote	Delete
📄	View	Website	0001109	09/02/2021 14:00:00		Amended Order 221.76	✅	❌

- ✅ Changes Accepted.
  If the user accepts the changes they place the order with the amendments.

- ❌ Changes Rejected.
  If the user rejects the changes the order status is changed to 'Deleted' and removed from the PrintStation

Approval

In an organisation there may be a requirement for orders to be checked before they are produced. When a user completes placing an order an approval message[150] will inform them that their order requires approval before it is passed to the print room for processing. An Approver can view orders details so that they can decide to send the order to the PrintStation or reject the order.

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[151] can be changed to suit your requirements.
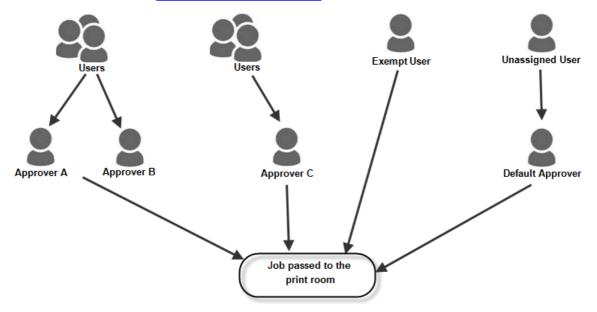
The system can be configured to allow approvers to change the following parts of the order if appropriate and to help approvers decide whether an order should be passed to the PrintStation the system can be configured to allow them to download the associated PDF[147] .

- Order details[143] - 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[144] - amend the account code, name or description.

- Recalculate prices[145] - 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[146] - 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 approvers[152].
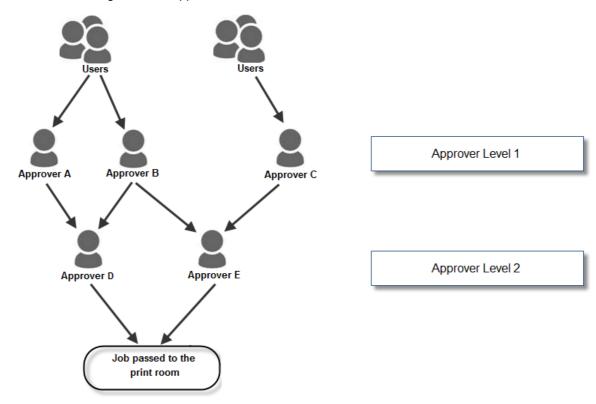
In some cases you might have users that will not require their orders to be approved. You can make the user exempt[157] so that any orders they place are passed directly to the PrintStation in the print room. For more information see the section on assigning users to approvers[152].

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.

Approval Process

An administrator will need to configure the system before approval can used.

Configuring Approval

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 and add the selected users to the approver Role.

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

To Turn Approval on and 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 [139]
.

4.   Amend the settings as required. For more information see the section on

5.   Click Save

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. Assign users as required.

Using Approval

When a user places an order they will see a message on the confirmation page stating that the order will not be placed until it is approved. The message can be amended to suit your organisation. For more information see Changing the Checkout Message[150] .

The assigned Approver will receive an email notifying them that there is an order that needs their approval. As an Approver they will have an Approval tab on their Skyline website which will list all orders that require their approval. When the order has been approved it is passed to the PrintStation for processing. Skyline is configured to automatically send an email to the person who placed the order to confirm that their document has been approved. If the order is rejected an email will also be sent to update the user of their order status.

Additional Fields

If you require more information from your users when they place an order there is a licensed feature which enables additional fields to be added to a product. Once a product has been created additional fields can be added to enable the user to specify further details of their order. The additional fields are shown on the original job ticket and on a tab within the PrintStation. They can also be included in custom job tickets[477] .

If you are using Global products on multiple portals the additional fields assigned to the global product are specific to a portal.

The fields types are either text, numerical, check, drop down boxes or a calendar picker and can be made mandatory with options added for drop down lists. Customer entries in the additional fields are limited to 1024 characters.

The additional fields types are defined^[571] and then added^[579] to a product in the Skyline Website and will appear below the selected product when an order is being placed. The fields can be added to one or more products. Additional pricing can be applied to a product when the check^[575] or drop down^[576] fields are added, if required.

Note:

    Changes should not be made to live orders if you are using pricing on Additional fields.

An example of a product with 5 different additional fields added.

Print Job Ticket

Simple Printing

Document Name: Manual (602)
Order Number: 0005086
Created: 25/10/2022 02:10 PM

Owner: Anne Webb
Pages: 602
Quantity: 1
Status: Downloaded
Account Code:
Account Name:
Account Description:
Price Estimate: 862.05

Document

Paper	A4 White 80gsm
Printed Sides	Double Sided
Printer Type	Black and White
Production	Digital

Organization Name	ePrint
First Name	Anne
Family Name	Webb
Street	Long Street
City	Big City
Region	The World
Contact Number	0123456789

Priority	Normal
Delivery Method	I will pick it up

Further Information

Enter Export Code	kagsd874ho9
Type of Invoice Required	Single
Premium Paper Required	☑
Cardboard Tube per Order	☑
Colour of Ribbon	Blue
Type of packaging for each document	Cardboard Box
Notes box	more and more notes
Cardboard tube per poster	☐
Project Reference Number	1235879

Example of a job ticket with additional field details

Defining Additional Field Types

You can define the field type for each field as required. There are 5 types of fields available - Textbox [572] , Multiline Textbox [573], Numeric Field [574], Checkbox [575] , Dropdown List [576] and Date Picker [578] . All fields can be assigned the same field type or any combination of types to suit your requirements.

It is recommended that you give the fields a name which describes the type of field you are creating. The fields are listed when you assign [579] a field to a product and that is where you would add a more descriptive name for the field which will appear on the product. The maximum length of the field name is 50 characters.

Each field can be used in different products.

To Define the Additional Field Types:

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

2. In the Products section click **Additional Fields**.

    Define Addtional Field Types
    Define addtional field types for your Job Tickets

3. The Additional Fields window opens.

Example of the Define Additional Field Types window with 37 fields that have been defined.

Defining a Text Field

To define a Text Field:

1. Select the field type **Textbox**.

2. The additional fields are displayed. Enter a Field name and any other field requirements then click **Add Field**.

- Field Name - Enter the name you want to use to identify the field.

- Empty Text - Enter text to be displayed when the field is empty

- Default Text - Text to be automatically entered but can be changed by the user.

- Make this field mandatory - Some text must be entered before the order can be placed

- Mandatory Message - Message to be displayed if the field is not completed.

Your new field has been created.

Defining a Multi Lined Text Field

ⓘ   A user can enter up to 1024 characters in a multi-lined text box

To define a Multi Lined Text Field:

1.   Select the field type **MultiLine Textbox**.

2.   The additional fields are displayed. Enter a Field name and any other field requirements then click **Add Field**.

- Empty Text - Enter text to be displayed when the field is empty

- Default Text - Text to be automatically entered but can be changed by the user.

- Make this field mandatory - Some text must be entered before the order can be placed

- Mandatory Message - Message to be displayed if the field is not completed.

Your new field has been created.

Defining a Numeric Field

To define a Numeric Field:

1. Select the field type **Numeric Field**.

2. Enter a Field name and any other field requirements then click **Add Field**.

- Minimum Value - The minimum value that can be entered. This field can be left blank.

- Maximum Value - The maximum value that can be entered. This field can be left blank.

- Make this field mandatory - Some information must be entered before the order can be placed

- Mandatory Message - Message to be displayed if the field is not completed.

Your new field has been created.

Defining a Checkbox Field

To define a checkbox:

1. Select the field type **CheckBox**.

2. Enter a Field name and any other field requirements then click **Add Field**.

- Checked by default - Select this option if the majority of the time order will be received with the option selected.

- Make this field mandatory - Not currently supported

- Mandatory Message - Not currently supported

3. Add the pricing per page, per document and/or per order, then click **Save**. The cost per page, cost per document and cost per order is included in the calculated cost for the order.

Defining a Dropdown Field

To define a dropdown field:

1. Select the field type **DropDown List**.

2. Enter a Field name and any other field requirements then click **Add Field**.

- Make this field mandatory - Select if an option must be selected before the order can be placed

- Mandatory Message - The message to be displayed if the field is not completed and the option Make this field mandatory has been selected.

2. Create the drop down entries.

 - Enter a name in the New option name field.

 - Click ![plus icon] to add the option name. When you have added all the option names click ![save icon] to save your entries.

3. Select the option **Start with blank entry** if you do not want an option pre-selected. If you want an option selected by default select the option in the DropDown list and then click Set Default . The option selected will be the option that the order will contain unless the option is changes by the person who is placing the order.

4. Add the pricing per page, per document and/or per order for each different DropDown item. The cost per page, cost per document and cost per order is included in the calculated cost for the order.

5. Click Save to save your requirements.

Defining a Date Picker Field

To add a Date Picker field:

1. Select the field type **Date Picker**.

2. Enter a Field name and any other field requirements then click **Add Field**.

- Allow Dates in the Past - Select if you want people to select dates in the past.

- Allow Weekends - Select if you want to include weekends in your date selection.

- Minimum Lead Time - Enter the number of days required.

- Make this field mandatory - Select if an option must be selected before the order can be placed

- Mandatory Message - The message to be displayed if the field is not completed.

Your new field has been created.

Adding Additional Fields

After Additional fields have been defined you can assign them to products. When a user orders a document and selects the product any additional fields will be made available. In the example below 3 additional fields have been added to the A4 Booklet product.

To Add Additional Fields:

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

2. In the Products section click **Assign Additional Fields**

   Assign Addtional Fields
   Assing Additional Fields to your Products

3. The Assign Additional Fields window opens. The number in brackets next to a product indicates how many additional fields have been assigned to the product.

NEEDS UPDATING

1. Select the product that you want to amend. A list of the all the available additional fields becomes available.

2. Select the Additional field to be added and click the arrow to add the field to the product.

3. As multiple fields can be added to a product, add any further fields as required.

4. Click **Save**.

 Note:

When an additional field is removed from a product:
   it is not removed from all previous orders for that product.
   it is **removed** from the list of fields on the Approval page. This happens even if the order was placed when the product contained the field.

Creating Catalogues

Catalogues are created by Skyline Administrators. They can hold the same document information as libraries and can be shared among many users. However, users are not able to upload documents to a catalogue, delete, copy or move any documents. They are able to order the documents and if the administrator has created a job ticket for the document they will only be asked how many copies that they require. A catalogue could be described as a read-only shared library.

You can print a hard copy of a manual by clicking Feature Guide - Catalogues which opens a PDF copy of the manual. You can then download or print the document.

To create a catalogue:

1. Log in as an Administrator and click **Preferences**.

    🛒 View Basket (0)   Preferences   Downloads | Edit | Admin | Management | Logout

2. Select **Libraries**.

    Libraries
    Create, edit and delete your personal libraries

3. As a catalogue is a shared library that users have read-only access rights you need to create a library before you can create the catalogue. Enter a name for your new library and click Add. In the example below a library called 'Past Exam Papers' has been created. It is listed in the 'My Personal Libraries' section.

    Manage Personal Libraries

    Add a new library

    Library Name [   ] [Add]

    📁 **My Personal Libraries**

Library Name		Default	
My Library		☑	✖
Past Exam Papers	Share Library	☐	✖

    📁 **My Shared Libraries**

Shared Library Name		
Manuals	Manage Catalogue Permissions	✖

    📁 **Shared libraries belonging to other users**

    Shared to users

Library Name	Owner Username
No records to display.	

    Shared to user groups

Library Name	Owner Username
No records to display.	

4. In your list of personal libraries click the link **Share Library** next to the library that you want to make available to other users as a catalogue.

5. Select the users or roles that need access to the library that you have created. You can select individual users from the list shown and search for them if the list is too long. You can also choose the share it to all users by selecting the role 'User'.

When you have selected the users they will have access to your shared library.

- The catalogue will be listed in the section My Shared Libraries. When you are logged in as an administrator all shared libraries are created as read-only catalogues.

- If you want to change the users who have access to your shared library, click **Manage Catalogue Permissions** to change the permissions.

- Do not select the option All Users Have Full Control so that users will only be able to view and order documents from the catalogue.

When users have been given access to a catalogue view in their libraries they will see the catalogue listed in the shared Libraries area of the screen. In the example below a catalogue named 'Past Exam Papers' is available as well as a shared library called 'Manuals'.

When a catalogue has been created documents need to be added to the catalogue so that users can order the documents.

To add documents to a catalogue:

1. Open your Library and select the documents to be added to the catalogue.

2. Click [icon] to **Move** the selected documents and select the catalogue that you want to move the selected documents into. The documents will be moved from the original library into the catalogue.

3. View the catalogue that you moved the documents into. The documents can be renamed and a brief description added.

    1. Change the view to "Catalog View".

    2. Click 🖉 associated with the document.

    3. Amend the document name and add a description of the document. When finished click **Save**.

4. The updated details are shown in the catalogue.

4. The job ticket for the document needs to be defined.

1. Click 🛒 associated with the document to view the product options.

2. Click **Proceed** associated with the product that is used to produce the document.

3. Complete any product options that are required and enter a quantity of 1 then click **Next**.

4. When you view the Basket page, click the **Libraries** web page.

5. You need to check that the document defined job ticket is available to the users. Log into Skyline as a user with access to the catalogue.

6.   View the catalogue. The basket associated with the amended document will be green.

7.   Click 🛒 associated with the document that you have just updated. The quantity of documents to be ordered can be entered then the order can be added to the basket. The document ordered can not be edited or ordered with another product.

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Version Changes

The latest version of Skyline is 7.6.0

Version Changes 2024

Version 7.6.0

Updates in version 7.6.0 released November 2024 include:

1. You can assign a [Skyline Form]◻664 to all users, specific users or groups of users.

2. A [Skyline Subscription]◻252 Service has been created. Details of how to update the subscription are included.

3. You can now [create groups of users]◻37 which can then be used when assigning forms. Users can also belong to more than one group.

4. [Page errors]◻301 are recorded and Administrators can view the details.

5. The Role a library is shared to is now shown on the [Libraries page]◻369 .

6. When a quote is accepted the same order ID is used as when the [quote]◻445 was requested.

7. A new field has been added to the [Job Ticket]◻431 called Original Price. This new field is also available in the [Managemet Reports]◻394 .

8. An [Accessibility Theme]◻227 can be applied if one is available.

9. A [Search field]◻651 can be added to Skyline Forms which will provide a lookup facility from an Excel workbook.

Version 7.5.1

Updates in version 7.5.1 released April 2024 include:

1. You are now able to assign a global product to different [product categories]◻553 on different portals without needing to re-name the product.

2. Additional fields are now shown during the [approval process]◻377 and can be amended by the approver.

3. 3 types of [Colour Analysis]◻159 have been added. You are also able to amend the colour thresholds.

4. The [Forgotten Password]◻308 process has been made simpler.

5. [Forms]◻649 have been enhanced to provide captions to form elements and allow a form field to be hidden.

6. In PrintStation an option has been added to [record all printing by default]◻501 .

7. The Log In message is now configurable when you are using [LDAP Authentication]◻85 .

8. The [Additional fields]◻569 with a price for the order have the price included in the total price and not as a separate value shown on the confirmation page.

9. The [Portal]◻731 and [Default]◻728 configuration option 'Password Maximum Number of Characters' has been removed.

Version Changes 2023

Version 7.5.0

Updates in version 7.5.0 released September 2023 include:

1. Several new field types have been added to [Skyline Forms]⁶⁵¹ including the Date Picker.

2. A Date Picker field has been added to the [Additional Field Types]⁵⁷⁸ available.

3. The option to add a Lead Time to orders when using the [Smart Calendar]¹¹⁴

4. A new portal configuration [upload.showorderstab]²²¹ has been added to enable the Orders tab to be hidden from a user.

Version 7.4.0

Updates in version 7.4.0 released March 2023 include:

1. [Customer forms]⁶⁴⁹ .
   Customer forms are designed to be used with Skyline Automate. Please contact sales@eprint.net for details on how these can help you automate tasks.

2. [Preset Quantity]⁵⁴⁵
   You are able to give users a list of quantities to be selected from for a specific order. You can also assign a quantity to an order.

Version 7.3.1

Updates in version 7.3.1 released January 2023 include:

1. The new licensed feature called [Additional fields]⁵⁶⁹ has been updated so that up to 20 fields can be added to existing products. Also, any fields which are either a choice from a drop down list or a tick box can now be priced up. The additional cost can be added to every page, every copy requested or to the complete order.

Version Changes 2022

Version 7.2.0

Updates in version 7.2.0 released October 2022 include:

1. Azure login ^{304} is now available.

2. When you edit ^{353} or merge ^{358} documents in your libraries any new documents are sent to the PDF Conversion Queue and will then be available in the same library as the original documents. You can now edit or merge documents that contain up to 100 pages.

3. If you use the Smart Calendar ^{114} you have the option to prevent orders being submitted for completion on the same day as they are being ordered.

4. Changing between websites when using PrintStation has been made easier with the option to select the website from a drop down list when logging in ^{410} . When you are in PrintStation you can change using the Connection ^{491} option on the Setup menu.

5. Administrators are able to change the wording of the Document Name label that users see when submitting paper originals ^{98} . The wording of the error message that appears when 'Next' is clicked before both fields are completed can also be amended.

6. A new portal configuration has been added which allows administrators to change whether users can upload documents ^{96} to a portal or not. You can also change the message displayed when a PDF is being converted ^{97} .

7. A new licensed feature has been added called Additional fields ^{569} . Up to 14 fields can be added to existing products.

8. There is a new portal configuration which can be used to only allow one document at a time called Ordering - One Document Only ^{215} .

Version 7.1.1

Updates in version 7.1.1 released February 2022 include:

1. Colour analysis ^{341} of documents is now done when the documents are uploaded by the PDF converter.

2. A portal specific ^{731} option called "Upload - Create PDF Thumbnails" was added to enable the PDF converter to create thumbnails for uploaded PDF's

3. An option has been added for Terms and Conditions ^{57} to be accepted before a user can login.

4. The Stripe payment ^{207} facility has been updated to be able to use 3D secure 2 for customer authentication.

5. A message can be added ^{60} to the login and home pages for specific portals or all portals.

Version Changes 2021

Version 7.1.0

The following features have been added or updated in version 7.1.0. build 5 released November 2021

1. XPIF printer driver added for Xerox Versant 3100.

2. The installation of CostManager, PrintStation and ProductManager has been updated so you can select to automatically open the application when the installation is complete.

3. A new option of Single Hole Punch[541] was added to the ProductManager.

4. Live Orders[408] has a new filter so that you can find jobs that were not added to the reports when they were marked as In Production, Printed or Complete.

Updates in version 7.1.0 build 9 released December 2021 include:

5. Promotional codes can be applied to payments made via Stripe[207].

6. There are four new configurations options available for use when using Skyline Publisher[241]:-

    •   Product Editor: Full screen height;

    •   Product Editor: Use full screen;

    •   Product Editor: Back button return URL;

    •   Products: Hide the products tab from users[87].

7. An error message is displayed if a PDF merge[358] fails.

8. PrintStation will no longer ask how a document was printed if it has just been printed and the status is changed from Printed to Completed.

9. Product categories[553] made available for Global products.

10. Some minor bug fixes.

Version 7.0.9

The following features have been added or updated in version 7.0.9. build 1 released June 2021

1.   Folders have been updated to enable a choice of output options[485] as shown below. You also have the ability to group folders[490] .

   •   PDF only

   •   PDF and CSV Job Ticket,

   •   PDF with XML Job Ticket

   •   an Automate Folder.
       NOTE: When you install the new version, your Folders tab will be empty, even if you had folders set up before. Clicking on **Setup** > **Folders** and then closing the folders window will restore any folders that you had set up before in the Folders tab.

2.   The help link[111] on the libraries page can be set to open and email, web page or PDF.

3.   When you print from Acrobat in PrintStation you can select NOT to display the job number[499] at the front of the document name or at the end.

Version 7.0.8

The following features have been added or updated in version 7.0.8. build 1 released February 2021

•   When a status email[443] is sent out from the PrintStation any notes in the User field can be included in the email.

•   When any changes are made to the order on PrintStation and saved, the Staff Notes area[447] is automatically updated with the operators name. This is in addition to the date and time stamp which is saved.

•   Enhancements to the Quotation process[677] which can now be used by organisations using third party payment providers e.g. Stripe. The work flow has also been amended so that details of the quotation[445] are shown in the staff notes area and in the history tab within PrintStation.

•   The PDF Converter Services are checked and an email is sent to all Administrators if there are any services that are not running. The Upload Page[92] will allow PDF's to be uploaded but no other documents until the service is restarted.

Version Changes 2020

Version 7.0.7

The following features have been added or updated in version 7.0.7. released October 2020.

- A simple quotations process[678] has been added. An administrator will need to configure the system[211] before quotations can be requested[330] by a user. The quotation is sent out[445] by the print room using PrintStation.

- If you use Global products you can now use the Approval[132] process which was added in version 6.9.8.

Version 7.0.6

The following features have been added or updated in version 7.0.6. released July 2020.

- You can edit a document[353] that has been uploaded into your library and create a new document. You can also merge documents[358] together using the Edit function.

- When using Global Products the administrator[39] can now download and use both the ProductManager and CostManager.

Version 7.0.5

The following features have been added or updated in version 7.0.5. released May 2020.

- The Custom Document options can be priced up[615] and banding can be applied to all custom document options.

- Localised date portal time zone[232].

- When you print from Acrobat in PrintStation you can select to display the job number[499] at the front of the document name or at the end.

- Status emails[512] can be send to multiple people using the CC option.

- There is a change to the way you can reset the PrintStation layout[434].

Version 7.0.4

The following features have been added or updated in version 7.0.4. released March 2020.

- The feature Smart Calendar[114] has been introduced to allow Print Rooms to set printing levels.

- The layout of the Orders web page[339] has been simplified.

- In PrintStation there is an option to show error messages[497] or run PrintStation in Debug Mode.

Version 7.0.3

The following features have been added or updated in version 7.0.3. released February 2020.

- User details can be sorted[32] by User Name, Email, Last Login Date and by the new field Orders. There is also a facility to export the details[27] .

- Skyline Publisher[241] now supports Global products as well as Portal products.

- Users can enter either an account code or another code when placing and order. For example, an expenditure code may be required instead of an account code. Skyline can be configured to enable this by using the Account Name field[200] as another field to input a code.

- Account Code masking[200] can now be applied when using any Checkout Mode[117] . Earlier releases did not support account masks when you were using the Checkout Mode 'Combine Address Delivery and Accounts'.

Version Changes 2019

Version 7.0.2

The following features have been added or updated in version 7.0.2. released November 2019.

- Website landing pages[45] can be made portal specific.

- Skyline Publisher[242] can be installed on a proxy server. You can then associate your Publisher server with Skyline.

- Documents in shared libraries[364] can be listed alphabetically or in date uploaded order.

- More fields are available to be included in customised job tickets[477] including Approver details

- Approver details can now be included in Management reports[385]

Version 7.0.1

There were several features that have been added or updated in version 7.0.1. released October 2019.

- Make Payments using Stripe[332]
  Skyline can be configured to accept Stripe payments for orders placed. The user is automatically directed to the Stripe site when they place an order.

- Make Payments using WPM Education[334]
  Skyline can be configured to accept WPM Education payments for orders placed. The user is automatically directed to the Stripe site when they place an order.

- Summary Email for orders placed.[515]
  When an email is sent out for an order placed you can select to send one order for each document in the order or one email for all the documents.

Version 6.9.9

There were several features that have been added or updated in version 6.9.9. released June 2019.

- Deleting Users[36]
  You can now completely remove users rather than just making them inactive. When a user is deleted any orders that they have placed are removed from the PrintStation when the program is next refreshed.

- PrintStation Detail Pane[427]
  The information in the tabs within the Detail pane has been completely updated. New features have been added including a new tab which shows details of the approval process, if used.

- A new search[348] facility on the Libraries page allows users to order documents directly from the search results.

- Colour Analysis[341]
  When a user places an order you can now find the number of pages that contain colour so that the cost of printing the document can then be more accurately calculated.

Version Changes 2018

Version 6.9.8

There were several features that have been added or updated in version 6.9.8. released June 2018.

[Approval]□ 372

A lock feature has been added. When an approver selects a job it is locked to that approver so that the order cannot be approved by anyone else. There is an unlock button which can be used to assign the order to another approver. When used the original approver will no longer be able to make changes to the order. This prevents two approvers working on the same order at the same time.

[Zip Files]□ 328

When an order is placed for documents contained within Zip files the user has to input the number of pages before they proceed with placing the order. This means that the pricing feature will now be able to price orders which contain Zip files.

[Group Products into Categories]□553

Products can be grouped together in categories. When an order is placed the user can view the available products in each category and select the required product. Products that are organized into categories are easier to use than a long list of all the available products.

Other enhancements include:

- If [Multiple Documents]□ 323 are ordered at the same time a thumbnail of each document is shown during the ordering process.

- New way to Search on [Live Orders]□ 396 .

- [Unused documents]□ 494 can be deleted manually or automatically which will prevent PrintStation taking a long time to update the Orders Grid.

- The new configuration [Authentication - Login Cookie Expiry (hours)]□ 55 allows administrators to control how long login details are held in cookies.

Version 6.9.7

There were several features that have been added or updated in version 6.9.7 build 3. released June 2018.

Approval has been enhanced:

1. The [Approval Status]□ 383 report lists all the documents that are waiting to be approved.

2. A [warning threshold]□ 142 can be set against the time that orders are waiting for approval.

3. A [second level of Approval]□ 141 can be used before an order is sent to the PrintStation.

4. You can now make it compulsory that [notes]□ 148 are added when an order is approved or rejected.

5. The [message]□ 149 Approvers see when reviewing an order can be amended to give specific instructions.

Custom document options have been updated:

1. [Custom document options]□ 541 can be renamed in ProductManager.

2. Live orders[397] show the custom document options in the details tab. Notes are now in a separate tab.

3. Reports[388] can be created that include custom document options.

4. Approvers are able to see the custom documentation options on the Details tab when they are reviewing a document for approval[377] .Notes are now in a separate tab.

5. Custom document options are shown in the original job ticket[471] .

Various other enhancements:

1. When you preview a document[349] the number of pages being displayed is shown.

2. The default configuration option Library - Cache document thumbnails[300] has been added for documents stored on a remote drive.

3. Product images[551] are now specific to each portal. They can easily added or removed in ProductManager.

4. You can add a website landing page[45] to the Skyline website.

Version 6.9.6

There were several features that have been added or updated in version 6.9.6 build 1. released June 2018.

1. A completely new version of Skyline Cloud Printer[619] was added.

2. TemplateManager has been discontinued.

3. The Management Reports[386] have been updated & re-designed.

4. Shared libraries[364] can be configured to enable users to upload documents into the library even if they are not the owner of the library.

5. PDF's and ZIP files bypass the Converter and are uploaded[315] directly into the user's library.

6. Some minor bug fixes

7. When re-ordering[325] you are able to edit the original job ticket.

Version Changes 2017

Version 6.9.5

There were several features that have been added or updated in version 6.9.5. released June 2017.

1. [Self Registration can be configured so that approval is required before a Skyline account is active](48)
   A new global & portal configuration called 'Registration - New Users Must Be Approved' has been added. The system can be configured to require an account to be activated before they are able to log in after Self Registration.

2. [Administration of shared libraries](369)
   An administrator is able to add or remove users or roles to any shared libraries. They are also able to transfer ownership of the shared library to another user.

3. [Manage portal users window updated](27)
   You are able to apply a filter to show all users or just users that require approval.

4. [System Emails](266)
   A new configuration page has been added where you can edit the subject and text of system emails.

5. [Setup Cost can be applied to a Product](606)
   If there is a setup cost for a particular product type you can now add a cost. The cost will be added each time that the product is ordered as a one off charge. So if you order one or one hundred copies there will only be one setup costs added to the order.

Version Changes 2016

Version 6.9.4

There were several features that have been added or updated in version 6.9.4. released June 2016.

1. Approval has been updated[372] .
   When a user completes placing an order an approval message will inform them that their order requires approval before it is passed to the print room for processing. 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 parts of the order if appropriate including the order details, account information, customer details. The pricing can be recalculated to reflect any changes.

2. The look & feel of assigning users roles[42] and the website log in window has been updated.

3. Two extra fields available when you manually enter account codes[164] to allow entry of the account code name and description if required.

4. Live Order has been expanded so that there is now a facility to export the order details.

5. The look & feel of shared libraries[345] has been updated to make the process simpler.
   Shared libraries are shown on the web page whilst personal libraries are available in a drop down menu on the libraries web page.

Version 6.9.3

There were several features that have been added or updated in version 6.9.3. released June 2016.

- Assigning Specific Accounts to Users[171] - 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.

- Creating Media Reports - There is a new management report which allows reports to be created detailing the Media that has been used.

- Approval[372] - More information about the order is now available and comments can be added when an order is approved or rejected. The method used to turn approval on[137] has also been updated.

- CostManager[598] and ProductManager[536] can now be run on a proxy server.

- Live Orders[397] - Managers can see a list of all the orders placed on the PrintStation and amend the orders as required.

- The procedure to re-license Skyline[252] has been simplified.

- Global products can be costed using CostManager.

- A Standard job ticket[475] & a Delivery note[476] can now be printed for each order from PrintStation.

Version 6.9.2

Version 6.9.2. released June 2016 includes some minor bug fixes to the Website and PrintStation. The major enhancements are not visible to end users but they should experience a faster service.

- A new Skyline command line Purge Utility[297] is available to remove old data and files from Skyline servers. It can be run as a scheduled task to remove old data and files at regular intervals.

- A completely redesigned PDF Converter that is at least 20 time faster.
  It still uses the Neevia Document Converter at its core but the preview thumbnails are now created on demand by the website. Skyline version 6.9.2 can also be configured to use multiple PDF Converters to reduce the time that users have to wait for their documents to be available after uploading them. The new PDF Converter comes with a setup and monitoring utility that makes it simple to configure new installations and shows the activity of all the PDF Converters configured.

Version Changes 2015

Version 6.9.1 SP2

There was a bug fix applied to the PrintStation software in version 6.9.1. SP2. released June 2015.

ℹ️ PrintStation will work after the bug fix has been applied. However, we would recommend that you do find time to re-install PrintStation as some enhancements have been made to the following features:

- Download All – the download meter will show in the orders grid area and indicate how many orders are being downloaded.

- Statuses are shown with the number of jobs assigned to each status.
- The pop-up notification window will no longer show that there are a negative number of new jobs available.
- You can assign a status to an order when the status is not displayed on the PrintStation i.e. Completed. Any status which is not displayed in the PrintStation are shown in red in the menus.
- The status Paper Originals Received has been re-instated.

Version 6.9.1

The following changes are included in the 6.9 upgrade released June 2015.

- Chili Publisher integration

- Enhancements to PrintStation that include:

  - "Download All" button re-introduced on the PrintStation

  - When you download a job on the PrintStation, there is now a progress bar for each job and a cancel button

- There is a count-down timer visible on the Refresh button that shows that the automatic refresh is running and the time to the next refresh

- The PrintStation is much faster at leading jobs after a refresh

- The PrintStation download folder location has been moved to C:\Skyline\PrintStation and the installation automatically gives users to correct permissions on that location. In previous releases, IT had to be called in after each upgrade to give users full control over the PrintStation folders. Now the folder are all in the one location so we will no longer get problems with user permissions.

- Skyline Website enhancements include:

  - The preview pages are now generated on demand if a user clicks on the preview icon. Admin can set the number of thumbnail that will be generated and the default is to generate the first 20 pages which should be fine for most cases.

  - The look-and-feel of the libraries page and the job ticket pages has been greatly improved. The document thumbnail and the product image and also now shown on the job ticket pages.

  - Password polices can be enforced in this release, forcing users to change their password after a set period and ensuring that password need configurable complexity rules. E.g. minimum number of characters, uppercase, numbers and special characters required.

  - PDFs are deleted from the PrintStation download folder when the job status is set to Deleted

Version 6.8.1

The following changes are included in the 6.8 upgrade released June 2015.

- PrintStation[422] has been re-designed to make it faster & more responsive.

  - Orders are grouped by status[425] and you can change the order that the status is displayed[498].

  - You can view orders[423] by all users, a specific user or by a specific status.

  - You can now easily change the price[448] of a product using the simplified pricing tab.

  - The history of an order can be seen in the overview[427] tab in the Details pane when an order is selected.

  - The price of the order is included on the printed job ticket[471] ,

  - You can now run a test print[455] of an order which will not appear on the management reports,

- The reporting feature[385] available to Managers has been updated to make it easier to compile the reports that you need. The data can also be easily exported to another program so that it can be presented in a format which is applicable for your business. Examples have been included showing some different ways that the exported data can be presented using Excel[390] .

- When you view the list of orders placed[339] you are now able to see the account code associated with your order.

- Pricing is now shown on the job ticket[339] which can be printed when the order is placed.

- You can amend the order that the tabs[91] in the Website are shown and see all the available tabs, even the ones which are not currently available for the users.

- The upload facility[315] has been enhanced to allow easier uploading of multiple documents.

Version Changes 2014

Version 6.7.3 Sprint 3

The following changes are included in the 6.7.3 sp3 upgrade released June 2014.

- The Delivery & Priority labels can be changed as required by your business.

- The bug in sending some types of user email has been resolved.

- The incorrect zero pricing shown on reports has been resolved.

- Document Name now displayed on the job ticket page.

- The default setting for Business Stationery no longer uses Silverlight

- Prices are displayed to users in status emails to 2 decimal places.

- The print progress form on the PrintStation displays much more information about the printing process and allows users to cancel a print.

- Hosted customers can now use their own mail server details for sending status emails.

- When the PrintStation marks a job as Deleted, it is removed from the users list.

- The quantity text box on the product page is bolder.

- Dutch and German translations enhanced.

Version 6.7.3

The following changes are included in the 6.7.3 upgrade released June 2014.

- When ordering a document and the Delivery Options or Priority are priced as zero the text is not displayed on the confirmation page. These fields are only shown when there is a cost associated with either a delivery option or priority option.

- You enter the required quantity of documents when you select the product options. If you are ordering several different documents on the same order the quantity is applied to each document when you proceed to the basket. Quantities of documents can be changed before you complete the order.

- The price of orders can be updated to reflect agreed changes. It is also possible to re-print an order at no cost to the customer or to print a part order and price it accordingly.

- VMware and HyperV connectivity have been amended to provide a reliable system.

- Few minor bug fixes.

Version Changes 2013

Version 6.7.2

The following changes are included in the 6.6.2 upgrade released June 2013.

- A new Skyline application called CostManager has been developed the replace the PriceManager. The price of an order can be calculated based on the number of pages, the media type, number of sides that are printed and whether the printing is in colour or black and white. Each document ordered can have a separate cost added to cover binding, stapling, folding etc. Finally a cost for the whole order can be applied to cover delivery & priority requests.

    - The printing cost can be set using a much simpler price-per-page structure, or they can be set using media costs + printing costs (click charge) in the same way as the PriceManager.

    - Price banding for printing costs is much simpler to implement.

    - New custom binding options can be priced.

    - Separate price lists can be created for Digital, Wide Format and Offset printing.

    - Printing costs can be set for different paper sizes.

    - A Digital, Wide Format or Offset printing price list can be selected per product.

    - The prices for documents when covers are not printed is now correctly calculated when using the CostManager.

- Prices are calculated much faster on the Basket page in the Website.

- On the accounts page when users are validating an account code and only one code is shown on the list of matching codes, users no longer need to select this account.

- Users can select multiple jobs to change the status or delete them.

- When the automatic refresh timer is used, the count-down is displayed on the refresh button.

- The PrintStation can transfer the job ticket information of Konica Bizhub printers.

- Some minor bug fixes.

Version Changes 2012

Version 6.7.1

The following changes are included in the 6.7.1 upgrade released June 2012.

- Ability to lock jobs on the PrintStation.

- View all the PrintStations that are connected to your PrintStation and select what jobs are shown in the Orders Pane.

- The Status of your jobs are indicated by colours in the Orders pane.

- You can select the fields that are displayed in the Orders pane.

- Libraries and catalogues can now be searched.

Version 6.6.3

The following changes are included in the 6.6.3 upgrade released June 2012.

- Faster start up time for PrintStation.

- Enhanced support for Xerox FreeFlow printers.

- Programming of Fiery and Creo DFE's.

- Support for Konica BizHub printers.

- Extended support for generic printers.

- Improved job management for multi PrintStation environments.

- PrintStation colour coded job status.

- PrintStation document previews are displayed automatically (no refresh required).

- Field headings now lock in operators preference in PrintStation.

- Library document search facility.

- Pop up Notification option in PrintStation.

Version Changes 2011

Version 6.6.2

The following changes are included in the 6.6.2 upgrade released June 2011.

- Where HTTPS is a offered users are automatically re-directed to the secured https site.

- Simplified process of licensing and installing Skyline. Customers can now install Skyline themselves by validating their license number.

- The admin page has been redesigned in zones for better navigation.

- US date format now available.

- Only Approvers will now see the Approval web page.

- Improved error logging.

- All Skyline applications will now issue a message window when upgrades are available and give users the option of a download.

- Log in page now features a larger font.

- Users can create shared libraries (Item 2664).

- Thumbnail resolution has been improved and in document preview users can now switch between book view and classic view.

- Users can now edit the name and add a description to documents in shared libraries.

- Library page refreshes automatically when PDF conversion complete.

- My Quote page now features enhancements including previews of documents.

- Users can now order multiple documents with a single job ticket.

- Ability to automatically associate users with account codes via a suitably configured customer database.

- Users able to edit and personalize columns in the accounts page table.

- The Website admin page now features the new tab, 'Accounts & Pricing', which groups the pricing configuration in one place. This also now allows users to use any major credit card to place an order.

- The log in page requesting Username and password is now translatable.

- Further German translations have now been incorporated throughout the applications.

- Translations have now been applied to accounts page.

- The upload progress window is now translatable.

- PrintStation now supports proxy server installations.

- Users can now generate reports for all jobs that reach the PrintStation including those from paper originals and generic printers.

- Any changes that the PrintStation operator makes to the job ticket are now captured and fields amended.

- Users are now able to transfer documents between PrintStations.

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Appendix

Information that can be found in the Appendix includes:

- Pre-installation checklist⬚752.

- A list of language country codes⬚755.

- A list of the portal configurations options⬚731 .

- List of the default configuration options⬚728.

- Details of the supported file formats⬚741 .

- An overview of the System Statuses used by Skyline and how they can be changed to suit your organisation.⬚677

Configuration Information

Default Configuration Options

The following default configuration options are available in Skyline when logged in with Host privileges. Any changes to the default configuration will affect ALL portals associated with Skyline.

- Authentication - Login Cookie Expiry (hours)□ 55 - Sets the amount of time that the login details are saved the login cookie.

- Authentication - Remember Me Checked□ 56 - Enables or disables the remember me check box on the log in screen.

- Authentication - Remember Me Visible□ 54 - Toggles the visibility of the remember me check box on the log in screen.

- Authentication - Require Email□ 53 - Sets whether an email address is required to register as a new user or not.

- Checkout - Save Delivery Address□ 113 - Toggles whether the checkout delivery address check box is visible.

- Checkout Mode□ 117 - Enables the you to combine the Address, Delivery and Accounts pages into one page.

- Document Directory - Specifies where the downloaded documents are stored.

- Document Error Folder - Specifies where the error files are stored.

- Document - Preview Mandatory□ 108 - Sets whether users have to preview the PDF of their job before they place an order.

- Download Link Visible to Users□ 622 - Sets whether the skyline driver download is displayed or not.

- Forgotten Password - Show Link□ 62 - Toggles whether users can see the "I forgot my password" link when they log in.

- Global Products□ 525 - If True Global options are available, if false portal specific options are used.

- Global Errors - Show Friendly Error Messages□ 76 - Toggles debug display mode. True = show friendly error, False = show full error on screen.

- Help link for Library page□ 111 - Enables you to link to a web page, a PDF or an email.

- Last Upgrade Date - Shouldn't be changed. This is automatically updated when an update is run.

- Library - Allow Custom Libraries□ 102 - Toggles whether custom libraries are enabled or not.

- Library - Users Can Download PDF□ 109 - Toggles whether users are able to download their documents as PDF.

- Library - Cache Document Thumbnails□ 300 - If true the document thumbnails are copied to the local wwwroot\ThumbnailCache directory. If false all thumbnails are deleted.

- Library - Click Thumbnail□ 107 - Toggles whether users preview or order a document when they click on a thumbnail.

- Library - Enable Colour Analysis of uploaded documents□ 341 - Turn on/off the Colour Analysis feature.

- Library - Colour Analysis Model□ 341 - Select the colour analysis model to be used.

- Library - Default View□ 101 - Sets whether library items are shown in list, details or thumbnail view.

- [Library - Number of Preview Pages](#)[107] - Select how many pages of the document can be previewed from a drop down list.

- [Library - Process Black Threshold Percentage](#)[159]. - Select the percentage of colour to be treated as processed black when using Colour Analysis.

- [Login - Host Message to users](#)[60] - Used to configure a message that will show on the login window and home page of all portals.

- [Login - Host Message expiry date](#)[60] - Used to set an expiry date for the message to all users.

- [Login - LDAP login prompt](#)[85] - Enter a message that will show on users login window.

- [Login - Show Host Message](#)[60] - Used to make the message visible.

- [Look And Feel - Language](#)[130] - Sets default language.

- [Look And Feel - Tab Style](#)[89] - Sets the look of the tabs on the website.

- [Look And Feel - Use Menu Tabs](#)[87] - Toggles menu tabs on and off.

- [Managers Can Edit Live Job Details](#)[396] - If True Manager will be able to edit jobs in Live Orders.

- [Managers Can View Live Job PDFs](#)[397] - If True Manager will be able to view a PDF in Live Orders.

- [New users - Redirect to external website](#)[45] - If users are redirected to a Website Landing page.

- [New users - Redirection website URL](#)[45] - The Location of the Website Landing page.

- [Ordering - One Document Only](#)[215] - restrict the number of documents that are ordered per order number to one document.

- [Ordering - Order Number Mask](#)[214] - Sets the system order number mask.

- [Ordering - Show Price](#)[162] - Toggles whether the price is shown when the user places an order.

- [Paper Originals - Missing Information Error](#)[98] - Change the wording of the error message.

- [Paper Originals - Document Name Label](#)[98] - Change the wording of the label.

- [Password Reset Token Timeout (minutes)](#)[65] - Sets how long the password rest token lasts.

- [Password Expiry Days](#)[71] - Value specifies the number of days until a password has to be changed.

- [Password Minimum Number of Characters](#)[67] - Value specifies the minimum length of a password.

- [Password - Numbers Required](#)[68] - Value specifies the number of numbers that a password must contain.

- [Password Regular Expression](#)[72] - Formula specifies the password requirements.

- [Password Special Characters Required](#)[69] - Value specifies the number of special characters that a password must contain.

- [Password Uppercase Characters Required](#)[70] - Value specifies the number of upper case letters that a password must contain.

- PrintStations all see each other - Not Currently Supported.

- [PrintStation - Automatically assign to portal](#)[233] - Automatically connect a new PrintStation to a portal if there are enough PrintStation licenses.

- PrintStation - Save file names as order ID - Toggles whether to save files as the order ID when saving to a folder from the PrintStation.

- [PrintStation - Show all portals by default](#)²³³ - If true all PrintStations can see all portals. If False you can select the Portals that the PrintStation is associated with.

- Product Editor: Full screen height - Specifies the height of the window when using full screen. Used with [Skyline Publisher](#)²⁴¹ .

- Product Editor: Use full screen - Specifies whether to display the Product Editor in full screen or not. Used with [Skyline Publisher](#)²⁴¹.

- 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. Used with [Skyline Publisher](#)²⁴¹ .

- Products: Hide the products tab from users - Hides the Products tab when logged in as a User. Used with [Skyline Publisher](#)²⁴¹ .

- Pull Printing License enabled - Not currently supported.

- Pull Printing Timeout - Delete documents not printed after - Not currently supported.

- Registration - New Users Must Accept Terms - Not Currently Supported.

- [Registration - New Users Must Be Approved](#)³³ - New users are set as inactive until they are approved.

- [Registration - Show Register new user link](#)⁴⁷ - Toggles the register new user link on the log in page.

- Search Type - Shouldn't be changed. Option is updated from the Accounts & Pricing configuration page.

- Security - Watermarking Enabled - Not currently supported.

- [Session Timeout](#)²³⁰ - Sets the session timeout in minutes.

- [Theme - Show Accessibility Selector](#)²²⁷ - Turns on the Accessibility Selector if an Accessibility theme is available.

- [Upload - Allow Paper Originals](#)⁹⁸ - Toggles whether paper originals can be uploaded or not.

- [Upload - Check the Status of the PDF Converter services](#)⁹² - Toggles whether the PDF Converter Services are monitored.

- Upload - Conversion Timeout Minutes - Sets the document conversion timeout in minutes.

- [Upload - Directory](#)²³¹ - Specifies where the uploaded files are stored.

- Upload - Show Conversion queue - Sets whether the upload progress table is displayed on the uploads page.

- [Upload - Show Supported Formats link](#)⁹⁵ - Toggles the Upload types link on and off.

- [User Forms - Show Tab](#)⁶⁶⁴ - True/False Toggles paper User Forms web page.

Portal Configuration Options

The following portal configuration options are available in Skyline when logged in with either Administrator or Host privileges. Changes made will only affect the portal that you are associated with.

- Authentication - Login Cookie Expiry (hours)⌷ 55 - Sets the amount of time that the login details are saved the login cookie.

- Authentication - Remember Me Checked⌷ 56 - Enables or disables the remember me check box on the log in screen.

- Authentication - Remember Me Visible⌷ 54 - Toggles the visibility of the remember me check box on the log in screen.

- Authentication - Require Email⌷ 53 - Sets whether an email address is required to register as a new user or not.

- Checkout - Save Delivery Address⌷ 113 - Toggles whether the checkout delivery address check box is visible.

- Checkout - Show Delivery Priority Page⌷ 112 - Sets whether users see the delivery options page as part of the order process.

- Checkout Mode⌷ 117 - Enables the you to combine the Address, Delivery and Accounts pages into one page.

- Document - Preview Mandatory⌷ 108 - Sets whether users have to preview the PDF of their job before they place an order.

- Download Link Visible to Users⌷ 622 - Sets whether the skyline driver download is displayed or not.

- Forgotten Password - Show Link⌷ 62 - Toggles whether users can see the "I forgot my password" link when they log in.

- Global Errors - Show Friendly Error Messages⌷ 76 - Toggles debug display mode. True = show friendly error, False = show full error on screen.

- Help link for Library page⌷ 111 - Enables you to link to a web page, a PDF or an email.

- Library - Allow Custom Libraries⌷ 102 - Toggles whether custom libraries are enabled or not.

- Library - Allow User Libraries⌷ 110 - Toggles whether libraries are enabled or not.

- Library - Users Can Download PDF⌷ 109 - Toggles whether users are able to download their documents as PDF.

- Library - Click Thumbnail⌷ 107 - Toggles whether users preview or order a document when they click on a thumbnail.

- Library - Enable Colour Analysis of uploaded documents⌷ 341 - Turn on/off the Colour Analysis feature.

- Library - Colour Analysis Model⌷ 341 - Select the colour analysis model to be used.

- Library - Default View⌷ 101 - Sets whether library items are shown in list, details or thumbnail view.

- Library - Number of Preview Pages⌷ 107 - Select how many pages of the document can be previewed from a drop down list.

- Library - Process Black Threshold Percentage⌷ 159. - Select the percentage of colour to be treated as processed black when using Colour Analysis.

- Login - Message to users⌷ 60 - Enter a message that will show on users login window and home page.

- [Login - LDAP login prompt](#)◻85 - Enter a message that will show on users login window.

- [Login - Show Message on Login and Home pages](#)◻60 - Turn the message to users on.

- [Login - Show Terms and Conditions Checkbox](#)◻57 - Turn the Terms and Conditions Checkbox on.

- [Login - Terms and Conditions Expiry](#)◻57 - Set an expiry date for the Terms and Conditions cookie.

- [Login - Terms and Conditions Link Text](#)◻57 - Enter the text for the link to the Terms.aspx page.

- [Look And Feel - Tab Style](#)◻89 - Sets the look of the tabs on the website.

- [Look And Feel - Use Menu Tabs](#)◻87 - Toggles menu tabs on and off.

- [Managers Can Edit Live Job Details](#)◻396 - If true Manager will be able to edit jobs in Live Orders.

- [Managers Can View Live Job PDFs](#)◻397 - If true Manager will be able to view a PDF in Live Orders.

- [New users - Redirect to external website](#)◻45 - If users are redirected to a Website Landing page.

- [New users - Redirection website URL](#)◻45 - The Location of the Website Landing page.

- [Ordering - One Document Only](#)◻215 - If true Users will only be able to order one document at a time.

- [Ordering - Order Number Mask](#)◻214 - Sets the system order number mask.

- [Ordering - Show Price](#)◻162 - Toggles whether the price is shown when the user places an order.

- [Paper Originals - Missing Information Error](#)◻98 - Change the wording of the error message.

- [Paper Originals - Document Name Label](#)◻98 - Change the wording of the label.

- [Password Reset Token Timeout (minutes)](#)◻65 - Sets how long the password rest token lasts.

- [Password Expiry Days](#)◻71 - Value specifies the number of days until a password has to be changed.

- [Password Minimum Number of Characters](#)◻67 - Value specifies the minimum length of a password.

- [Password - Numbers Required](#)◻68 - Value specifies the number of numbers that a password must contain.

- [Password Regular Expression](#)◻72 - Formula specifies the password requirements.

- [Password Special Characters Required](#)◻69 - Value specifies the number of special characters that a password must contain.

- [Password Uppercase Characters Required](#)◻70 - Value specifies the number of upper case letters that a password must contain.

- PrintStation - Save file names as order ID - Toggles whether to save files as the order ID when saving to a folder from the PrintStation.

- Product Editor: Full screen height - Specifies the height of the window when using full screen. Used with [Skyline Publisher](#)◻241.

- Product Editor: Use full screen - Specifies whether to display the Product Editor in full screen or not. Used with [Skyline Publisher](#)◻241.

- 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. Used with [Skyline Publisher](#)◻241.

- Products: Hide the products tab from users - Hides the Products tab when logged in as a User. Used with [Skyline Publisher](#)◻241.

- Registration - New Users Must Be Approved[33] - If true the users who self registers needs to be approved before they can gain access to the Skyline website.

- Registration - Show Register new user link[47] - Toggles the register new user link on the log in page.

- Security - Watermarking Enabled - Not currently supported.

- Session Timeout[230] - Sets the session timeout in minutes.

- Theme - Show Accessibility Selector[227] - Turns on the Accessibility Selector if an Accessibility theme is available.

- Upload - Allow Paper Originals[98] - Toggles whether paper originals can be uploaded or not.

- Upload - Allow users to upload documents[96] - Toggles whether the upload function is enabled or not.

- Upload - Check the Status of the PDF Converter services.

- Upload - Create PDF Thumbnails - If true then uploaded PDF's are passed to the PDF Converter to create the PDF. If false, uploaded PDF's go straight to the library.

- Upload - Custom PDF Conversion Message[97] - Enables you to change the message displayed when a PDF is being converted.

- Upload - Show Orders Tab[221] - Allows you select if you want to show/hide the Orders tab.

- Upload - Show Paper Originals Tab[98] - True/False Toggles paper Originals web page.

- Upload - Show Supported Formats link[95] - Toggles the Upload Types link on or off.

- Upload - Use Default Library Only - Not currently supported.

- User Forms - Show Tab[664] - True/False Toggles paper User Forms web page.

Standard Job Ticket Fields

The Standard Job Ticket[472] contains information on the product[737] selected during the ordering process and information from the delivery address[735] and delivery options[736] . The Skyline website log in user name is shown as the Customer with the associated email address.

JOB TICKET

| Customer | Anne Webb | ePrint Direct Ltd | | Order No | 0005126 |

Contact Name	Anne Webb
Email	Annette.webber@eprint.net
Phone	+44(0) 1438 726 732
Account No	018885171XXXXX Teaching

Price Estimate	99.78
Order Date	23 May 2016 16:38
Due Date	27 May 2016 00:00
Shipping Method	I'll pick it up

Delivery Address

Office 3 Gateway 1000
Arlington Business Park
Stevenage, Hertfordshire

Document: **Skyline Manual**

Priority **Not Urgent**

Pages per document   558
No of copies   3
Product Type   A4 Plastic Comb Bound

Body
  Printer Type   Black and White
  Stock   A4 White 80gsm
  Printed Sides   Double Sided

Front Cover
  Printed Sides   One Sided
  Printer Type   Colour
  Stock   A4 White Card 160gsm
  Laminated (Y/N)   true

Back Cover
  Printed Sides   Not required
  Printer Type
  Stock   A4 White Card 160gsm
  Laminated (Y/N)   true

Finishing
  Folding
  Hole Punching
  Stapling
  Binding Type   Plastic comb

Skyline Administration Manual

NOTES

Please make sure that the colour of the binder is white. If this is not available please contact me for further information.

Regards,

Anne

Date printed - 23/05/2016 16:38:07

Delivery Address Form Fields Used:

These fields are completed according to the details that have been entered in the address fields. Details are either stored in the Delivery Address Form⌐312 or completed each time an order is placed. The Address form is created using ProductManager⌐581 so the forms are created specifically for each website. The fields used to create the form can be labelled as required so if information is not showing as expected please check the original address option.

The following Address Options are used in the Standard Job Ticket in the following fields.

First Name	Contact Name
Phone Number	Phone
Street	Delivery Address
City	Delivery Address
Region	Delivery Address
Organization Name	Customer
Post Code	Postcode

Delivery Options Form Fields Used:

These fields are completed according to the details that have been entered in the shipping section when placing an order. The Delivery form is created using [ProductManager]⁵⁸⁷ so the forms are created specifically for each website. The fields used to create the form can be labelled as required so if information is not showing as expected please check the original delivery options

The following Delivery Options are used in the Standard Job Ticket in the following fields.

Priority	Priority
Date Required Calendar	Due Date
Delivery Method	Shipping Method

Product Option fields used:

All product will be different but the will contain some of the document options. The following document options are shown on the Standard Job Ticket:

Media	Stock
Binding	Binding
Printed Sides	Printed Sides
Printer type	Printer Type
Laminating	Laminated (Y/N)
Folding	Folding
Stapling	Stapling
Hole Punch	Hole Punching
Notes	Notes

Delivery Ticket Fields

The Standard Job Ticket contains information on the product[737] selected during the ordering process and information from the delivery address[735] and delivery options[736] .

DELIVERY NOTE

Skyline ™

Delivery Address

ePrint Direct Ltd
Office 3 Gateway 1000
Arlington Business Park
Stevenage, Hertfordshire

Date		Order No	0005126
Shipping Date	27 May 2016 00:00	Shipping Method	I'll pick it up

Item Code	Item Description	Total
A4 Plastic Comb Bound	Skyline Manual No of pages per document = 558	3

Thank you for your order

Please check all items carefully and notify us of any descrepancy within 24 hours of delivery.

Items Received by:

Signed   Print   Date

Delivery Address Form Fields Used:

These fields are completed according to the details that have been entered in the address fields. Details are either stored in the Delivery Address Form[312] or completed each time an order is placed. The Address form is created using ProductManager[581] so the forms are created specifically for each website. The fields used to create the form can be labelled as required so if information is not showing as expected please check that the original address option.

The following Address Options are used in the Delivery Ticket in the following fields.

Organization Name — Customer

Street — Delivery Address

City — Delivery Address

Region — Delivery Address

Delivery Options Form Fields Used:

These fields are completed according to the details that have been entered in the shipping section when placing an order. The Delivery form is created using ProductManager[587] so the forms are created specifically for each website. The fields used to create the form can be labelled as required so if information is not showing as expected please check that the original delivery options

The following Delivery Options are used in the Delivery Ticket in the following fields.

Date Required Calendar   Shipping Date

Delivery Method   Shipping Method

Supported File Formats

This list contains some of the currently supported file types; additional file types are constantly added. If the file type you are looking for is not listed here please e-mail us at helpdesk@eprint.net.

Skyline can convert many file formats to PDF. The following list includes current and old file formats. In order to make sure that popular file formats will not present any file conversion problems, ePrint Direct has introduced a Certification Program. In order for an application to be certified, it had to undergo stringent testing to ensure that users of Skyline will have a trouble-free experience converting their documents with Skyline.

Note:

In order to convert some file formats, additional software may need to be purchased and loaded on the Skyline server.

- Supported Applications 742
- Spreadsheet Formats 743
- Presentation Formats 743
- Graphic Formats 744
- Vector Graphic Formats 745
- CAD Formats 745

Supported Applications

The following file formats are supported:

- Generic Formats Adobe PDF
- Encapsulated PostScript (EPS)

- Microsoft Publisher formats
  (requires MS Publisher to be installed – used as a parser)
- Microsoft Visio formats
  (requires MS Visio to be installed – used as a parser)

- Lotus WordPro formats
  (requires Lotus WordPro to be installed – used as a parser)
- Word Processing Formats
  (requires MS Word to be installed – used as a parser)

- ASCII Text
- ANSI Text

- Microsoft RTF
- Microsoft Word for PC v2

- Microsoft Word for PC v3
- Microsoft Word for PC v4

- Microsoft Word for PC v5.5
- Microsoft Word for Macintosh v4

- Microsoft Word for Macintosh v5
- Microsoft Word for Macintosh v6

- Microsoft Word for Macintosh v98
- Microsoft Word for Windows v2.x

- Microsoft Word for Windows v6.0
- Microsoft Word for Windows 95

- Microsoft Word for Windows 97
- Microsoft Word for Windows 2000

- Microsoft Works v1.0
- Microsoft Works v2.0

- Microsoft Works v3.0
- Microsoft Works v4.0

- Microsoft Windows Write v1.0
- Microsoft Windows Write v2.0

- Microsoft Windows Write v3.0
- WordPerfect v5.x

- WordPerfect v6
- WordPerfect v7

- WordPerfect v8
- WordPerfect v9/2000

- WordPerfect for Macintosh v2
- WordPerfect for Macintosh v3

Spreadsheet Formats

Requires MS Excel to be installed – used as a parser.

- Corel QuattroPro v7
- Lotus 1-2-3 v2
- Lotus 1-2-3 v4
- Lotus 1-2-3 96
- Lotus 1-2-3 R9
- Microsoft Excel v4
- Microsoft Excel v6
- Microsoft Excel 2007/2010/2013
- Microsoft Works Spreadsheet v1.0
- Microsoft Works Spreadsheet v3.0

- Corel QuattroPro v8
- Lotus 1-2-3 v3
- Lotus 1-2-3 v5
- Lotus 1-2-3 97
- Microsoft Excel v3
- Microsoft Excel v5
- Microsoft Excel 97
- Microsoft Excel for Mac 98
- Microsoft Works Spreadsheet v2.0
- Microsoft Works Spreadsheet v4.

Presentation Formats

Requires MS PowerPoint to be installed – used as a parser.

- Lotus Freelance 1.0-2.1
- Microsoft PowerPoint 95
- Microsoft PowerPoint 2007/2010/2013

- Microsoft PowerPoint 4.0
- Microsoft PowerPoint 97
- Microsoft PowerPoint for Macintosh 98

Graphic Formats

Requires Image Conversion pack – used as a parser. Supported graphic formats are:

- AVS - AVS X image file
- BMP - MS Windows Bitmap image file
- BMP - OS/2 Bitmap
- DCX - ZSoft IBM PC multi-page Paintbrush file
- DIB - MS Windows Device Independent Bitmap
- DPX - Digital Moving Picture Exchange
- FAX – Group 3 FAX encoding
- FITS - Flexible Image Transport System
- FPX - FlashPix Format
- GIF - CompuServe graphics interchange format
- GIF87 - CompuServe graphics interchange format ver 87
- ICO - MS Windows Icons
- ICO - OS/2 Icons
- IPTC - Newswire profile
- JBIG - Joint Bi-level Image experts Group file interchange format
- JP2 - JPEG-2000 JP2 File Format Syntax
- JPEG - Joint Photographic Experts Group JFIF format
- JPG - Joint Photographic Experts Group JFIF format
- MIFF – Magick image file format
- MNG - Multiple-image Network Graphics
- MPC - Magick Persistent Cache image file format
- MTV - MTV Raytracing image format
- OTB - On-the-air Bitmap
- PBM - Portable Bitmap
- PCD - Kodak PhotoCD - Base/16, Base/4 and Base only
- PCDS - Kodak PhotoCD - Base/16, Base/4 and Base only
- PCT - Macintosh PICT
- PCX - PC PaintBrush
- PGM - Portable GrayMap
- PICT - Apple Macintosh QuickDraw/PICT file
- PNG - Portable Network Graphics
- PNM - Portable Any Bitmap
- PPM - Portable PixelMap
- PSD - Adobe Photoshop
- P7 - XV's visual schnauzer format
- RAS - Raster Sun Microsystems
- RGBA - Raw red, green, blue, and matte samples
- SGI - Irix RGB image file
- SUN - Raster SunMicrosystems
- TGA - TrueVision Targa
- TIFF - Tagged Interchange File Format
- VICAR – V.I.C.A.R. Image file format
- VID - Visual Image Directory
- VIFF - Khoros Visualization image file
- WMF - Windows Meta File
- XBM – X Windows system bitmap, black and white only
- XPM - X Windows system pixmap file (colour)
- XWD - X Windows system window dump file (colour)

Vector Graphic Formats

Requires Adobe Illustrator to be installed – used as a parser (AI – Adobe Illustrator).

- CDR - CorelDRAW graphics
- CGM - Computer Graphics Metafile
- DWG - AutoCAD Drawing
- DXF - AutoCAD Interchange
- EMF – Enhanced Metafile
- FLM – Film strip file format
- FH4 - FreeHand 4
- FH5 - FreeHand 5
- FH7 - FreeHand 7
- FH8 - FreeHand 8
- PDD – Adobe Photoshop
- PXR - Pixar file format
- SVG – SVG file format
- SVGZ - SVG Compressed file format
- VDA - Targa vda file format
- ICB - Targa icb file format
- VST - Targa vst file format
- Vector Graphic Formats II (requires CorelDraw to be installed– used as a parser) CDR - CorelDRAW graphics

- CDX - CorelDRAW compressed
- PAT - Pattern File
- CDT - CorelDRAW template
- CLK - Corel R.A.V.E
- CMX - Corel Presentation Exchange
- CPX - Corel CMX compressed
- AI - Adobe Illustrator
- WPG - Corel WordPerfect Graphic
- WMF - Windows Metafile
- EMF - Enhanced Windows Metafile
- CGM - Computer Graphics Metafile
- SVG – SVG file format
- SVGZ - SVG Compressed file format
- PCT – Macintosh PICT
- DWG - AutoCAD Drawing
- DXF - AutoCAD Interchange
- FH4 - FreeHand 4
- FH5 - FreeHand 5
- FH7 - FreeHand 7
- FH8 - FreeHand 8
- SHW – Corel Presentations

CAD Formats

Requires Autodesk VoloView or AutoCAD to be installed – used as parsers.
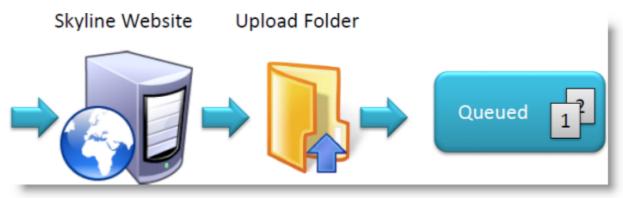
- DWF - Drawing Web Format
- DWG - Auto CAD Drawing
- DXF - Auto CAD DXF
- RML - RedlineXML
- IPT - Inventor Part Document
- IAM - Inventor Assembly Document
- IDW - Inventor Drawing Document
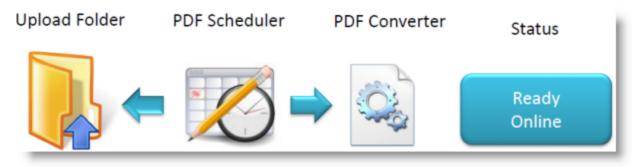
Converting Documents to PDFs

When a document is uploaded by a user in Skyline, it is given a unique name and moved to the Skyline Upload folder. The document status is marked as queued by the website. The exact location of this directory can be found in the Default Configuration settings on the Admin page when you are logged in to the Skyline portal with Host Administrator privileges.
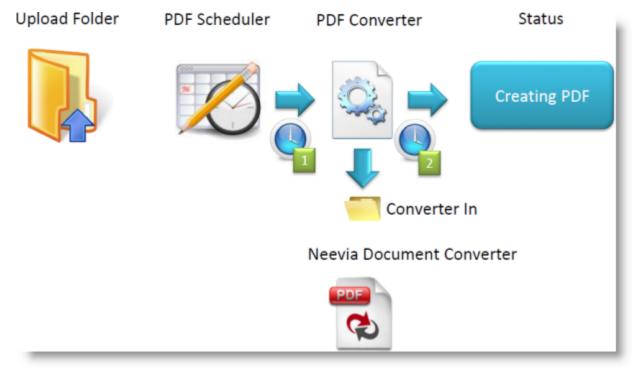
The PDF Scheduler monitors the upload folder for new documents. When an uploaded file is detected, the PDF Scheduler looks for a PDF Converter that is at the status Ready and Online.
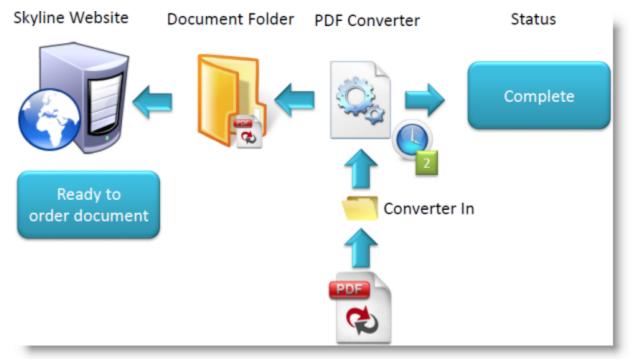
The PDF Scheduler allocates the uploaded file to the free PDF Converter and records the time the document was allocated [1]. The PDF Converter changes the status to Creating PDF, moves the uploaded file to the ConverterIn folder and passes it to the Neevia Document Converter to be converted to PDF. The PDF Converter also records the time the document was passed for conversion [2].
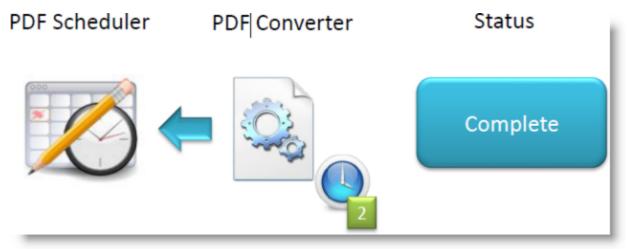
When the Neevia Document Converter has converted the file to PDF, the PDF converter moves it to Skyline Document folder and it appears in the user's Library, ready to order. The PDF Converter sets its status to Complete.
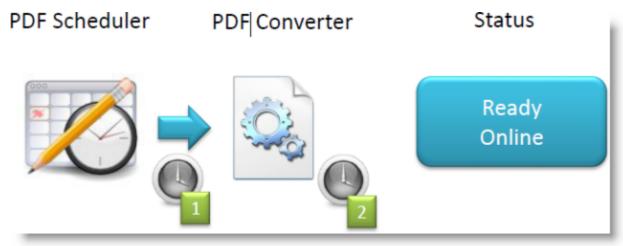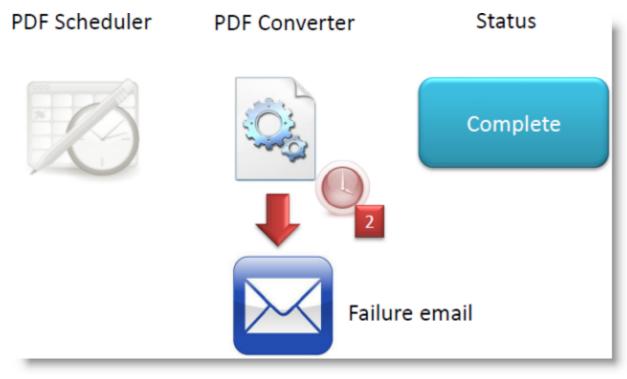
The PDF Converter then waits for the PDF Scheduler to change the status to ready.
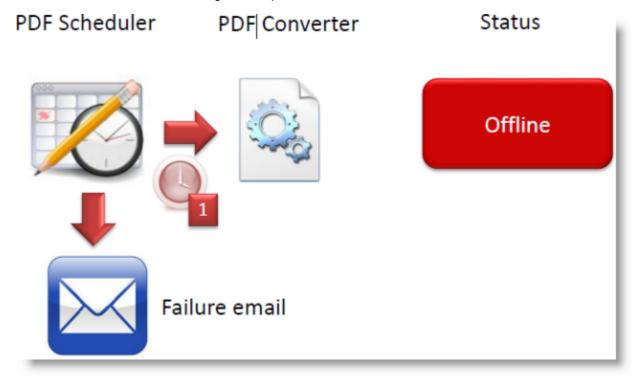
When the PDF Scheduler changes the status to Ready, the PDF Converter stops its timer and waits for another file.

If the PDF Scheduler does not respond to the Complete status within 1 minute, the PDF Converter will assume that the PDF Scheduler has crashed and sends a failure email to the configured recipients.
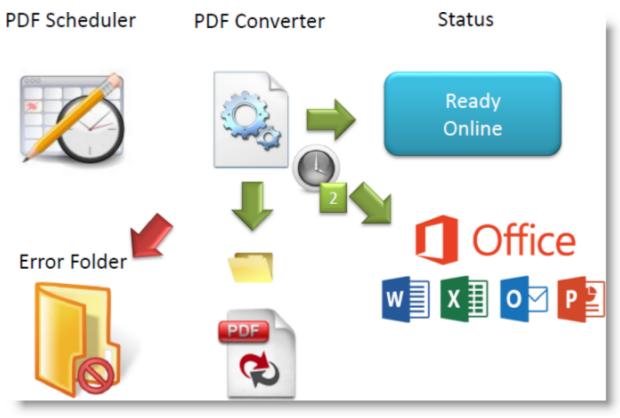
If the PDF Converter does not respond within 7 minutes, the PDF Scheduler will assume that it has crashed, send out a Failure Email to the configured recipients and mark the PDF Converter Offline.
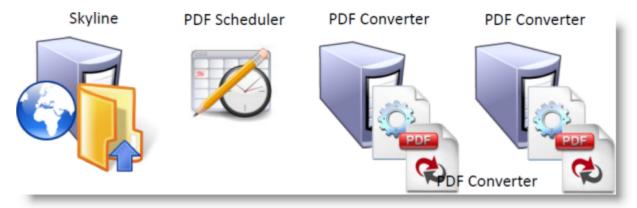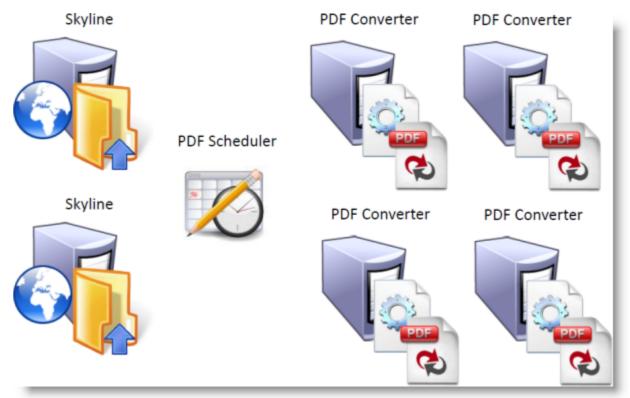
If the PDF Converter has not crashed but not responded in time it will reset itself. It restarts the Neevia Document Converter, clears the ConverterIn and Neevia temp folders, closes any hung copies of Word, Excel, PowerPoint or Publisher, sets the uploaded document status to Error, moves the uploaded document to the Error folder and puts itself back online.

Additional PDF Converters can be installed on other PC's to share the document conversion load and provide redundancy in the case that one should fail.

The PDF Scheduler can even handle multiple web servers for load balancing of the Skyline websites and many PDF Converts,

Pre-Installation Checklist.

Installing Skyline

Make sure that the Server meets the hardware requirements as specified in the online manual and that these Skyline Software requirements have been met and that you have all the required information BEFORE you start the Skyline installation process.

Requirement	Completed ?
Fixed IP-Address - Please contact your IT department to check that this has been configured for the Skyline server.	
DNS Entry - Required for the URL that the Skyline Website will be using, The URL is required when you make the website available to users. Please contact your IT department to check that this has been configured. URL is	
User Access Control - Turned off during installation process.	
Internet Information Services (IIS) - Must be installed.	
.Net Framework 4 or 4.5 - Must be installed.	
Microsoft Office - The installation MUST be a CUSTOM installation as detailed in the Pre-Installation section of the manual.	
Enhanced Security - Turned off during the installation process.	
Skyline Installation CD - Make sure that this is available if you are not installing directly from the website.	
Internet Access - You may need to download any Skyline updates from http://download.eprint.net/Installation/Skyline/	
Pin Code - Only required if you need to install any Skyline updates.	
Skyline License Number -	
Neevia PDF Converter Serial Number -	
Test Software files - The Neevia Document Converter needs to be tested with example files that will be uploaded e.g. a Word, Excel, PowerPoint and Publisher files.	
Adobe Acrobat Reader - Required to check the PDF creation. This can be uninstalled later.	
Local Admin Account Name: .... Password:	

Installing Print Room Software

Make sure that the PC meets the hardware requirements as specified in the online manual. Before you start installing PrintStation, CostManager or the ProductManager Software make sure that the requirements have been met and that you have the required information.

Requirement	Completed ?
User Access Control - Turned off during installation process.	
.Net Framework 4 or 4.5 - Must be installed.	
Internet Access - You need open Skyline to be able to download the required programs.	
Adobe Acrobat Reader - version 8 or greater should be installed of a full version of Adobe Acrobat 8 or greater.	
Local Admin Account Name: .... Password:	

Configuring Skyline

After Skyline has been installed the system will need to be configured before it is fully operational. The following information will be required during the configuration process.

Requirement	Completed?
ProductManager	
- Details of paper stocks .... ☐	
- Details of products that are available.. ☐	
- Information required for the Address form.................................. ☐	
- Information required for the Delivery form................................. ☐	
CostManager	
- Pricing details of your products... ☐	
PrintStation	
- Printer details including driver details...................................... ☐	
- Name of portal to associate with PrintStation...............................	
Website	
- Portal theme ZIP file .... ☐	
- Name of your Portal Theme..	

Language Country Codes

Listed in the table are the available language codes for Skyline.

AF	Afrikaans	**SQ**	Albanian
AR-SA	Arabic (Saudi Arabia)	**AR-IQ**	Arabic (Iraq)
AR-EG	Arabic (Egypt)	**AR-LY**	Arabic (Libya)
AR-DZ	Arabic (Algeria)	**AR-MA**	Arabic (Morocco)
AR-TN	Arabic (Tunisia)	**AR-OM**	Arabic (Oman)
AR-YE	Arabic (Yemen)	**AR-SY**	Arabic (Syria)
AR-JO	Arabic (Jordan)	**AR-LB**	Arabic (Lebanon)
AR-KW	Arabic (Kuwait)	**AR-AE**	Arabic (U.A.E)
AR-BH	Arabic (Bahrain)	**AR-QA**	Arabic (Qatar)
EU	Basque	**BG**	Bulgarian
BE	Belarusain	**CA**	Catalan
ZH-TW	Chinese (Taiwan)	**ZH-CN**	Chinese (PRC)
ZH-HK	Chinese (Hong Kong SAR)	**ZH-SG**	Chinese (Singapore)
HR	Croatian	**CS**	Czech
DA	Danish	**NL**	Dutch (Standard)
NL-BE	Dutch (Belgium)	**EN-AU**	English (Australian)
EN-US	English (United States)	**EN-GB**	English (United Kingdom)
EN-BZ	English (Belize)	**EN-CA**	English (Canadian)
EN-NZ	English (New Zealand)	**EN-IE**	English (Ireland)
EN-ZA	English (South Africa)	**EN-JM**	English (Jamaica)
EN-CB	English (Caribbean)	**EN-TT**	English (Trinidad)
ET	Estonian	**FO**	Faeroese
FA	Farsi	**FI**	Finnish
FR	French (Standard)	**FR-BE**	French (Belgium)
FR-CA	French (Canadian)	**FR-CH**	French (Switzerland)
FR-LU	French (Luxembourg)	**GD**	Gaelic (Scotland)
GD-IE	Gaelic (Ireland)	**DE**	German (Standard)

DE-CH	German (Switzerland)	**DE-AT**	German (Austria)
DE-LU	German (Luxembourg)	**DE-LI**	German (Liechtenstein)
EL	Greek	**HE**	Hebrew
HI	Hindi	**HU**	Hungarian
IS	Icelandic	**ID**	Indonesian
IT	Italian (Standard)	**IT-CH**	Italian (Switzerland)
JA	Japanese	**KO**	Korean
IV	Latvian	**IT**	Lithuanian
MK	Macedonian (FYROM)	**MS**	Malaysian
MT	Maltese	**NO**	Norwegian
PL	Polish	**PT-BR**	Portuguese (Brazil)
PT	Portuguese (Portugal)	**RM**	Rhaeto-Romanic
RO	Romanian	**RO-MO**	Romanian (Republic of Moldova)
RU	Russian	**RU-MO**	Russian (Republic of Moldova)
SZ	Sami (Lappish)	**SR**	Serbian (Cyrillic)
SK	Slovak	**SL**	Slovenian
SB	Sorbian	**ES**	Spanish (Spain)
ES-MX	Spanish (Mexico)	**ES-GT**	Spanish (Guatemia)
ES-CR	Spanish (Costa Rica)	**ES-PA**	Spanish (Panama)
ES-DO	Spanish (Dominican Republic)	**ES-VE**	Spanish (Venezuela)
ES-CO	Spanish (Colombia)	**ES-PE**	Spanish (Peru)
ES-AR	Spanish (Argentina)	**ES-EC**	Spanish (Ecuador)
ES-CL	Spanish (Chile)	**ES-UY**	Spanish (Uruguay)
ES-PY	Spanish (Paraguay)	**ES-BO**	Spanish (Bolivia)
ES-SV	Spanish (El Salvador)	**ES-HN**	Spanish (Honduras)
ES-NI	Spanish (Nicaragua)	**ES-PR**	Spanish (Puerto Rico)
SX	Sutu	**SV**	Swedish
SV-FI	Swedish (Finland)	**TH**	Thai
TS	Tsonga	**TN**	Tswana

TR	Turkish	UK	Ukrainian
UR	Urdu	**VE**	Venda
VI	Vietnamese	**XH**	Xhosa
JI	Yiddish	**ZU**	Zulu

Upgrading the Document Converter

In Skyline version 6.9.2 a new PDF converter was included which requires Neevia 6.8 to be installed. Please make sure that you have the Neevia Document Pro registration key that ePrint provided when you requested the Upgrade.
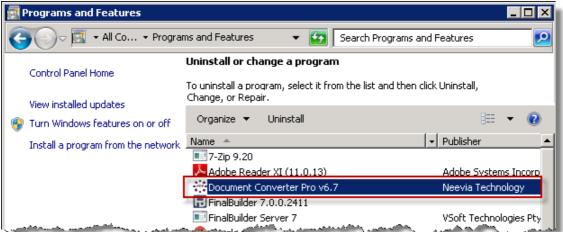
1. Preparing for the Upgrade

To prepare for the upgrade:

1. Open Services and stop the Neevia service (DC Start), PDF converter (Skyline Converter) and PDF scheduler (Skyline Scheduler).
    If you are unable to stop the PDF Converter service you need to:

    1. Open Task Manager [right mouse click the task bar and select the option **Start Task Manager**].

    2. View the Details tab.

    3. Select **NodeService.exe** and click **End Task**.

2. If your Document Converter is not Neevia 6.8 you need to uninstall the document converter.
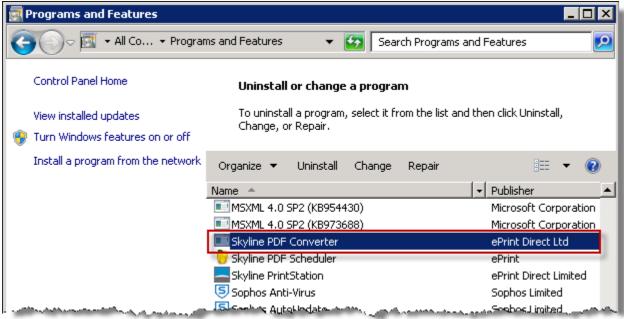
3. Check that Neevia has been completely removed using explorer.

    1. If the folders C:\Program Files (x86)\neevia.com or C:\Program Files (x86)\neeviaPDF.com are still listed you need to uninstall the image pack.

    2. Manually remove any Neevia folders using explorer.

4.   Uninstall the Skyline PDF converter.
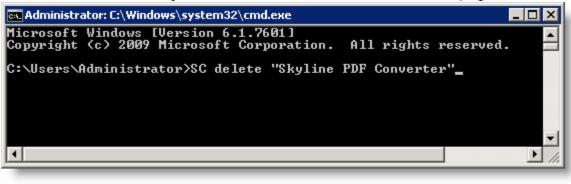
If the Skyline PDF Converter is not listed in the control panel > Programs and Features window you will need to delete it from the command line prompt.

a)   Open the command line in administrator mode. Right mouse click and select **Run as Administrator**.

b)   Enter the text **SC delete "Skyline PDF Converter"**. Press enter to delete the program.

2. Installing Neevia DCPro

Before you begin the Neevia installation make sure that you have the product registration information available.

To install Neevia DCPro:

1. Browse to http://download.eprint.net/Installation/Skyline/ and download the file **3-Neevia Document Converter.zip**.

2. Unzip the Neevia dcpro 6.8 file. Right mouse click the file and open the file **Properties**. If the Security setting states "*This file came from another computer and might be blocked to help protect this computer*", click **Unblock**.

3. Double click 🗗**dcpro.exe** to start the installation.

    a) The License Agreement window opens. Select **I accept the agreement** then click **Next** to continue.

    b) The Destination Location window opens. Click **Next** to continue.

c)   The Start Menu Folder window opens. Click **Next** to continue.

d)   The Icons window opens. Click **Next** to continue.

e)   The summary window opens. Click **Install** to continue.

f)   The Product Registration window opens. Select **Enter registration info** and enter the registration details that ePrint supplied. Click **Next** to continue.

g) The program is installed. When the installation has been completed the window opens where you can click **Finish** to exit the installation.

3. Check that a program called Image Pack is listed.

If the program is missing you will need to install it.

1. Browse to http://download.eprint.net/Installation/Skyline/ and download the file **4-Neevia Image Pack.zip**.

2. Unzip the file.
Right mouse click the file and open the file **Properties**. If the Security setting states "*This file came from another computer and might be blocked to help protect this computer*", click **Unblock**.

3. Double click **imagepack.exe** to start the installation & follow the instructions.

4.   Open [PDF] Neevia Converter and from the **Settings** drop down menu select **Advanced Settings**.

    a)   The Advanced Settings window opens. Select **Launch as Windows Service** and then click **Configure**.
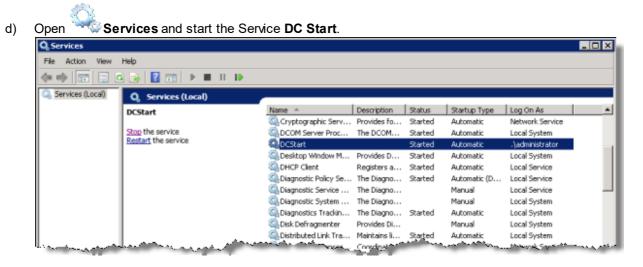
    b)   The Configure Windows Service window opens.

       1.   Click **Browse** and select **NeeviaPDF**.

       2.   Enter the password & confirm the password for the NeeviaPDF account which should be Rem0tePr1nter.

3. Make sure that the following options are selected then click **OK** to save the information.

- Adjust DCOM settings for MS Office Apps.

- Restart Service after 1000 conversions.

- Restart Service after 10 consecutive conversion errors.

c) Close the Neevia Converter.

d) Open ⚙ **Services** and start the Service **DC Start**.

3. Checking the DCOM Settings

The Neevia PDF Converter needs to talk to the software that the documents were originally created in. It uses a program called DCOMCNFG to communicate with the original software. Permissions need to be updated for DCOMCNFG and each software program that files will be created in before being sent to the PDF Converter.

To check the DCOM Config permissions:

1. Open **Administrative Tools** and double click **Component Services**. Make sure that you are logged in with your usual administrator name and password.

2. Open the folder DCOM Config.
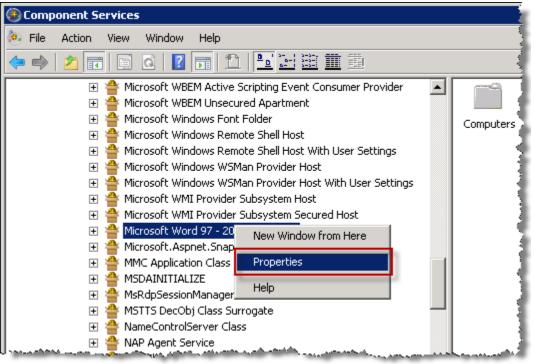
1. Select **Component Services** > **Computers** > **My Computer** > **DCOM Config**.

    If you get a DCOM Configuration Warning window open where you are asked if you want to record an item click **Yes** each time the warning appears.

3. Scroll down the list to the software program that the Neevia PDF Converter will use. In the example below Microsoft Word 97 has been selected.

1. Right mouse click the selected program and select **Properties**.

ⓘ**Note:**

If you can not find the program you require listed close the window and click **Start > Run > mmc comexp.msc /32**. Then continue from step 2. The software programs should then be listed.

4. The Application Properties window opens. In the **Security** tab view check that the Permissions are all set as **Use Default**.

5. Repeat the procedure for each software program that NeeviaPDF will need to convert e.g Excel, PowerPoint etc.

4. Checking the Neevia Settings

To check the Neevia Settings:

1. Open [icon] Neevia Converter and from the **Settings** drop down menu select **Folders**.

2. The Input Folders window opens.

    1. Click **Edit Settings**.

3. The Edit Input Folder Settings window opens.

    1. Click the **Document Parsers** tab.

4.   The Edit Input Folder Settings window opens.

1.   Select the **PSPDF** icon.

2.   Click **Edit**.

5.   The Edit Parser Settings window opens,
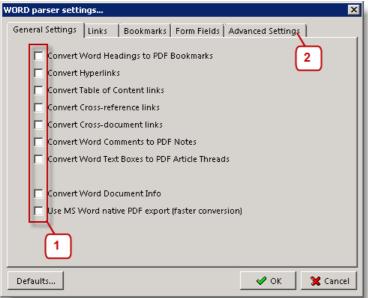
1.   Click **Advanced Settings...**.

6. The PSPDF parser Settings window opens.

    1. Select the option **Disable PDF to PDF Conversion**.

    2. Click **OK**.

7. You return to the Edit Parser Settings window. Click **OK** to save your settings and close the window.

8. At the Edit Input Folder Settings window select the **Word** icon and click **Edit**.

9. The Edit Parser Settings window opens. Click **Advanced Settings**.

10. The Word parser settings window opens.

    1. Remove all the ticks.

    2. Click the **Advances Settings** tab.

11. The Word parser settings window opens.

    1. Select the option **Convert custom page sizes**.

    2. Select the macros option **Disable All**.

    3. Click **OK**.

12. You return to the Edit Parse Settings window. Click **OK** to save your settings and close the window.

13. At the Edit Input Folder Settings window select the **Excel** icon and click **Edit**.

14. The Edit Parser Settings window opens. Click **Advanced Settings**.

15. The Excel parser settings window opens.

    1. Remove all the ticks.

    2. Click the **Advances Settings** tab.

16. The Excel parser settings window opens.

1. Select the option **Detect and convert custom page sizes**.

2. Select the macros option **Disable All**.

3. Click **OK**.

17. You return to the Edit Parse Settings window. Click **OK** to save your settings and close the window.

18. At the Edit Input Folder Settings window select the **PowerPoint** icon and click **Edit**.

19. The Edit Parser Settings window opens. Click **Advanced Settings**.

20. The PowerPoint parser settings window opens.

1. Remove all ticks except for the option **Detect and convert custom page sizes**.

2. Click **OK**.

21. You return to the Edit Parser Settings window. Click **OK** to save your settings and close the window.

22. At the Edit Input Folder Settings window select the **Publisher** icon and click **Edit**.

23. The Edit Parser Settings window opens. Click **Advanced Settings**.

24. The Publisher parser settings window opens.

1. Select the option **Detect and convert custom page sized**.

2. Click **OK**.

25. You return to the Edit Parser Settings window. Click **Apply** to save your changes and close the window.

26. Close Document Converter. When you are asked are you sure you want to close the Service Config interface click **Yes**.

5. Installing the New PDF Converter
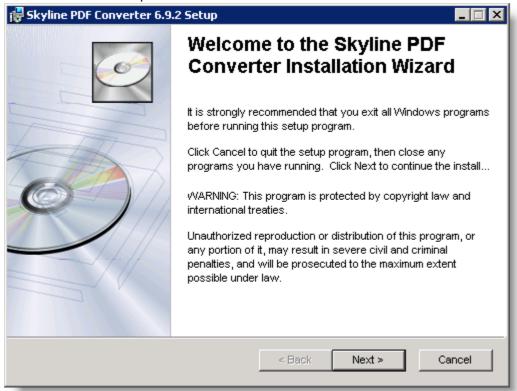
To install the PDF Converter:

Download the Skyline upgrade utility if not already done from www.eprint.net/support/downloads.aspx.

1. Browse to http://download.eprint.net/Upgrade/PDF_Converter_6_9_2/ and download the file **Skyline PDF Converter 6.9.2.zip**.

2. Unzip the Skyline PDF Converter 6.9.2 file. Right mouse click the file and open the file **Properties**. If the Security setting states "*This file came from another computer and might be blocked to help protect this computer*", click **Unblock**.

3. Double click 🖥 **Skyline PDF Converter 6.9.2.exe** to start the installation.

   a) The Welcome window opens. Click **Next** to continue

   b) The License Agreement window opens. Select **I accept the license agreement** and click **Next**.

c) The Installation Prerequisites window opens. Click **Next** to continue.

d) The Ready to Install window opens. Click **Next** to continue

e) The Completed window opens. Click **Finish** to exit the installation.

3. The PDF converter program is open.

4. Minimize the Skyline PDF Converter Setup window.

6. Start the PDF Converter Service

The PDF converter service needs to be started.

To start the PDF Converter Service:

1. Open **Services** and locate **Skyline PDF Converter**.

2. View the properties of the Skyline PDF Converter service by right mouse click the service and select Properties.

3. The Properties widow opens. Change the Startup type to **Automatic**.

4.   Click the Log On Tab. Select **This Account** and make sure that the local administrator account details are showing. Use the Browse button to enter the details if required.

5.   Click **Apply** then **OK** to save the changes.

6.   Start the PDF Converter Service.

7. Testing the PDF Converter

The converter is now ready to be tested.

1.   Maximize the Skyline PDF Converter Setup window.

2.   Check the location details of the Skyline Converter.

The default entries are:

- SQL Instance - .\Skyline

- Username - Skyline

- Password - Skyline

3.   Click **Connect**. As you have run an upgrade all the configuration details should be automatically completed.

4.   From a Skyline website test the converter by uploading documents of all the different types that the users will send. The common ones are Word, Excel, PowerPoint, Publisher. PDF and a zipped file.

5. If all files are correctly converted close the PDF converter application.

6. Make sure that the PDF Converter Service is started.

7. Do one final test by converting the files again from a website. If all is OK you have successfully upgraded the document converter.

Opening the PDF Converter

After the initial installation of the PDF Converter there may be an occasion that you will want to open the converter, possibly to amend any of the settings.

To open the PDF Converter:

1. Locate **SkylinePDFConverterSetup.exe** which by default in the folder C:\Program Files (x86)\Skyline \Skyline PDF Converter.

2. Right mouse click on the **SkylinePDFConverterSetup.exe** file and select **Run as administrator** from the menu. If you just double click the file you can get an error when the program tries to connect to the database.

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