

Version: 7.6.0.8



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# Introduction

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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

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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 <u>http://localhost</u> 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.

- 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)
- 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 <u>Register as a New User</u><sup>D<sub>306</sup></sup> 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 <u>Creating & Managing Users</u><sup>D<sub>27</sub></sup>.</sup></sub>

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.

#### \rm 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.

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

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**.

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

Example of exported data in Excel

#### **Adding Users**

Skyline is set up for Database authentication where User Names and Passwords are stored in the database SkylineMembership. Initially there will be no users on the system. Users can add themselves to this database if the option <u>Registration - Show Register new user</u><sup>D47</sup> is enabled on the log in page or user accounts can be created by a Skyline administrator.



- 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 <u>Registration New Users Must Be Approved</u><sup>D<sub>33</sup></sup> 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.</sup></sub>

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

#### To add users to the current portal:

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



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

Add a new user		
Username	Anne Webb	7-1
Password	2o!Kj%Y8	Re Generat
Confirm Password	2o!Kj%Y8	_
Email	anne.webb@eprint.net	3
Send username and pass	word to the user new	
4	Create User	Back
_		

1. Enter the user's name.

2

Click Generate. The password will be automatically generated.

When a password is generated the password criteria are not applied. When the user changes their password the rules are applied to their entry.

- 3. Enter the user's email address. Tick the option **Send username and password to the user new**.
- 4. Click Create User. The new account will be created. The new user will receive an email containing the details of their account.
- 5. You will see the message "Your account has been successfully created". Click **Continue** to finish the process. An email will be sent to the user if the option was selected.



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

The wording of the "Your {portal\_name} user account" email can be amended.

#### To amend the email:

@

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

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 *i* to edit the **Your {portal\_name} user account** email.

		A user account has been created for you on the Skyline portal (url	). Your login details are:
		Usemame: {usemame}	
Email to new users when created by     Your {port     an Administrator	rtal_name} user account	Password: {password}	
		You can change your password to something more memorable o http://lurll/UserAdmin/Default.aspx	n the Preferences page
Email Subject			
Your (portal_name) user account			
Email Body			
B Z ∐ ske ≡ ≡ ≡ <b>≡ </b>	E IE 🔒 😣		
A user account has been created for you on the Skyline	e portal {uːʃ]. Your login details	ares	
Username: {username}			
Password: {password}			
You can change your password to something more mer	emorable on the Preferences pa	age http://[url]/UserAdmin/Default.aspx	
P > RemoveElement			
Save Cancel			

When new users have been added they need to be activated. The icon **①** 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**.



<u>Users</u> Manage users for current Portal

3. Load all users that are not approved.

🕂 Add a new user	All Users 🔹	ら Load
	💄 All Users	
Username	Users Not Approved	
	Duplicate Users	T
non Vanstone	Ø Users with no email	ber@eprint.net

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

P	Theresa Green	annette.webber@eprint.net	09/12/2019 17:07:28	Approver, User
Theres	a Green	Not Approved		
		Send email to Reset Password		
		Email: annette.webber@eprint.net	Portal URL to use in email: localhost	•
🗸 U	pdate 🗙 Ca	ancel		Delete User and ALL user data

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 *P* to edit the **Your new account has been activated** email.

1	nail to user when set Active Your new account has been activated 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.
Ema	ubject
You	ew account has been activated
Ema	lody
B	/ 亚▲ 新香酒■■ 得得任任 象 😣
acc	
<u>P</u> >	noveElement
Sa	Cancel

#### **Searching for Users**

	Username	Email	Last Login Date	Orders	Roles	Not Approved
	Anne	T				
Í	Anne Webb	annette.webber@eprint.net	17/12/2019 10:39:01	41	Administrator, Approver, Editor, Manager, Staff, User	
P	annette.webber@eprint.net	annette.webber@eprint.net	24/10/2017 09:14:30	0	Administrator, Manager, Staff, User	
K	▲ 1 ▶ ▶ Page Size:	15 💌				2 items in 1 page

#### 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.

🕂 А	dd a new user All	NoFilter	📘 Export to
		Contains	
	Username	DoesNotContain	Last Lo
	Ann	StartsWith	
1	Aaron Vanstone	EndsWith	12/11/
	Annua MaDanald	EqualTo	
<i>•</i>	Angus McDonald	NotEqualTo	12/11/
0	April Showers	GreaterThan	28/11/
I	Bob Jones	LessThan	07/05/
Ì	Brian Dawson	GreaterThanOrEqualTo	03/12/
1	Brian Lawn	LessThanOrEqualTo	09/12/
1	Charles Taylor	Between	04/11/
1	Chris	NotBetween	
<i>•</i>	Chris	IsEmpty	11/09/
0	Chris Topper	NotIsEmpty	03/09/
I	Christmas Ives	IsNull	12/11/
P	Cuthbert Sewell	NotIsNull	17/12/

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.

	Username	Email	Last Login Date	Orders	Roles	Not Approved
	Click here to sort	T				
P	Aaron Vanstone	annette.webber@eprint.net	12/11/2019 09:27:07	2	Manager, User	
P	Angus McDonald	annette.webber@eprint.net	12/11/2019 16:40:43	1	User	
P	Anne Webb	annette.webber@eprint.net	17/12/2019 10:26:17	41	Administrator, Approver, Editor, Manager, Staff, User	
P	annette.webber@eprint.net	annette.webber@eprint.net	24/10/2017 09:14:30	0	Administrator, Manager, Staff, User	
P	April Showers	annette.webber@eprint.net	28/11/2019 11:36:59	6	User	
P	Bob Jones	annette.webber@eprint.net	07/05/2019 14:50:53	1	User	
P	Brian Dawson	annette.webber@eprint.net	03/12/2019 13:35:22	1	Manager, User	

#### **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	
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**.



<u>Users</u> Manage users for current Portal

3. Load all users that are not approved.

<table-cell-rows> Add a new user</table-cell-rows>	All Users 🔹	ら Load
	💄 All Users	
Username	Users Not Approved	
	🔲 Duplicate Users	T
🔌 🛛 Aaron Vanstone	Ø Users with no email	ber@eprint.net

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

Ì	Theresa Gre	een	annette.webber@eprint.net	09/12/2019 17:07:28	1	Approver, User	θ
There	esa Green		🗹 Not Approved				
			Send email to Reset Password				
			Email: annette.webber@eprint.net	Portal URL to use in e	mail: (	localhost 💌	
<b>V</b> 1	Update	🗙 Cance	el				Delete User and ALL user data

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.					
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.



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

1	Theresa Green	annette.webber@eprint.net	09/12/2019 17:07:28	Approver, User
Theresa	a Green	<ul> <li>Not Approved </li> <li>Send email to Reset Password</li> </ul>		
	22	Email: annette.webber@eprint.net	Portal URL to use in email: localhost	•
🗸 n	pdate 🗙 Cance	el		Delete User and ALL user data

- 1. Select Not Approved **①**.
- 2. Click Vpdate
- 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	T				
Ø	Theresa Green	annette.webber@eprint.net	09/12/2019 17:07:28	1	Approver, User	0
M	▲ 1 ► ► Page Site	ze: 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><sup> $D_{43}$ </sup> or on suspending user accounts see <u>Suspending Users</u><sup> $D_{35}$ </sup>. 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.

Users

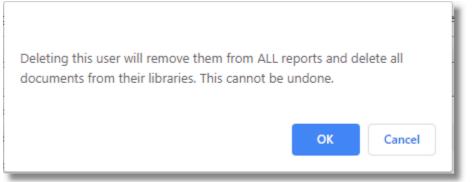


Manage users for current Portal

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

1	Anne Webb	annette.webber@eprint.net	10/12/2019 16:21:44	Administrator, Approver, Editor, Manager, Staff, User	
Anne	Webb	🗆 Not Approved			
		Send email to Reset Password			- 1
		Email: annette.webber@eprint.net	Portal URL to use in	email: eprint.ngrok.io 💌	
<ul> <li>Image: A start of the start of</li></ul>	Update 🗙	Cancel		Delete User and ALL user data	

- 1. Click 🔲 Delete User and ALL user data
- 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<sup>1</sup> <sup>649</sup>.

### 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.

User Groups			
South	Search group 🔍 Ӷ Sav	/e	Search users
South West	Fred Bear George Hill India Jewel Minnie Netherfield		Adam Becks admin Anne Webb Bob Jones Carrie Osp developer
		+	Edgar Falls Karl Levine Nettie Oliver Pine Paul
			Peter skylinehost SteveD Tester Tester2969

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.

roject A 🛛 📘 🗙	🛉 Search group	R Save	Search users	
er Groups	Project A (0)		User not in this Group (20)	
East			Adam Becks	
" North			admin	
			Anne Webb	
Project A			Bob Jones	
" South			Carrie Osp	
West			developer	
			Edgar Falls	
			Fred Bear	
	No users in this group	-	George Hill	
	no azis ar ins group	-	India Jewel	
			Karl Levine	
			Minnie Netherfield	
			Nettie	
			Oliver Pine	
			Paul	
			Peter	

1) Select the group that you want to add users into. Then select the user in the User not in this

**Group** list and click *the user will be added to the group.* 

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

	p	4	
User	r not in this Group (20)		
Ada	am Becks		*
adm	min		
Ann	ne Webb		
Bob	b Jones		
Carr	rrie Osp		
Eda	par Falls		
Indi	ia Jewel		
Karl	'l Levine		
Min	nnie Netherfield		
Net	ttie		
Oliv	ver Pine		
Pau	ul		
Pete	er		
skyl	linehost		_
Stev	veD		*

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 <u>Administrator</u><sup>D39</sup>, <u>Editor</u><sup>D41</sup>, <u>Manager</u><sup>D40</sup>, <u>Approver</u><sup>D41</sup>, <u>Staff</u><sup>D41</sup> and <u>User</u><sup>D40</sup>.

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			
2	Users Manage users for current Portal	<b>8</b> 8	Roles Manage user roles for current Portal
Produc	ts		
E	Select Products Manage and assign products for your portal	1	Manage Template Permissions Manage the permissions on templates created in TemplateNanager
Conter	ıt		
-	Custom Pages Add, Edit & Remove custom website pages		Selected Custom Pages Assign custom website pages to portals
2	<u>Tabs</u> Add edit tabs		
Orders			
	Select Address Form Assign a delivery form to a portal	<i></i>	Select Delivery Form Assign a delivery form to a portal
4	<u>Order Statuses</u> Create, edit & delete order statuses		External Accounts Create external accounts connections
	Portal External Accounts Assign accounts to a portal	<b>I</b>	Accounts Add, amend and delete internal account codes
2	Order Numbers Set a start order number for a portal		Accounts and Pricing Setup your accounts and payment provider
ò	Approval Options Setup the options available to approvers	2	User Accounts Allocare accounts to users
4	Approval Users Allocate users to approvers		
Config	uration		
Ş	Skyline Driver Settings Add and update the Skyline driver settings	<b>R</b>	License Settings Add and Renew License
•	Uploaded Document Types Add and Update Uploaded Document Types	@	Email Settings Add and update email settings
<b>m</b>	System Emails Edit the subject and text of system emails		
Portals	1		
30	Portal Configuration Manage the configuration options for this portal	>>	Portal Watermark Select watermark file for portal
~	Website Languages Add edit Website Languages	S.	Portal URL's Create and delete websites in the current portal

hared to users		
Library Name	Owner Username	
Exam Papers	Anne Webb	Manage Catalogue Permissions
Test Docs	Anne Webb	Manage Catalogue Permissions
Project Alpha	Charles Taylor	Manage Catalogue Permissions
Skyline	Janet Vanstone	Manage Catalogue Permissions
Skyline	Vernon Pickle	Manage Catalogue Permissions
Skyline hared to user group Library Name		Manage Catalogue Permissions
Help Manuals	Anne Webb	Manage Catalogue Permissions
Research Papers	Anne Webb	Manage Catalogue Permissions

Administrators are also able to manage shared libraries<sup>1</sup><sup>300</sup> 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 global products<sup>D</sup><sup>SS</sup> are being used they will not have access to ProductManager or CostManager.

Reports		
	Table reports	Legacy Table Reports
<b>⊘</b>	Approval Status	
Orders		
<b></b>	<u>Live Orders</u> View Orders	

#### 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.

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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.

ITS Dee	ed to be approved	before they are releas	ed							Select Users
	User Name	Order ID	Document Name	Product	Account Code	Pages	Copies	Submitted Date	Required Date	Priority
0006	6065									
Ľ	Cuthbert Sewe	II 0006065	Skyline Website	A4 Plastic Comb Bound	1-111-1111- 1111	70	30	14/02/2017 09:58:00	16/02/2017	Not Confidential
0006	6066									
Ŀ	Brian Dawson	0006066	Upgrade Procedure	Collated Sets	2-222-2222- 2222	42	5	14/02/2017 10:02:00	15/02/2017	Confidential
	iew Details	Customer Details Skyline Website	History	Α	4 Plastic Comb	Bound			Laminated	Save
	ew Details		History A4 White 80gs			Bound ble Sided	Ţ	Black and White		Save
	ew Details	Skyline Website					<b>*</b>	Black and White		Save
_	ew Details	Skyline Website			▼ Dou		_	Black and White	-	The Save
_	ew Details	Skyline Website Document Front cover:		m	* Dou		*	Black and White	•	Save
_	ew Details	Skyline Website Document Front cover: Back cover:	A4 White 80gs	.m 111 Bi	Pour     Pour	Plastic con Coples	* * 10		•	Save
Dvervie	ew Details	Skyline Website Document Front covers Back covers Account Code	A4 White 80gs	m 111 8	Pour     Pour	ble Sided Plastic con	* * 10		· · · · · · · · · · · · · · · · · · ·	Save
_	ew Details	Skyline Website Document Front cover: Back cover: Account Code Account Name	A4 White 80gs	m 111 8	Pour     Pour	Plastic con Coples	* * 10	Price 16	· · · · · · · · · · · · · · · · · · ·	Save
_	ew Details	Skyline Website Document Front cover: Back cover: Account Code Account Name	A4 White 80gs	m 111 8	Pour     Pour	Plastic con Coples	* * 10	Price 16	· · · · · · · · · · · · · · · · · · ·	B Save

#### 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**

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

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

### To assign roles for a user:

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



Manage user roles for current Portal

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

Roles

Roles	
Administrator	Manage Users
Approver	Manage Users
Editor	Manage Users
Manager	Manage Users
Staff	Manage Users
User	<u>Manage Users</u>

- 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.

Users in role: Approl	2			
James Search Add Selected Users	ſ	Approver		Back
James Kirk	*	Username	Remove	3
James Speak		Anne Webb	×	_
		Cuthbert	×	
		SteveD	×	
		H I H Page size: 10	<ul> <li>3 items in 1 pages</li> </ul>	

- 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 <u>Suspending Users</u><sup> $D_{35}$ </sup>.

### 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.

Search Ad	d Selected Users	Approver	Ţ	Back
bigail Smith	*	Username	Remove	
dmin		Anne Webb	×	
ine Webb inette Webber		Anne webb		
d	=	Cuthbert	×	
ian Dawson		James Speak	×	
arles Taylor				
ris1		SteveD	×	
hristmas Ives uthbert		H + 1 > H Page sizes	10 - 4 items in	1 01000
ithbert Sewell		rage suc	10 4 Merris III	1 pages
svid Allen				
atty Pen				
ic Long				
ic West				
orence				
orence Ashby ed				
ed Smith				
reda				
	*			

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

## **Creating Login Options**

44

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 <u>Register as New User<sup>D47</sup></u> is enabled on the log in page. If required the registration process can be configured so that user's need to be <u>approved</u> <u>after registration<sup>D48</sup></u> to activate their account.
- User accounts can be created<sup>D42</sup> by a Skyline administrator.
- Users log in to Skyline with their existing corporate user name and password<sup>174</sup>.

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<sup>D53</sup> 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 <u>remember me next time option</u><sup>D56</sup> 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<sup>D54</sup>.
- 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 □<sup>62</sup>.

## 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.

Annette Annett		Portal	Portal Name	Expires	Portal ID	Authentication	HTTPS		Theme	
	/		Annette		81ecc57b-865c-447f-90bc-501df1b5bf60	Database		Portal URLs	Skyline	Û

Portal ID of the Portal Annette is highlighted.

### To add a landing page:

46

63

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

₩ <u>View Basket (0)</u>	Preferences	Downloads	Edit	Admin	<u>Management</u>	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  $\checkmark$  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 <u>role of User<sup>D</sup></u><sup>39</sup>. By default this option is enabled. If you remove this option user accounts can be created by a Skyline administrator.

Username		
Password		
🗌 Remember me	next time	
		Log In
Register as New I forgot my passy		

Example Login Window

#### To enable or disable the Register as New User link:

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

	Users Developed (o)	L purchase and	L. Barnette and	L eute	A day in		1
▦	<u>View Basket (0)</u>	Preferences	Downloads	Ealt	Aamin	Management	Loqout

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

2

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 <u>default configuration option</u><sup> $D_{78}$ </sup>. 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

48

2

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:

Skyline Manual

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

Portal Configuration

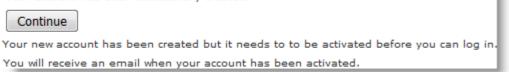
Manage the configuration options for this portal

- 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  $\swarrow$ .
- 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.

### Register

Your account has been successfully created.



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.



System Emails Edit the subject and text of system emails

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

/	Email to user when set Inactive after registration	Your new account needs to be activated	Your new account has been created but it needs to to be activated before you can log in. Yo will receive an email when your account has been activated.
Ema	il Subject		
You	ir new account needs to be activated		
Ema	il Body		
B	x II aba 📰 🗃 📰 📰	建建田田 😫 😣	
act	ivated.	eeds to to be activated before you car	log in. You will receive an email when your account has been
<u>P</u> >	RemoveElement		
Sa	ve Cancel		

50	Skyline	Manual
----	---------	--------

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  $\checkmark$  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 Admin - Users page to activate this user.	been activated. Log in the the
Emi	il Subject			
	ew user has registered			
Ema	il Body			
B	/ ⊻ 🜬 🗉 🗃 📰 🜌	律律任日 😣 😣		
An	ew user '(username)' has registered but	their account has not been activate	ed. Log in the the Admin - Users page to activate this user.	
P>	RemoveElement			
Sa	Cancel			

The icon **①** 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**.



<u>Users</u> Manage users for current Portal

3. Load all users that are not approved.

<table-cell-rows> Add a new user</table-cell-rows>	All Users 🔹	ら Load
	💄 All Users	
Username	Users Not Approved	
	Duplicate Users	T
🖉 🖉 Aaron Vanstone	Ø Users with no email	ber@eprint.net

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

P	Theresa Green	annette.webber@eprint.net	09/12/2019 17:07:28	Approver, User
Theres	a Green	Not Approved		
		Send email to Reset Password		
		Email: annette.webber@eprint.net	Portal URL to use in email: localhost	•
🗸 N	pdate 🗙 Car	ncel		🛅 Delete User and ALL user data

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 *P* to edit the **Your new account has been activated** email.

1	Email to user when set Active	our new account has been activated	Your new account has now been activated. You can now log in with and password that you used when creating your new account.	h the username '(username)'
Ema	ail Subject			
You	ir new account has been activated			
Ema	ail Body			
B	I I I ale 📰 🗃 📰 🕎 🕸	: 課 注 注 🔒 😣		
	ur new account has now been activated. You	ו can now log in with the username 'נ	sername)" and password that you used when creating your new	
<u>P</u> >	RemoveElement			
Sa	Cancel			

## Email Address Required

By default an email address has to be entered when a new user <u>self registers</u><sup> $D_{47}$ </sup> or an administrator <u>creates a</u> new user<sup> $D_{28}$ </sup>. 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.

₩	<u>View Basket (0)</u>	Preferences	Downloads	Edit	Admin	<u>Management</u>	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 otin .
- 5. Click 💾 to save the setting.

To configure **Authentication - Require Email** for all portals associated with Skyline use the <u>default</u> <u>configuration option</u><sup> $D_{78}$ </sup>. 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.

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## 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 <u>automatically remember the log in details</u><sup>D 56</sup> 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.

Username	Anne Webb			
Password	•••••			
Remember me next time				
Log In				
Register as New User				
I forgot my password				

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

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

₩ <u>View Basket (0)</u>	Preferences	Downloads	L Edit	Admin	Management	Lionout
H			1 1000	<u></u>		

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.
- To amend this option click *P*.
- 5. Click 💾 to save the setting.

To configure **Authentication - Remember Me Visible** for all portals associated with Skyline use the <u>default</u> <u>configuration option</u><sup> $D_{728}$ </sup>. 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.

	₩ <u>View Basket (0)</u>	Preferences	Downloads	Edit	Admin	<u>Management</u>	Logout
--	--------------------------	-------------	-----------	------	-------	-------------------	--------

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



<u>Portal Configuration</u> Manage the configuration options for this portal

- 3. Find Authentication Login Cookie Expiry (hours) in the list.
- 4. To amend this option click  $\checkmark$ . 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 <u>default configuration option</u><sup> $D_{728}$ </sup>. 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 option  $\square^{54}$ .

Username Anne Webb						
Password	•••••					
Remember me next time						
Log In						
Log In Register as	New User					

#### 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 <u>default configuration option</u><sup> $D_{728}$ </sup>. 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.

Username	Anne Webb							
Password	•							
Remember me next time								
I have read and agree to the Terms and Conditions								
Log In								
Register as New User								
I forgot my password								

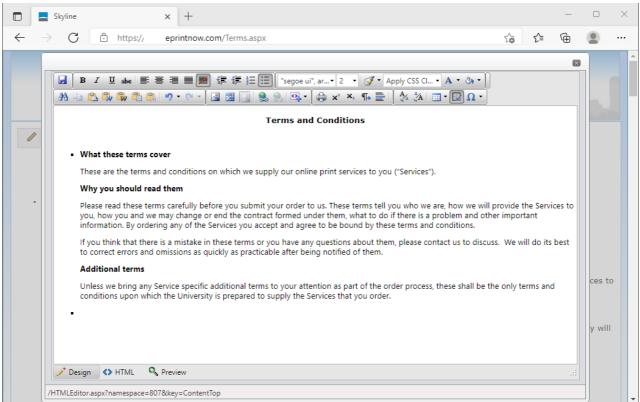
Example of a Login window with the Terms and Conditions option

## To add the Terms and Conditions option:

- 1. Login to Skyline with <u>Editor</u><sup>D39</sup> rights as well as Administrator rights.</sup>
- 2. Click the **Edit link** to turn Edit on.
- 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.

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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.

		Skyline		×	+												—		$\times$
¢		$\rightarrow$ C	https://	epr	rintnow.cor	m/terms.as	spx								τõ	€_≡	Ē		
			the state																-
			de			1 M	line Mine	a.		R.			π.	L.					
	P						Terms	s and	Cond	ditions									
	• 1	These tern	ns																
	'	What the	se terms cover																
	٦	These are	the terms and co	onditio	ons on whi	ch we sup	oply our o	online	print	t service	es to yo	ou ("Se	rvices").						
	Why you should read them																		
	F	Please rea	d these terms ca	refully	/ before yo	ou submit	your orde	der to ເ	us. Th	These ter	rms tel	ll you w	vho we a	re, how	we will	provide	the Se	rvices to	0
	you, how you and we may change or end the contract formed under them, what to do if there is a problem and other important																		
	information. By ordering any of the Services you accept and agree to be bound by these terms and conditions.																		
		If you think that there is a mistake in these terms or you have any questions about them, please contact us to discuss. We will do its best to correct errors and omissions as guickly as practicable after being notified of them.																	
					is quickly i	as proceed		· song	9.100										
																		Back	

- 7. You will be logged out in order to refresh the whole session. Log back into Skyline.
- 8. Click the Edit link to turn editing off.
- 9. Click the Admin Link.
- 10. In the Portals section click **Portal Configuration**.
- 11. Amend the following configurations:
  - Change the option Login Show Terms and Conditions Checkbox to True.
  - Amend the option Login Terms and Conditions Cookie Expiry if required.
  - Amend the option Login Terms and Conditions Link Text if required.



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

# Adding Login Messages

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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 up December.	ograde this website will be unavailable from midnight Friday 14 to 06:00 Saturday 15	
Username Password Log In	Anne Webb	

#### 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.

Yo	ou 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 upgr December.	Due to an upgrade this website will be unavailable from midnight Friday 14 to 06:00 Saturday 15 December.							
You can now p	lace an order for printing dissertations.							
(	Anne Webb •							

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

Ì	-	Login - Message to users	You can now place an order for printing dissertations.
P	-	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



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.

Username
Password
Remember me next time
Log In
Register as New User
I forgot my password

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

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

₩ <u>View Basket (0)</u>	Preferences	Downloads	Edit	Admin	Management	Logout

## 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 <u>default</u> <u>configuration option</u><sup> $D_{78}$ </sup>. 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.

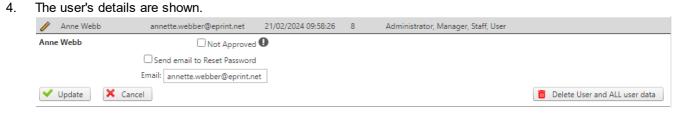
#### To reset a user's password:

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



<u>Users</u> Manage users for current Portal

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



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





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: <u>Reset Password</u>

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**.
  - @

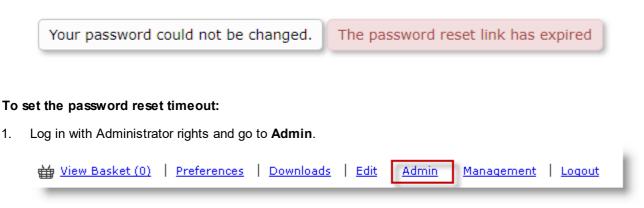
System Emails Edit the subject and text of system emails

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

Ø	Change Password	Password Request	A new password has been requested. If you did not request a ne email. Your password will not be changed yet been changed. TE please click the following link: {ChangePasswordLink}	
	I Subject word Request			]
B A ne			ignore this email. Your password will not be changed yet been	
		-	~~	
Sav	e Cancel			

#### 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.



1. In the Portals section click Portal Configuration.



- 2. Find Password Reset Token Timeout (minutes) in the list.
- 3. To amend this option click  $\swarrow$  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 <u>default configuration option</u><sup>D728</sup>. 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<sup> $D_{71}$ </sup>. There is also a facility to enter a regular expression<sup> $D_{72}$ </sup> 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<sup>D67</sup>
- numbers<sup>168</sup>

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- special characters<sup>169</sup>
- upper-case characters<sup>D</sup><sup>70</sup>.

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.

	Change your password		
	New passwords must meet the password policy requirements		
	<ul> <li>It must be at least 3 characters in length</li> <li>It must include at least one number</li> </ul>		
<ul> <li>It must include at least one of the following characters !\$%^&amp;*()+=@</li> </ul>			
	<ul> <li>It must include at least one uppercase character</li> </ul>		
	<ul> <li>Your password needs to be changed every 30 days</li> </ul>		
	Current Password		
	New Password		
	Confirm Password		
	Update Password		

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 <sup>[]</sup><sup>313</sup> 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.
  - C C

Manage the configuration options for this portal

3. Find Password Minimum Number of Characters.

Portal Configuration

- 4. To select a value between 0 and 16 click  $\checkmark$ . 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 <u>default configuration option</u><sup>D728</sup>. 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 <u>change</u> their password<sup>1333</sup> 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 pas	sword	
<ul><li>New passwords must meet the meet the password policy requirement</li><li>It must include at least one number</li></ul>		
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

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Manage the configuration options for this portal

- 3. Find Password Numbers Required.
- 4. To select a value between 0 and 8 click  $\checkmark$ . 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 <u>default</u> configuration option<sup>D</sup><sup>78</sup>. 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<sup>1313</sup> 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 le	east 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.
  - 22

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  $\checkmark$ . 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 <u>default</u> configuration option<sup> $D_{78}$ </sup>. 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<sup>1313</sup> but the new password that does not include any capital letters 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 uppercase character		
Current Password		
New Password		
Confirm Password		
Update Password		

#### 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.



<u>Portal Configuration</u> Manage the configuration options for this portal

- 3. Find Password Uppercase Characters Required.
- 4. To select a value between 0 and 8 click  $\checkmark$ . 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 <u>default configuration option</u><sup>D728</sup>. 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:

Portal Configuration

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

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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  $\checkmark$ . 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 <u>default configuration</u>  $\underline{option}^{\square_{78}}$ . These options are only available when you are logged in with Host privileges.

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#### 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 <u>http://regexlib.com/</u> 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<sup>1313</sup> 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.

<u>Portal Configuration</u> Manage the configuration options for this portal

- 3. Find Password Regular Expression.
- To enter a value click

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- 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

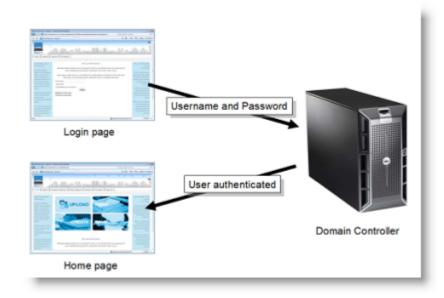
- It must be at least 3 characters in length
- It must include at least one number
- It must include at least one of the following characters !\$%^&\*()\_-+=@~#<,>.?
- It must include at least one uppercase character
- Your password needs to be changed every 30 days

Current Password	
New Password	
Confirm Password	
Update Password	

To configure **Password Regular Expression** for all portals associated with Skyline use the <u>default</u> configuration option<sup>1</sup><sup>278</sup>. 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 D<sup>81</sup>.

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<sup>D75</sup>.
- 2. Check error settings  $D^{76}$ .
- 3. Add domain name  $D^{77}$ .
- 4. Test LDAP Settings<sup>D</sup><sup>78</sup>.
- 5. Configure Network Authentication<sup>180</sup>.

#### **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.

₩ <u>View Basket (0)</u>	Preferences	Downloads	Edit	Admin	<u>Management</u>   <u>I</u>	.oqout

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



<u>Portals</u> Create, edit & delete 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.

Add A New Portal	
Portal Name	Portal URL
Admin UserName	Admin Email
Admin Password	Confirm Password
Apply look & feel from	Auto-Delete Date

- 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.



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 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.
- 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="ADServiceWindows" connectionString="LDAP://your.domainname:389/DC=your,DC=domainname" /> </connectionStrings>

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

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

<providers>

<!-- NB. Do not change the names of these providers -->

<clear />

<add name="Database" connectionStringName="SkylineMembership" 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"/>-->

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.

₩ <u>View Basket (0)</u>	Preferences	Downloads	Edit	Admin	<u>Management</u>   <u>Logout</u>	I
)						

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:

- 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.
- 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**

Skyline Manual

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

### To change the portal authentication:

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

₩ <u>View Basket (0)</u>	Preferences	Downloads	Edit	Admin	Management	Loqout

2. In the Portals section click Portals.

<u>Portal</u>	<u>5</u>	
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.

	Portal	Portal Name	Expires	Auto-Delete Date		HTTPS	П	Theme
₽ ×	abc abc.freus.com	abc	21/10/2012 00:00:00	25/10/2012 00:00:00	Database -		Portal URLs	Ť
					Network			

- 4. Change Database to Network on the drop down list.
- 5. Click 💾 Save.
- 6. Browse to the URL defined when you created the LDAP portal. You should be able to log in with a network username and password. The LDAP setting defined so far will allow any user for the domain to log into Skyline with their network username and password.

#### LDAP - ProductManager Access

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

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

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

Eile	<u>E</u> dit	⊻iew	Hi <u>s</u> tory	<u>B</u> ookmarks	<u>T</u> ools	<u>H</u> elp
S G	oogle					+
E	) 🕘 lo	icalhost				

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

₩ <u>View Basket (0)</u>	Preferences	Downloads	<u>Edit</u>	Admin	<u>Management</u>	<u>Loqout</u>

3. In the Portals section click Portals

<u>Portals</u> Create, edit & delete portals

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

	Portal	Portal Name	Expires Auto-Delete Date		HTTPS		Theme	
/	Network network.eprintoffice.com	Network		Network		Portal URLs	Skyline	×
1	Skyline localhost	Skyline		Database	F	Portal URLs	Skyline	
/	Test1 test2.eprintoffice.com test1.eprintoffice.com	Testl		Database	•	Portal URLs		×

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.

					•				
	Portal	Portal Name	Expires	Auto-Delete Date		HTTPS		Theme	
/	Network network.eprintoffice.com	Network			Network		Portal URLs	Skyline	×
/	<b>Skyline</b> localhost	Skyline			Database	Π	Portal URLs	Skyline	
/	Test1 test2.eprintoffice.com test1.eprintoffice.com	Testl			Database	-	Portal URLs	1	×

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

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

Wew Website URL		
Add 1		
buildserver	×	
192.000.0.00	×	
localhost	×	
	2	Back

- 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.

		Portal	Portal Name	Expires	Auto-Delete Date		HTTPS		Theme	
1	1	Network network.eprintoffice.com	Network			Network		Portal URLs	Skyline	×
/	•	Skyline buildserver 192.	Skyline			Database	п	Portal URLs	Skyline	
/	•	Test1 test2.eprintoffice.com test1.eprintoffice.com	Testl			Database	п	Portal URLs		×

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

#### To open ProductManager:



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

Skyline ProductManager	
http://	customer.eprintoffice.net
<b>.</b>	anne webb
Ô	×
Ren V	nember me Login Cancel
Version: 7.02.0	Line alle and and

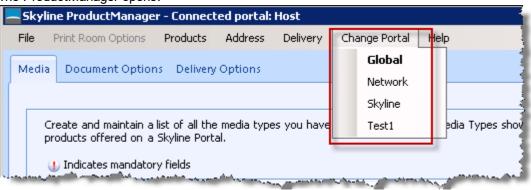
3. The connection details window opens. Enter the localhost machine name or IP address and click **Connect** 

📥 Skylir	ne ProductManag	er			×
Connect	to portal				
http://	customer.eprinto	office.net		Connect	
Proxy det	ails • Proxy Server				
Proxy	address		Pr	oxy port	
Usern	ame	Password	De	omain (Optional)	
Version:	7.0.2.0		Ok	Cancel	

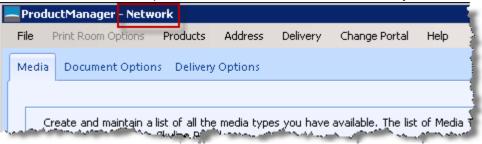
4. Enter the user name SkylineHost and password SkylineH0\$t, then click Log in.

#### 5. The ProductManager opens.

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- 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.

Password Log In	Username	anne.webb
	Password	•••••
Plaza anter your system logic upercome and password	Log In	
Please enter your system login username and password	Please enter	your system login username and password

#### 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'.
- Click 
   A 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 <u>default configuration</u>  $\underline{option}^{D_{78}}$ . These options are only available when you are logged in with Host privileges.

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# **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.

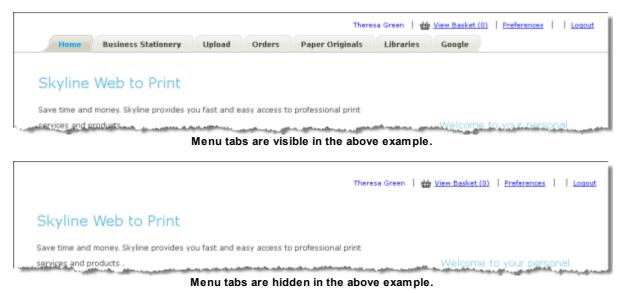
The features that are available for your users will depend how you have chosen to setup your portals.



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).



#### To Hide/Show Menu Tabs:

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- 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.
- To amend this option click *P*.
- 5. Click 💾 to save the setting.

To configure **Look And Feel - Use Menu Tabs** for all portals associated with Skyline use the <u>default</u> <u>configuration option</u><sup> $D_{728}$ </sup>. 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.

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- 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<sup>D</sup><sup>89</sup> 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. <u>Examples</u><sup>D89</sup> are shown at the end of this section.
- To amend this option click *P*.
- 5. Click 💾 to save the setting.

To configure **Look And Feel - Tab Style** for all portals associated with Skyline use the <u>default configuration</u>  $\underline{option}^{\square^{720}}$ . 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.

		ar	nnette   🕁 <u>View Bas</u> l	cet (1)   Prefe	rences   Do	wnloads   Edit   Admin   Management   Logout
Home	Business Stationery	Upload	Paper Originals	Libraries	Orders	
the spread and	and marine	frank .	and the second second	Januar .	<u></u>	6.6.2.255 Logsed in ast. Portal Administra

• Strip Style.



• Inbox Style.



• Mac Style.

annette   🕁 <u>View Basket (1)</u>   <u>Preferences</u>   <u>Downloads</u>   <u>Edit</u>   <u>Admin</u>   <u>Management</u>   <u>Logout</u>
Home Business Stationery Upload Paper Originals Libraries Orders
6.2.235 Logoed is as: Partal Administrator Administrator

• Custom Style.

	annet	te i 🕁 🗹	iew Basket (1)	Prefe	rences	Downloads	Edit	Admin	Management	t   Logout
На					pload	Paper	Origin			Orders
سرمس المناص	سيسي	un and a dark					Logged	in ası Pi	irtal Administrate	Admin Home

• Vista Style.

annette   🇰 <u>View Basket (1)</u>   <u>Preferences</u>   <u>Downloads</u>   <u>Edit</u>   <u>Admin</u>   <u>Management</u>   <u>Logout</u>
Home Business Stationery Upload Paper Originals Libraries Orders
6.6.2.255 Logged in asi, Portal Administrator   Admin Home

• Wizard Style.

			annette	View Basket (1)	Preferences	Downloads	Edit   Admin   Management   Logout
	Home	Business Stationery	Upload	Paper Originals	Libraries	Orders	
1		- Arman and		a a sub-su		6,6.2.2	55 Logged in as: Portal Administrator L Admin Home

• Theme Style.

	annette   🚔 Vie	w Basket (1)   Preferences	Downloads Ed	it   Admin   Ma	anagement   Logou
Home Business Stationery	Upload	Paper Originals	Libraries	Orders	

• Default Style.

			an	nette   🏰 <u>View Bask</u>	et.(1)   Prefe	rences   D	ownloads   Edit   Admin   Management   Logout
	Home	Business Stationery	Upload	Paper Originals	Libraries	Orders	
		and the second states in such			·		6.6.2.255 Logged is as: Portal Administrator   Admin Hemotor

# **Editing the Tabs**

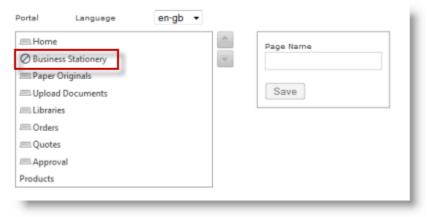
You are able to change the wording that is used on the tabs. For example, you might want to change the tab name 'Orders' to be 'My Orders'. If you use more than one language, select the tab language to be changed.

#### To change the tab names:

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



- Add edit tabs
- 3. A list of the tabs is shown. Tabs which are not available have Ø beside the tab name.



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

Portal	Language	en-gb 🔻		
-Home	1			Page Name
⊘ Busine	ess Stationery		Ψ.	My Orders
-Paper	Originals		_	
	d Documents			Save
Librari	es			
Orders	;			
Quote	5			
- Appro	val			
Products				

5. The tab name has been changed.

Portal	Language	en-gb	•		
-Home					Page Name
Ø Busines	ss Stationery			-	
I Paper C	Driginals			_	
-Upload	Documents				Save
— Librarie	15				
🕮 My Ord	lers				
Quotes					
-Approv	al				
Products					
_			_		

# **Upload Web Page**

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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<sup>D315</sup>.

				anne v	webb   🛗 <u>Viev</u>	<u>w Basket (0)</u>   <u>Prefere</u>	nces   Downloads   E	dit   <u>Admin</u>   <u>Management</u>   <u>Logout</u>
Skyline	lar and	-14						
Home	Upload	Paper Originals	Library	Orders	User Forms	FBI Business Card	FBI Production Page	
Your documen	ed <u>Support</u>	ed File Formats						
	Positio	n			File Name			
No records to	o display.							

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.

anne webb   🛱 <u>View Basket (0)</u>   <u>Prefer</u>	rences   Downloads   Edit   Admin   Management   Logout
Skyline Land Land Land Land Land Land Land Land	and the second sec
Home Upload Paper Originals Library Orders User Forms FBI Business Card	FBI Production Page
Upload Your Document to Print           Select           Proceed         Supported File Formats	
PLEASE NOTE. The service is currently only able to accept PDF file uploads.	

#### To re-start a service:

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



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

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

#### To stop checking the PDF Converter Service:

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



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.

DocumentType		Extension	. 1
/ Excel		tt.	î
			_
Document Type	Word		- 1
File Extension	Doc2		- 1
	Add C		- 1
			- 1
	3		- 1

- 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 in 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.

Proceed Supported File Formats	Use the Select button to upload one or more files. When all the selected files have been uploaded, click on the Proceed button
Position	File Name
No records to display.	

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 <u>default</u> <u>configuration option</u><sup> $D_{78}$ </sup>. 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

**Skyline Manual** 

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.

₩ <u>View Basket (0)</u>	Preferences	Downloads	<u>Edit</u>	Admin	<u>Management</u>	Logout
					20	

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



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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 <u>default configuration option</u><sup> $D_{728}$ </sup>. 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.

Select		
Proceed Supported File Formats		
The conversion process could take a little while, depe is shown below. The conversion stages are: Queued -> Creating PDF -> Creating thumbnails -> F		er documents in the PDF converter queue. The position of your document
Position No records to display.	File Name	

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  $\swarrow$  and enter the required message.
- 5. Click 💾 to save the setting.

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Select	
Proceed Supported File Formats	
Please be aware that very large documents will take longer to	upload than small ones.
Position	File Name
No records to display.	

#### 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 <u>default configuration option</u><sup>D™</sup>. 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 instruct options available and ensures your requ	 nt Room. Providing your instructions this way gives you access to all the document i	finishing
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

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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.

Administration	99
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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.

Paper Originals allows you to provide finishing instruction options available and ensures your requi	ns via Skyline for a hard copy document mailed to the prin rements are clearly understood.	t Room. Providing your instructions this way giv	es you access to all the document finishing
Document Name	Original		
Number of Pages			Next 🕨
An order for paper originals must include	the document name and the number of pages		

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**.

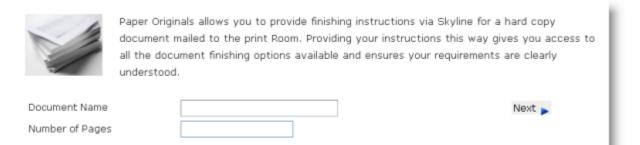


Portal Configuration Manage the configuration options for this portal

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

100	Skyline	Manual
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If you want to stop users from being able to submit paper originals to Skyline portal you can hide the tab. The example below shows a typical Paper Original web page. For more information on ordering documents with reference to a physical hard copy, see the section on Using Paper Originals<sup>D 327</sup>.



#### 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

- To amend this option click *P*.
- 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**

My Library	🖮 🗽 🗋 • 😫 • 🛱 🏲 🖬 • 😮	Shared Libraries
Project Omega Project Omega Project Omega	Search Q Libraries Shared to a Group	Help Manuals
🗌 🔍 🔂 🥁 Website	29/06/2020 C 23 MB 95 09:31:28 Libraris Shared to Users	😂 Exam Papers
🗌 🔍 🔂 🎰 ProductManager	29/06/2020 4.59 MB 64 09:31:27	
🗌 🔍 🔂 🧰 PrintStation	29/06/2020 5.91 MB 102 09:31:27	
🗌 💼 🖮 Manual	29/06/2020 36.93 MB 0 09:31:27	
🗌 🔍 📩 🖮 Installation	29/06/2020 10.64 MB 174	

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 *P*. Select the required mode:
  - ListView.

3

- DetailsView.
- ThumbsView.
- · Catalog View
- 5. Click 💾 to save the setting.

To configure **Library - Default View** for all portals associated with Skyline use the <u>default configuration option</u>  $\square^{728}$ . 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 <u>default</u> <u>configuration option</u><sup> $D_{728}$ </sup>. 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.

My Library	🖮 🗽 🖹 • 😫 🌪 🗐 • 🝞 Shared Libraries
Project Alpha     ibrary	Search 🛛 📿 🛱 Help Manuals
Project Omega Personal Libraries	Libraries Shared to a Group
🗌 🔍 🔂 🧰 Website	29/06/2020 C 22 MB 96 Exam Papers 09:31:28 Libraris Shared to Users
🗌 🔍 📩 🏠 ProductManager	29/06/2020 4.69 MB 64 09:31:27
🗌 🔍 🔁 🥁 PrintStation	29/06/2020 5.91 MB 102 09:31:27
🗌 🏦 🖮 Manual	29/06/2020 36.93 MB 0 09:31:27
🗌 🔍 🔂 🎰 Installation	29/06/2020 10.64 MB 174

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 0 to open the column chooser window.

Anne Webb   🖶 <u>View Basket (0)</u>   <u>Preferences</u>	Downloads Ed	lit Admin Ma	nagement Logout
			🌆 🛲 🐖
Skyline 💧 🔤 🔒		1	
		واللعقال	الالفاع
Home Upload Libraries Paper Docs Products Orders Approval Website			
nome opicau cloranes raperoces riouces orders approval vieware			
		~ -	
	1 • 🕒	• 🔝 🍸	• 🕜
Select All My Library			
Select All My Library		Search	<b>Q</b>
Document Name	Date	Size	Number of Pages
🗌 🚺 🥁 Administration	24/06/2020 10:42:19	12.88 MB	120
		2.22.112	
🗌 🔍 🔂 🏠 Simple	18/06/2020	3.28 MB	80

### 5. The Column Choose window opens

Column Chooser	×
Column Chooser	
Hide Left Column V Hide Right Column 1 Cancel Apply 1 2	

1. Remove the tick by Hide Right Column.

### 2. Click Apply.

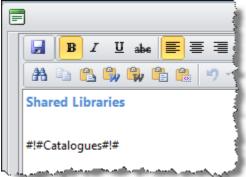
6. Refresh the web page by going to the home page and then returning to the Libraries page. There is a blank column on the right of the page.

Anne Webb   #	View Basket (0)   Preferences   Downloads   Edit   Admin   Management   Logout
Home Upload Libraries Paper Docs Products Orders	Approval Website
	🖞 • 😫 🌪 🗐 • 🔞 🗾
Select All My Library	Search
Document Name	Date Size Number of Pages
Administration	24/06/2020 12.88 MB 120 10:42:19
🗌 🔍 📆 🎃 Simple	18/06/2020 3.28 MB 80 10:12:14

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

E	1																																				×
		I	в	I	U	ab	•	=	=	-	1		2	1	1	1		se	rif			-	Size	-	I	* A	pply	CSS	CI	- A	-	3	2				
	8	4	à I	8	<b>%</b>	Ŵ	r.	1	4	2	- (	M -		3	2		51	2	0	÷	4	×	*	<b>4</b>	T+ 3		1	4 3	Á [	•		Ω۰					
																											-										
	1	De	esign		0	HTN	/IL	0	λ, P	revi	ew																						Wor	ds: 0	Characte	rs: O	4
	_					_	_	_	_			_			_		 						_														-[]]
																	 																				- 1
-																																					

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.

5		1 3			
	Anne Webb   🛗 <u>View Bask</u>	et (0)   Prefer	ences Dow	nloads   Edit	Admin   Management   Logout
			_		n 🚛 🚛 🚛
Skyline		- L I	. (		
Real Property of the Real Property of the	المحافظ والمحافظ والم			والله و	المحمد والمحمد المحمد
			Lenio		
Home Upload Libraries Paper Docs	Products Orders Approva	Website			
		~			
My Library	🖮 🚊 🗎 🔹	🕒 🔹 🖾	2 💙 🗉	- C	Shared Libraries
Select All My Library			Search	 	😂 Project Omega
Document Nam	2	Date	Size	Number of	
				Pages	
🗌 🛍 🧰 Administration		24/06/2020 10:42:19	12.88 MB	120	
🗌 🔍 🔂 🎃 Simple		18/06/2020	3.28 MB	80	

#### **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 Q associated with the document.

**Note:** When Skyline is first installed the <u>default configuration option</u><sup>D<sup>728</sup></sup> **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**.



Manage the configuration options for this portal

- 3. Find Library Number of Preview Pages in the list.
- To amend this option click *P*.
  - 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**.
- To amend this option click
- 7. Click 🖿 to save the setting.

# Forcing Preview Before Sending Order

**Skyline Manual** 

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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 <u>default</u> <u>configuration option</u><sup> $D_{728}$ </sup>. 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**

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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 set to the document or a 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**.



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.
- 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 <u>default</u> <u>configuration option</u><sup> $D_{78}$ </sup>. 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.

Wiew Basket (0)   Preferences	<u>Downloads</u>   <u>Ec</u>	it <u>Admin</u>	Management   Logo	ut
-------------------------------	------------------------------	-----------------	-------------------	----

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



<u>Portal Configuration</u> 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. <u>https://www.example/</u> <u>attachments/article/650MH896.pdf</u>. This opens the PDF in Chrome, Edge, Firefox and Internet Explorer 11.
- 4. Click 🖿 to save the setting.

# Amending Delivery Details

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

If the <u>Checkout Mode</u><sup>D177</sup> 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.

d Back	Document T	ype Product Options Basket Address Shipping Account Co	nfirm
Priority		Normal	
Date required		30/04/2015	
Delivery Method	d l	I'll pick it up 🔻	
Notes		This is not urgent but if ready before the required date please ring extension 6754 & I will arrange collection.	2
		(b	Next 🕨

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**.



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  $\checkmark$ .
- 5. Click 🖿 to save the setting.

To configure **Checkout - Show Delivery Priority Page** for all portals associated with Skyline use the <u>default</u> <u>configuration option</u><sup> $D_{78}$ </sup>. 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 <u>address details</u><sup>D</sup><sup>312</sup>. Any changes made will be reflected when they place their next order.

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 this delivery a	ddress	Next

#### 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**.



Manage the configuration options for this portal

3. Find Checkout - Save Delivery Address in the list.

Portal Configuration

- 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  $\checkmark$ .
- 5. Click 🖿 to save the setting.

To configure **Checkout - Save Delivery Address** for all portals associated with Skyline use the <u>default</u> <u>configuration option</u><sup> $D_{728}$ </sup>. 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.

Cancel Order	er det	ails be	low and c	onfirm vo	ur order			
Select the date		•		-	arch 2020			<b>&gt; &gt;&gt;</b>
required		Mon	Tue	Wed	Thu	Fri	Sat	Sun
🔵 Date available		24	25	26	27	28	29	1
Reduced printing		2	3	4	5	6	7	8
Low printing		9	10	11	12	13	14	15
capacity		16	17	18	19	20	21	22
Date not available - Contact print room		23	24	25	26	27	28	29
Closed or date in the past		30	31	1	2	3	4	5
Quantity Document			Product			Pages		Pric
5 Manual			Binding 7.0	).4		918		1948.5

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

**Note**: If you are using the Smart Calendar you should not use a calendar in your delivery form created in  $ProductManager^{D^{sar}}$ .

#### 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.

ut hea	ding	This s	This service is being transferred to a new server and will be available again on Monday 7th November							
r Prompt		Selec	Select Date Required User Prompt in red							
Ow Capacity Message         Your order exceeds the print capacity for this date. Please select another date										
<b>A A</b>		N	lay 2023			b bb	Work days Total printing capacity			
Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon 100000 Maximum pages per Day			
24	25	26	27	28	29	30	Tue Selected date			
1	2	3	4	5	6	7	Wed Printing capacity			
1	2	3	4	Э	0	/	Thu Low printing capacity warning Fri Fri Low level threshold			
8	9	10	11	12	13	14				
15	16	17	18	19	20	21	Users will not be able to submit prints			
10			10	13	20	21	Stop Level			
22	23	24	25	26	27	28	O Date available Date available			
29	30	31	1	2	3	4	Printing capacity     changed     Printing capacity			
							Low printing capacity     Low printing capacity			
Allow job	s to be su	bmitted to	day				Stop Level     Date not available			
nimum Lea	ad Time (d	lays)					Closed or date in the past     Closed or date in the past			

- 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.

U The option to enter a <u>mask for the account number</u><sup>D™</sup> 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 <u>default configuration option</u><sup> $D_{728}$ </sup>. 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 <u>order number format</u>  $D^{214}$  can be configured and the <u>start number specified</u>  $D^{213}$ . If there is a red cross by an order, the order can be deleted. The job statuses can be amended to <u>allow or prevent orders from being</u> deleted  $D^{220}$ .

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:

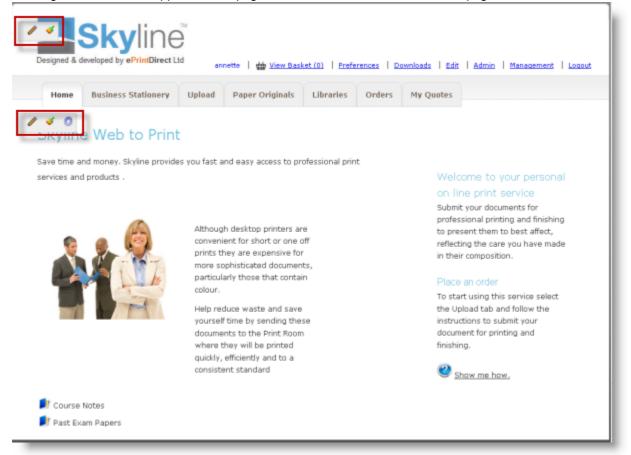
- Change the contents<sup>1</sup><sup>119</sup> of the Home web page.
- Show an external web page<sup>D12</sup>, for example allow access to the companies Intranet.
- Apply specific portal themes<sup>1</sup><sup>226</sup>.

#### **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.

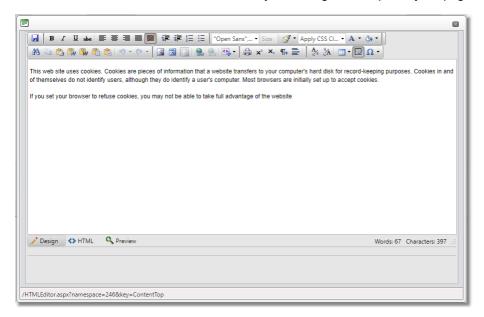
#### To amend the home page:

- 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  $\checkmark$  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 Style		×			
Background colour					
Select a colour from the	e dropdown list or enter your own				
Select Colour:	None <b>v</b>				
Apply Custom Colour:					
Apply to all pages					
Cancel	Apply				
-					
/CSSEditor.aspx?name	space=246&key=centerbarCSS				

Administration	121
----------------	-----

# 🙆 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.

E Column Chooser	×
Column Chooser	
Hide Left Column Hide Right Column	
/ColumnCSSEditor.aspx?namespace=246&key=ColumnCSS	

#### 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.



<u>Custom Pages</u> Add, Edit & Remove custom website pages

3. A list of any existing pages will show.

Add nev	v custom p	age	ſ	ה

1. Click the link Add new custom page.

#### 4. A new field appears.

Corporate Intranet	

- 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

Back

Submi

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		
U Webcasts		
Google		
Corporate Intranet	0	
save order 2		Bock

- 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.

annette   🕁 View Basket (1)   Preferences   Downloads   Edit   Admin   Management   Logout
Home Business Stationery Upload Orders Paper Originals Libraries Approval Corporate Intranet
13 130 13
3

- 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.

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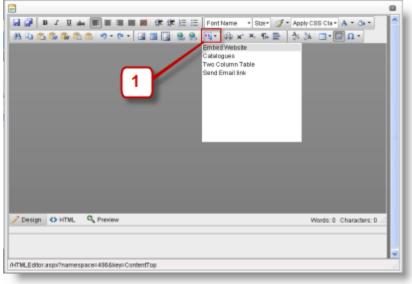
10. You need to ensure that the embedded page fills the entire lower pane. Click on the centre column. The column chooser window opens.

🚍 Column Chooser	$\boxtimes$
Column Chooser	
Hide Left Column Hide Right Column Cancel Apply 1	
/ColumnCSSEditor.aspx?namespace=496&key=ColumnCSS	.#

- 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.

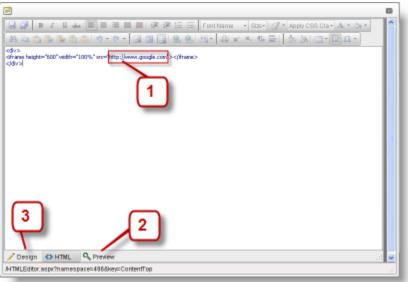


1. Click Insert Code Snippet and select Embedded Website from the drop down menu.

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



- 1. To change the embedded page click A 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 <a href="http://your\_web\_address\_here.com">http://www.google.com</a> becomes <a href="http://www.google.com">http://www.google.com</a> becomes <a href="http://www.google.com"/>http:/
- 2. Click Preview to view how the page will look if you save it.
- 3. Click *Pesign* then click *her base the base 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.

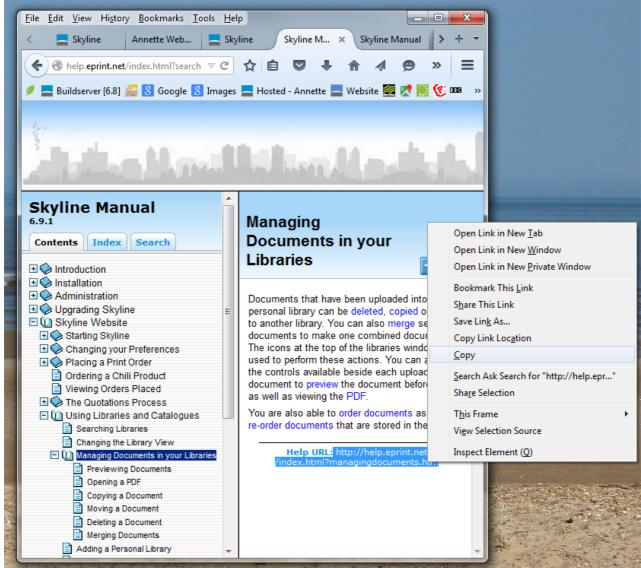
# Adding Links to the Online Manual

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

Home Orders	Business Stati	onery Uplo	ad Pap
Personal library	Anne Webb		
This is your personal Library where you can save	📄 Select All		
documents and order	File	Name	<u>Date</u>
reprints.	🗖 Q, 🔁 🎃	40 Pages	06/07/20
How to : <u>Search Libraries</u>	🗖 🔍 🔁 🎃	Yeosimite	30/06/201
Link to the	🗖 🔍 🔁 🎃	Word Document	30/06/201
online manual	🔲 Q, 🔁 🎃	This is an A4 Portrait Page	30/06/201

## 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.

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6. Enter the required text for the layout.

e	
	<b>B</b> <i>I</i> <u>U</u> abe <b>E</b> ≡ ≡ <b>Z ‡ ‡ ‡ ↓ ∃ ≡ </b> "segoe
	A 🖻 🖺 🖏 🛱 🖺 🤊 - 🤍 - 🔝 🔜 🔯 😣 斗 🚺
	Personal library
ŀ	This is your personal Library where you can save documents and order reprints.
	How to : Search Libraries
	Managing Documents Text added
1	

7. Highlight the text and click Hyperlink Manager.

🛛 🚰 🖪 🖌 🗓 abe 🗐 🗄 🗏 🧱	🖅 🗄 🗄 🛛 "segoe ui",ari 🔻 Size 🕇
A 🗈 🔁 🥠 🗣 😩 😕 - 🔍 - 🛛 🗷	📓 😣 💁 🖬 🖨 🖈 👫
Personal library	Hyperlink Manager (CTRL+K)
This is your personal Library where you can save documen	ts and order reprints.
How to : Search Libraries	
Managing Documents	
Lunder	and the second s

8. The Hyperlink Manager window opens.

📄 Hyperlink Manager					
Hyperlink Ar	nchor E-mail				
URL	http://help.eprint.net/index.htm				
Link Text	Managing Documents				
ID	U				
Target	New Window				
Existing Anchor	None				
Tooltip					
CSS Class	Apply Class 🔹				
3 OK Cancel					

- 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.

Home Orders	Business Sta
Personal library	Anne Webb
This is your personal Library	📄 Select Al
where you can save	1
documents and order	<u>Filk</u>
reprints.	🗖 🔍 🔁 🎃
How to : <u>Search Libraries</u>	🗖 Q, 🔁 🎃
Managing Documents	
	🔲 🔍 🔁 🎰
A support of the second se	and a second

# Changing the Default Language

If the default language is not listed in the list of specified website languages<sup>D131</sup> 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

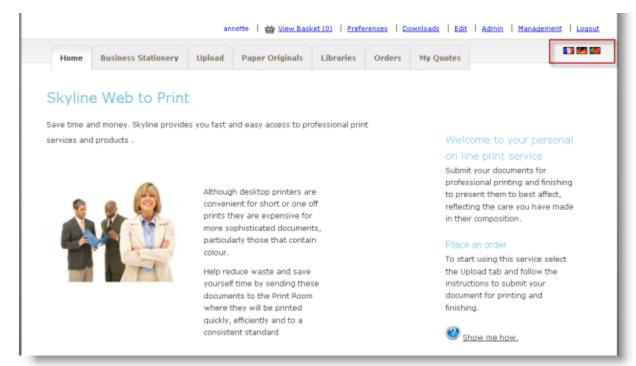
Manage the configuration options for this portal

- 3. Find Look And Feel Language in the list.
- 4. To amend this option click  $\checkmark$  and enter the required language code. For more details refer to the Language Country Codes<sup>D755</sup> 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</u>  $\underline{option}^{\square^{728}}$ . 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.



<u>Website Lanquages</u> Add edit Website Languages

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

English (United States) ( en-us )	•	<i>6</i>
German (Germany) ( de-de )	•	
English (United Kingdom) ( en-gb )	•	##
Italian (Italy) ( it-it )	•	
Select Language	•	- 1
Submit		

- 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 <u>approval message</u><sup>150</sup> will inform them that their order requires approval before it is passed to the print room for processing.

		proved before the	ay are releas	ed							<b>.</b>	Select Users
Refr	Isn			Document		Account			Date	Date		
		User name	Order Id	name	Product	Code	Pages	Copies	Submitted	required	Prie	ority
~	0003049											Â
	■ <b>•</b> •	Angus McDonald	0003049	Journey to GDPR Compliance	A4 Booklet	007	18	2	05/06/2018 16:16:00			
v	0003056											1
	- 6 -	David Donald	0003056	ProductManage	Simple	007	62	6	18/06/2018 10:17:00	22/06/201	8 Not	urgent
>	0003057											
-	0003058											-
-												_
Ov	rview Detai	ils Customer	Details	History Notes								
	erview Detai	CostManage		History Notes	Po	rtrait Stap	le			Lami	inated	🖺 Save
Ov	erview Detai		er	History Notes 4 White 80gsm	Po		le rouble Sideo	•	Black and V		inated	E Save
73		CostManage	er		Po			•	Black and V			🖺 Save
7		CostManage	er		Po	•		_	Black and V			E Save
7		CostManage Document Front cover:	er			•		•	Black and V	White •		E Save
7		CostManage Document Front cover: Back cover:	er A	4 White 80gsm	Bin	D		•	Black and V	White •		Save
73		CostManage Document Front cover: Back cover: Account Code	er (4	4 White 80gsm	Bin e Pag	D	ouble Sideo	•	Price	White •		P Save
7		CostManage Document Front cover: Back cover: Account Code Account Name	er (4	4 White 80gsm 07 nternational Rescu	Bin e Pag	D	Copies	•	Price	White •		E Save
73		CostManage Document Front cover: Back cover: Account Code Account Name	er (4	4 White 80gsm 07 nternational Rescu	Bin e Pag	D	Copies	•	Price	White •		D Save
1 fai	And the second s	CostManage Document Front cover: Back cover: Account Code Account Name Account Descr	er A	4 White 80gsm 07 nternational Rescu felp Required tes standard rejection	e Pag Dat	D	Copies	•	Price	White •		Save Save
tf a r tf th a] Pr	And the second s	CostManage Document Front cover: Back cover: Account Code Account Name Account Descr	er A	4 White 80gsm 07 nternational Rescu felp Required tes standard rejection	e Pag Dat	ding     pes 28 te required 2	Copies	•	Price	White •		E Save
tf a r tf th a] Pr	aquest is being a ojact Number, bj	CostManage Document Front cover: Back cover: Account Code Account Name Account Descr	er A	4 White 80gsm 07 nternational Rescu felp Required tes standard rejection	e Pag Dat	ding     pes 28 te required 2	Copies	*	Price	White •		Save Save
far fth ] Pr Rea	equest is being a order is being a order is being a ofert Number, b]	CostManage Document Front cover: Back cover: Account Code Account Name Account Descr	er A	4 White 80gsm 07 nternational Rescu felp Required tes standard rejection	n codes.	D	Copies	*	Price Calcula	White •		E Save

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Any job with  $\checkmark$  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 reco	rd was opened by Mar	/ Bud on 12 June 2	2018 11:57 and	d cannot be change	ed while it is locked.
Id					
And the second second	A and a second and a	when when a some	er an that are	magine and and	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

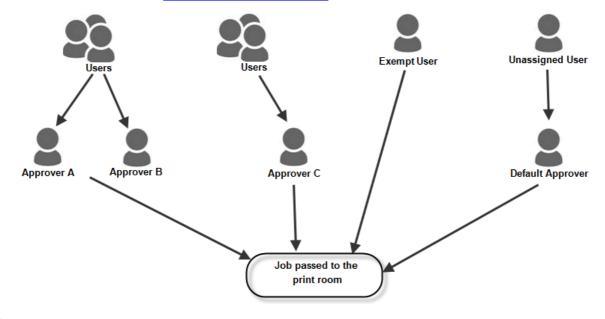
An Approver can view orders details so that they can decide to send the order to the PrintStation or reject the order. The system can be configured to allow approvers to change the following parts of the order if appropriate.

- Order details<sup>1143</sup> For example they could change the paper type, printing options e.g. double sided or single sided, Mono or colour print and quantity.
- <u>Account Information</u><sup>D</sup><sup>144</sup> amend the account code, name or description.
- <u>Recalculate prices</u><sup>145</sup> 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.
- <u>Customer Details</u><sup>146</sup> 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<sup>D</sup><sup>152</sup>.

In some cases you might have users that will not require their orders to be approved. You can make the <u>user</u>  $exempt^{D_{157}}$  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  $D^{152}$ .

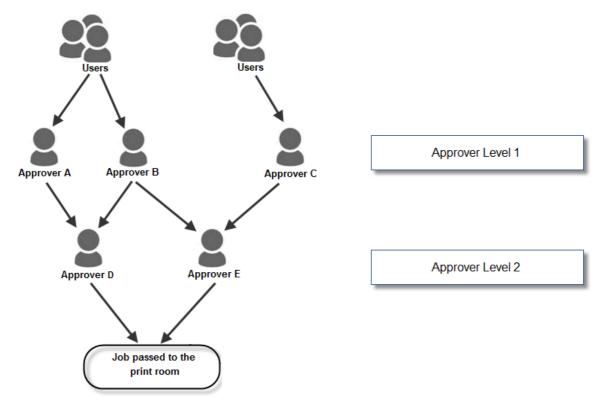


Approval is set and configured for each portal in your system.

## **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  $PDF^{D_{47}}$ .

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 <u>automated email messages</u><sup>D151</sup> 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.



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<u>Roles</u> Manage user roles for current Portal

3. 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

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.

Steve     Username     Remove       SteveD     Anne Webb     X       SkylineHost     X       N < 1     Page size: 10 x     2 items in 1 pages	Steve Search Add Selected Users	]	Users in role: Approver		Back
SkylineHost X	Steve		Username	Remove	
	SteveD		Anne Webb	×	
H I Page size: 10 Zitems in 1 pages			SkylineHost	×	
			H + 1 + H Page size: 10	2 items in 1 pages	

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.

Search Add Selected Users		Users in role: Approver		Back
Anne Webb		Username	Remove	
annette Annette Webber		Anne Webb	×	
ApproverBoss		SkylineHost	×	
Axd Cuthbert		SteveD	×	
Fred Freda		H + 1 + H Page size: 10	<ul> <li>3 items in 1 pages</li> </ul>	
James Speak				
Jemima Loki	مىلىس	an a	an a difference of the second	مسمع

# **Turning Approval on**

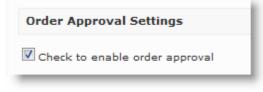
By default approval is not turned on. Approval needs to be enabled and the required settings selected.

# To select the approval settings:

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

Setup the options available to approvers

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



Click Save 4.

When approval has been turned on more options are available.

		6.9.7 Build - 3	Last Upgrade: 2018 February 28	Logged in as:	Portal Admir	nistrator	Admin.H
Order Approval Setti	ngs						
Check to enable order	approval						
Approval Settings							
Allows approvers to sele		orover -> Order Placed					Select Users
Normal Approval Delay	Up to 1 day						
Warning Approval Delay	Over 2 day						
Critial Approval Delay	Over 1 wee						
Critian Approvan Delay	OVEL 1 MEE	· · · ·					
Approvers can edit orde	r details						
Approvers can edit the	Account information						
Approvers can recalcula	te prices						
Approvers can edit cust	omer details						
Approvers can download	the document PDF						
Approvers have to ente	r a comment in the Approvi	el Notes field					
lessage displayed to appr	overs above the Approval N	otes field (512 charcters	max)				
lessage	If a request is being rejected	d please enter one of the	standard rejection codes.				
	If the order is being appro a) Project Number, b) A		-				
	-designment of						
Aessage displayed to user Aessage	s on the checkout page after Documents will not be prin		ed.				
Approval Emails							
imail to users when an ord	er is approved						
lubject	Order Approval Request						
+ Order Id	Your order number {Order	Id) has been approved. Th	he request for the document to be printed	has now been sent			
mail to users when an ord	ar is declined						
ubject	Order Approval Request						
Message	Your order number (Order	d) has been declined. This	r order har been canceled				-
+ Order Id	Four order number (order	uj nas been decimed. The	sorber has been cancelea.				
mail to Announce where							
mail to Approvers when ne subject	w orders require approval	mual					
fessage			and and and the effective are able to be the		-1.1		_
+ Approval Link	You have new orders awar	ang approval. You can vie	w these orders by clicking on this link: (Av	vaitingApprovaitir	K7		
mail to Default Approver	s or Administrators when n	ew orders require approv	al, but the user does not have an alloc	ated Approver			
Subject	No approver for a user						
Message Usemame	The user {username} has p	laced an order but they do	o not have an approver allocated to them.	Please allocate an	approver to this	user	

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 <u>Assigning Users to Approvers</u><sup>D</sup><sup>152</sup> for more information. If Approvers are

able to select their own users a Select Users button is available in their Approval page.

rder	s Needing Appro	val								
Orden	s need to be approv	ed before they a	re released							💄 Select Use
	User Name	Order ID	Document Name	Product	Account Code	Pages	Copies	Submitted Date	Required Date	Priority
					1					

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.

Allocated Users		Users not allocated to this	approver
		Search	Q.
Bob Jones		Christmas Ives	* Save Back
Brian Dawson	4	Cuthbert Sewell	
		David Donald	Hide allocated users
		Debbie	
		Donald	
		eprint.test1	
		eprint.test2	
		Eric West	
		Felix	
		Fred	
		Fred@eprint.net	
		Freda	
		George	
		George@eprint.net	
		Giles	
		Helen	
		Henriëtte	

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

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2.

Approval can be either single or two level approval. For more information please see the section on Configuring Approval  $D^{122}$ .

# To select the Approval Level:

1. Select the option from the drop down list.

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Allows approvers to select their o	own users
Single level approval	User -> Approver -> Order Plac
Single level approval	Up to 1 day 💌
Two level approval	Over 2 days

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	1

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 <u>Select Users</u>. The Assign Users to Approvers window opens. Level 1 approvers have next to their name and level 2 approvers have 2.

Approvers	Allocated Users (11)	Users not allocated to this approver
Default Approver 🔹 Set		Search
Approval Exempt Users Anne Webb  April Showers Theresa Green	Aaron Vanstone Angus McDonald Anne Webbl April Showers Charles Taylor Cuthbert Sewell David Donald Mike Evans	Ampton Save Back annette Annette Webber annette.webber@eprint.net Approver 1 Approver 2 Author 1 Berry
	Nigel Broad Pippa Delve Theresa Green	Bob Bob Jones Bourne Brian Dawson Brian Lawn chris.cemp Christmas Ives Debbie eprint.test1

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 Assign Users To Approvers Approvers Level 1 Approver Level 1 Approver Level 2 Approver Level 2 Approver 1 Theresa Green 1

## **Select Warning Time Period**

The status of orders waiting for approval can be viewed using the <u>Approval Status report</u><sup>D383</sup>. 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.

Approval Settings		
Allows approvers to select their own use	ins.	
	User -> Approver 1 -> Appro	ver 2 -> Order Placed
Normal Approval Delay	Up to 1 day 🔻	) i
Warning Approval Delay	Over 2 days 💌	
Critial Approval Delay	Over 1 week 🔹	]
	Not Set	
Approvers can edit order details	Over 1 day	
Approvers can edit the Account information	Over 2 days	
Approvers can recalculate prices	Over 3 days	
Approvers can edit customer details	Over 1 week	
Approvers can download the document	Over 2 weeks	
Approvers have to enter a comment in	Over 30 days	
	ويوم المراجع ا	· · · · · · · · · · · · · · · · · · ·

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.

Approval Settings		
Single level approval	User -> Approver ->	Order Placed
Normal Approval Delay	Up to 1 day	•
Warning Approval Delay	Over 2 days	-
Critial Approval Delay	Over 1 week	*
Approvers can edit order details		
Approvers can edit the Account in	formation	A

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.

		Website		A4 Plastic C	omb Bound	La	minated	🖺 Save
	Bayter	Document	A4 White 80gsm	•	Double Sided 🔹	Black and White		
-		Front cover:		-	•	•		
	ماديسانيلية	Back cover:	A4 White Card 160gsm	•	•	•		
	STORES N	Account Code		Binding	Plastic comb	-		
		Account Name		Pages 98	Copies 10	Price 71.90		
		Account Description		Date required		Calculate Price		

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

our Notes (Not visible to user)	B Save

## **Enable Editing of Account Information**

## To enable an approver to edit account information:

1. View the approval options.

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2. Select the option Approvers can edit the Account information.

Allows approvers to select their own users Single level approval User -> Approver -> Order Placed							
Single level approval <ul> <li>User -&gt; Approver -&gt; Order Pla</li> <li>Up to 1 day</li> <li>Image: The second second</li></ul>							
Warning Approval Delay	Over 2 days	•					
Critial Approval Delay	Over 1 week	*					
Approvers can edit order details           Approvers can edit the Account information         Image: Comparison of 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 <u>Accounts and Pricing</u><sup> $D_{204}$ </sup> page. Click **Save** to save any changes.

Г		Website		A4 Plastic C	omb Bound	Larr	ninated	🖺 Sa
Γ	market and	Document	A4 White 80gsm	•	Double Sided •	Black and White 🔹		
L		Front cover:		-	•	-		
	Hubberry Le	Back cover:	A4 White Card 160gsm	•	•	•		
2	Distants M	Account Code		Binding	Plastic comb	-		
		Account Name		Pages 98	Copies 10	Price 71.90		
		Account Description		Date required		Calculate Price		

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

Overview Details Customer Details History Notes		
User Notes	Your Notes (Not visible to user)	🖺 Save
	LJ	

#### **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.

Allows approvers to select their own	users	
Single level approval	User -> Approver ->	Order Place
Normal Approval Delay	Up to 1 day	*
Warning Approval Delay	Over 2 days	*
Critial Approval Delay	Over 1 week	-
Approvers can edit order details		
Approvers can edit the Account info	mation	
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.

		Website		A4 Plastic C	Comb Bound	Lar	ninated	🖺 Save
	manutes.	Document	A4 White 80gsm	•	Double Sided 🔹	Black and White		
1		Front cover:		-	-	-		
	مادرمة الملاطرة	Back cover:	A4 White Card 160gsm	•	•	-		
	CONTRACT, M	Account Code		Binding	Plastic comb	-		
		Account Name		Pages 98	Copies 10	Price 71.90		
		Account Description		Date required	100	Calculate Price		
							·	

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.

Approval Settings		
Allows approvers to select their own	users	1
Single level approval 🔹	User -> Approver -:	> Order Placed
Normal Approval Delay	Up to 1 day	-
Warning Approval Delay	Over 2 days	· ·
Critial Approval Delay	Over1 week	-
Approvers can edit order details	rmation	
Approvers can recalculate prices	-	
Approvers can edit customer details		1
Approvers can doubted the docum	ent PDF	أقصور ومعاصلته

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.

Overview Details	Customer Details History Notes			ED from
Name prefix	Mrs	Organisation name	ePrint	🖺 Save
First name	April	Street	Long Street	
Family name	Showers	City	Big City	
Email address	annette.webber@eprint.net	Region	The World	
Phone number	01010 258 963 456	Post Code		
		•		

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

Verview Details Customer Details History Notes		🖺 Save
User Notes	Your Notes (Not visible to user)	E save
	1	

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ア

#### 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.

Approval Settings		
Allows approvers to select their own	users	
Single level approval 🔹	User -> Approver -> C	Order Placed
Normal Approval Delay	Up to 1 day	-
Warning Approval Delay	Over 2 days	-
Critial Approval Delay	Over 1 week	-
Approvers can edit order details		
Approvers can edit the Account info	rmation	
Approvers can recalculate prices		
Approvers can edit customer details	5	
Approvers can download the docum	ent PDF	
Approvers have to enter a commen	t in the Approval Notes fie	ld
	n a general de la compañía de la com	لاستحمادهم
Click Save		

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

A

1	Website		A4 Plastic C	omb Bound	Lan	ninated	🖺 Sa
Bayes	Document	A4 White 80gsm	•	Double Sided 🔹	Black and White 🔹		
	Front cover:		-	•	•		
والمسالية الم	Back cover:	A4 White Card 160gsm	•	•	•		
CLUTCHL M	Account Code		Binding	Plastic comb	-		
	Account Name		Pages 98	Copies 10	Price 71.90		
	Account Description		Date required	100	Calculate Price		

Example showing the location of the View PDF button.

3.

# Enable Compulsory Notes

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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.

Approval Settings	
Allows approvers to select their own	users
Single level approval	User -> Approver -> Order Placed
Normal Approval Delay	Up to 1 day 💌
Warning Approval Delay	Over 2 days 💌
Critial Approval Delay	Over 1 week 🔹
<ul> <li>Approvers can edit order details</li> <li>Approvers can edit the Account infor</li> <li>Approvers can recalculate prices</li> <li>Approvers can edit customer details</li> <li>Approvers can download the docume</li> <li>Approvers have to enter a comment</li> </ul>	ent PDF

# 3. Click Save

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

ProductManager		Portra	Portrait Staple				Lamir	nated	
Elay	Document	A4 White 80gs	m	*	Double Sided	Ŧ	Black and White	-	
	Front cover:			Ŧ		Ŧ		Ŧ	
ale should be	Back cover:					¥		¥	
Mandown M	Test Account Code	0254	Please enter a reason fo	or Appro	wal or Rejection		•	-	
	Test Account Name	General Sta				10	Price 33.00		
	Test Account Description	Account De			ОК				
son for Approval o	r Rejection								
Approve X	Reject								

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**.

Reason for Approval or Rejection						
Reason for Approval or Rejection						
✓ Approve						

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.

Approvers have	ت کرده از میرد و اس سرده استان سرده استان این استان استان to enter a comment in the Approval Notes field
Message displayed	to approvers above the Approval Notes field (S12 charters max)
Message	If a request is being rejected please enter one of the standard rejection codes.
	If the order is being approved please enter the following information:
	a) Project Number, b) Approval Code c) Cost Code

3. Click Save

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

f the order is be	ing rejected please enter one of the standard rejection co ing approved please enter the following information: r, b] Approval Code c] Cost Code	des.
Reason for Appro	val or Rejection	
Approve	🗙 Reject	

#### Example of a new message

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# Changing the Checkout Message

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

# Your order was successful.

ocur	nents will	not be printed until	they are approved.		
rder	notifications	will be sent to your regist	tered email address which is:	annette.webber@ep	rint.net
	Quantity	Document	Product	Pages	Price
9	4	Website	A4 Plastic Comb Bound	92	30.52
		,		Delivery	1.00
				Priority	0.50

#### 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.

Message to users	
Message displayed to users	on the checkout page after an order is placed
Message	Documents will not be printed until they are approved.

# **Amending Email Messages**

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

Approval Emails	
Email to users when an orde	er is approved
Subject	Order Approval Request
Message     Order Id	Your order number (Orderdd) have been approved. The request for the document to be printed has now been sent.
Email to users when an orde	ar is declined
Subject	Order Approval Request
+ Order Id	Your order number (OrderId) has been declined. This order has been canceled.
Email to Approvers when ne	w orders require approval
Subject	New Orders Awaiting Approval
Approval Link	You have new orders awaiting approval. You can view these orders by clicking on this link: {AwaitingApprovalLink}
Email to Default Approvers	or Administrators when new orders require approval, but the user does not have an allocated Approver
Subject	No approver for a user
Message + Username	The user (username] has placed an order but they do not have an approver allocated to them. Please allocate an approver to this user

#### **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:

Order Id

ler Id - The order number is inserted into the email text.

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

Username - 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.



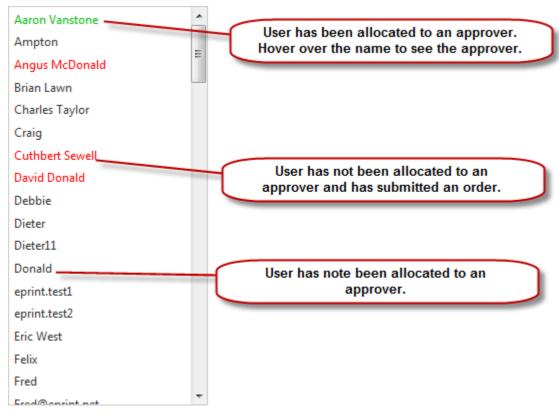
Approval Users Allocate users to approvers

3. The Assign Users to Approvers window opens.

pprovers	Allocated Users (6)	Users not allocated to this approver	
efault Approver 🔹 Set		Search	
Approval Exempt Users Approval Exempt Users Ampton Angus McDonaid Anne Webb Mary Bud Richard Cross Theresa Green Tracey Thornton	Bob Jones James Speak Janet Vanstone John Blunt Karen Buckle Lily Carrey	Aaron Vanstone Ampton Angus McDonald Anne Webb1 annette Annette Webber annette.webber@eprint.net Approver 1 Approver 2 April Showers Author 1 Barry Bourne Brien Dawson Brien Dawson	
		Charles Taylor chris.camp	

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.

Ampton	•	Save Back
Angus McDonald	-	
Brian Lawn	Ξ	✓ Hide allocated users
Charles Taylor		and the second se
		a ana hiddan

Allocated users are hidden

#### **Default Approvers**

Approver has been configured as
the Default Approver

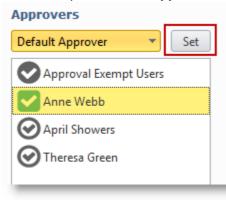
An email is sent to all users who have been assigned as a default approver & anyone with administrator rights when orders are submitted by users that have not been allocated to an approver. The Default Approver will also see a message if they view their approval page. There can be more than one default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

	Needing App	ovar					
ders ne	ed to be approv	ved before they a	ire released				
orde	er has been j	placed by a us	ser that doesn't	have an appr	over allocated to	them	
_							
	User Name	Order ID	Document Name	Product	Account Code	Pages	Copies

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.

# Approvers Approver Set Approval Exempt Users Anne Webb April Showers Theresa Green

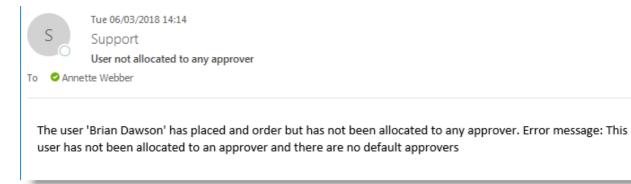
3. Click Set

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."

	ve been informed	: you don't currently have an ap	prover anocated to you. Add	ninistrators n
Quantity	Document	Product	Pages	Price
20	Australia by Rail	Collated Sets	48	52.80

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.

Approvers	Allocated Users (2)	Users not alloca	ted to this approve	· •
Approver 👻 Set		Search	Q	<u> </u>
Approval Exempt Users	Brian Lawn	Bob	^	Save Back
Anne Webb	Christmas Ives	Bob Jones	~	
April Showers	3	Bourne		Hide allocated
Theresa Green		Brian Dawson	-	
		chris.camp		12
<b>(</b> 1)		Debbie		Ľ
_		Donald		

#### **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.

	011-11	Save
4.	Click	Jane

Approvers	Allocated Users (2)	<b></b>	Users not allocated to t	his approver	
Approver * Set		Ľ	Search	Q	
Approval Exempt Users	Brian Lawn	()	Bob	*	Save Back
Anne Webb	Christmas Ives	4	Bourne		
	Bob Jones		Brian Dawson		Hide allocated users
April Showers			Charles Taylor		
Theresa Green	Ľ		chris.camp	=	
Land and the second second second	and an and and a second state.	ARRIVATION.	Cuthbert Sewell	ومشرولة والدوم	and a second second second

#### **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.

Approvers	Allocated Users (1)		Users not allocated to this approver	
	Search	Q		
Approval Exempt Users	Anne Webb		Aaron Vanstone Save Bac	k.
Anne Webb	-		< Ampton	
-			Angus McDonald	d use
<ul> <li>April Showers</li> </ul>			Anne Webb1	

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# **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 <u>CostManager</u><sup>D ∞</sup> to set the pricing.
- <u>Additional fields</u><sup>1</sup><sup>500</sup> 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 <u>remove the price column</u><sup>1 ••</sup> from the shopping basket page.
- You need to select a payment method of either Account<sup>D161</sup>, Stripe<sup>D207</sup> or WPM Education<sup>D209</sup>.

If you have <u>enabled the account code feature</u><sup>1<sup>161</sup></sup> you can configure the account information required to suit your accounting requirements including:

- <u>Making an account code mandatory</u><sup>D<sup>∞</sup></sup>.
- Providing a list of internal account codes<sup>173</sup>.
- Linking Skyline to an existing account code database<sup>1174</sup>.
- Validate a manually entered account number<sup>167</sup>.

# **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<sup>D</sup><sup>341</sup>.

#### To Activate Colour Analysis:

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

Skyline Manual

1. Sign in with SkylineHost or administrator privileges and go to Admin.

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

Portal Configuration

2

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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.

- 1	2	din.	11	
1			L	۴
		-	7	
			r -	

# Accounts and Pricing

Setup your accounts and payment provider

#### 3. The Accounts and Pricing page opens.

	7.0.4.1	L	ast Upgrade: 2020 January 29.	Logged in as:	Portal	Administrator	<u>Admi</u>
Pricing	CostManager 👻	~					
Please select Payment Provider	Account 👻	U					
Show Account page	User Prompt		Enter your account code:				
Account Code mandatory	Incorrect account code message	I	Please enter a valid account	code.			
Validate Account Code							
Account Code or Account Name mandatory							
		Field La	bel	Optional Mask			
O Users enter an Account Code in a text box	Account Code	Accou	nt Code				
Users are shown a list of Account Codes	Account Name	Accou	nt Name			🖉 Hid	lden
	Account Description	Accou	nt Description			🖉 Hid	lden
	Delivery	Delive	ry				
	Priority	Priorit	у	]			
Search Button	3						

- 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 <u>Stripe</u><sup> $D_{207}$ </sup> or <u>WPM Education</u><sup> $D_{209}$ </sup> payment providers.

×
t

#### Pricing showing in the shopping basket

Document	Product	Quantity	Pages	Edit	
Manual	Comb Bound	10	602	Edit	×
				New	

#### 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.

Skyline PrintStation : Connected to - buildsenier.ep	intoffice.net			_ = ×
Rite Setup Languages Help				
On Demand Printing				
Portais	Orders			+ 41 X
test2 ·	💭 Refresh 🚛 Download All 🙀 Download 🕲 Proof Print, 😭 Status 🔹 📆 View 🎁 D	elete 🚵 Print Job Ticket		
Statuses Users PrintStations Archived	OrderD Price Document Name Usemanie Statu     Order Placed		s Caples Submitted d	inte Required
Alan Pickle (1)	🗿 🗃 🛛 0000025 S0.00 Bigline CostMan Alan Pickle 🛛 Order Placed	Laminated	20 2 08/08/2016 10:02:00	0
Sanne Webb (2) Sanney (29)				
1 Teci (33)	Overview Detail Ricing Body Front Cover Back Cover Delivery Original			Dutput
Summer (2)				Printers Failder
	Order Order Number 0000025	Please enter any change notes here		<b>N</b>
	Document Name Skyline CostManager			42x fm.
Protein	Decoment Price 18.00 Update			42x fm. =
		Maximum of 2000 Characters		Adobe P.
	4)H			Neeflow 🗸
Checking for new jobs 0047				

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**.



<u>Portal Configuration</u> 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 <u>default configuration</u> <u>option</u><sup> $D_{72}$ </sup>. 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  $D^{167}$ .

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  $\underline{Checkout Mode}^{D_{117}}$  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**.

The second secon

Accounts and Pricing

Setup your accounts and payment provider

3. Choose the options for manually entering account codes.

	7.0.	4.1	Last Upgrade: 2020 January 29	Logged in as:	Portal Admir	nistrator   <u>Admin Home</u>
Pricing	CostManager	•				
Please select Payment Provider	Account	<mark>ر</mark> .				
Show Account page	User Prompt		Enter your account code:	)		
Account Code mandatory	Incorrect account code mes	sage	Please enter a valid account	code.		
Validate Account Code						
Account Code or Account Name mandatory						
		Field	l Label	Optional Mask	F.	
Users enter an Account Code in a text box	Account Code	Ac	count Code	##-### ###		
$igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igodoldsymbol{igo$	Account Name	Ac	count Name			✓ Hidden
	Account Description	Ac	count Description			🖉 Hidden
	Delivery	De	livery	]		
	Priority	Pri	prity	]		
	Cancel Save	9				

- 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
- 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 I 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 <u>internally created database</u><sup>D</sup><sup>173</sup> or extracted from an <u>external database</u><sup>D</sup><sup>174</sup> 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.

Document Type Product Options	Basket Address Shipping	Account Confirm
<b>Back</b>	Please try again - Invalid	Code
Please enter your account code		alidate

Error Message Shows When an Incorrect Account Code is Entered.

Account Code	Description
300A	BNE - New QR
Please enter your account code	300a Validate
	Next

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**.

The second secon

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Accounts and Pricing

Setup your accounts and payment provider

#### 3. The account setup page opens.

	7.0.4.1		Last Upgrade: 2020 January 29	Logged in as:	Portal	Administrator	Admin Home
Pricing	CostManager 🔹						
Please select Payment Provider	Account 🔻						
Show Account page	User Prompt	[	Enter your account code:	0			
Account Code mandatory	Incorrect account code message		Please enter a valid account c				
✓ Validate Account Code		L					
Account Code or Account Name mandatory							
		Field L	abel	Optional Mask			
Users enter an Account Code in a text box	Account Code	Acco	unt Code				
Users are shown a list of Account Codes	Account Name	Acco	unt Name			🖉 Hid	den
	Account Description	Acco	unt Description			🗹 Hid	den
	Delivery	Deliv	ery				
	Priority	Priori	ty				
	Cancel Save						

- 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<sup>D</sup><sup>173</sup> or extracted from an external database<sup>D</sup><sup>174</sup> 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.

Acco	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	234		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.

The second secon

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Accounts and Pricing

Setup your accounts and payment provider

#### 3. The account setup page opens.

	7.0.4.1		Last Upgrade: 2020 January 29	Logged in as:	Portal	Administrator	<u>Admin Home</u>
Pricing Please select Payment Provider	CostManager	D					
Show Account page	User Prompt		Enter your account code:				
Account Code mandatory	Incorrect account code message		Please enter a valid account	code.			
<ul> <li>Validate Account Code</li> <li>Account Code or Account Name mandatory</li> </ul>							
		Field	l Label	Optional Mask			
Users enter an Account Code in a text box	Account Code	Acc	count Code				
() Users are shown a list of Account Codes	Account Name	Acc	count Name			🖉 Hie	dden
	Account Description	Acc	count Description			🖉 Hie	dden
	Delivery	Del	livery	]			
	Priority	Pric	prity				
🕑 Search Button							
Only return exact matches in searches							
$\ensuremath{}$ Return all values that contain the search text	Cancel Save						

- 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.

Δ	
	ι.
•	

This feature can only be used with internal accounts.

Billing Code		•	Search
	Billing Code	Account Name	Account Description
	007	International Rescue	Help required
	2574	Training Documents	Test Department
	3482	Training Documents	Engineering Department
	765	test	test

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

#### To assign account codes to specific users:

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

User name	Search All users	
Usernames	Accounts	Allocated Accounts
Anne Webb	007	
annette	0254	÷
Annette Webber	0256	≡ →
Bilbo	2574	
Fred	2578	
Freda	2589	
James Speak	3482	
Kiki	3487	
▼	305	<b>T</b>
Save Back		

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.

Image: Enable user specific accord	unts 1	
anne	Search All users	
Usernames	Accounts 2	Allocated Accounts
Anne Webb	007	
annette	0256	+
Annette Webber	2574	= ++
	2578	
	2589	
	3487	
	765	
4	8450	
Save Back	-0.6300000	•

- 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.
- 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 D<sup>173</sup> or change existing ones D<sup>173</sup>.

#### To setup and manage internal account codes:

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



<u>Accounts</u>

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.

O Add new record					
	Account Code	Description	Detail		
I	FF2e	Finance Annual Report	Example account	×	
I	IT1	IT Manuals	Example account	×	
I	81	Sales Department	Example account	×	
I	TT2	Test Account	Example account	×	

#### To add a new account code:

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

0,	dd new record			GRefresh
	Account Code	Description	Detail	
×				
1	FF1	Finance Departments		x
I	FF2	Finance Annual Report		×
I	IT1	IT Manuals		×
P	IT2	IT Help Brochures		×
Ø	81	Sales Department		×
1	82	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

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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
   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><sup>D</sup>.

#### 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.

Connection Name Eprint Accounts	
Connection String Provider=Microsoft.Jet.OLEDB.4.0;Data Source=C:\Skyline\External Accounts\Account Codes.xis;Extended Properties="Excel 8.0;HDR=Yes;IMEX=1";	٦
	1

- 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 <u>www.connectionstrings.com</u> is helpful).



If you were connecting to an CSV file the connection string would be similar to the one shown below:

*Provider=Microsoft.Jet.OLEDB.4.0;Data Source=C:\Skyline\Customers\;Extended Properties="text;HDR=No;FMT=Delimited";* 

If there are no field headings in your file amend the section *HDR=Yes* to *HDR=No*, as shown in the example below.

Provider=Microsoft.Jet.OLEDB.4.0;Data Source=C:\Skyline\External Accounts\Account Codes.xls;Extended Properties="Excel 8.0;**HDR=No**;IMEX=1";

- 5. The Select statement is used when users are shown a list of account codes. It needs to show the name of the worksheet in the workbook that contains the account details as well as specific fields, if applicable. See the section Example Queries<sup>1</sup> 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**.

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

Connection Name			
Eprint Accounts			
Connection String			
	LEDB.4.0;Data Source=C:\Skyline\Extern	al Accounts/AccountCodes4.xis;Extended Properties="Excel 8.0;HDR=Yes	;(IMEX=1";
Select Statement			
	I account information from your database	d as the account name and the third as the account description.	
	y any name, as long as they are returned in		
	filtering your accounts by username or use		
		n account where username ='{0}' and userRole in ({1})	
	e logged in usemame and {1} with a comm		
	partment) from (sheet1 \$)	seperates intro ore organis in users roles	
percertepact/foreiged/fac	benniend nem feneeriet		
Demonster (D)			
Parameter {0}			
Parameter {1}			
Test settings			
Account code validat	ion query		
The query used to check if	the account code entered by the user exist	s in the database.	
Again the first column retu	med vill be stored as the account code, the	second as the account name and the third as the account description.	
Example of a query: select	accountCode, accountName, description fro	m account where accountcode = {0}	
OR select * from account v	where accountcode = {0} and username ='{	1}" and userrole in ({2})	
{0} vill be replaced by the	account code the user has entered, {1} will	be replaced with the logged in username and {2} with a comma separated list of	The logged in users roles
select [code],[project].[de	spartment  from [sheet1 \$]		
Parameter {0}			
Parameter {1}			
Parameter {2}			
TestCotions			
TestSettings			
code	project	department	
2250	Project C	Accounts	Cancel Submit
2251	Project X	Accounts	
2253	Project A	Accounts	and a second and the second

#### 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.

E	Eprint Accounts	
P	Provider=Microsoft.Jet.OLED8.4.0; Data Source=Ci/Skyline\External Accounts\AccountCades4.xis;Extended Properties="Excel 8.0;HDR=Yes;IMEX=1";	
		Bac

Version: 7.6.0.8

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- 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 <u>enabled the account codes</u><sup>161</sup> 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.

'sheet 1\$' is not a valid name. Make sure that it does not include invalid characters or punctuation and that it is not too long.
Connection Name
Eprint Accounts
Connection String
Provider=Microsoft.Jet.OLEDB.4.0;Data Source=C:\Skyline\External Accounts\Account Codes.xis;Extended Properties="Excel 8.0;HDR=Yes;IMEX=1";
Select Statement
The query used to select all account information from your database
The first column returned will be stored as the account code, the second as the account name and the third as the account description.
You may call the columns by any name, as long as they are returned in the above order.
You also have the option of filtering your accounts by username or user role.
Example of a query: select accountCode, accountName, description from account where username ='{0}' and userRole in ({1})
{0} vill be replaced with the logged in username and {1} with a comma separated list of the logged in users roles  select* from [sheet 1\$]  There should not be a space in the worksheet name.
Parameter {0}
Test settings
Account code validation every
29     Worksheet contains       30     No spaces.

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.

<b></b>	F1	F2	F3	
	60589	2036	Department A	
	60590	2037	Department B	
	60591	2038	Department C	
	60592	2039	Department D	
	60593	2040	Department E	And the state of t

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
 		Qaana daxaa dagaada a adalaha adalaha qaa

# Select specific Excel fields.

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n the example below the field Nominated Owner is not required. Account code validation query The query used to check if the account code entered by the user exists in the database. Again the first column returned will be stored as the account name and the third as the account description.					
	cample of a query: select accountCode, accountChame, description from account where accountcode = {0}				
	28 select * from account othere accountcode = (0) and username = '(1)' and usernole in ({2})				
	(0) will be replaced by the account code the user has entered. (1) will be replaced with the logged in username and (2) with a comma separated list of the logged in users reles select* from [sheet1\$]				
Parameter {1} Parameter {2} TestSettings					
Code	Project	Department	Nominated Owner Cancel	Submit	
2250	Project C	Accounts	D Roberts	Submit	
2251	Project X	Accounts	E Edwardson		
2253	Project A	Accounts	J Smith		
2252	Project B	Accounts	B Fletcher		
3450	Brojact Ga	Encineeria	ALugstaff		

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.

الافراد المحالي المحالي المحال المحال والمحال المحال المحال المحال المحال المحال المحال المحال المحال المحال ا	and the second se					
Account code validation query						
The query used to check if the account code entered by the user exists in	he database.					
Again the first column returned will be stored as the account code, the sec	ond as the account name and the third as the account description.					
Example of a query: select accountEede, accountName, description from account where accountcode = (0) OR select * from account where accountcode = (0) and username ='(1)* and userrole in ({2}) (0) will be replaced by the account code the user has entered. (1) will be replaced with the logged in username and (2) with a comma separated list of the logged in users roles						
					select [code], [project], [department] from [sheet1\$]	Updated statement which includes the required fields
					Parameter {0}	
Parameter {2}  TestSettings						
code project	department Concel Submit					
2250 Project C	Accounts					
2251 Project X	Accounts					
2253 Project A	Accounts					

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 <u>http://</u><u>www.2brightsparks.com</u>. 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.

New	Ctrl+N Ty	pe	Last Run	Result	🏫 Next Run	Le
Modify	Ctrl+M	Backup	10/07/2012 08:57:47	<ul> <li>Success</li> </ul>	Not Scheduled	C
Delete	Def 📉	Backup		🥐 Imported	11/07/2012 08:	D
Rename	F2					
Сору	Ctri+C	(1)				
Enable						
Disable						
Stop all profiles	Ctrl+Alt+S					
	Ctrl+Alt+S Ctrl+Alt+P					
Pause all profiles	Ctrl+Alt+S Ctrl+Alt+P Ctrl+Alt+R					
Pause all profiles Resume all profiles	Ctrl+Alt+P Ctrl+Alt+R					
Pause all profiles Resume all profiles Refresh	Ctrl+Alt+P Ctrl+Alt+R F5					
Stop all profiles Pause all profiles Resume all profiles Refresh Select all	Ctrl+Alt+P Ctrl+Alt+R F5 Ctrl+A					
Pause all profiles Resume all profiles Refresh Select all	Ctrl+Alt+P Ctrl+Alt+R F5					
Pause all profiles Resume all profiles Refresh Select all	Ctrl+Alt+P Ctrl+Alt+R F5 Ctrl+A					
Pause all profiles Resume all profiles Refresh Select all Unselect all	Ctrl+Alt+P Ctrl+Alt+R F5 Ctrl+A Ctrl+U					
Pause all profiles Resume all profiles Refresh Select all Unselect all	Ctrl+Alt+P Ctrl+Alt+R F5 Ctrl+A Ctrl+U					

1. From the Profiles drop down menu select New.

2. The New Profile window opens.

🔹 New Profile
A profile stores information about the folders or files you would like to backup or synchronize. You can create multiple profiles for more complex tasks.
2

- 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.

💠 New Profile	
What type of profile do you want to create?	
? • Backup 1	
? Synchronize	
C Mirror	
2	
	× Abort

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

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

🚸 New Profile	_ 🗆 🗙
Click the dropdown lists to select the locations of your files.	
Source Internal/external drive, network path, etc.	•
3	
	Abort

- 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.

💠 New Profile	
	_1
FTP Connection Del	tails
<u>H</u> ostname	Brains ann a' garddin gyr ager
<u>U</u> sername	pana di seconda di s
Password	*****
Port	21-1
	This is an SFTP server (port 22)
	2
🕜 <u>H</u> elp	Done Abort

- 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.

Information
The main profile setup window will now open. This will give you the opportunity to make changes to the profile, if required.
ОК Неір
Do not prompt me again

1. Click OK.

# 7. The profile setup window opens.

💠 Profile Setup: Skyline A	Accounts - Simple	×
Click For Options	and the search	
Simple	Source	Htematives
🔣 Decisions - Files 💐 FTP	FTP C	F Alternatives
Expert	96 Choose sub-directories and files	🌱 Change <u>F</u> ilter
	Description of this profile	
	Your profile is almost complete.	
	Click the folder icons above and to the right of the "Source" and "FTP" buttons to select your directorie	s.
	P	
🕜 <u>H</u> elp	🛃 Apply 🗸 🔍 K	Cancel

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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.

💠 Profile Setup: Skyline A	Accounts - FTP - Advanced 🛛 🗙
Click For Options	🖉 Search
: Simple	FTP Server Connection Details
💒 When	This is an SFTP server (port 22)
🥺 Fast Backup	Port 21.22
🔠 Decisions - Files	
Left Copy/Delete	L
Compare Options	Seconds Between Attempts 5
U Compression	Read 1 (seconds) 60 -
Encryption	
TTP	Encryption and compression options
3 Advanced	Encrypt the communication channel
H Proxy	Client certificate to use
Firewall Misc.	Lociality
Programs - Before	Encrypt the data channel
Auto-close	Use implicit connection (port 990)
To Email	Reduce bandwidth by using compression (MODE Z)
E Log	Misc
Network	
O CD/DVD Burner	Limit bandwidth usage to 0 bytes per second.
Cloud	Quote Character
🖼 Variables	Server timezone
🗹 Notes	Use Unicode (UTF8) Only if the FTP server supports it
🖻 Scripts	
🖻 Backup Email	MDTM syntax Default
Easy	Use LIST command without options
🕜 <u>H</u> elp	🛃 Apply 🗸 🔽 Cancel

1. Under FTP select the Advanced option.

Click For Options	5 Search
	FTP Server Connection Details
<ul> <li>Simple</li> </ul>	The Server Connection Decans
f When	This is an SFTP server (port 22)
Fast Backup	Port 21
Decisions - Files	
Copy/Delete	Reconnect Attempts 2
Compare Options	Seconds Between Attempts 5
Compression	Read timeout (seconds) 60 =
Encryption	00 x1
FTP	Encryption and compression options
📑 Advanced 🛛 🐸	Encrypt the communication channel
H Proxy	
🗮 Firewall 🛛 🔒	Client certificate to use [Default]
Misc.	Encrypt the data channel
Programs - Before	1- ··
Auto-close	Use implicit connection (port 990)
To Email 🗳	Reduce bandwidth by using compression (MODE Z)
Log Warni	ing X
Network	
CD/DVD Burner	You may need to change the FTP port number from 21. Would you like it changed to the default (port 990)?
Cloud	
Variables	4
Notes	Yes No
a Scripts	
Backup Email	io not prompt me again
Easy	-
2	Use LIST command without options
1	
🕜 <u>H</u> elp	🛃 Apply 🛛 🗸 QK 🔀 Cancel

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.

💠 Profile Setup: Skyline /	Accounts - FTP - Advanced	×
Click For Options	🖉 Search	
: Simple	FTP Server Connection Details	1
💒 When	This is an SFTP server (port 22)	
🤒 Fast Backup	Port 990 -	
🔢 Decisions - Files		
🚰 Copy/Delete	Reconnect Attempts 2	
Compare Options	Seconds Between Attempts 5	
U Compression	Read timeout (seconds) 60	
🗎 Encryption		
N FTP	Encryption and compression options	
3 Advanced	Encrypt the communication channel	
H Prov		and the second s

# 188 Skyli

# 12. The FTP settings need to be tested.

💠 Profile Setup: Skyline A	ccounts - FTP 🛛 🗙
Click For Options	A Search
Click For Options Click For Options Simple When Fast Backup Copy/Delete Compare Options Compression Encryption FIP Advanced Proxy Firewall Misc. Programs - Before Auto-close To Email Log Network CD/DVD Burner Cloud Variables	FTP files are on an FTP server Shared Settings Use shared settings: None FTP Server Connection Details Hostname Username Password Prompt for the password when run (profile will fail if run unattended) SFTP Key SFTP Key Password If the FTP server cannot set a files date & time then change the local files date & time to match that on the serve Test FTP settings
Notes Scripts Backup Email Easy	

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

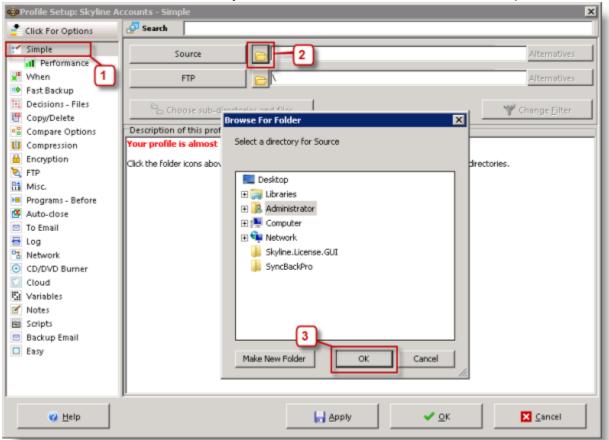
13. The settings are tested. When complete you will receive the message that the FTP server was logged into.



1. Click OK.

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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.

🚸 Profile Setup: Skyline A	Accounts - Simple
Click For Options	A Search
Simple	Source C:\Users\Administrator\Documents\ Alternatives
💒 When	FTP Alternatives
<ul> <li>Fast Backup</li> <li>Decisions - Files</li> <li>Copy/Delete</li> <li>Compression</li> <li>Encryption</li> <li>Encryption</li> <li>FTP</li> <li>Misc.</li> <li>Programs - Before</li> <li>Auto-close</li> <li>To Email</li> <li>Log</li> <li>Network</li> <li>CD/DVD Burner</li> <li>Cloud</li> <li>Variables</li> <li>Notes</li> <li>Scripts</li> <li>Backup Email</li> <li>Easy</li> </ul>	Choose sub-directories and files Choose sub-directories Choose sub-di
<u>₩</u> etp <u>₩</u> etp	Apply V CK

1. Click Choose sub-directories and files.

192

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

Image: Control of the state	File & Folder Selection : Skyline Accounts				_ 🗆
Do not use selections (can improve performance)	Click here to see more options				
Do not use selections (can improve performance)	ime 🛆 📊	Size (KB)	Attribs	New Files	New Folders
Do not use selections (can improve performance)				🦤 Include new files	🔂 Include new folders
Do not use selections (can improve performance)					
Do not use selections (can improve performance)					
Do not use selections (can improve performance)					
	Skyline FTPS Server.sps	7.41	A		
W Help     Image Clean Up     Image Filter     Image Abort     Image Clean Up	Do not use selections (can improve performance)				
	😮 <u>H</u> elp 🛛 😼 Clean Up 🛛 🌱 C	hange <u>F</u> ilter	× <u>A</u> bort		Cancel

- 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.

lame 🔺	Size (KB)	Attribs	New Files	New Folders
∃• 🖉 🍙 \			Ignore new files	🖌 🔂 Include new folders
🗹 🖄 Account Codes.xis	14.00	A	Ignore new files	
🗖 🔄 desktop.ini	0.39	HSA	Include new files	1
🔲 📄 LicenseRequest.txt	2.36	A	Auroque new mes	
🔲 🐵 Skyline FTPS Server.sps	7.41	A		

1. Select the option Ignore new files.

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

Click here to see more options				
Name 🔺	Size (KB)	Attribs	New Files	New Folders
=· 🗹 🏠 \			😽 Ignore new files	Real Include new folders
🗹 🖻 Account Codes.xis	14.00	A		Renore new folders
🔲 😰 desktop.ini	0.39	HSA	1	Include new folders
🔲 📄 LicenseRequest.bd	2.36	A	_	Thouse new folders
🔲 🐵 Skyline FTPS Server.sps	7.41	A		

- 1. Select the option Ignore new folders.
- 19. You are returned to the Profile Setup window.

💠 Profile Setup: Skyline A	ccounts - Simple	×
Click For Options	🖉 Search	
Simple	Source C:\Users\Administrator\Documents\ Alternatives	
💒 When	FTP Alternatives	1
<ul> <li>Fast Backup</li> <li>Decisions - Files</li> <li>Copy/Delete</li> <li>Compression</li> <li>Encryption</li> <li>FTP</li> <li>Misc.</li> <li>Programs - Before</li> <li>Auto-close</li> <li>To Email</li> <li>Log</li> <li>Network</li> <li>CD/DVD Burner</li> <li>Cloud</li> <li>Variables</li> <li>Notes</li> <li>Scripts</li> <li>Backup Email</li> <li>Easy</li> </ul>	Choose sub-directories and files Choose sub-directories and provide the file on Source will replace the file on FTP. Chies only on Source are copied to FTP. Chies only on Source are copied to FTP. Chies an empty directory is only on Source then the decision is automated. Chies an empty directory is only on Source then the decision is automated. Chies and prove the files in prover: Chies and files/folders will be ignored: "\%RECYCLE.BIN"\%SBSECOR, "%\AppData\Loca\Temporary Internet Files\", "\%AppData\Loca\Temporary Internet Files\", "\%AppData\Loca\Temporary Internet Files\", "\%Local Settings\Temp\", "\%Midows\Temporary Internet Files\", "\%Local Settings\Temp\", "\%Midows\	R
🕜 Help	Apply V QK Sancel	

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

Confirm	×
?	Would you like to perform a simulated run for this new profile? A simulated run does not copy or delete any files, but does produce a report on what would have been copied or deleted.
	1 Yes No Help
_	

1. Click Yes.

#### 21. A simulated test is run.

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SyncBackPro V6. ofiles Task Prefe		Hala							
	rences Columns						(Charles and Charles and Charl		
Profile 🔺		Туре	Last Run		Result		Next Run		
	fine Accounts	Sackup	11/07/201	2 02:18:52	Running		Not Schedule		
	FTPS Server	💽 Backup			🤗 Impor	ted	11/07/2012 08:	D:	
Differences fo	r profile: Skyline	Accounts (SIMUL	ATED)						_ 0
🗄 🧕 Click he	ere to see more opt	ions							
Source A			Size (bytes)	Date & Time	A	ction		FTP	
Account Co	des.xls		14,336	23/01/2012 0	3:58:34 •	Copy to FTP		VAo	count C
	dimensional data a filman	folders to FTP 🔫		1	25				
	Mirror all the files/				<u></u>	Mirror all the fi	iles/folders to So	ource	
	Source	FT				Mirror all the fi		Byles	
					Files				
oot					Files Source only	Files 1 y 1	KE		1MB)
oot ilename					Files Source only FTP only	Files 1 y 1 0	KE	Bytes	1MB)
loot ilename ize (bytes)					Files Source only FTP only Collisions	Files 1 1 0 0	KE	<b>Bytes</b> 4.00KB (0.0:	1MB)
toot ilename iize (bytes) Jate & Time					Files Source only FTP only Collisions Skipped	Files 1 1 0 0 0 0 0	KE	<b>Bytes</b> 4.00KB (0.0:	1MB)
toot ilename ize (bytes) Date & Time Attributes					Files Source only FTP only Collisions Skipped Unchanged	Files 1 1 0 0 0 0 1 0 1 0 0 0 0 0 0 0 0 0 0	14 01	<b>Bytes</b> 4.00KB (0.0: (B (0MB)	1MB)
ioot ilename ize (bytes) Date & Time Attributes fash /ersioned					Files Source only FTP only Collisions Skipped Unchangeo To Source	Files 1 0 0 0 1 0 1 0 0 1 0 0 0 0 0 0 0 0 0 0 0 0 0	14 0H	Bytes 4.00KB (0.0: 3B (0MB) 3B (0MB)	
ioot ilename ize (bytes) date & Time Attributes lash tersioned					Files Source only FTP only Collisions Skipped Unchangeo To Source To FTP	Files 1 0 0 0 1 0 1 0 1 1	14 01 01	Bytes 4.00KB (0.0 3B (0MB) 3B (0MB) 4.00KB (0.0	1MB)
ioot ilename ize (bytes) date & Time Attributes lash tersioned					Files Source only FTP only Collisions Skipped Unchangeo To Source To FTP To copy/m	Files	14 01 01 14	Bytes 4.00KB (0.03 3B (0MB) 3B (0MB) 4.00KB (0.03 4.00KB (0.03	1MB)
toot ilename ize (bytes) Date & Time Attributes fash /ersioned					Files Source only FTP only Collisions Skipped Unchangeo To Source To FTP To copy/m To delete	Files	14 01 01 14	Bytes 4.00KB (0.0 3B (0MB) 3B (0MB) 4.00KB (0.0	1MB)
toot Filename Size (bytes) Date & Time Attributes Hash Versioned Versions					Files Source only FTP only Collisions Skipped Unchangeo To Source To FTP To copy/m	Files	14 01 01 14	Bytes 4.00KB (0.03 3B (0MB) 3B (0MB) 4.00KB (0.03 4.00KB (0.03	1MB)

- 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.

Profile 🛆	Type	Last Run	Result	😭 Next Run	Le
Skyline Accounts	🔿 Backup	10/07/2012 08:55:20	<ul> <li>Simulation Succes</li> </ul>	Not Scheduled	C
Skyline FTPS Server	🔿 Backup		Imported	11/07/2012 08:	D

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

🚭 SyncBackPro ¥6.1.0.5				_ 🗆	×
Profiles Task Preferences Columns He	lp				
Profile 🔺	Type	Last Run	Result	🏫 Next Run	Le
Skyline Accounts	🙀 Backup	11/07/2012 02:18:52	🗸 Simulation Succes	Not Scheduled	C:
Skyline FTPS Server	🔿 Backup		🕐 Imported	11/07/2012 08:	D:
1	)	2			-
		🏫 😭	<b>•</b>	<ul> <li>Image: Construction</li> <li>Image: Construction&lt;</li></ul>	
New Modify Delete	Run	Restore Schedule	Stop! 2BrightSparks	Help E <u>x</u> it	

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

# 196 Sk

	Skyline	Manual
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<ol><li>The Differences for profile window op</li></ol>	pens.
---------------------------------------------------------	-------

SyncBackPro ¥6.1							_ [		
Profiles Task Prefer	ences Columns								
🔽 🔽 Profile 🛆		Туре	Last Run	Result		🏫 Next Run	Le		
	ine Accounts	🕏 Backup	10/07/201	2 08:57:47	Runnir	-	Not Scheduled	C:	
- Skyline	FTPS Server	Sackup			🕐 Imp	oorted	11/07/2012 08:	D:	
Differences for	profile: Skyline	Accounts						-	
🗉 🗧 Click he	re to see more opt	ions							
Source A			Size (bytes)	Date & Time		Action		FTP	
(Account Cod	les.xls		14,336	23/01/2012 0	3:58:34	Copy to FTP		VAccount	t Cod
×	Airror all the files/	folders to FTP 📑			Ķ	Mirror all the f	files/folders to Sou	irce	<u>,</u>
	Source	F1	IP			Files	КВу	tes	
Root					Files	1			_
Filename					Source o			0KB (0.01MB)	
Size (bytes)					FTP only		0KB	(0MB)	
Date & Time					Collision				
Attributes					Skipped				
Hash					Unchan				
Versioned					To Source			(0MB)	
Versions					To FTP	1		0KB (0.01MB)	
•					To copy,			10KB (0.01MB)	
					To delet		0KB	(0MB)	
-					To prom				
					To renar	me 0			
Elp	🔥 a	omparison Program	ms	4				Abort	1
				<u> </u>	μ	<b>⊡</b> ⊆ontinu		- Brote	

# 1. Click Continue Run.

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

Profile 🔺	Type	Last Run	Result	😭 Next Run	L
Skyline Accounts	🛃 Backup	10/07/2012 08:57:47	<ul> <li>Success</li> </ul>	Not Scheduled	
Skyline FTPS Server	🕏 Backup		🥙 Imported	11/07/2012 08:	C

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

A Cupellar	kPro ¥6.1.0.5		5		_ 0	
						<u>ک</u>
	sk Preferences Columns He	%p				_
🗖 🖬 P	rofile 🔺	Type	Last Run	Result	🔛 Next Run	Le
	Skyline Accounts	🛃 Backup	11/07/2012 02:31:01	Success	Not Scheduled	C:
	- Skyline FTPS Server	Backup		🤌 Imported	11/07/2012 08:	D:
·····	~					
	1					- 1
	_					- 1
						- 1
						- 1
						- 1
						- 1
						- 1
						- 1
						- 1
						- 1
						- 1
						- 1
						- 1
						- 1
				2		- 1
•						<u> </u>
	<b>=</b>	<b></b>	🏫 🛛 🏠 🗌		🕜 🖡	
New	Modify Delete	Run	Restore Schedule	Stopl 2BrightSparks	Help E <u>x</u> it	
1						

- 1. Select the Profile.
- 2. Click Schedule.
- 27. Confirm that you want to create a schedule for the selected profile.

Confirm 🗙
There is no schedule for the profile "Skyline Accounts". Would you like to create one?
1     Yes     No     Help       Do not prompt me again

- 1. Click Yes.
- 28. Enter your windows logon password.

🚸 Windows Logon Password		×
Enter your Windows logon password for 2	2K8R2X64EN\Administrator. If you do not have a passw	ord simply press OK.
$\geq$		1
(1)	2 – V QK	Cancel

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

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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.

💠 Schedule				_ 🗆 🗵
When do you want the pr C Daily	ofile to run? • Weekly		C Monthly	
Start: 11/07/2012	• 05:00:00	*		
Recur every: 1	weeks on:			
🔽 Sunday	🔽 Monday	🔽 Tuesday	🔽 Wednesday	
🔽 Thursday	🔽 Friday	🔲 Saturday		
Repeating				
Run this profile every	1 days	0 hours	0 minutes	0 seconds
for a duration of	1 days	0 hours	0 minutes	0 seconds
	Indefinitely			
Security	- stastinisty			
Run only when user is	logged on			
🔽 Run whether user is lo	gged on or not			
	ord. The profile will only have	ve access to local reso	ources.	
			4.00	
			✓ <u>о</u> к	Cancel

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

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

🕸 Schedule for Skyline Accounts		×
Status		
The task is ready to run at its next scheduled time,		
(0×0000001)		
Next Run		
11/07/2012 05:00:00		
11/07/2012 05:00:00		
Recent Run		
Unknown		
Never		
Schedule		
Every 1 weeks (Monday,Tuesday,Wednesday,Thursday,Friday)		
,		
Run As	Shared?	Disabled?
2K8R2X64EN\Administrator	No	No
	1	
Delete Schedule	🕜 <u>H</u> elp	<u>✓ o</u> ĸ

- 1. Click OK.
- 31. At the main SyncBackPro window details of the next scheduled run are shown.

💠 SyncBackPro V6.1.0.5							
Profiles Task Preferences Columns H	elp						
Profile	Туре	Last Run	Result	🔐 Next Run	Left/S		
Skyline Accounts	🙀 Backup	11/07/2012 02:31:01	Success	11/07/2012 05:00:00	C:\\		
Skyline FTPS Server	🜩 Backup		P Imported	11/07/2012 08:00:00	D:\\		
المتعمر ومرجعته والمحاص		and the second	and a second second				

#### 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.

- Back	
You must select an account	
Please enter your account code & Click Validate	
	Next >

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.

2	-	1	l,
		ę	r

Accounts and Pricing

Setup your accounts and payment provider

#### 3. The account setup page opens.

	7.0.3.1	Last Upgrade: 2020 January 03	Logged in as:	Portal Administrator	Admin Home
Pricing	CostManager 🔹				
Please select Payment Provider	Account 🗸				
Show Account page	User Prompt	Enter your Account or Expe	nditure code:		
Account Code mandatory	Incorrect account code message	Please enter a valid code.			
Validate Account Code					
Use Account Name if Account Code is empty					
(4)		Field Label	Optional Mask		
Users enter an Account Code in a text box	Account Code	Account Code			
O Users are shown a list of Account Codes	Account Name	Account Name		🕑 Hidden	
	Account Description	Account Description		🕑 Hidden	
	Delivery	Delivery	]		
	Priority (5)	Priority	]		
	Cancel Save				

- 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.

Administration	201

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.

	7.0.3.1		Last Upgrade: 2020 January 03	Logged in as:	Portal	Administrator	Admin Home
Pricing	CostManager 💌						
Please select Payment Provider	Account 💌						
					Ø		_
Show Account page	User Prompt		Enter a General Ledger Code	or Project Code			
Account Code mandatory	Incorrect account code message	•	Please enter a valid General L	edger Code or Projec	ct Code		
Validate Account Code							
Account Code or Account Name mandatory							
		Field	Label 🤦	Optional Mask			
Users enter an Account Code in a text box	Account Code	Ger	neral Ledger Code				
Users are shown a list of Account Codes	Account Name	Pro	ject Code			Hid	dden
	Account Description	Acc	ount Description			🕑 Hic	dden
	Delivery	Del	ivery				
	Priority	Pric	ority				
	Cancel Save						

- 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.

Document Type Product C	Options Basket Address Shipping	Account Confirm	
Back			
Please enter a valid General	Ledger Code or Project Code		
Please enter a valid General Enter a General Ledger C			
Enter a General Ledger C			
Enter a General Ledger C	ode or Project Code		

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
- I 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 I 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.

		<b></b>	
Document Type Product Options Basket	t Address Shipping Accou	aunt Confirm	
Enter your Account or Expenditure co Account Code	de:		
Expenditure Code			
	Format: a### #: number L: uppercase letter I: lowercase letter a: number or letter		

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.

ders								
📿 Refresh	🕹 🕹 Download All	🛃 Download 📀 Proof Print	😪 Status 👻 🛃 View 🛅 🛙	Delete   👌 Print Job Ti	cket <b>Q</b> Search	↔ Fill Width	Currer	t Job
	OrderID	Document Name	Username	Status	Product	Pages	Copies	Total p
Order plac	ed		<u>.</u>					
	0002982	PacificNorthWestUSA	Cuthbert Sewell	Order placed	Booklet	10	5	50
J -	0002981	Manual	Cuthbert Sewell	Order placed	Comb Bound	602	1	602
	0002981	A4 Comb Bound	Cuthbert Sewell	Order placed	Simple	242	5	1210
Overview General Lei Project Cor Account De Impositon	dger Code AB12		taff Notes				Folde Canon MG HP ENVY 4 Microsoft I Xerox Glob	3600 500 Pr
	laced 0002982	Cuthbert Sewell Booklet	PacificNorthWestUSA	Print Job Ticket	.::			

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

## Amending the Account Labels

Skyline Manual

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".

Accourt	nt Code 💌		Search	
	Account Code	Account Name	Account Description	
	001	account 1	Description 1	_
	0010	<b>T</b>		

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.

	7.0.4.1	Last Upgrade: 2020 January 29	Logged in as:	Portal Administrator   <u>Admin Home</u>
Pricing	CostManager 🔹			
Please select Payment Provider	Account 🔻			
Show Account page	User Prompt	Enter your account code:		
Account Code mandatory	Incorrect account code message	Please enter a valid account	t code.	
Validate Account Code				
Account Code or Account Name mandatory				
	Fie	ld Label	Optional Mask	
Users enter an Account Code in a text box	Account Code	harge Code		
Users are shown a list of Account Codes	Account Name	harge Name		Hidden
	Account Description	harge Description		Hidden
	Delivery	elivery		
	Priority P	riority		
	Cancel Save			

- 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.

Charge	: Code 🔹		Search	
	Charge Code	Charge Name	Charge Description	
	001	account 1	Description 1	

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ī

## 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

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

#### 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**.

The second secon

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# Accounts and Pricing

Setup your accounts and payment provider

#### 3. The account setup page opens.

	7.0.4.1		Last Upgrade: 2020 January 29	Logged in as:	Portal	Administrator	Admin Home
Pricing	CostManager 💌						
Please select Payment Provider	Account 👻						
	User Prompt		Enter your account code:				
Account Code mandatory	Incorrect account code message		Please enter a valid account o	:ode.			]
Validate Account Code							_
Account Code or Account Name mandatory							
		Field	Label	Optional Mask			
Users enter an Account Code in a text box	Account Code	Acc	ount Code				
Users are shown a list of Account Codes	Account Name	Acc	ount Name			🗆 Hie	dden .
	Account Description	Acc	ount Description			🗆 Hie	dden .
	Delivery	Ship	oping				
	Priority	Pac	kaging				
	Cancel Save						

- 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.

Please check the order details below and confirm your order

Quantity	Document	Product	Pages	Price
25	PrintStation	A4 Plastic Comb Binding	66	92.00
			Shipping	2.00
			Packaging	5.00
			Total	99.00

# **Enabling Stripe**

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

Stripe is a licensed feature of Skyline.

Pricing	CostManager 🔹
Please select Payment Provider	Stripe 💌
This portal is not licensed fo	or Stripe Payments. Please

#### 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.



<u>Accounts and Pricing</u> 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.

Pricing	CostManager 💌
Please select Payment Provider	Stripe 👻
Delivery Costs Label	Delivery
Priority Costs Label	Priority
Stripe Account Publishable Key	pik_teal_jid105R6Ovitud30480000RgCuRBO
Stripe Account Secret Key	sk_heit_FT3HBCuUID/BBBEniGun+rfPupDHUBNQEX8
Back Save	

**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.

Pricing	CostManager 🔹
Please select Payment Provider	Stripe 🔻
Delivery Costs Label	Delivery
Priority Costs Label	Priority
Stripe Account Publishable Key	
Stripe Account Secret Key	
Allow Stripe Promotion Codes	
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 <u>delivery form</u><sup>1</sup><sup>568</sup>. 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	Stripe 💌
Delivery Costs Label	Delivery
Priority Costs Label	Priority
Stripe Account Publishable Key	pk +====================================

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 <u>Using WPM Education to Pay for an</u> Order<sup>① 34</sup> for further details.

WPM Education is a licensed feature of Skyline	WPM Educatior	۱ is a	a licensed	feature	of Skyline
------------------------------------------------	---------------	--------	------------	---------	------------

Pricing	CostManager 👻
Please select Payment Provider	WPM Education 👻
This portal is not licensed for Please contact sal	

#### 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.

Pricing		CostManager	•		
Please select Payment Pro	vider	WPM Education	•		
Delivery Costs Label	Delivery		Priority Costs Label		Priority
Client ID	8216		Pathway ID		27
Department ID	1		Shared Secret		•••••
Payment Option	EP		From Email Address		support@eprint.net
Callback URL	https:// *//	ŋ <mark>41./</mark>		Check that	this URL is valid
Redirect URL	https://e	19 A.		Check that	this URL is valid
WPM Pathway URL	https://	يون ويون نورونو	•	Check that	this URL is valid
Back Save					

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6. You can amend the Delivery Costs and Priority Costs labels to match the terminology used on your <u>delivery form</u><sup>1</sup><sup>568</sup>. The amended labels will appear on the confirmation page. The field will only show if options is completed in the delivery form.

Pricing Please select Payment Prov	vider	CostManager   WPM Education		
Delivery Costs Label	Delivery	Priorit	y Costs Label	Priority
Client ID	8216	Pathw		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  $\checkmark$ .

R

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:

- 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 <u>Creating a Product</u><sup>156</sup>.
- 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 <u>Selecting the</u> Pricing<sup>1</sup>.

File         Help           Price Type         Cost Per Page         Cost Per Document         Cost Per Order						
Product name	Calculated price	Fixed price	Price each	Setup cost	Tax rate %	
Booklet	۲	$\bigcirc$		0.00	0.00	Image: A start of the start
Collated	۲	$\bigcirc$		0.00	0.00	<b>?</b>
Quotation	$\circ$	۲	0.0000	0.00	0.00	Image: A start of the start
Simple	۲	0		0.00	0.00	<b>/</b>

- 3. Assign the product to the required portal. For more information, please refer to the section on Adding <u>Products to a Portal</u><sup>1552</sup>.
- 4. Open the website and sign in with Administrator rights. View the **Admin** page and In the Orders section click **Order Statuses**.



<u>Order Statuses</u> Create, edit & delete order statuses

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

Order Placed Emails	<ul> <li>Send one Order Placed email per document ordered</li> <li>Send one Order Placed email per order</li> </ul>	
New orders with no price	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 <u>Changing the Wording in a Status Email</u><sup>1512</sup> 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<sup>D</sup><sup>30</sup>.

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<sup>D 45</sup>.

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# **Configuring Order Details**

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

- <u>Specify the number that the Order numbers should start at Dress</u>. 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<sup>D<sup>214</sup></sup>. 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.
- <u>Amend the status of orders</u><sup>D<sup>216</sup></sup>. When an job order is placed on PrintStation the order is listed in the <u>Orders web page</u><sup>D<sub>339</sub></sup> where the status of the order is shown. As the order is processed the order status is automatically updated

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.



<u>Order Numbers</u>

Set a start order number for a portal

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



## 4. Click Submit.

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

Last Order Number 60000	
Your order number details have been saved	Back Submit

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# 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 <u>specifying the</u> starting order numbers<sup>D213</sup>.

## 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  $\mathscr{O}$ . 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 <u>default</u> <u>configuration option</u><sup> $D_{728}$ </sup>. 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.

😑 Skyline Website 🌓 Skyline Downloads 🚦	test1.eprintnow.com say	<b>/</b> 5		line Help 🛛 📕 Tes	t2
	Please complete this order l	before ordering another do	ocument	<u>s   Edit</u>   <u>Admir</u>	n   <u>Management</u>   <u>Logout</u>
			ОК		4
Mary and the					
Home Upload Paper Originals Li	braries Orders Produ	cts FAQS			
Document Type	Product Options Basket Address	Shipping Account Confirm			
Document	Product	Quantity Price	Pages	Edit	
Administration	Simple Printing	1 🎅 67.50	270	Edit 🗙	
				Next	

#### 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 🥒.

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- 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 <u>Orders Web Page</u><sup>D</sup><sup>116</sup> 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 <u>automatically generate an email message</u><sup>D<sup>217</sup></sup> when a job status is changed. You can also configure the wording shown for the status displayed in the Orders web page.

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

<u>Waiting for Quote</u><sup>D<sup>300</sup></sup> 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.



<u>Order Statuses</u> Create, edit & delete order statuses

3. The current system statuses that have been selected are shown.

	Туре	Name	End User Display	Email User	Allow order to be deleted	Show Orders on Printstation
P	Waiting for Quote	Waiting for quote	Waiting for quote	$\checkmark$	I.	<b>V</b>
P	Quote Sent	Amended Order	Amended Order	$\checkmark$	1	<b>V</b>
P	Order Placed	Order placed	Order Placed	~	1	1
P	Awaiting Paper Originals	Awaiting Paper Originals	Awaiting Paper Originals	<b>V</b>	1	<b>V</b>
P	Downloaded	Downloaded	Downloaded	<b>V</b>		1
P	Paper Originals Received	Paper Originals Received	Paper Originals Received			1
P	Query Outstanding	Query Outstanding	Query Outstanding	~		1
P	In Production	In Production	In Production			<b>V</b>
P	Printed	Printed	Printed	~		1
P	Completed	Completed	Completed	$\checkmark$		
P	Archived	Archived				1
1	Deleted	Deleted				<b>V</b>

- 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.

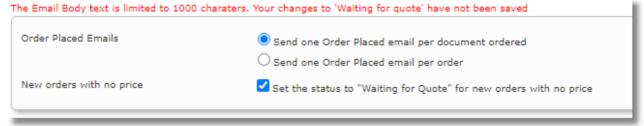
## **Amending Status Emails**

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<sup>D<sub>515</sup></sup> in Configuring PrintStation regarding these requirements.</sup></sub>

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.



<u>Order Statuses</u> Create, edit & delete order statuses

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

	Туре	Name	End User Display	Email User	Allow order to be deleted	Show Orders on Printstation
	Waiting for Quote	Waiting for quote	Waiting for quote	1	~	1
>	Awaiting Paper Originals	Waiting for Paper Originals	Awaiting Paper Originals	<b>V</b>	<b>V</b>	1
۶	Quote Sent	Quote Sent	Quotation Sent	1		1
۶	Paper Originals Received	Paper Originals Received	Paper Originals Received			1
۶	Order Placed	Order placed	Order placed	1		
۶	Downloaded	Downloaded	Downloaded			
۶	Query Outstanding	Query Outstanding	Query Outstanding	<b>V</b>		<b>1</b>
۶	In Production	In Production	In Production			
1	Printed	Printed	Printed	<b>V</b>		<b>1</b>
1	Completed	Completed	Completed			
۶	Archived	Archived	Archived			1
1	Deleted	Deleted	Deleted			

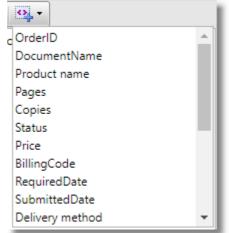
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🤌 Qu	iery Outstanding	Query Outstanding	Query Outstanding	d.	d.
Status settings					
Name	Query Outstanding	Show Orders	on Printstation 🗹 🛛 Email Us	er 🔍 (1)	
End User Display	Query Outstanding		to be deleted	0	
		2			
Email Settings	5	D			
Email Subject	Print Order Query				
CC List	Copy status emails. Sep	arate multiple email addresses	with a ; character		
Email Body			•		
BI ∐ab	ĸ ≡ ≡ ≡ <b>≣</b>	律律目目 😫 😣	96		
📌 Design 🔇	> HTML <sup>Q</sup> Preview			ii.	
Design Save Cance				H.	

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 is 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.

	Туре	Name	End User Display	Email User	Allow order to be deleted	Show on Printstation
/	Awaiting Paper Originals	Awaiting Paper Originals				¥
1	Paper Originals Received	Recieved	Paper Originals Received			<b>V</b>
/	Order Placed	Order Placed			2 🗆	¥
1	Downloaded	Downloaded	۲			<b>V</b>
1	Query Outstanding	Query Outstanding	Query Email Sent			4
I	In Production	In Production				<b>V</b>
مديد کې	Printed			And and a second		

- 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.

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## 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.

	Document	Product	Pages	Quantity	OrderID	Price	Order Date	Status
View	Skyline Adminis	A4 Comb Bound	146	132	0009057 20/02/2012	89.63	20/02/2012 16:59:00	Order Placed 🗙
View	Exam Reports	Collated Sets	8	125	0009054 15/02/2012	4.50	15/02/2012 17:24:00	Awaiting Paper Originals
View	Evacuation Proc	A4 Booklet	43	6	0009053	0.48	15/02/2012 15:48:00	Completed

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.

<u>Order Statuses</u> Create, edit & delete order statuses

## 3. Click 🖉 by the status type Order Placed.

Ø	Order Placed	Order placed	Order placed	<b>a</b>		<b>A</b>
Status settings						
Name	Order placed	Show Orders	on Printstation 🗹 🛛 Email User 🛛			
End User Display	Order placed	Allow order t	o be deleted 🛛 🖸			
mail Settings						
mail Subject	Order Placed					
CC List	paul.clark@eprint.net;paul.cl	lark@btinternet.com				
Your order (Ord	be 📰 🗃 📰 📰 📰		0, •	Order Id Account Code Required Date Order Date Priority Name prefix First name Family name Phone number Organisation nam Street City Region Post Code The name of east for Priority or D	following fields in th [Orderld] (BillingCode) (RequiredDate] (Priority) (NamePrefix) (FinstName) (FamilyName) (PhoneNumber) e (OrganizationName (Street) (City) (Region) (PostCode) ch document ordered elivery will be appen	e) J. prices and any co
				the layout below Document nam		Price
				Document nam	ie 2	Price
				Priority		Price
🥜 Design 🔌	HTML Q Preview			Delivery		Price
				Total		Price

- 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		X
★	View	Administration	0000111	30/04/2024 14:03		In Production		
7	View	Manual	0000111	30/04/2024 14:03		Order Placed		X
7	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:

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- 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.

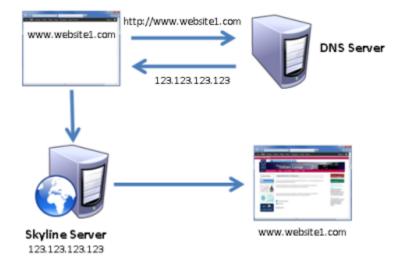
## **Configuring Skyline Portals**

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.



No portal has been configured for this URL :

#### localhost

Retry



**Note:** Before a portal can be added you need to associate the Skyline fixed IP address with the Portal URL in the DNS (Domain Name Server). This is usually done by your network administrators.

You can use the command nslookup to check to see if the portal URL has been mapped in the DNS.



#### To associate a Portal with a website:

- 1. Log in with Administrator rights and go to Admin.
- 2. In the Portals section click Portal URL's.



Portal URL's

Create and delete websites in the current portal

3. A list of associated websites is shown.

New Website URL	
Add amatta a 2 m	×
	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

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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.

Skyline Manual

<u>Portals</u> 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			ſ	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.

Gradient - Red Theme Gradient - Blue Theme	Download Download	Edit main CSS	×
Gradient - Green Theme	Download	Edit main CSS	×
Upload a new Theme	Select		
Submit 2			
New Theme Name Existing Themes			
Clone			
			Back

- 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 <u>apply the portal theme</u>  $D^{26}$ .

## **Applying Portal Themes**

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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**.

<u>Portal Themes</u> Select a theme for a portal

3. A list of available portal themes are shown.

1	
Portal Selector Annetle	
O Aachen1 O APA Becky	
O Vivent ○ White ○ White Admin ● Xerox Apply Theme	
	Back

- 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.

Skyline	ma la mabili	
Save yourself time & money with Student's Guild Print Room LOGIN / REGISTER Username Password Remember me next time Log In Register as New User		
		Accessibility 🗎 Regular 🔹 Regular High Contrast

#### 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  $\checkmark$ .
- 5. Click 💾 to save the setting.

To enable the accessibility selector for all portals associated with Skyline use the <u>default configuration option</u>  $\square^{728}$ . 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:

(a)

- 1. Log in with Administrator rights and go to Admin.
- 2. In the Configuration section click Email Settings.

<u>Email Settings</u>

Add and update email settings

3. Enter the email configuration settings if you are going to use Portal Specific settings.

This portal can use the default email settings set Switch to Default Settings	by the Host Administrator, or yo	can use portal specific email settings
Email From Address	ang Santial	
SMTP Server SMTP Server Username	- And Address of California	
SMTP Server Password		
SMTP Port Number	Use SSL	
Email error log files to		
Copy error log files to ePrint Support		
Enter an email address to test the settings		Test Settings
nail Template		
ow Template Hide Template		
tup custom emails		Back

- 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.

کرمار و ۲۰۰۰ و مربوعات مرمندی و می <sub>رد</sub> مربوط می و میشند. مربوط می مربوط می و مند و می <sub>رد</sub> و در مربوط می مربوط می مربوط و مربوط و مربوط و مربوط و	والواح الصاريف مجروري والمحالين والمحالين والمتصحا فأتمت المرح حويت والارد والمصل من الأفاط المحا
Email Template <u>Show Template</u> wde <u>Template</u> You may design your portal's email template below.You must add the email body place holder	where you would like the main body of the email to appear.
Placeholder: {EmailBodyText}	
B / 및 abs 至 至 至 至 當 當 律 律 注 ⊟ Font Name ▼ 8▼ A * 3.*	
(EmailBodyText)	
Design	
landa ana ang ang ang ang ang ang ang ang an	iii Maraa ya gaadaa ka waxaa dalka waxaa ya waxaa ka ka aa ya waxaa ka waxaa waxaa waxaa waxaa waxaa waxaa waxaa w

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**.

Enter an email address to test the settings Test Settings		l
-----------------------------------------------------------	--	---

6. A message will show on the web page stating that "the email has been sent, please check your inbox".

	annette.webber@eprint.net
The email has been sent, please che	ck your inbox

7. You will receive a test email confirming that the email settings for the portal have been correctly setup.

Test Email	
noreply@eprint.net	
To: dereattie Walder	
The email setting for the portal must be grading when have been set up correctly.	<

#### 230 5

**Skyline Manual** 

## **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**.

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Portal Configuration

Manage the configuration options for this portal

- 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 <u>default configuration option</u><sup>D<sup>78</sup></sup>. 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

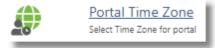
- 3. Find Upload Directory in the list.
  - The default upload directory is "Documents\UploadedDriverFiles\". Amend as required.
- To amend this option click *P*.
- 5. Click 💾 to save the setting.

## **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**.

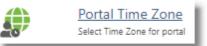


3. Select the required time zone for the portal and click Set

Portal Time Zone			
PLease select the Time Zone for this portal. (UTC+00:00) Dublin, Edinburgh, Lisbon, London	<b>•</b>	Portal Date and Time: Tuesday 09 June 2020 10:04	
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**.



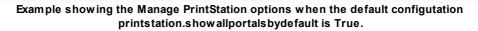
6. Select the required time zone for all portals and click Set

Portal Time Zone			
PLease select the Time Zone for this portal. (UTC+00:00) Dublin, Edinburgh, Lisbon, London	-	Portal Date and Time: Tuesday 09 June 2020 10:04	
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.

umber of items per pa	9e 10 🔻	Add/Remove a	Portal To A PrintSta	ation
PrintStation PC	Assigned Portals	PrintStation	DEV-03	Ŧ
DEV-03	Skyline	× Portal	Network	
GOLLUM	Skyline	×		
INARA	Skyline	×	- Ke	emove Add



#### 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.

PrintStation PC	Assigned Portals		PrintStation	DEV-03
16A(0)	Skyline,Network	×	Portal	
Della Links	Skyline	×	Porcar	Network
HARTON	Skyline	×		Remove Add 3

- 1. Select the PrintStation from the drop down menu.
- 2. Select the Portal from the drop down menu.
- 3. Click Add.

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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.
  - 2

Manage PrintStation(189/1000) Administer PrintStation Options

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

umber of items per pa	9e 10 🔻	Add	/Remove a	Portal To A PrintStat	ion
PrintStation PC	Assigned Portals	Prin	Station	DEV-03	•
100.000	Skyline	×	al		
1111111	Skyline	×		Network	
and the	Skyline	×		Ren	nove Add

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'.

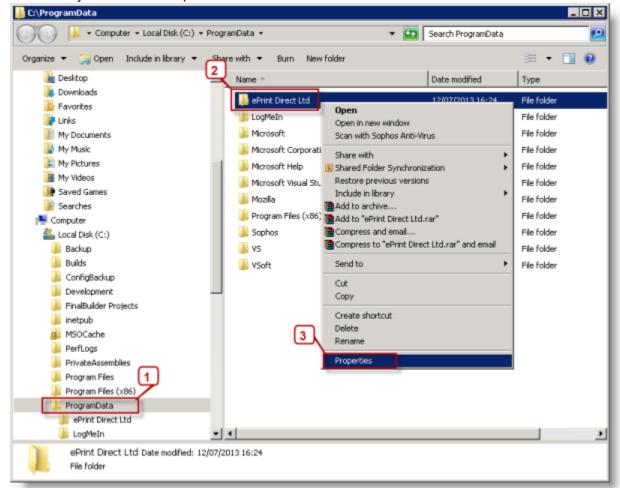
# Note:

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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.

📙 ePrint Direct Ltd Properties 🚹 🛛 🗵
General Sharing Security Previous Versions Customize
Object name: C:\ProgramData\ePrint Direct Ltd
Group or user names:
💐 Everyone 📃
& CREATOR OWNER
SYSTEM     Administrators (SNDW/DDN\Administrators)
To change permissions, click Edit.
Permissions for Everyone Allow Deny
Full control 🗸 🔺
Modify 🗸
Read & execute 🗸
List folder contents
Read 🗸
Write V
For special permissions or advanced settings,Advanced
Learn about access control and permissions
OK Cancel Apply

- 1. View the **Security** page.
- 2. Click Edit.

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4. The Permissions for ePrint Direct Ltd window opens.

🕌 Permissions for ePrint Direct I	Ltd	×
Security		
Object name: C:\ProgramData\a	ePrint Direct Ltd	
Group or user names:		
Serveryone		
& CREATOR OWNER		
SYSTEM     Administrators (SNOWDON\A	(dministrators)	
Users (SNOWDON/Users)	laministrators)	
,		
	Add	Remove
Permissions for Everyone	Allow	Deny
Full control		
Modify		
Read & execute		
List folder contents		
Read		
Learn about access control and pe	ermissions	
ОК	Cancel	Apply

- 1. Click Add.
- 5. The Select Users, Computers, Service Accounts or Groups window opens.

Select Users, Computers, Service Accounts, or Groups	? ×
Select this object type: Users, Groups, or Built-in security principals	Object Types
From this location: eprint.local	Locations
Enter the object names to select ( <u>examples</u> ):	Check Names
Advanced	Cancel

1. Click Locations.

6. The Windows Security window opens.

Windows Security	×	
Enter Network Password Enter the name and password of an account with permissions for eprint.local.		
For example user, user@example.microsoft.com, or domain\user name		
User name Password Domain: EPOINT		
OK Cancel		

1. Click **Cancel**. You only need access to the local machine not to the network

7. The Locations window opens.

Locations		? ×
Select the location you want to search.		
Location: SNOWDON Entire Directory e- eprint.local		
	2 OK Cancel	
	OK Cancel	

- 1. Select your PC name at the top of the list.
- 2. Click OK.

8. You return to the Select Users or Groups window.

Select Users or Groups	? >	<
Select this object type:		
Users, Groups, or Built-in security principals	Object Types	
From this location:		
SNOWDON	Locations	
Enter the object names to select ( <u>examples)</u> :	2	
Everyone	Check Names	
	3	1
1		
Advanced	OK Cancel	
		14

- 1. Type Everyone.
- 2. Click **Check Names**.Check that **Everyone** is now underlined. Click **OK**.
- 9. You are returned to the Permissions for ePrint Direct Ltd window.

🕌 Permissions for ePrint Direct	Ltd 🗙
Security	
Object name: C:\ProgramData\	
Group or user names:	
💐 Everyone	
CREATOR OWNER	
SYSTEM .	
Administrators (SNOWDON)	Administrators)
SNOWDON\Users)	
	Add Remove
Permissions for Everyone	Allow Deny
Full control	
Modify	
Read & execute	2) 🗹 🗆 🗌
List folder contents	
Read	
Learn about access control and pe	ermissions
3 ОК	Cancel Apply

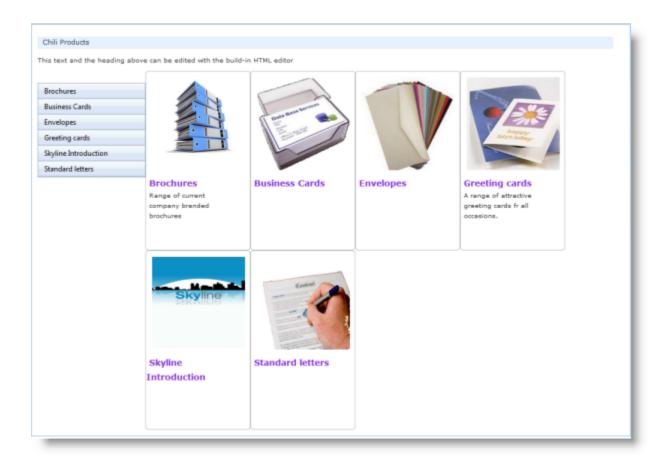
- 1. Select the user group **Everyone**.
- 2. In the section Permissions for Everyone check the option Full Control. Click OK.
- 10. You are returned to the ePrint Direct Ltd Properties window. The user group Everyone should now have Full control. Click **OK**

## **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

Skyline Manual

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**.



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Publisher Server Connect Skyline with a Publisher server

#### 3. Enter the required Skyline Publisher server details

Connect to Skyline Pu	ublisher Server	
		Use Proxy
URL	http://publisher.eprintnow.com/chili	Proxy Address
Environment	Admin	Proxy Port
Username	Admin	Proxy Username
Password	•••••	Proxy Password
Confirm 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**.

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	1	L
Ŀ		L

<u>Publisher Environments</u> Assign Publisher Environments to Portals

3. A list of Portals and whether they are linked to a Skyline Publisher Environment is shown.

	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  $\checkmark$  associated with the portal that you want to link to an Environment.
- 2. Select the Environment from the drop down list.

# Editing Folders

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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:

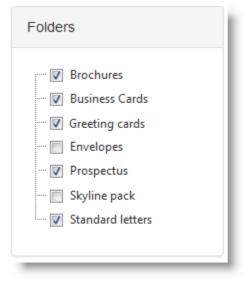
Skyline Manual

- 1. Log in with Administrator rights and go to Admin.
- 2. In the Publisher section click Publisher Folders.



<u>Publisher Folders</u> Select Publisher Folders to display

3. All the available Publisher folders are listed. The folders that are ticked are visible from the Skyline website.



Administration	245
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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.

Folders	Title	Image	Document Preview
Brochures  Business Cards  Greeting cards  Envelopes  Prospectus  Skyline pack  Standard letters	Business Cards Subtitle Description	Box cards.gif   Upload new image  Add Delete	
	.d Special offer Special offer colour	Background colour	Business Cards Back Save

• **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**.



<u>Publisher Products</u> 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.

💷 🧰 Brochures
🖶 🔚 Business Cards
🖃 📜 Chris
APME coffee label
····■ (hidden)

2. Select the Skyline Product to be associated with the publisher product. All products created with the ProductManager show as available products.

Skyline Product	
Portrait Staple	
100 80gsm Single Sided Business Cards	
Collated Sets	
Landscape Staple	
Comb Bound	
Coil binding	
Hide	

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**.

Workspace	
Administrator	*
Atlantic Airways	E
Bath WorkSpace 1	
Birthday Card	
Business Card V1	
Default variable workspace	+
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**.

View Setting	
Bath prospective	*
ePrint Business Card V1	
ePrint Direct data letter	Ε
Nestle Business Card	
Skyline Intro portrait	Γ
Skyline introduction	÷
Make default	

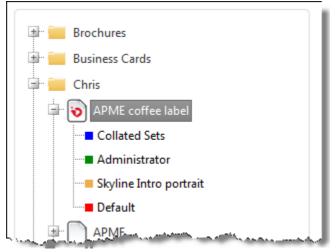
5. Select the PDF Setting. If there is a PDF setting that is frequently used that setting can be selected by default. Select the PDF setting and click **Make Default**.

PDF Setting	
Default	
Make default	

#### 6. Click **Save** by the Preview

	Gast. Namr Job Tite State State
124/1	m:+44(2)Mattelle 1:44(2)Mattelle 1:44(2)Factor 1:44(2)Factor Data
APME coffee label	
Back	Save

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.

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	۰.	
	ì	ì

Publisher Products Assign products to Publisher documents

3. Open the folder & select the product that you want to remove from the Skyline web page.

🖈 🚞 Brochures	Skyline Product	
💷 🚞 Business Cards	Portrait Staple	
Business Card Typel	100 80gsm Single Sided Business Cards	
1 Nestle US no logo	Collated Sets	
NEW DOCUMENT	Landscape Staple	
- 100 80gsm Single Sided Business Cards	Comb Bound	
<ul> <li>Default variable workspace (default)</li> </ul>	Coil binding	NEW DOCUMENT
—= Nestle Business Card (default)		
Default (default)	Hide 2	a
🗈 🚃 Chris	9	
🗊 🚞 Envelopes	Workspace	Back Save
Grationerede	workspace	and a state of the

- 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.

Brochures	Skyline Product	
🖃 🚃 Business Cards	Portrait Staple	
Business Card Type1	100 80gsm Single Sided Business Cards	
Nestle US no logo	Collated Sets	
NEW DOCUMENT	Landscape Staple	
(hidden)	Comb Bound	
<ul> <li>Default variable workspace (default)</li> </ul>	Coil binding	NEW DOCUMENT
Nestle Business Card (default)	10.1	
Default (default)	Hide	
🖶 📒 Chris		
Sin Envelopes	the second se	Back Sav

## Maintenance

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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<sup>D<sup>268</sup></sup>. 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.
- <u>Taking the Website Offline</u><sup>[]233</sup>. If you are doing an <u>upgrade</u><sup>[]669</sup> or doing a <u>manual backup</u><sup>[]258</sup> you need to take the Skyline website offline. This will prevent changes to the database during the backup.
- Accessing SQL Service through a Firewall<sup>D<sup>264</sup></sup>. For Skyline to be able to reach the databases on an external SQL server the relevant ports on this server must be open.
- <u>Amending Skyline Email Settings</u><sup>D<sup>265</sup>. You are able to enter the email addresses that are used when the Skyline system generated emails are sent.</sup>
- <u>Moving the Skyline Database</u><sup>D<sup>288</sup></sup>.
   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.



<u>License Settings</u> Add and Renew License

#### 3. Your license details are displayed.

License Fields	This server	Skyline License values		
Drive ID		CAC94486		
Machine Name	TEST-01	TEST-01		
CPU ID	0000000000000000	000000000000000000000000000000000000000		
Mac Address	60458DC16E8A	6045BDC16E8A		
Windows Installation Date	2022-10-28 10:42:56	10/28/2022 10:42:56 AM		
Windows Version	10.0.17763	6.2.9200		
Operating System Type	Server	Server		
IP Address	10.0.0.11			
Service Subscription	on Expiry Date 09 M	ay 2024		
Serial Number	NQYZ-P4M4-6HTL-4R8G-Y48D-A5A1-1F			
License Activated	True			
Activation Date	15/12/2022 00:00:00			
Installation Date	16/12/2022 00:00:00	Pricing	True	
Last Start Date	23/04/2024 09:23:34			
PrintStations	101	Portals	999	
CHILI Publisher	True			
Pull Print	False	Ignore Hardware ID's	True	
Colour Analysis	True	Stripe Payment	True	
WPM Payment	True			
ase enter the supplied serial	number below	Validate		
lqtdSxUhHtSqqCY3leMt EKmNV0kQchSjd8XcTnOU Q&ILBuus5HkURc/c972 (WhHn70kXzhHLqNQ/RY) ISSSmRg4FH1yVqh35x; VVqt86on4e6A3jzXpIG VIItZ2k4XICUJ9TIqK; DC2rKmMnh2CKBOWnxzg;	PQLPDLZhAnTap8Ryq9DP4QtzspxW SCxjEulV1s5EEFy0d0jqQOTUhDxG SVMNOBHQJWROreFfnWn1tUGskj5EL gAfhu016gYeXXRA0MCHhQQSSHXTH BpfFVD5Mgfh+W194URB6y71P10R S6tyqieJq+TC49DMEDD0urkPhWZG CRXYUE/QW+Le4AYShJvVbnqtJHN ue7pLMUCAdf3LHYUYGO18ZORE79 F0dqmzviFeZMvbdvLtW3fCKWX8SK	<pre>VIPYjmLEnuuNmdU2xqlY6wkuf; PCMNVJ=wFcj6Fg89tJwLhiqov U9zPCqxtvcFu7tUoAprSf3r2j; rv8Fd3zdSinY9olFIHU2SPs8k a9A4WDLDVqaDjzlEj85p2Xybwl nil6sOuaInTuRGlghSRvdoVX1; JAU1FAFoxFtc0I3Q2MKqOStbD 8td5yK9KbSayejtz6eg4YrCfV;</pre>	zrJán wfg+e LTVh1 DBgzq P9hPv LkJJh FEdTf L9KTx	The instructions on installing a license file can be found by clicking the button below. View Online Manual You may need to allow pop-up windows to view the online manual
SDFc4LMTc5L17te78FC	Select	0Z0Hb/ThoSAnQKEBq0da/+ZkZ/ load	thNXp //	
ivated Skyline License file				

#### 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.



<u>License Settings</u> 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.

Please enter the supplied senai number below	
Validate	
JGobkmK3gfBdJplAIxXlJ9QLPDLZhAnTap8Ryq9DP4QtzspxWoSwU5BLoVcONft85BZ61y2oC0qx5q+ xFlqtd <xuhhtsqq0y31embcvfeulvis5efyou3jqqotuhdxoviryjmlenuummdu2xq1yowkufzrj4n IPEKmhV0kQch5jd8xcTnO6VMNOBHQJWROnEfpWnltUGskj5eLPCNVNJJewFcj6Eg09t1mLhGqvwfg+e cCQ8ILBuus5hkUkr/c9T2n4fhu016gYeXXRA0KCHhQvSSHXTH19zPCqXfvcFu7flAnpcf3r2jiTVh1 DJVHHnrJ0KX/hHlqNQ/RV1BpfFVDSMgfh+W194UR36y71PlmaZFBFqCgMuLEtL/mouNVkBTcVfbWZwr</xuhhtsqq0y31embcvfeulvis5efyou3jqqotuhdxoviryjmlenuummdu2xq1yowkufzrj4n 	The instructions on installing a license file can be found by clicking the button below. View Online Manual
TWiQjxiy:DNpRZGIWyb2hsN8F883YJT6oS9x4WuMyasr/5VH2KTC3I04E2nxrie0jkdHLqY/HEhH3Yb JGSDmGJj+rxSPSE9FR11TxzQhtAqCEskUbaSBbUM8y98oesSAp79Z6VyT/rWwNOSK2LQFmmSb1hHCmP	You may need to allow pop-up windows to view the online manual
6QwNKps/LZIZZyep/2w0H5iyuCOCBmjn4tlqCLwY/eK/ebiYsHQAOdLxD67seajjtnx/ShbCVUw6+3V aixn28SF1fU7teIdhgfiqgDL2qYw4t/16oofTsA2Ebtv7wbbbUpwktNr41s25li5affa2SLdZh9vAA3 OUuqD4rKh/FRaLthrIjTUuTOWEqKMejjwyMNOaikH0CkxQWcl0ZVjImHWz9mcqhWK7NDHjsEQfMe1A1	Click on the license to select the
Upload Skyline license file Select Upload	whole licence
Activated Skyline License file	
Clicking on the Reset button will reload the Skyline website and save any new license file to the database.	

- 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.



<u>License Settings</u> 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 <u>upgrading Skyline</u><sup> $D^{ee}$ </sup> or <u>running a manual backup</u><sup> $D^{ee}$ </sup> you need to take the Skyline website offline. This will prevent changes to the database during the backup.

## To take the website offline:

 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 <u>locating your Skyline Website</u><sup>D254</sup>. Renaming this file will change to Skyline homepage to a holding page shown in the example below.

C http://localhost/ - Windows Internet Explorer	
🚱 😔 🖉 http://localhost/ 🛛 🛃 🚱 Google	P •
File Edit Wew Favorites Tools Help	
🚖 Favorites 📃 http://localhost/	
Skyline Skyline is currently offline for maintenance. Sorry for any inconvenience caused.	~

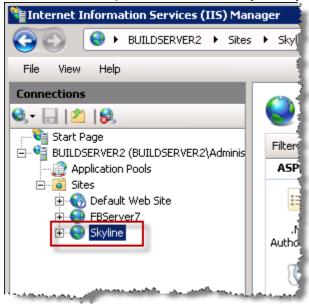
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## Locating your Skyline Website

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.

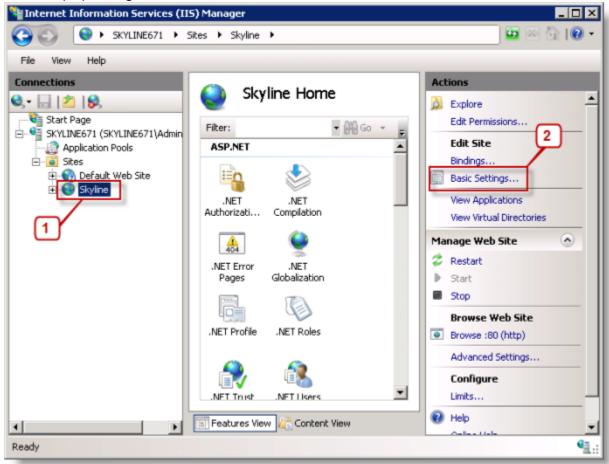
Edit Site		? ×	
Site name: <mark>Skyline</mark>	Application pool: Classic .NET AppPool	Select	
Physical path: C:\Skyline\wwwroot Pass through authentication			
Connect as Test Settings			
	ОК	Cancel	

# 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.

## Skyline Manual

## 2. The Edit Site window opens.

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Edit Site		? ×
Site name: <mark>Skyline</mark>	Application pool: Skyline	Select
Physical path: C:\Skyline\www.root	2	
Connect as Test Settings		-1
	ОК	Cancel

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.

www.root			_ 🗆 🗙	
🌀 🕕 🚽 🔹 Computer 🔹 Local Disk (C:) 🔹 Sl	syline - www.root -	👻 🔛 Search www.root	: 🗾 😰	
Organize 🔻 🦲 Open 🔻 Burn New folder			iii • 🖬 🛛	
🚣 Local Disk (C:)	Name -	Date modified	Туре	
g 9d1880665649379c111700ca116b	uploadFileTypes.aspx	06/07/2012 18:15	ASPX File	
671Upgrade	UploadPreview.aspx	06/07/2012 18:15	ASPX File	
🎍 inetpub	UploadPreview2.aspx	06/07/2012 18:15	ASPX File	
MS0Cache	UploadPreview3.aspx	06/07/2012 18:15	ASPX File	
PerfLogs PrintStation Downloads	UserPage.aspx	06/07/2012 18:15	ASPX File	
PrintStation Downloads Program Files	VariableDataItem.aspx	06/07/2012 18:15	ASPX File	
Program Files (x86)	VariableDataItem2.aspx	06/07/2012 18:15	ASPX File	
ProgramData				
Skyline	VariableDataItems.aspx	06/07/2012 18:15	ASPX File	
ConfigurePDFscheduler	WATERMARKING- server permission		Text Document	
ConverterIN	Web.config	25/03/2013 10:31 Open	CONFIG File	
Data	Web.sitemap	Edit	SETEMAP File	
Documents	web6.6.3.335.config		Microsoft Visual Studio Tools fo	r Applications 2.0
InstallSQL	XMLFile.xml	Restore previous versions	Notepad	
Upgrade	3MLFile2.xml	Send to •	Choose default program	
🗼 www.eroot	XQueryTest.aspx		ASPX File	
🌽 Admin	zTest.aspx	Cut	ASPX File	
App_Browsers		Сору		
		Create shortcut	· ·	
Web.config Date modified: 25/03/201	3 10:31 Date created: 06/07/20	Delete Rename		
CONFIG File Size: 25.8 KB		Rename		
		Properties		

4. In the <connectionStrings> section identify the server name and database name. In the example below the server name is **.\Skyline**.

📕 Web.config - Notepad
File Edit Format View Help
<pre><assembly_fullname="eprint.skyline.entitylayer, culture="neutral," pre="" publickeytoke_<=""></assembly_fullname="eprint.skyline.entitylayer,></pre>
 <sqlservercatalognameoverwrites> <add key="Skyline" value=""></add></sqlservercatalognameoverwrites>
<add key="Skyline" value=""></add>
<pre><connectionstrings></connectionstrings></pre>
<pre><add "="" adservicewindows"="" connectionstring="LDAP://eprint.local/OU=eprint.DC=" name="Skyline" skylinemembership"=""></add></pre>
<add 15"="" connectionstring="LDAP://eprint.local/OU=eprint,DC=&lt;/td&gt;&lt;/tr&gt;&lt;tr&gt;&lt;td&gt;&lt;/connectionStrings&gt;&lt;br&gt;&lt;system.web&gt;&lt;/td&gt;&lt;/tr&gt;&lt;tr&gt;&lt;td&gt;&lt;pre&gt;&lt;sessionPageState historySize=" name="ADServiceWindows"></add>

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.

U Note: It is strongly recommended that Skyline databases is backed up on a regular basis.

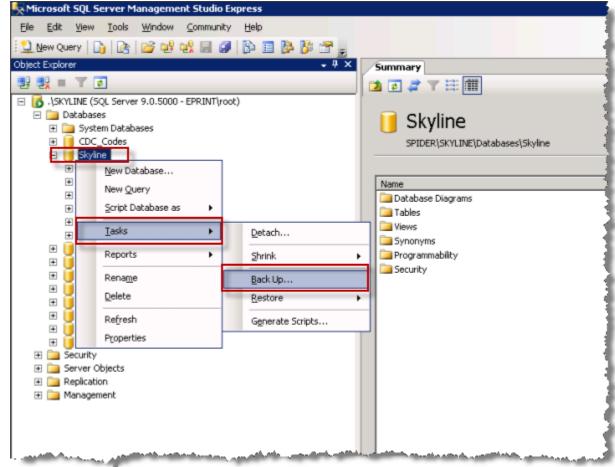
## To run a manual backup:

- 1. Take the <u>website off line</u>  $D^{253}$ .
- 2. On the PC where the database is located, start the SQL Server Management Studio.

🛃 Connect to Server	×
SQL Serve	Windows Server System
Server type:	Database Engine
Server name:	Windows Authentication
User name: 2 Password:	EPRINT\root
3	Remember password
<u>C</u> onnect	Cancel Help Options >>

- 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**.

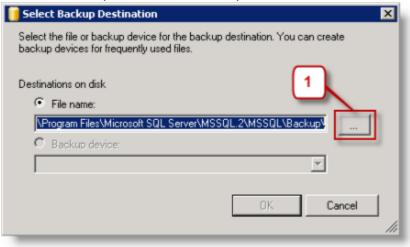
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4. The Back Up Database - Skyline window opens. Any existing backup locations and names need to be removed.

📒 Back Up Database - Skyline		
Select a page	🖳 Script 👻 🚺 Help	
General		
Poptions	Source	
	Da <u>t</u> abase:	Skyline
	Recovery model:	SIMPLE
	Backup type:	Ful
	Backup component:	
	<ul> <li>Database</li> </ul>	
	C Files and filegroups:	
	Backup set	
	Name: Sk	yline-Full Database Backup
	Description:	
	Backup set will expire:	
	After:	÷ days
	C <u>O</u> n: 08/11/2011	
Connection	Destination	3
Server: .\SKYLINE	Back up to: O Djs	к Стаде
Connection:	C:\Temp\SkylineLVR\Skyline.bak	Add
EPRINT\root		
View connection properties		Remove
	[1]	2 Contents
Progress		
Ready		
"94.59"	1	
		OK Cancel

- 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.

🏮 Locate Database Files - SPIDER\SKYLINE 📃 🛛 🗙			
Select the file:			
C: Documents and Settings Signal Fishdr Signal Settings Settings Settings Settings System Volume Information System Volum			
Selected path: C:\Temp Files of type: Backup Files(".bak;".tm)			
File name: Skyline.bak			
2 OK Cancel			

- 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.

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7. You return to the Select Backup Destination window.

📑 Select Backup Destination	×
Select the file or backup device for th backup devices for frequently used fil	e backup destination. You can create es.
Destinations on disk File name: C:\Temp\Skyline.bak C Backup device:	
2	

- 1. The backup name and location that you have just entered are showing.
- 2. Click **OK**.
- 8. The Back Up Database Skyline window opens.

📑 Back Up Database - Skyline	
Select a page	🖾 Script 👻 💽 Help
T Dprions	Overwrite media
	Reliability
Connection	Perform checksum before writing to media     Continue on error
Server: .\SKYLINE	Transaction log
Connection; EPRINT\voot	<ul> <li>Truncate the transaction log</li> <li>Back up the tail of the log, and leave the database in the restoring state</li> </ul>
	Tape drive
Progress	Unlgad the tape after backup
O Ready	Rewind the tape before unloading
	OK Cancel

- 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.

Microsoft	Microsoft SQL Server Management Studio Express 🛛 🗙			
•	The backup of database 'Skyline' completed successfully.			
<b>B</b>	OK			

- 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

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# 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

1.4	-	
1.1		• X -
	<b>r</b> -	<b>M</b> 1
1.144	-	
1.2	-	- 1

Add and update email settings

3. Details of the current email settings are listed.

mail From Address	and the second s	
MTP Server	(kolikist of	
MTP Server Username		
MTP Server Password		
MTP Port Number	Use SSL	
mail error log files to		
opy error log files to ePrint Support		
ter an email address to test the settings		Test Settings
il Template		
w Template Hide Template		

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.

Subject	Email Content
New Quote Received	A quote has been received for your order. Please lo into Skyline
Password Request <sup>D63</sup>	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 Quotes Requests	You have a new quote request. Please go to {NewQuotesLink}
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
Your new account needs to be activated <sup>D48</sup>	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.
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.
<u>A new user has registered</u> <sup>D48</sup>	A new user '{username}' has registered but their account has not been activated. Log in to the Admin - Users page to activate this user.
Your {portal_name} user account <sup>D 28</sup>	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://
	New Quote Received         Password Request         Password Request         New Quotes Requests         Order placed with no price set         Your new account needs to be activated         Vaur new account has been activated         A new user has registered         Your {portal_name} user

Туре	Subject	Email Content
		{url}/UserAdmin/Default.aspx
Activation email sent to new Skyline Cloud Printer users	<u>Activate your account</u> D∞	Click Activate to activate your account on the website <u>Activate</u>

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.

	Туре	Subject	EmailContent	
I	New quote received	New Quote Received	A quote has been received for your order (Orderid). Please log in	to skyline.
	il Subject			
Nev	v Quote Received			
Ema	il Body			
B		律律注注 🔒 🧶		
Aq	uote has been received for your order (Q	rderid). Please log into skyline.		
Sa	Cancel			
San	CallCE			

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  $D^{253}$ .
- 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.

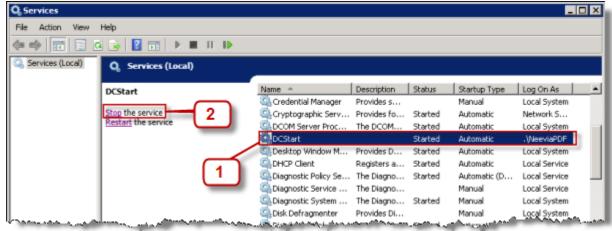
# Fonts and the PDF Converter

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.



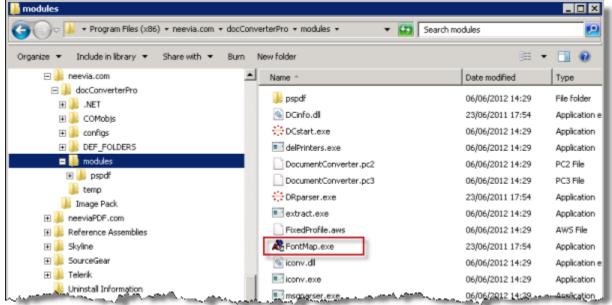
- 1. Select the service DCStart.
- 2. Click Stop the service.

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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.

FontMap	×
Map Fonts	Close

1. Click the button **Map Fonts**. When all the fonts have been mapped the application automatically closes.

7. Open the Neevia Document Converter.

🔆 Neevia Document Converter Pro	
Converter View Settings Help	
Files in queue:	
[9:10:31 AM] DC Pro version: 6.1	-
[9:10:31 AM] Computer Name: 2K8R2X64EN [9:10:31 AM] Current User: Administrator	
[9:10:31 AM] Is Admin: True	
[9:10:31 AM] Temp Folder: C:\Program Files (x86)\neevia.com\docConverterPro\temp\WVDC\ [9:10:31 AM] Default System Printer: Neevia Converter	
[9:10:31 AM] Debug Mode enabled: False [9:10:31 AM] Input folders:	
[9:10:31 AM] C:\Program Files (x86)\neevia.com\docConverterPro\DEF_FOLDERS\IN\	
	¥
Main log Error log	
Started Time: 9:10:58 AM Total threads: 0 Converted docs: 0	1.

- 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.

Image: Possible Parsers	Enable / Disable Parsers		Configuration
<ul> <li>Microsoft Excel</li> <li>Microsoft PowerPoint</li> <li>Microsoft Internet Explorer</li> <li>Microsoft Project</li> <li>Microsoft Visio</li> <li>Microsoft Publisher</li> <li>Microsoft Snapshot</li> <li>Corel WordPerfect</li> <li>CorelDraw</li> <li>WordPro</li> <li>Autodesk Design Review</li> </ul>	_		
<ul> <li>Microsoft PowerPoint</li> <li>Microsoft Internet Explorer</li> <li>Microsoft Project</li> <li>Microsoft Visio</li> <li>Microsoft Publisher</li> <li>Microsoft Snapshot</li> <li>Corel WordPerfect</li> <li>CorelDraw</li> <li>WordPro</li> <li>Autodesk Design Review</li> </ul>	Microsoft Word	-	<ul> <li>Folder-specific configuration</li> </ul>
<ul> <li>Microsoft Internet Explorer</li> <li>Microsoft Project</li> <li>Microsoft Visio</li> <li>Microsoft Publisher</li> <li>Microsoft Snapshot</li> <li>Corel WordPerfect</li> <li>CorelDraw</li> <li>WordPro</li> <li>Autodesk Design Review</li> </ul>	Microsoft Excel		Show DC Pro Tray Icon
<ul> <li>Microsoft Project</li> <li>Microsoft Visio</li> <li>Microsoft Publisher</li> <li>Microsoft Snapshot</li> <li>Corel WordPerfect</li> <li>CorelDraw</li> <li>WordPro</li> <li>Autodesk Design Review</li> </ul>	Microsoft PowerPoint		Don't prompt for closing confirmation
Microsoft Visio         ✓ Microsoft Publisher         ✓ Microsoft Snapshot         Corel WordPerfect         CorelDraw         WordPro         Autodesk Design Review	Microsoft Internet Explorer		Create log file
Auto of Installed Parsers I Launch as Windows bervice configure I Launch as Windows bervic	Microsoft Project		Debug Mode
<ul> <li>Microsoft Publisher</li> <li>Microsoft Snapshot</li> <li>Corel WordPerfect</li> <li>CorelDraw</li> <li>WordPro</li> <li>Autodesk Design Review</li> <li>Automet Installed Parsers</li> </ul>	Microsoft Visio		Launch as Windows service configure
Microsoft Snapshot Corel WordPerfect CorelDraw WordPro Autodesk Design Review Auto	Microsoft Publisher		
CorelDraw CorelDraw WordPro Autodesk Design Review AutortInstalled Parsers	Microsoft Snapshot		
CorelDraw WordPro Autodesk Design Review Auto Auto Auto Color Scheme: Gray	Corel WordPerfect		
WordPro Autodesk Design Review Auto Auto Color Scheme: Gray Gray	CorelDraw		use only built-in fonts Max Conversiouse mapped fonts
Autor desk Design Review Color Scheme: Gray	☐ WordPro		use all system fonts
Autott Installed Parsers	Autodesk Design Review	-1	Scan input folder(s) every 1000 ms
		_	Color Scheme: 📕 Gray 💌

- 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).

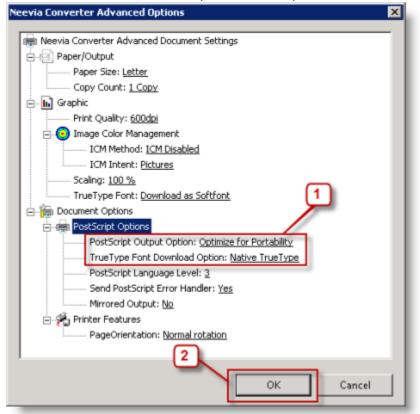
heevia Converter Properties	×
General Sharing Ports Advanced Co	lor Management   Security   Device Settings
Neevia Converter	
Location:	
Comment:	
Model: Neevia Converter	
Features Color: Yes	Paper available:
Double-sided: No	
	A4 <u>A</u>
Staple: No	
Speed: 400 ppm	
Maximum resolution: 2540 dpi	<u> </u>
1 Prefer	ences Print Test Page
	OK Cancel Apply

- 1. Select Printing Preferences.
- 12. The Neevia Converter Printing Preferences window opens.

Neevia Converter Printing Preferences	×
Layout Paper/Quality	
Orientation:	
A Portrait	
Page Format	
Pages per Sheet 1	
	=
	=
	Advanced
	OK Cancel Apply

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.

## Skyline Manual

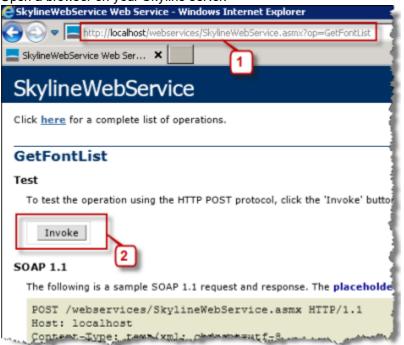
#### **Default List of Fonts**

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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 <u>http://localhost/webservices/SkylineWebService.asmx?op=GetFonstList</u>
- 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.

					7.0.1	.28 Log	pged in as: H	lost Administrator	Admin Home
	Portal	Portal Name	Expires	Auto-Delete Date		HTTPS		Theme	
/	Demo demo.eprintnow.com	Demo			Database		Portal URLs	Demo	×

- 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.

Add 1	2
demo.eprintnow.com	×
	3 Bock

- 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.

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6. Click the pencil associated with the portal to edit the details.

	Portal	Portal Name	Expires	Auto-Delete Date	HTTPS	Theme
×	demo.eprintnow.com	Demo		Database		Demo 🗙

- 1. Select the option **HTTPS**.
- 2. Click 🖿 to save the change.
- 7. Restart the website by entering the command **IISRESET** at the command prompt on the Skyline server.

## 8. Re-install PrintStation<sup>D505</sup>.

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.

Portal Details			
https://			Connect
Use HT	TPS	3	
2			
Proxy details			
Use Proxy Serve	er		
Proxy address		Proxy port	
		0 💠	

- 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.

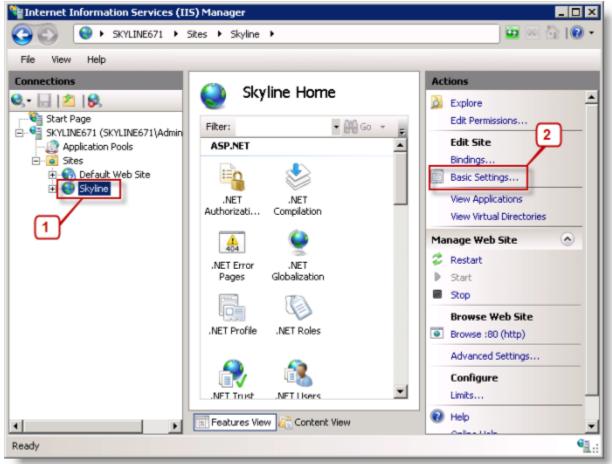
HTTPS should now be completed.

# 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.

## Skyline Manual

## 2. The Edit Site window opens.

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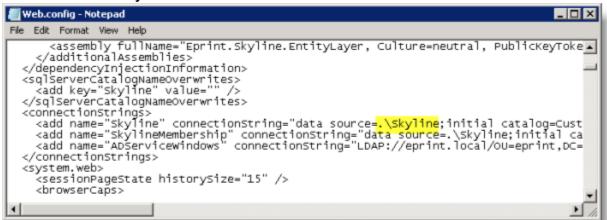
Edit Site		? ×
Site name: <mark>Skyline</mark>	Application pool: Skyline	Select
Physical path: C:\Skyline\www.root		2
Pass-through authentication Connect as Test Setting	15	-1
	ОК	Cancel

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.

www.root				
🕥 - 📕 🔹 Computer 🔹 Local Disk (C:) 🔹 S	kyline + www.root +	👻 🔛 Search www.roo	:	
ganize 🔻 🦪 Open 💌 Burn New folder			8# • 🗊 😧	
🚢 Local Disk (C:)	Name -	Date modified	Туре	
a 9d1880665649379c111700ca116b	uploadFileTypes.aspx	06/07/2012 18:15	ASPX File	
671Upgrade	UploadPreview.aspx	06/07/2012 18:15	ASPX File	
🍌 inetpub	UploadPreview2.aspx	06/07/2012 18:15	ASPX File	
4 MSOCache	UploadPreview3.aspx	06/07/2012 18:15	ASPX File	
PerfLogs	UserPage.aspx	06/07/2012 18:15	ASPX File	
PrintStation Downloads	VariableDataItem.aspx	06/07/2012 18:15	ASPX File	
Program Files				
Program Files (x86)	VariableDataItem2.aspx	06/07/2012 18:15	ASPX File	
ProgramData Skyline	VariableDataItems.aspx	06/07/2012 18:15	ASPX File	
ConfigurePDFscheduler	WATERMARKING- server permission	is neede 06/07/2012 18:05	Text Document	
ConverterIN	Web.config	25/03/2013 10/31	CONFIG File	
Data	Web.sitemap	Open Edit	SITEMAP File	
Documents	web6.6.3.335.config		Microsoft Visual Studio Tools for Applications 2	2.0
InstaliSOL	XMLFile.xml	Restore previous versions	Notepad	10
Upgrade	XMLFile2.xml	Send to >	Choose default program	
k www.root	XOueryTest.aspx		ASPX File	_
🔒 Admin		Cut		
App_Browsers	zTest.aspx	Сору	ASPX File	
······································		Create shortcut	×	
Web.config Date modified: 25/03/20	13 10:31 Date created: 06/07/20	Delete		
CONFIG File Size: 25.8 KB		Rename		
		Properties		

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.

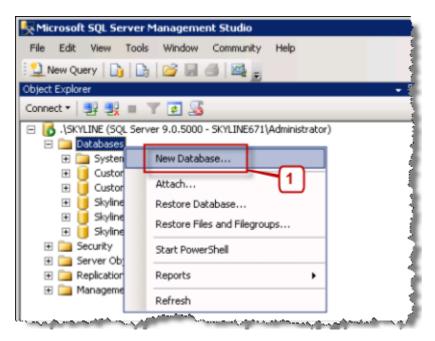
Connect to Server	×
SQL S	erver 2008
Server type:	Database Engine
Server name:	
Authentication:	Windows Authentication
User name:	SKYLINE671\Administrator
Password:	
	Remember password
Connect	Cancel Help Options >>

- 1. Enter the name of the SQL Server
- 2. Select the authentication type Windows Authentication or use your SA account log in.

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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**.

New Database	·		1 、	5		_ 🗆 🗙
Select a page	<u> S</u> Script	- 🖪 н				
🚰 General	<b>a</b>		1			
Contions	Databas	e name:		New Datab	ase	
Pilegroups	Owner:			<default></default>		
	owner.			Lagrants		
	🗖 Use f	iull-text in	dexing			
	Databas					
	Logical		File Type	Filegroup	Initial Size (MB)	Autogrowth
	New D		Rows	PRIMARY	3	By 1 MB, unrestricted growth
	New D	ataba	Log	Not Applicable	1	By 10 percent, unrestricted growth
Connection						
Server: .\SKYLINE						
Connection:						
SKYLINE671 Administrator						
View connection properties						
Progress						
C Ready	1					▶
We as P						Remove
						пеноув
					2	
					-	OK Cancel

- 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**.

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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**.

🛼 Microsoft SQL Server Mana	agement Studio		
File Edit View Tools W	indow Community Help		
🕴 🋄 New Query   🛅   🛅   🖆	;		
Object Explorer		+ 4 ×	
Connect • 📑 📑 🛒 🔤 🝸 🚦	a 🔏		
E 🚺 .\SKYLINE (SQL Server 9.0	0.5000 - SKYLINE671\Administ	rator)	
🖃 🚞 Databases			
🕀 🚞 System Databases	s		
E Ustomer			
	ship		
E SkylineConverter			
E SkylineMembershi	D		
🗉 📔 New Databas			
🗉 📋 New Members	New Database		
E 🦲 Security	New Query		
Gerver Objects     Gerver Objects     Gerver Objects	Script Database as		
Replication      Management			1
	Tasks 🕨	Detach	
	Policies +	Take Offline	
	Facets	Bring Online	
	Start PowerShell	Shrink +	
	Reports +	Back Up	
	Rename	Restore +	Database
	Delete	Generate Scripts	Files and Filegroups
	Refresh	Publish using Web Service	Transaction Log
	Properties	Import Data	
		Export Data	
Ready		1.	

12. The Restore Database window opens.

🍢 Restore Database -			X
😵 No backupset selected to be restore	۰d،		
Select a page General Files Options	Sorpt • N Help Source C Database: C Device: Database: Destination Database: Restore to:	2 2 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	
- Street and an address of the street of	Restore plan	المحمد المرجع بالمحاجب المحاجب المحاجل والمستحد والمحاجل والمستحد والمحاجل والمحاجل والمستعول والمستعليات	

- 1. Select Device.
- 2. Click Browse.

13. The Select Backup Devices window opens.

Select backup devices		
Specify the backup media and its loc	ation for your restore operation.	
Backup media type: Backup media:	File	2 Add
~(1)		Remove
		Contents
	OK Car	icel Help

- 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

Select backup devices			
Specify the backup media ar	d its location for your re	store operation.	
Backup media type:	File	¥	
Backup media:			
C:\\Skyline	.bak		Add
			Remove
			Contents
J			
		ок Са	ncel Help

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.

🕕 Ready Select a page 🛛 📓 Script 🔹 🚺	Help						
	Help						
General Files Options C Detaba C Detaba Database: Restore to Restore plan Backup sets	ise: C:\Temp(Sky iabase: Skyline 1 NewDatabas : The last back		gust 2	014 15:41:46)			⊻ … ▼ Timeire…
Restore M	lame	Component	Туре	Server	Database	Position	First LSN
- <b>T</b>	Skyline-Full Database Backup	Database	Full	PRINTROOM(SKYLINE	Skyline	1	2439190000085400

- 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.

Restore Database - NewDatabase								
🕽 Ready								
Select a page	🔜 Script 🔹 📑 Help	Script + 🚺 Help						
General Files Options	Restore database files	85			_			
	Relocate all files to folder							
	Data file folder :		C:\Program Files\Microsoft SQL Server\MSSQL11.MSSQLSERVER\MSSQL\DATA C:\Program Files\Microsoft SQL Server\MSSQL11.MSSQLSERVER\MSSQL\DATA					
	Log file folder :							
	Logical File Name	File Type	Original File Name	Restore As				
	Skyline	Rows Data	C:\Program Files\Microsoft SQL	C:\Program Files\Microsoft SQL				
	Skyline_log	Log	C:\Program Files\Microsoft SQL	C:\Program Files\Microsoft SQL	רי			
الميران الطبيطة بالدرستين			and the second second second second	and a second sec				

- 1. Click browse the locate the new mdf data location.
- 2. Click browse to locate the new ldf data location.

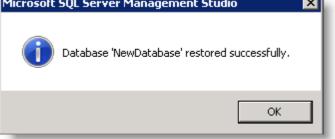
🖡 Locate Database Files - SQL-01 📃 🗖				
Select the file:				
Binn DATA AdventureWorks.mdf AdventureWorks_log.ldf dist_db.LDF dist_db.MDF master.mdf modellog.ldf MS_AgentSigningCertificate MSDBD ata.mdf MSDBD ata.mdf MSDBD ata.mdf MSDBD ata.mdf MSDBD ata.mdf MSDBD ata.mdf MSDBD ata.mdf MSDBLog.ldf NewD at abase Membership.mdf	•			
NewDatabaseMembership_log.ldf				

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16. Select the page **Options**. The restore process can be started.

Ready							
Select a page Script • NHelp							
General							
Piles Restore options	Restore options						
	Verwrite the existing database (WITH REPLACE)						
	Preserve the replication settings (WITH KEEP_REPLICATION)						
Restrict access to the restored database (WITH RESTRICTED_USER)							
Recovery state: RESTORE WITH RECOVERY	•						
Standby file: C:(Program Files)/Microsoft SQL Server)/MSSQL11.MSSQLSERVER(MS	SSOL18ackup1Skylin						
Leave the database ready to use by rolling back uncommitted transactions. Additional transaction logs ca	annot be restored.						
Tail-Log backup							
Take tal-log backup before restore							
Leave source database in the restoring state (WITH NORECOVERY)							
Backup file: C:(Program Files)/Mcrosoft SQL Server/MSSQL11.MSSQLSERVERI(MS	SSQL\Backup\Skylin						
Server connections							
Gase existing connections to destination database  Prompt							
Connection							
SQL-01     [BUILDSERVER\Administrator]	reset for the restored						
Vew connection properties							
Progress							
Done							
2							
	I and I and I						
ОК	Cancel Help						

- 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. Microsoft SQL Server Management Studio



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- 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.

😓 Restore Database -			_ 🗆 🗙
😵 No backupset selected to be restore	1.		
Select a page General Files Options	Script	2	
	Destination		
	Database:		•
	Restore to:	and a second	Timeline

- 1. Select Device.
- 2. Click Browse.

19. The Select Backup Devices window opens.

Select backup devices		_ 🗆 🗵
Specify the backup media and it	is location for your restore operation.	
Backup media type:	File	2
Backup media:		Add
		Remove
_		Contents
	OK Car	ncel Help

- 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

ackup media type:	File	•	
ackup media:			
:\Temp\SkylineMembership.ba	ĸ	L	Add
			Remove
			Contents

4. Click OK.

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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.

🍢 Restore Database - NewDataba	seMembership	_ 🗆 🗙
🕕 Ready		
Select a page General Files Cptions	Restore plan Backup sets to restore:	Timeline

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.

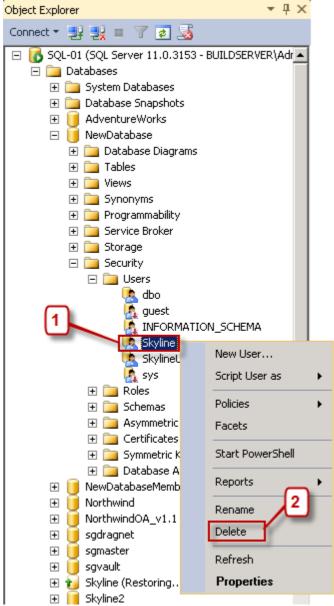
🍢 Restore Database - NewDataba	seMembership			-	. IIX
🕕 Ready					
Select a page General Files Toptions	Script • 🚺 Help	s			
	Relocate all files t	o folder			
	Data file folder :	0	(Program Files)/Microsoft SQL Server(MS	SSQL11.MSSQLSERVER\MSSQL\DATA	
	Log file folder :	C)	\Program Files\Microsoft SQL Server\M5	55QL11.M55QLSERVER\M55QL\DATA	
	Logical File Name	File Type	Original File Name	Restore As	
	SkylineMember	Rows Data	C:\Program Files\Microsoft SQL	C:\Program Files\Microsoft SQL	-
	SkylineMember	Log	C:\Program Files\Microsoft SQL	C:\Program Files\Microsoft SQL 2	ן

- 1. Click browse the locate the new mdf data location.
- 2. Click browse to locate the new ldf data location.

🔋 Locate Database Files - SQL-01
Select the file:
DATA
AdventureWorks.mdf
AdventureWorks_log.ldf
dist_db.LDF
dist_db.MDF
master.mdf
mastlog.ldf
model.mdf
modellog.ldf
MS_AgentSigningCertificate.cer
MSDBData.mdf
MSDBLog.ldf
NewDatabase.mdf
NewDatabase_log.ldf
NewDatabaseMembership_log.ldf
NorthwindDA_v1.1.mdf
Northwind0A_v1.1_log.ldf

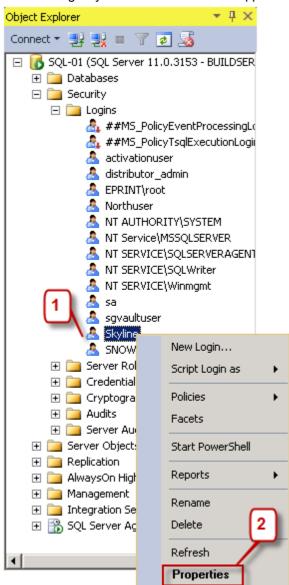
- 22. Select the page **Options**. The restore process can be started by selecting the restore option "Overwrite the existing data (WITH REPLACE).
- 23. Click **OK**. When the database has been restored you will see confirmation of the restore.

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

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26. The log in Properties - Skyline window opens.

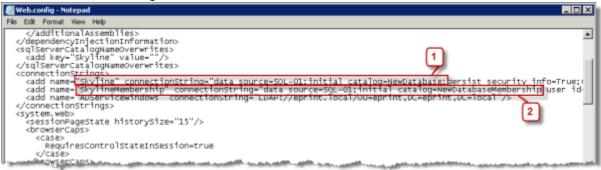
Select a page Script + 🚺 Help	
General General	
Server Roles Users mapped to this login:	
User Mapping Detroit in Stogin. Map Database User Default Schema	
Status	
master	
dban	
VewDatabase Skyline	
2 Northwind	
NorthwindDA_v1.1	
sqdragnet	
Guest account enabled for: NewDatabase	
Database role membership for: NewDatabase	
Connection aspnet_Roles_FullAccess	<b>_</b>
Server: aspnet_Roles_ReportingAccess	
SQL-01 asphec_webt_vent_FullAccess db_accessadmin	
Connection: db_backupoperator	
BUILDSERVER \Administrator db_datareader	
View connection properties	
db_ddladmin	
Progress db_denydatareader	
III db ourser	_
db securityadmin	
3 db_securityadmin	
	-
3 Public	Tancel

- 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**.

🕥 - 📕 🔹 Computer 🔹 Local Disk (C:) 🔹 S	kyline + www.root +	- 🔛	Search www.roo	t	2
ganize 💌 🧾 Open 💌 Burn New folder				) i • 🖬 (	0
Local Disk (C:)     Joint Disk (C:)     J	Name * UploadFileTypes.aspx UploadFreview.aspx UploadPreview2.aspx UploadPreview3.aspx UploadPreview3.aspx UserPage.aspx VariableDataItem.aspx VariableDataItem.aspx		Date modified 06/07/2012 18:15 06/07/2012 18:15 06/07/2012 18:15 06/07/2012 18:15 06/07/2012 18:15 06/07/2012 18:15	Type ASPX File ASPX File ASPX File ASPX File ASPX File ASPX File	
<ul> <li>ProgramData</li> <li>Skyline</li> <li>ConfigurePOFscheduler</li> <li>ConverterIN</li> <li>Data</li> </ul>	VariableDataItems.aspx WATERMARKING- server permission Web.config Web.sitemap	Open Edit	06/07/2012 18:15 06/07/2012 18:05 25/03/2013 10:31	ASPX File Text Document CONFIG File SITEMAP File	
Documents InstallSQL Upgrade Admin App_Browsers	web6.6.3.335.config  MuFile.xml  MuFile2.xml  XQueryTest.aspx  zTest.aspx	Send to Cut Copy	revious versions	Microsoft Visual Studio 1     Notepad     Choose default program     ASPX File     ASPX File	
Web.config Date modified: 25/03/20 CONFIG File Size: 25.8 K8		Create shi Delete Rename	ortcut		

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

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- 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.

Skyline ×						
← → C 🗋 localhost/Admin/Default.aspx						☆ 🔳
	- <del>44</del>	1	1	I I	1	
<ul> <li>Home</li> <li>Business Stationery</li> <li>Upload</li> <li>Paper Originals</li> <li>Libraries</li> <li>Orders</li> </ul>			6.7.4 Release 1	Lopged in ast Host i	& Portal Admini	strator   <u>Admin +</u>
Warning: There has been a problem with permissions	on the below files					
D:\Skyline\Documents\Documents\21102014163724/	txt					
D:\5kyline\Documents\errors\21102014163724.bit						
D:\Skyline\Documents\UploadedDriverFiles\21102014						
D:\Skyline\Documents\Uploads\21102014163724.txt						*
4						

You need to make the following changes:

- 1. <u>Apply a portal theme  $D^{226}$ </u>.
- 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 <u>associate a PrintStation</u> with the new portal<sup>D<sup>233</sup></sup>.
- 4. Add a user  $D^{28}$  and assign roles  $D^{42}$ , if required.
- 5. Amend the <u>email settings</u>  $D^{265}$ , 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.

	<u>File Name</u>	Date	Size	Number of P	ages Owner
🗖 🔍 🍅	Simple	05/10/2015 10:29:13	3.28 M	4B 80	Anne Webb
	Skyline Administration [20120402]	05/10/2015 09:04:05	4.29 M	ИВ 1	Anne Webb
🗖 🔍 🎃	A4 Booklet	17/08/2015 09:11:36	2.42 1	4B 62	Anne Webb
n Q 🎃	Using External Account Codes	28/07/2015 10:23:29	0.09 1	4B 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.

#### Skyline Manual

A certain understanding of network servers and basic command line usage is required to run the utility.

#### To run the purge utility:

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- 1. Locate your <u>Skyline database</u><sup> $D_{25}$ </sup> and then take a backup of the database.
- 2. log in to the Skyline server and locate your Skyline website<sup>1284</sup>.
- 3. Download the purge utility from <a href="http://download.eprint.net/Utilities/">http://download.eprint.net/Utilities/</a> and unzip the file in to the directory c: <a href="http://skyline.">\skyline.</a>
- 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.

С

Other switches that can be used instead of -all are:

-orders	only delete orders older than the specified number of days.
-documents	only delete documents older than the specified number of days.
-deleted	remove all orders that have the status "deleted"
-completed	for all orders older than the specified number of days change orders with the status "Completed" to "Archived"
-thumbnails	delete all thumbnail images for documents that have been previewed
-orphaned	delete all orphaned documents that are no longer in the database
-clean	clean the databases of all orphaned records.

Please refer to the section <u>Skyline Update Utility</u><sup>D<sup>299</sup></sup> 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.

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# **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.

₩ <u>View Basket (0)</u>	Preferences	Downloads	Edit	Admin	Management   Logout	
				-		

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 location 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.



Home Upload Paper Originals Libra	ry Orders User Forms FBI Business Card FBI Production Page		
	There has been a minor error, please return to the home page.		
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.

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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.

Start Date       End 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	Portal Errors			
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       29/04/2024 19:00:38     nettie     A potentially dangerous Request. QueryString value was detected from the client (n="").     /ChooseDocumentType.aspx       29/04/2024 19:00:7     appe wabb     A potentially dangerous Request. QueryString value was detected from the client (n="").	Start Date		End Date	Show Errors
29/04/2024 09:08:34     nettie     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 19:00:7     appe wabb     A potentially dangerous Request.QueryString value was detected from the client (n="").     //ChooseDocumentType.aspx	Time Stamp	Username	Error Message	Error Page
29/04/2024 09:00:38 nettie detected from the client (n=""). /ChooseDocumentType.aspx	29/04/2024 09:08:34	nettie		was /ChooseDocumentType.aspx
	29/04/2024 09:00:38	nettie		was /ChooseDocumentType.aspx
	23/04/2024 13:40:07	anne webb		was /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

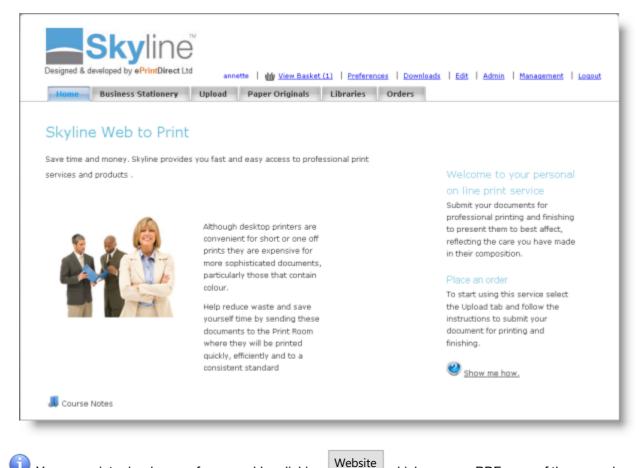
- at System.Web.HttpRequest.ValidateString(String value, String collectionKey, RequestValidationSource requestCollection) at System.Web.HttpRequest.<>c\_DisplayClass280\_0.<ValidateHttpValueCollection>b\_0(String key, String value)
- at System.Web.HttpValueCollection.EnsureKeyValidated(String key)
- 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.



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

which opens a PDF copy of the manual.

# **Starting Skyline**

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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 1 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.



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.

Sign in w	vith Microsoft
Sign out of Micro	osoft

3. Enter your details and click Next.

Microsoft	
Sign in	
Email address, phone number or Skype	
Can't access your account?	
	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.

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### **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**.

Username	•
Password	*
Remember me next time	
Log In	
Register as New User	
I forgot my password	

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.

#### Register

New passwords must meet the meet the password policy requirements

<ul> <li>It must be at least 4 characters in length</li> <li>It cannot be longer than 10 characters</li> <li>It must include at least one number</li> <li>It must include at least one of the following characters !\$%^&amp;*()+=@~</li> <li>It must include at least one uppercase character</li> <li>Your password needs to be changed every 30 days</li> </ul>	i<,>.?
Username Theresa Green Details of what yo Password •••• Confirm Password •••• Email Remember me next time Create User Cancel	

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**.

Register
Your account has been successfully created. Continue
Your new account has been created but it needs to to be activated before you can log in. You will receive an email when your account has been activated.

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.

Username
Password
Remember me next time
Log In
Register as New User
I forgot my password

#### To reset your password:

- 1. Click the **I forgot my password** link.
- 2. Enter your username and click **Send me password reset instructions.**

#### Forgotten your password?

Enter your username and we'll send instru	ctions on how to reset your password to the registered email address.
Send me password reset instruction	s

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.

#### Forgotten your password?

2004	e webl	h
arrire		0

An email has been sent to your registered email address giving details how to reset your password.

Finish

Skyline Website	309
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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.



٢	5	≪	$\rightarrow$	ij	
					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: <u>Reset Password</u>

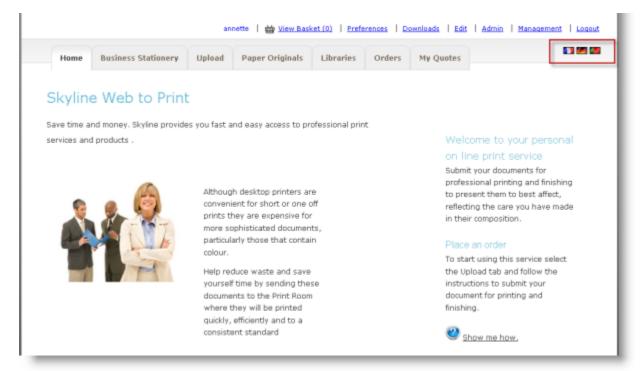
5. You will be able to enter a new password then click on the **Change Password** button. You will be taken to your Login page and be able to login with your new password.

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 <u>email address</u><sup> $D_{311}$ </sup>, change your password<sup> $D_{313}$ </sup> and enter a <u>delivery address</u><sup> $D_{312}$ </sup> 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.

	annette   🎃 <u>Voir le panier</u>	0   Préférences   Téléchargemen	nts   Edition   Admin   Gesti	on   Déconnexion
	_			se 🚑 🌆
ienvenue sur votre ervice personnel 'impression en ligne.				
oumettez vos documents our des impressions et es finitions				
rofessionelles afin 'améliorer vos				
ésentations, ensez à l'attention que pus désirez porter à leur				
omposition.				

# 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.

₩ <u>Viev</u>	w Basket (0)	Preferences	Downloads	Edit	Admin	<u>Management</u>	Logout
Select <b>E</b> l	mail.						
@	<u>Email</u> Change Email	Address					

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

Back				
Change your email address				
Current Email annette webber@eprint.net				
New Email Address:				
Confirm Email Address				
Update Email Address				

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

Back Change your ema	il address
Your email address ha	s been changed successfully
Current Email New Email Address:	annangen andre graande en
Confirm Email Address	Update Email Address
	Opdale Cmail Audress

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## 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**.

₩ <u>View Basket (0)</u>	Preferences	<u>Downloads</u>	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.

Title		<b>_</b>
nue		
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
		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:

2.

3.

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

₩ <u>View Basket (0)</u>	Preferences Down	<u>iloads</u>   <u>Edit</u>	<u>Admin</u>	<u>Management</u>   <u>Lo</u>	<u>qout</u>
Select Password.	assword				
The Change your pass Change your pass	word form opens.				
New passwords must	meet the meet the passv	word policy requ	uirements		
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.

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

#### Change your password

The Current Password	The Current Password entered is not correct				
Current Deserverd					
Current Password					
New Password					
Confirm Password					
Update Password					

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# **Placing a Print Order**

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

- The easiest way is to simply <u>upload</u><sup>135</sup> 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 <u>libraries</u><sup>1345</sup>.
- 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 <u>Paper Originals</u><sup>D</sup><sup>ser</sup> 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
Yo	ur documents ar	e being converted.

Position	File Name
No records to display.	

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#### 3. The documents are uploaded.

Upload Your Document to Print		
Select Skyline Manual.pdf × Cancel Licence Agreement R1.4.rtf × Remove Administration.pdf × Remove		
<ul> <li>Installation.zip × Remove</li> </ul>		
Proceed Supported File Formats		
Your documents are being converted.		
Position No records to display.	File Name	
no records to display.		

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

SkylineManual.pdf × Cancel

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.

Licence Agreement R1.4.rtf × 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.

My Library	Ś	×	•	•	2 🝸		8
Select All My Library				:	Search		<u> </u>
Manual Created: 10/06/2020 Pages: 918 Size: 39.90 MB Owner: Anne Webb						Order Download	<b></b>
PrintStation						Order	<del>A</del>

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  $\bigcirc$  next to the document that you want to preview. For more information see the section on previewing documents  $\square_{349}$ .

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.

Document Type Produ	uct Options Basket Address	s Shipping Account Confirm	
Million And	cument name: Manual ges: 918		
Basio	: Printing	Manuals	Specialised Printing
	Collated Multiple collated se	ets.	Proceed
	Simple		

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.

Document Type Product Opti	ions Basket Address Shippi	ng Account Confirm		
Eskyind Pages: S	<b>t name:</b> Manual 918			
	Documents		D	
	Media	A3 White 80gsm	<b>•</b>	
	Printed Sides	Double Sided	•	
Collated Multiple collated sets.	Printer Type	Black and White	•	
-			2	3

- 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.

Document Type	Product Options Basket A	ldress Shipping	Account Confirm		
Document	Product	Quantity	Price	Pages	Edit
Manual	Collated	1	78.03	918	Edit 🗙
					Next

6. The delivery address information is automatically completed if you have entered a <u>delivery address</u><sup>1312</sup>. 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.

Back			
Name Prefix	Ms	<b>•</b>	
First Name	Anne		
Family Name	Webb		
Department	ePrint	•	
Street	Long Street		
City	Big City		
Region	The World		
Postal Code	ABC 123		
Phone Number	01234 567 890		

- 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.

Document Type Product O	tions Basket Address Shipping Account Confirm	
Back		
Delivery Details (24hrs	Notice Required)	
benvery becans (24ms	Notice Requried)	/
Priority	Not urgent 👻	
Delivery Method	E-mail when ready for collection 🔻	
		<u>2</u>
		Next 🕨

- 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 <u>accounts</u> <u>features</u><sup>158</sup> have been selected for your portal. If you do not see the account page proceed directly to the next step.

	ent Type Product Options Ba: Back	sket Address Shipping Account Confirm	m
Accou	nt Code 🔹	Search	
	Account Code	Account Name	Account Description
	007	International Rescue	Help Required
	0254	General Stationery	Account Dept
	0256	Training Documents	Account Dept
	2589	engleburk Ltd	Word Supplier
	P305	Development	P305 Project
	T369	Development	T369 Project
	T369-C	Special Development	T369 Project
	W587	Development	W587 Project
			Next

- 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	



#### Please select a date

Select date required		I			June 2020			► ►►
	N	lon	Tue	Wed	Thu	Fri	Sat	Sun
<ul> <li>Date available</li> </ul>		25	26	27	28	29	30	31
Reduced printing		1	2	3	4	5	6	7
<ul> <li>capacity</li> <li>Printroom very busy</li> </ul>		8	9	10	11	12	13	14
Closed - Contact		15	16	17	18	19	20	21
<ul> <li>printroom</li> <li>Closed or date in</li> </ul>		22	23	24	25	26	27	28
the past		29	30	1	2	3	4	5

Quantity	Document	Product	Pages	Price
1	Manual	Collated	918	78.03
			Total	78.03
			c	onfirm 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 <u>Approval</u><sup>1</sup><sup>112</sup> has been turned on you will see a message that the document will not be printed until the document is approved.

ct Pages Price	Docume	ant Type Produ	ct Options Basket A	Address Shipping Account Conf	firm	
ct Pages Price	our (	order wa	s successful.			
ct Pages Price	rder Nu	mber: 000320	5			
	ll order	notifications wi	ll be sent to your reg	istered email address which is: 👘	:r@eprint.net	
d 918 78.03	ll order	notifications wi	ll be sent to your reg	istered email address which is: :	:r@eprint.net	
	ll order	notifications wi Quantity	Il be sent to your reg	istered email address which is: . Product		Price
	II order				Pages	
	ll order					
			Document	Product	Pages	

Skyline can be configured to automatically send an email  $D^{2i7}$  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			
S Support To Annette Webber		← ≪	→ ···· 10:28
Your order 0003205 on 10/06/2020 has been received.			
You have notified us that the order is required by 12/06/2020 00:00:00			
Document	Copies	Pages	Price
Manual	1	918	78.03
Total			78.03

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.

My Library	- 🛋 🥁 🖹 • 🗎 •	😂 🌪 🗉	• 🕜
Select All	My Library	Search	Q
D	Document Name	Date	<u>Number of</u> Pages
🗹 🔍 🔂 🎰	Manual	10/06/2020 10:42:35	918
🔽 🔍 🔂 🏠	CostManager	10/06/2020 10:42:35	28
🔽 🔍 🔂 🏠	Website	10/06/2020 10:42:34	96
00 =	DrintStation	09/06/2020	102

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.

Document Type Product Opt	ions Basket Address Shipp	ing Account Confirm	
Basic Printir	ng	Manuals	Specialised Printing
	Collated Multiple collated sets.		Proceed

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.

#### Skyline Manual

- 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 <u>delivery address</u><sup>1312</sup>. 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 <u>accounts</u> features<sup>158</sup> 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 <u>Approval</u><sup>D</sup><sup>12</sup> 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 <u>send an email</u><sup>227</sup> 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	r 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.

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#### **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 *d* adjacent to the document that you want to re-order.
- 2. The first page of the order and product details are shown.

		×
Skyline Con	nplete Manual	Pages: 870
	A4 Plastic Comb Bound A4 document with Acetate front cover and card rear. Cover printed in black and white or colour. Black comb only.	
Clear Jobticket	New order Edit Job Ticket Quantity	2 Add To Basket

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	2 142.72	602	Edit	×
						ext 🕨

- 1. Click **Next** to continue placing the order.
- The delivery address information is automatically completed if you have entered a <u>delivery address</u><sup>D</sup><sup>312</sup>. 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.
- You may be asked to specify or select an account code. This feature is only available if the <u>accounts</u> <u>features</u><sup>158</sup> 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.

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

Cancel	ck the order details below Order	and confirm your order		
Quantity	Document	Product	Pages	Price
12	Print Room Manual	A4 Plastic Comb Binding	124	71.04
			Total	71.04 rm 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.

Document Name Number of Pages	1 2 Next
-------------------------------	----------

- 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		×	

Next 🕨
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- 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.

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#### **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.

Pages:	1 Administration	
Basic Printing	Manuals	Specialised Printing
	Collated Sets Multiple collated sets.	Proceed

- 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 <u>delivery address</u><sup>1312</sup>. 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.
- You may be asked to specify or select an account code. This feature is only available if the <u>accounts</u> <u>features</u><sup>158</sup> 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

Skyline Website	329
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configuration settings) send you an email confirming receipt. If the option <u>Approval</u><sup>D</sup><sup>132</sup> 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<sup>1217</sup> 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		×
1	View	Administration	0000113	30/07/2024 11:01		Order Placed		×
-	1/2		0000110	20/07/2024 10 55		0 I N I		$\checkmark$

- 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	<ul> <li></li> </ul>	×
*	View	Administration	0000113	30/07/2024 11:01		Order Placed		×
-	View	Manual	0000112	20/07/2024 10:55		Order Discad		¥

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

Skyline Job Ticket - Work - Microsoft Edge		X
https://test2.eprintnow.com/Printstation/	Jobticket.aspx?orderDetai	lld=bbc8b97c-95a9-43fc-9a21-cdf4c4 A <sup>ℕ</sup>
Print Job Ticket Quotation	Body	Í
REQUEST FOR QUOTE	Media	A4 White 80gsm
( ) ( ( ) ( ) ( ) ( ) ( ) ( ) ( ) ( ) (	Printed Sides	Double Sided
	Printer Type	Black and White
Document Name: Testing Notes for Additional Fields		
Order Number: 0000117 Created: 30/07/2024 02:07 PM	Please enter any other sp	ecial requirements
Owner: Anne Webb		
Pages: 1		
Quantity: 2000		
Status: Quote sent		
Account Code:		
Account Name:		
Account Description:		
Price Estimate: 25.00		
Original Price: 0.00	Title	Mrs
Pages with colour: 1		
Monochrome Pages: 0	Name	Anne Webb
	Company Name	ePrint

5. To accept the quotation click or to decline the quotation click  $\times$ . 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 <u>configured to accept Stripe</u><sup> $D^{207}$ </sup> payments for orders you are automatically directed to the Stripe site when you place an order. If you <u>request a quotation</u><sup> $D^{300}$ </sup> you are not required to pay using Stripe until you have accepted the quotation.

#### To make a payment using Stripe:

Pay Now

- 1. <u>Place your order  $D^{314}$  in the usual way.</u>
- 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

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

ePrint direct	TEST MODE	Pay with card			
Pay Skyline		Email			
£678.72		Card information			
		1234 1234 1234 1234	VISA	🛑 🧌 🔛 1866 - 1989	
CostManager 30 pages, 4 copies	£360.00	MM / YY	CVC	0	
ProductManager 64 pages, 12 copies	£318.72	Name on card			
Subtotal	£678.72	Country or region			
Add promotion and		United Kingdom		~	
Add promotion code		Postal code	Postal code		
Total due	£678.72				
			ecure 1-click checkout e and thousands of site		
Powered by <b>stripe</b> Terms Privacy			Pay		



-

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.

## 1 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
✤ 200FF ×	-£135.74
20% off	
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:

# 1 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

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## Using WPM Education to Pay for an Order

When Skyline has been <u>configured to accept WPM Education</u><sup>D<sub>209</sub></sup> payments for orders you are automatically directed to the WPM site when you place an order.

#### To make a payment using WPM:

1. <u>Place your order</u><sup>D<sup>314</sup></sup> 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 Tota	al	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						
Total	Total					

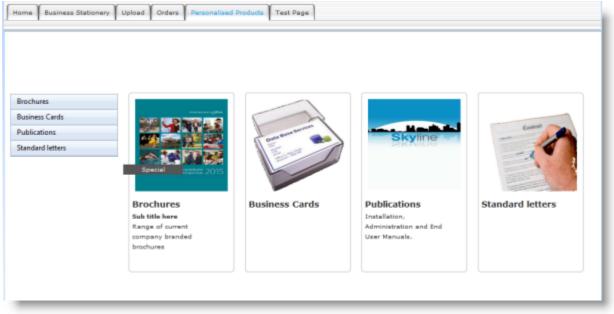
Example of an Order Placed email sent from Skyline.

## **Ordering a Product**

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#### 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.

ocument Type Product (	•	Shipping Account Confirm	
cument name: Business	Card Type1		
CHILI Publisher develo		1	<b>)</b>
10.5	Document		,
2	Paper	A4 White 80gsm	•
	Printed Sides	Double Sided	•
	Printer Type	Black and White	•
Portrait Staple			
Portrait collated set	Stapling	Double Staple	

- 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 <u>delivery address</u><sup>1</sup>. 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.

- You may be asked to specify or select an account code. This feature is only available if the <u>accounts</u> <u>features</u><sup>158</sup> 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 <u>Approval</u><sup>1</sup><sup>122</sup> 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 <u>send an email</u>  $D^{277}$  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 <u>automatically updated</u><sup>118</sup>. The price shown does not include any additional costs that apply to an order e.g. delivery costs.

**1** Note: When an order is <u>deleted in PrintStation</u><sup>D</sup><sup>463</sup> 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		×
7	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.

e	test2.eprintnow.com says			
	Are you sure you want to delete this order?			2
		ОК	Cancel	Ļ
Ļ		-	_	-

- 2. Click 🔁 to open the document PDF.
- 3. Click View 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.

Skyline Job Ticket -	Work - Microsoft Edge			_		$\times$
🕆 https://test2.	eprintnow.com/Printstation/J	obticket.aspx?orderDetailId=	=11f3cb74-614e-49c1-93	809-b6	7c8	A»
Print Job Ticket Collated Sets		Document				
		Paper	A4 White 80gsm			
		Printed Sides	Double Sided			
		Printer Type	Black and White			
Document Name: Manu	al	Production	Digital			
Order Number: 000011	2					- 8
Created: 30/07/2024 10	):07 AM	Title	Mrs			
Owner: Anne Webb		Name				
Pages: 794			Anne Webb			
Quantity: 1		Company Name	ePrint			
Status: Order Placed Account Code:		Address 1	Big City			
Account Name:		Address 2				
Account Description: Price Estimate: 43.67		County	Long Road			
Original Price: 43.67		Postal Code	ABC 123			
The second second	ges with colour: 741 nochrome Pages: 53	Phone Number	1234 567 890			

- 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  $\checkmark$ . For more information please refer to Requesting a Quotation  $\square^{33}$ .
- 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.

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

## **Colour Analysis**

If colour analysis in <u>turned on</u><sup>D</sup><sup>199</sup> 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.

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.

Skylind	CostManager	Order	<b>@</b>
-	Created: 15/02/2022 Pages: 30, 24 pages contain some colour	Download	1
	Size: 3.39 MB Owner: Anne Webb	Colours	

Once a document has been uploaded into a library click <u>Colours</u> 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.

	Skylind	/ Website	Order	
9	Signing Solution	Created: 23/04/2019 Pages: 94	Download	*
	<u>iliulimale</u>	Size: 6.15 MB Owner: Anne Webb	Analyse	
	ARE ARE ARE			

Example of a document before colour analysis has been run.

#### To run the analysis:

- 1. Click Analyse A. 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.

Skylnd	Document name: Website Pages: 94	Download 📩
Balan Balan	Pages with colour: 87 Monochrome pages 7	Back

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

#### Colour Analysis

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

Skylnd	/ Website	Order 🗑
-6	Created: 23/04/2019	
Sugar States	Pages: 94, 87 pages contain some colour	Download 💆
	Size: 6.15 MB	
أديسه اطريقا والأرار	Owner: Anne Webb	Colours
The state of the s	•	

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<sup>1</sup> 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.

My Library	-	🖮 🗼	•	🕒 - 🔓	2 🌪 🛙	• 0	Catalogues
Course Notes	ibrary Personal Libraries			( Date	Search Size	Number of	Skyline catalogues allow stock documents, prepared by your print provider, to be ordered
미 🔍 🔁 🏠	A4 Comb Bound			16/04/2020 02:06:38	6.87 MB	Pages 242	on-line. To view a list of the available documents click on one of the Catalogues below.
🗆 🔍 🔁 🎃	Manual (602)			16/04/2020 01:21:41	Libraries S	hared to a Group	Help Manuals
o 🔍 🔁 🎃	Simple			02/04/2020 09:46:41	Libraries s	shared to Users	😂 Research Papers
0 🔍 🔁 🏠	Japan			05/11/2019 11:15:43	1.79 MB	8	
0 🔍 🔁 🏠	Madeira			05/11/2019 11:02:21	2.18 MB	20	
🗆 🔍 🔁 🏠	CostManager			06/03/2018 09:59:33	2.55 MB	28	

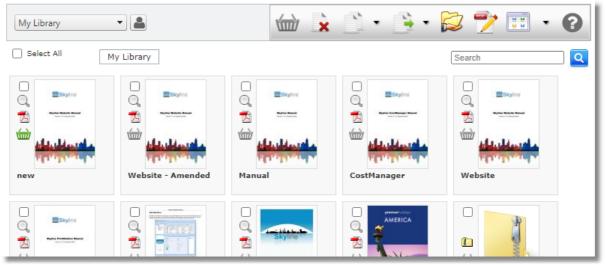
### **Changing the Library View**

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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  $D^{101}$ .

My Library	ŇШĬ	×	<u> </u>	 🔁 💙	
Select All My Library				Search	 Thumbnail view
					 Details view
Created: 16/06/2020					 List View I
Pages: 124 Size: 9.05 MB					 Catalog View

Examples of the different layouts are shown below.



Thumbnail View of the Library

My Library	•	🔬 📡	1	• 😂 ಶ	• 📰 • 🚱
Select All	My Library			Search	Q
	Created: 16/06/2020 Pages: 124 Size: 9.05 MB Owner: Anne Webb				Order 📾 Download 😒
	Website - Amended Created: 15/06/2020				Order 💼

Detals View of the Library

Download

- 74

My Library	•	۵ 🛓 🗎	• 🕒 • 🔓	2 🍸 🛙	• 🕜
Select All	My Library		(	Search	Q
	Document Name		Date	Size	<u>Number of</u> Pages
_ 🔍 🔁 🏠	new		16/06/2020 10:16:39	9.05 MB	124
_ 🔍 🔁 🎃	Website - Amended		15/06/2020 11:10:48	6.23 MB	96
_ Q, 🔁 🎃	Manual		10/06/2020	39.90 MB	918
		View of the Library			
My Library	•	-	• 🕒 • 🔓	2 🍸 🛙	• 🕜
My Library		-		Search	• ?
		۵	• 🔒 • 🔓		

Catalog view of the Library

### **Searching Libraries**

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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.

My Library	-	🖮 🗼	1.	•		2	-	0
Select All	My Library				Sea	ırch		
	<b>new</b> A new manual created by merging the Webs	site and PrintStatio	on Manuals, F	for use within	the the		Order	

- 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 **Q** the search button.
- 3. The results of your search are listed.

				Skyline		Q
Q	Skylno			1	Order	
	Septem Association				Download	*
		Skyline Administration	2			
		🖒 Library Name: Research Pap	ers			
Q	Skylno				Order	
	Styles Association				Download	7
		Skyline Administration				
		Library Name: Course Notes	and the second of the			.~~-
1. You	u can place an	order for the document using	Order	<b>.</b>		

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 <u>deleted</u><sup> $D_{352}$ </sup>, <u>copied</u><sup> $D_{351}$ </sup> or <u>moved</u><sup> $D_{352}$ </sup> to another library. You can also <u>merge</u><sup> $D_{353}$ </sup> 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 <u>preview</u><sup> $D_{360}$ </sup> the document before printing as well as viewing the <u>PDF</u><sup> $D_{360}$ </sup>.

You are also able to order documents<sup>D</sup><sup>317</sup> as well as re-order documents<sup>D</sup><sup>325</sup> 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 <u>configured the system</u><sup>D <sup>107</sup></sup> to show the first 10, 20, 50 or all paged in the document. You can view the whole document by <u>opening the PDF</u><sup>D <sup>300</sup></sup> associated with the document.

#### To preview a document in your library:

- 1. Click  $\square$  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.

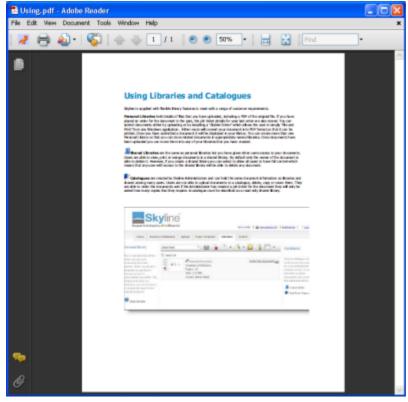
## Opening a PDF

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To open a document in your library as a PDF:

Skyline Manual

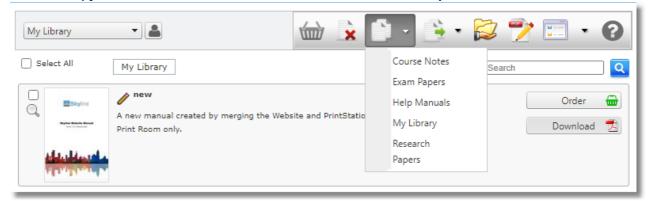
- 1. Click either 🔁 or Download 🗾 next to the document that you want to view.
- 2. The selected document opens in the PDF viewer window. Use the controls in the window to view the document. Close the window to return to Skyline.



#### **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.

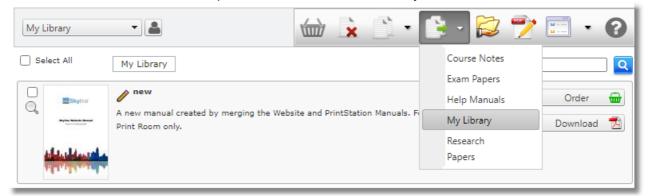


3. Select the library that you want to copy the selected documents into. The document will be available in the original library as well as the selected library.

#### **Moving a Document**

#### To move a document to another library:

- 1. Select a single document or multiple documents by entering a tick *I* 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.

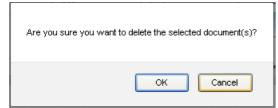


3. Select the library that you want to move the selected documents into. The document will be moved from the original library into the selected library.

#### **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  $\underline{\text{merge documents}}^{D^{358}}$  in either your own library or in a shared library.



2.

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.



3. The Edit Document page opens

dit document Iew document name 🗌				٦			Г	Save Ca
	view of the edited do	ocuments. Use the	arrow keys and dro	J opdown page or docu	emnt selectors to p	age through the do		Save
							Beginning of Book	1
								Select P
					Clauline			
					<b>Sky</b> line <sup>®</sup>			
					e Website Manu	al		
				Vers	ion: 7.6.3 [February 2020]		$\ominus$	
							C	
						<b>.</b>		
				ייידע				
Reload Preview								
		Website					96 pages	
- Electro - Website	•	□ 1	2	3 1000	4	5	ANCIENT CONTRACTOR CON	*
	•	the second s		And		<b>4</b>	r r	
				Tetra				
		7 ************************************	8	9	10 Eleptro	11		
				8 				
		13 ****	14 9'24 14 9'24 14 9'24 14 9'24 14 9'24 14 9'24 15 9'24 16 9'24 16 9'24 17 9'24 17 9'24 17 9'24 18 9'24 19	15	16	17	18 " <u>"""</u>	
				15 • • • • • • • • • • • • • • • • • • •			18 Mereconstants	

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- 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.

		End of Book	96
	Beginning of Book		Select Page
	Website		
	End of Book		
و الم الم الم الم الم الم الم الم			
n ePrint direct			
96			

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

30 Softwa Westaan Maxaal     Chanoging your Preferences     You are addeed and a to get the side some held for it. So we househouse to it is     you are addeed one we is encoured and at a get the side some held for it. So we househouse to its the side some held for its measurements     the side some some some some some some some som	Stylene Weaken     O		
Description of the vector protocol states systems has been colliqued by the right use a challenge of the system of the set of the se	To change your avail address: 1. Light and you for between <u>di</u> Your Bodie XI, <mark>Frideween</mark> , Source JJ, Fills, J. Advis, J. Sourgense: J. Lapor.		
nee autoritudees used reasinged uber reason	2 Solvert Frend I		
Sight will be Differ.	2. Enter your new enail edowes details. Clok Update Enail Address to saw your new details.		
All the all and the all the al	lana. - Changar gener an sa' kober 14		
A second	Calan Final and Antonia Contraction of Contractiono		
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www.iligiustaatad.ilistaatada fuadaatada fuadaatada fuada fuada fuadaatada	Re-Erst Name.		
Namenta argume Anno 1999 - Anno 1999 Anno 1999 - Anno 1999 Anno 1999 - Anno 1999	Case Sector		
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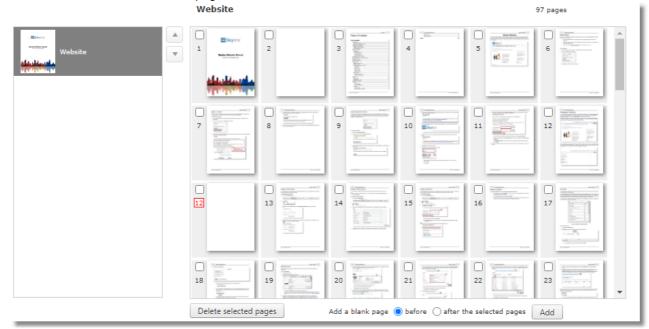
Example of using the Page button to view pages 23 & 13

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.

	Website	96 pages
Website	1     Shylin     2     3     Contained     Contained	
	T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T     T <td></td>	
	Image: series of the series	
	19     20     21     22       Delete selected pages     Add a blank page () before	re $\bigcirc$ after the selected pages Add

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.

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

<page-header><text><text><text><text><text><image/><image/><image/></text></text></text></text></text></page-header>			12-13 Select Page
	٠	<section-header><section-header><section-header><section-header></section-header></section-header></section-header></section-header>	

Example showing the blank page inserted before page 13.

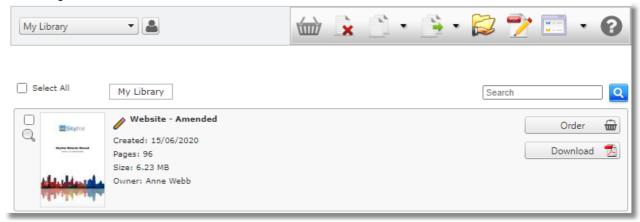
10. To remove pages from a document select the page to be removed in section at the bottom of the page then click Delete selected pages.

	Website	96 pages
Website	1 3 4 5	
		12 12
	Marcine         Marcine <t< th=""><th></th></t<>	

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.

2. s

#### 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 . The time taken to creating the thumbnails will depending on the size of the documents that you have selected to merge.

My Library	۵۰ 🕒 🗈 🖹 🖌	😂 禶 📰 🔹 😮
Creating document thumbnails. This can take a while. Please	wait	
Select All My Library		Search Q
this Select All option Amended		Order 💮
Created: 15/06/2020 Pages: 96		Download 📩
Size: 6.23 MB Owner: Anne Webb		
All and the second s		
Manual		Order 📅
Created: 10/06/2020		
Pages: 918 Size: 39.90 MB		Download 📩
Owner: Anne Webb		
and the second		
CostManager		Order 📾
Created: 10/06/2020		
Pages: 28		Download 🔁
Size: 2.83 MB		
With Driving a		
Vebsite		
Created: 10/06/2020		Order 💼
Pages: 96		Download 🔂
Size: 6.22 MB		
Owner: Anne Webb		

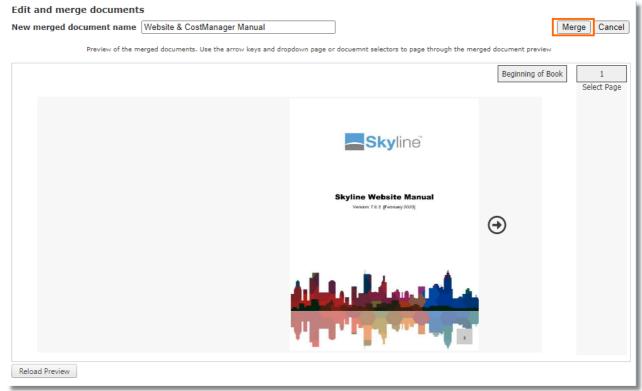
2. Enter a name for your new merge document.

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

	Website	96 pages
Website	Use these buttons to amend the order that the documents will be mereged together. Use the cross to delete a whole document if you decide that you do not want to include it in the new merge document.	
	Image: state	
	Image: State of the state o	a a a a a a a a a a a a a a a a a a a
	19     20     21     22     22       Delete selected pages     Add a blank page () before () after	r the selected pages Add

- 4. Edit the documents  $D^{353}$  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:

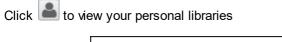
Very occasionally a merge will fail due to a problem with a PDF. If this happens an error message will show stating that there was a problem. Click the **Cancel** button and review your PDF's to correct the error.

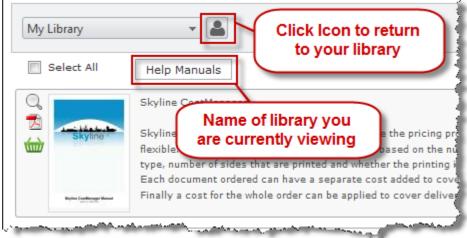
### Invalid PDF files

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.





### To add a new personal library:

- 1. Click kiew 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**.

Manage Per	sonal Libraries		
Add a new li	ibrary Help Manuals Add		
My Perso	onal Libraries		
	Library Name		Default
P	My Library		<b>a</b>
My Shar	ed Libraries		
	Shared Library Name		
I	Predefined documents	Manage Catalogue Permissions	Ŵ

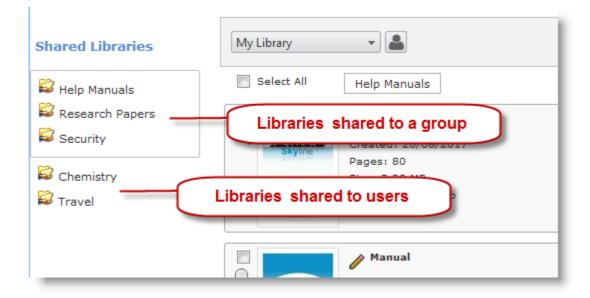
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# 3. The new library is added as a personal library; it is not available for any other users.

Manage Per	rsonal Libraries								
Add a new l	ibrary								
Library Name	brary Name Add								
My Pers	ional Libraries								
	Library Name		Default						
ľ	Help Manuals	Share Library		Û					
1	My Library			Û					
My Shar	red Libraries								
	Shared Library Name								
P	Predefined documents	Manage Catalogue Permissions		Û					

# **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 <u>document has been pre-defined</u><sup>D</sup> <sup>366</sup> 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<sup>D®1</sup>.

### To share a personal library:

- 1. Open your **Libraries** web page and click **i** 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.

Add a ne Library Nam			
	Library Name		Default
1	Help Manuals	Share Library	<b>D</b>
1	My Library		<b>1</b>
🔂 My S	Shared Libraries		
	Shared Library Name		
1	Predefined documents	Manage Catalogue Permissions	ŵ

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.

Help Manuals Give other users access to your Shared Library.		Back
Order by Date Submitted	O Order by Document Name	

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

Help Manuals Give other users access to your Share	ed Library.		Back
Transfer ownership to: Select User			Transfer
Order by Date Submitted	Order by Document Name	1	
Vsers Roles     Search Add Selected Users     Angus McDonald     Anne Webb     annette.webber@eprint.net     April Showers     break     2     Brian Dawson     Charles Taylor     chris     Cuthbert Sewell     David Donald     Donald Trump     Eric West     Horace Palmer     Janet Vanstone     July     Laura Skey     Mike Ansell     Mike Evans     Nettie     *********************************	Assigned Roles Staff	3 Give users full access Assigned Users Theresa Green	×

- 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  $\swarrow$  to

Խ . The	Library will be listed in the sect	tion <b>My Shared Libraries</b> .					
Manage Per	sonal Libraries						
Add a new li	brary						
Library Name							
My Perso	onal Libraries						
	Library Name		Default				
Ø	My Library		×	Û			
My Share	ed Libraries						
	Shared Library Name						
ľ	Help Manuals	Manage Catalogue Permissions		Û			
1	Predefined documents	Manage Catalogue Permissions		Û			

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**

**Skyline Manual** 

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 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

» New Document Name	
Skyline CostManager	
Description Skyline <u>CostManager</u> has been designed to make the pricing pro	
intuitive and flexible. The price of an order can be calculat the number of pages, the media type, the number of sides that printed and whether the printing is in colour or mono. Each o ordered can have a separate cost added to cover binding, stap	t are document
folding etc. Finally a cost for the whole order can be applied delivery and priority requests.	ed to cover
Save Cancel	55/500

### 4. The updated details are shown in Catalog View

Select All	My Library	Search		Q
C.	Skyline CostManager Skyline CostManager has been designed to make the pricing process intuitive and flexible. The price of an order can be calculated based on the number of pages, the media type, the number of sides that are printed and whether the printing is in colou or mono. 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 deliver and priority requests. Created: 09/01/2018 Pages: 558 Size: 1.89 MB Owner: Angus McDonald		Order Download	<b>a</b>

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- 5. The job ticket for the document needs to be defined.
  - 1. Click is associated with the document to view the product options.
  - 2. Click **Proceed** associated with the product that is used to produce the document.

Document Type Product (	Options Basket Address Shipping Account Confirm	
Document name: Skyline C	ostManager	
	Simple Printing A4 A3 or A5 document printed in black/white or colour. No covers or finishing options available.	Proceed ►
	A4 Booklet	
	Printed on A3 in black and white or colour and folded to produce an A4 booklet double stapled. Please use Special	Proceed.

- 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.

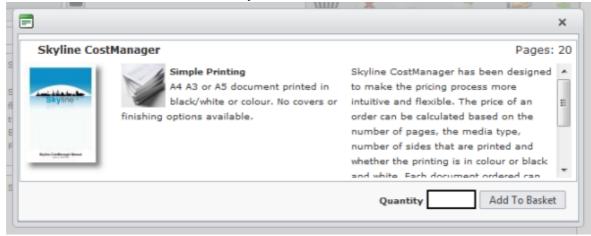
_	aries	Business Sta	tionery	Upload	Paper Documen	Orders	Approval	Products	Skylin	e Help
			Ð			-				
scument Type	Produc			s Shipping	Account Confin					
ocument Type	Produc			s Shipping	Account Confir					
	Produc		ket Addres		Account Confin		Brico	Prose	E-G+	
Document Type Document Skyline CostMar			icet Addres	s Shipping oduct mple Printing		Quantity	Price	Pages 20	Edit	×

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- 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.

My Library	•	🖮 🖹 - 🗋	🛓 - 🔯 🛛	<b>9</b>
Select All	Instruction Manuals		Search	Q
C.	CostManager Skyline CostManager has been designed to make the pri flexible. The price of an order can be calculated based or type, number of sides that are printed and whether the pr Each document ordered can have a separate cost added Finally a cost for the whole order can be applied to cover	the number of pages, the media inting is in colour or black and white. to cover binding, stapling, folding etc.		Order 💮

3. Click i 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.
- 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 Per	Solidi Libraries				
Add a new li	ibrary				
Library Name		Add			
My Pers	onal Libraries				
	L	ibrary Name			Default
P	N	/ly Library			<b>n</b>
🔁 My Shar	ed Libraries				
	Shared Library Name				
Ø	Help Manuals		Manage Catalogue Permissions		Û
1	Predefined documents		Manage Catalogue Permissions		Û
Shared Stared	libraries belonging to of	ther users			
Shared to user	'5				
Library Name	e	Owner Username			
Brochures		Nettie	Mana	age Catalogue Permissions	
SharedAzure	Library	annette.webber@eprint.net	Mana	age Catalogue Permissions	
Shared to user	roles				
Library Name	e	Owner Username	Role Name		
Project Alpha	a	Nettie	Approver	Manage Catalogue Permissions	
Project Alpha	a	Nettie	Manager	Manage Catalogue Permissions	
SharedAzure	Library	annette.webber@eprint.net	Administrator	Manage Catalogue Permissions	
Travel Broch	ures	Nettie	User	Manage Catalogue Permissions	

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- 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.

Project Alpha Library owner: Nettie		Back
Transfer ownership to: Select User		Transfer
Order by Date Submitted	Order by Document Name	
Users O Roles     Search Add Selected Users     Angus McDonald     Anne Webb	Assigned Roles	Give users full access Assigned Users
annette.webber@eprint.net April Showers break Brian Dawson Charles Taylor Chris Cuthbert Sewell David Donald Donald Trump Eric West Horace Palmer Janet Vanstone July Laura Skey Mike Ansell Mike Evans Nettie	Manager	No Users Assigned

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 is 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.

Project Omega Library owner: Charles Taylo	Back
Transfer ownership to: Select User	Transfer
Order by Date Submitted     Order by	Document Name
Users Roles     Search Add Selected Users	Give users full access
Aaron Vanstone Angus McDonald Anne Webb	Assigned Roles No Roles Assigned

- 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 **1**.

# 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 <u>approval message</u><sup>D150</sup> will inform them that their order requires approval before it is passed to the print room for processing.

ers need to be a	pproved before they are releas	eu									
resn	User name Orde	er Id Document name	Product	Accou	nt	Pages	Copies	Date	Date	required	Priority
			] [ ]	Code				Submitted			
					_						
0200441											
•	Laura Skey 0200	441 PrintStation	Comb Bound	0256		124	42	19/12/2023 10:22:00			Normal
0200442											
	Cuthbert Sewell 0200	1442 Website	Simple Printing	P305		110	5	19/12/2023 10:31:00			Normal
verview De	tails Customer Details	History Notes	Additional Fields								
	tails Customer Details PrintStation	History Notes	1	b Boun	d				L	aminated	🖺 Sar
		History Notes	1		d Double	e Sided		Black and Whi		_	🖺 Sau
	PrintStation		1	b Boun			• •	Black and Whi			🖺 Sav
	PrintStation	A4 White 80gsm	1	b Boun	Double		_		ite 🔹	•	🖺 Sav
	PrintStation Document Front cover:	A4 White 80gsm A4 Card	1	b Boun • •	Double Single None		•		ite •		🖺 Sav
8	PrintStation Document Front cover: Back cover:	A4 White 80gsm A4 Card A4 Card	Com	b Boun	Double Single None	Sided	•	Colour	ite •		🖺 Sav
	PrintStation Document Front cover: Back cover: Account Code	A4 White 80gsm A4 Card A4 Card 0256	Com Bindin Page:	b Boun	Double Single None	Sided omb Bind	•	Colour	ite		E Sav
	PrintStation Document Front cover: Back cover: Account Code Account Name	A4 White 80gsm A4 Card A4 Card 0256 Training Documents	Com Bindin Page:	• Boun • • • 9	Double Single None	Sided omb Bind Copies	•	Colour	ite		E Sav
	PrintStation Document Front cover: Back cover: Account Code Account Name	A4 White 80gsm A4 Card A4 Card 0256 Training Documents	Com Bindin Page:	• Boun • • • 9	Double Single None	Sided omb Bind Copies	•	Colour	ite		E Sav
	PrintStation Document Front cover: Back cover: Account Code Account Name Account Description	A4 White 80gsm A4 Card A4 Card 0256 Training Documents	Com Bindin Page:	• Boun • • • 9	Double Single None	Sided omb Bind Copies	•	Colour	ite		E Sav
	PrintStation Document Front cover: Back cover: Account Code Account Name Account Description	A4 White 80gsm A4 Card A4 Card 0256 Training Documents	Com Bindin Page:	• Boun • • • 9	Double Single None	Sided omb Bind Copies	•	Colour	ite		E Sau

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Any job with v 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 reco	rd was opened by Mary Bud on 1	2 June 2018 11:57 an	d cannot be changed whi	le it is locked.
de			r	OK
	and the second state of th	and a second as an	many and and a	

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					

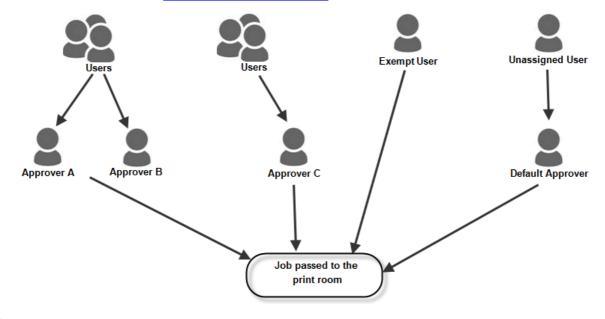
An Approver can view orders details so that they can decide to send the order to the PrintStation or reject the order. The system can be configured to allow approvers to change the following parts of the order if appropriate.

- Order details<sup>1143</sup> 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<sup>D</sup><sup>144</sup> amend the account code, name or description.
- <u>Recalculate prices</u><sup>145</sup> 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.
- <u>Customer Details</u><sup>146</sup> contact details
- <u>Additional Fields</u><sup>1</sup><sup>569</sup> 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<sup>D</sup><sup>152</sup>.

In some cases you might have users that will not require their orders to be approved. You can make the <u>user</u>  $exempt^{D_{157}}$  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  $D^{152}$ .

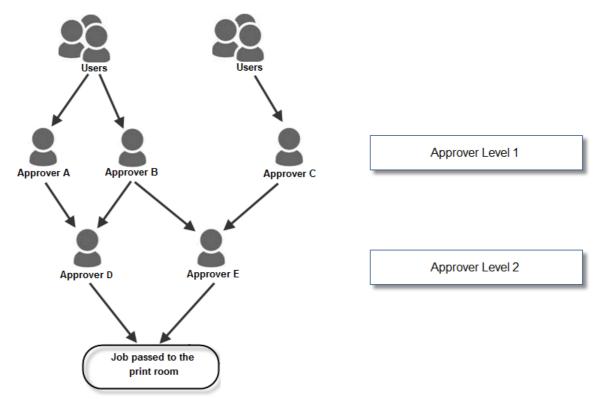


Approval is set and configured for each portal in your system.

### **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  $PDF^{D_{147}}$ .

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 <u>automated email messages</u><sup>D151</sup> 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 <u>Configuring Checkout Message</u><sup>1150</sup>

### 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	

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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<sup>D</sup><sup>147</sup> 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 **1**.

Overview	Details	Customer Details	History Notes Addition	nal Fields			
		Administration		Comb Boun	nd		Laminated
	P	Document	A4 White 80gsm	-	Double Sided 🔹	Black and White	•
	-	Front cover:	A4 Card	-	Single Sided 🔹	Colour	-
		Back cover:	A4 Card	-	None 🔻		•
		Account Code	0254	Binding	Comb Bind	•	
		Account Name	General Stationary	Pages 250	) Copies 17	Price 1,885.9	]
		Account Description	Accounts Department	Date required	III	Calculate Price	]

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.

Overview	Details Custor	ner Details	History	Notes	Addition	hal Fields								
	Historic	al Occupati	ions			Simple	Print	ting					Lami	inated
	Document		A4 White	e 80gsm			•	Doubl	e Sided	•	Black and	White	•	
	Front cove	r:					•			•			-	
ALC: NO	Back cove						•			•			•	
	Account C	ode	0256			Binding						•	]	
	Account N	lame	Training	Document	5	Pages	250		Copies	1	Price	103.75		
	Account D	escription	Account	s Departme	ent	Date req	uired				Calc	ulate Price		

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**

Overview Details	Customer Details	History Notes Additio	nal Fields		
	PrintStation		Comb Bound		Laminate
Skyfre	Document	A4 White 80gsm	•	Double Sided 🔹	Black and White
Real Property lies	Front cover:	A4 Card	•	Single Sided 🔹	Colour 🔻
ald adde and a	Back cover:	A4 Card	• N	None 🔻	•
	Account Code	0256	Binding	Comb Bind	•
	Account Name	Training Documents	Pages 124	Copies 42	Price 2,463.3
	Account Description	Accounts Department	Date required	III	Calculate Price
Details					
Overview Detail	S Customer Details	History Notes Addition	onal Fields		
Priority	Normal	•	Folding		•
Delivery Method	I will pick it up	•	Hole punching		•
Scaling		•	Stapling		•
Trees		•	Counties		•
Continents		•	Towns		
UK Parts		•	Capital Cities		

# **Customer Details**

Overview Details	Customer Details History Notes Add	itional Fields	
Name prefix	Mrs	Organisation name	
First name	Laura Skey	Street	
Family name		City	
Email address	annette.webber@eprint.net	Region TI	he World
Phone number	0123 456 789	Post Code	ABC 123

#### History

Overview Details Customer Details	History Notes Additional F	Fields	
Date Changed	Status Name	Print Station Name	Username
19/12/2023 10:22:22	Order Placed		

### Notes

Overview Details Customer Details History	lotes Additional Fields
User Notes	Your Notes (Not visible to user)

## **Additional Fields**

urther Information		Select an Additional Field to edit the Value
Additional Field	Value	Course Subject
Course Subject	Computing & Informatics	Computing & Informatics -
Course Code	TFD-8954-0003	

①Any changes made need to be saved before selecting another field.

3. If you need to see the contents of the document click download the document. This option will only be available if the option <u>Approvers can download the document PDF</u><sup>147</sup> has been selected.

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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.

If a request is being rejected please enter one o If the order is being approved please enter the f a] Project Number, b] Approval Code c] Cost Cod	ollowing information:	
Reason for Approval or Rejection		
Abbeer   Construction	Example with single level approval.	
If a request is being rejected please enter one o If the order is being approved please enter the f		

If the order is being approved please enter the following information: a] Project Number, b] Approval Code c] Cost Code	
Reason for Approval or Rejection	Approvers
	Select a Level 2 approver for this document
Approve X Reject	

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.

Order Approval Request noreply@eprint.net	Sent: To:	Tue 05/07/2016 09:39 Annette Webber
Your order number 0005287 have been approved. The req printed has now been sent.	uest f	or the document to be

Example of an email confirming that the order has been approved

# **Selecting Users**

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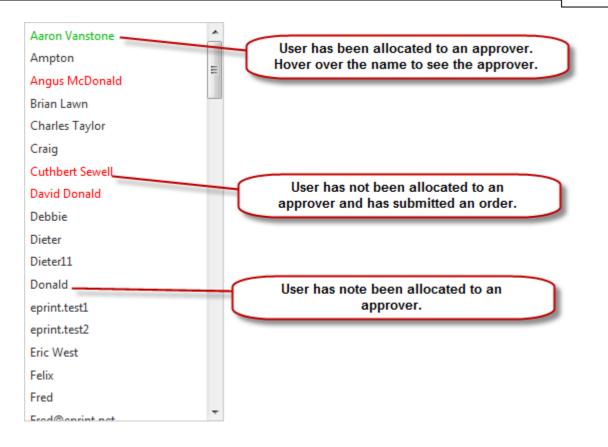
Depending or your requirements Approvers can be assigned users or they can select the users that they will manage. If they are able to select their own users a select users button is available on their Approval page.

ers ne	aed to be appro-	ved before they a	re released							Select Us
	User Name	Order ID	Document Name	Product	Account Code	Pages	Copies	Submitted Date	Required Date	Priority
				1						

When an approver clicks Select Users 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.

Allocated Users		Users not allocalte	d to this appro	over	
		Search	Q		
Abigail Smith	() ()	annette	*	Save Back	
Annette Webber	4	AxI		_	
Charles Taylor		Brian Dawson		Hide allocated users	
David Allen		Cuthbert			
Helen Nixon		Eric West			
		Fred	=		
		Freda			
		Giles Hunt			
		Horace Palmer			
		James Speak			
		Janet Vanstone			
		Jemima			
		John Thompson			
		Karen Milligan			
		Lily Carrey			
		Loki			
		Mike Evans	-		

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.



# 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

Select Users		
Allocated Users	Users not allocated to this app	prover 3
	Search	
	John Smith	Save Back
	John Smith1	
	Joy Hayden 2	Hide allocated users
	Karen Buckle	
	Lily Carrey	
	Lizzie Best	
	Lizzie Bestall	

# **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<sup>D</sup><sup>142</sup>.

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

Total doc waiting fo			ocuments waiting or Level 1 approval		uments waiting Level 2 approval		documents ed: 59/479	59
Documents	waiting for Level 1	approval	Documents wai	ting for Level 2 approv	al Last 1	00 documents declined		
	User Name	Order ID	Document Name	Date Submitted	Date Required	Product	Priority	Days Waiting
<ul> <li>Appro-</li> </ul>	ver: Angus McDona	ld - Count: 7						
Ŀ	Bob Jones	0002257	SouthEasternUSA	17/04/2018 09:16:00		A4 Plastic Comb Bound	Not urgent	7
È	Aaron Vanatone	0002254	ProductManager	17/04/2018 09:08:00		A4 Booklet	Required today	7
È	Nigel Broad	0002261	Wine Region	23/04/2018 09:08:00	04/05/2018 00:00:00	Collated Sets	Not urgent	1
	Tracey Thornton	0002259	large-print-tube- map	23/04/2018 09:05:00		Portrait Staple	Not urgent	1
È	Vernon Pickle	0002260	IBM Lotus Notes	23/04/2018 09:07:00	27/04/2018 00:00:00	A4 Booklet	Not urgent	1
È	Mike Evans	0002262	Singapore	23/04/2018 09:09:00	01/05/2018 00:00:00	Portrait Staple	Not urgent	1
E)	David Donald	0002263	Lisbon	24/04/2018 09:22:00		Portrait Staple	Not urgent	0

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.

Reports		
	Table reports	Legacy Table Reports
	Approval Status	
Orders		
<b>@</b>	<u>Live Orders</u> View Orders	

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 Using Exported Data in Excel<sup>1390</sup>.

The type of reports available are divided into 2 types.

- <u>Table Reports</u><sup>D</sup><sup>\*\*</sup> 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><sup>1383</sup> A report that displays the number of orders awaiting approval and details about the order.

### **Using Table Reports**

ports				Report Desc	ription				
aily Report		▼ Load		All fields for	orders printed for	current day			
port Name									
aily Report		Save	Delete						
				Variables can	be added to the des	cription. See online	manual for help		
🛛 🔽 Orders				Date Pri	nted				
🛛 📝 Job Ticket				Date Rang					
" 🔽 Printing				This Mont					
🛛 🗹 Document Fir	ishing			Start Date					
🐨 📝 User Details				01/10/20	19				
🛛 📝 Approval, Cus	tom Options and F	ayment		End Date	19 🔳				
25/10/2015									
k on a column head	ling to sort the grid			▼ Enclose data v	with quotes 🗹				
Run Report E	ing to sort the grid	by that value		Enclose data      Priority Cost		Product Name	Document Number	Paper Original	
Run Report E :k on a column head rag a column header	ing to sort the grid and drop it here to Date	by that value group by that colur Date	mn		vith quotes 🗹 Document	Product Name Collated		Paper Original	Docur Pages 1
Run Report E :k on a column head ag a column header Order Number	ing to sort the grid and drop it here to Date Submitted 23/09/2019	by that value group by that colur Date Completed 01/10/2019	mn		vith quotes 🗹 Document Name Irish Train		Number		Pages
Run Report E ik on a column head ag a column header Order Number 0002748	ing to sort the grid and drop it here to Date Submitted 23/09/2019 13:21:00 23/09/2019	by that value group by that colur Date Completed 01/10/2019	mn		vith quotes Document Name Irish Train Routes	Collated	Number 258057		Pages
Run Report E Ek on a column header ag a column header Order Number 0002748 0002747	ing to sort the grid and drop it here to Date Submitted 23/09/2019 13:21:00 23/09/2019 12:55:00 03/09/2019	by that value group by that colur Date Completed 01/10/2019	mn Delivery Cost	Priority Cost	vith quotes Document Name Irish Train Routes Wine Region Discover New	Collated Comb Bound	Number 258057 258048		Pages 1 2
Run Report E E ck on a column header ag a column header Order Number 0002748 0002747 0002710	Ing to sort the grid and drop it here to Date Submitted 23/09/2019 13:21:00 23/09/2019 17:12:00 03/09/2019 07/10/2019	by that value group by that colur Date Completed 01/10/2019	Delivery Cost	Priority Cost	Vith quotes 🖉 Document Name Irish Train Routes Wine Region Discover New Zealand	Collated Comb Bound Collated	Number 258057 258048 257982		Pages 1 2 88

# To run a report:

- 1. Log in with Manager rights and go to **Management**.
- 2. In the Reports section click **Table reports**.



Г

<u>Table reports</u>

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

Orders				
View all the orders on a portal between th	e se	elected st	art and end dates	
Reports				Report Description
Daily Report	*	Load		All fields for orders printed for current day
Report Name				
Daily Report		Save	Delete	
				Variables can be added to the description. See online manual for help
. Orders			-	a second se

- 4. Select a date range for the report.
- 5. Click Run Report

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- 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<sup>D so</sup> 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)							
O Save File							
Do this <u>a</u> utomatically for files like this from now on.							
OK Cancel							

## Creating a New Report

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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.



<u>Table reports</u>

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

eports		Report Description
Chris report	▼ Load	Details of the report fields selected can be entered in this area.
Report Name		
Example Report	Save Delete	
		Variables can be added to the description. See online manual

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

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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.

	Orders
	Order Number
	Date Submitted
	Date Completed
	Delivery Cost
	Priority Cost
Ð. 🗹	Job Ticket
۵.	Printing
۵.	User Details
œ. 🗆	Approval and Payment
÷	Notes

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

Reports			Report Description
Chris report	<ul> <li>Loa</li> </ul>	ad	Details of the report fields selected can be entered in this area.
Report Name	_		
Example Report	Sav		
	1		Variables can be added to the description. See online manual for help

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

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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:

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- 1. When you have run your report select the option "Export to CSV".
- 2. Open the file with Excel.

Opening Details of the documents printed between selected dates [In							
You have chosen to open:							
🔄lected dates [Including document finishing option selected].csv							
which is: Microsoft Excel Comma Separated Values File (28.4 kB) from: http://buildserver.eprintoffice.net							
What should Firefox do with this file?							
Open with Microsoft Excel (default)							
Do this <u>a</u> utomatically for files like this from now on.							
OK Cancel							

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

ľ	Cut		Calibri	- 11	• A* A	- = =	- *	- Wr	ap Text	General		٣		34	1	
Pa	ste 🛷 Form	at Painter	BIU	•	<u>ð</u> - <u>A</u>	• = =	温 休		rge & Center			ê		tting * as Ta		Inse
_	Clipboard	Fg.		Font		G	Ali	gnment		G 1	lumber	- 5		Style	\$	
	A1		. 6	fx Prod	luct Name											
1	A	в	С	D	E	F	G	н	1	J	к	L		м	N	0
1	Product N	OrderId	Document	Requeste	Total Prin	Collated	Scaling	Binding	Folding	HolePunc	Stapling					
2	Simple Pri	1905	26	22	26						OneStapl	ePortr	aitTop	LeftorLan	dscapeTopRi	ight
3	Simple Pri	1905	26	22	572						OneStapl	ePortr	aitTop	LeftorLan	dscapeTopRi	ight
4	Simple Pri	1911	26	12	312											
5	Simple Pri	1912	1	12	12											
б	Simple Pri	1912	1	12	12											
7	Simple Pri	1912	1	12	12											
8	A4 Plastic	1914	28	1	28			PlasticCor								
9	Simple Pri	1920	9	2589	23301											
10	Simple Pri	1922	9	125	1125											
11	A4 Plastic	1923	242	8	1936			PlasticCor								
12	Simple Pri	1923	602	8	4816											

### 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.

123		А	В	С	D	E
	1	Product Name	OrderId	Document Pages	Account Code	Total Printed Pages
<b>+</b>	4	A4 Booklet Total				128
+	25	A4 Plastic Comb Binding Total				1715
+	34	Business Card Total				15
+	38	Printing Double Sided and Stapled T	otal			420
+	77	Simple Printing Total				19570
<b>—</b>	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.

1 2 3		А	В	С	Н
	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
Ē	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.

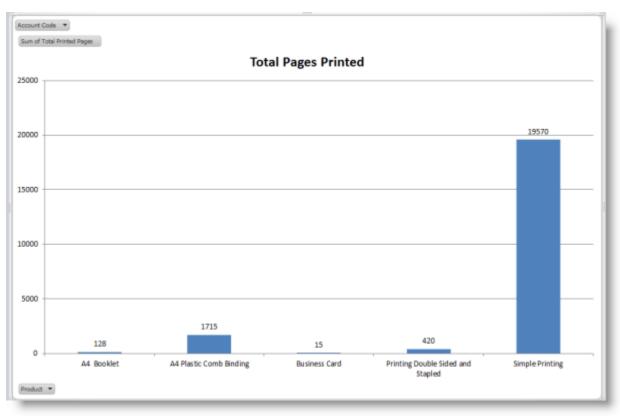
	А	В
1	Account Code	(AII)
2		
3	Product 💌	Sum of Total Printed Pages
4	A4 Booklet	128
5	A4 Plastic Comb Binding	1715
6	Business Card	15
7	Printing Double Sided and Stapled	420
8	Simple Printing	19570
9	Grand Total	21848
9	Grand Total	2184

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.

	А	В		С
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	<b>⊞121</b>		£	171.05
11	± 188		£	0.66
12	± 269		£	77.57
13	± 312		£	512.91
14	<b>⊞ 425</b>		£	412.42
15	<b>⊞ 517</b>		£	726.93
16	Grand Total		<b>£</b> 1	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.

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.

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# 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 <u>helpdesk@eprint.net</u>.

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**.



Manage the configuration options for this portal

3. Find Managers Can Edit Live Job Details in the list.

Portal Configuration

- 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.
- To amend this option click *P*.
- 5. Click 💾 to save the setting.

To configure **Managers Can Edit Live Job Details** for all portals associated with Skyline use the <u>default</u> <u>configuration option</u><sup>D</sup><sup>78</sup>. 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 the **Live Orders**.
- 3. You can use the shortcut it to load all the orders. If you want to only see orders that have been printed click the shortcut is in the shortcut in the shortcut is you will see orders that have been printed more than once.

hor	tcuts	Search		Date Ran	ige	Start Date	End Date		Status		
		All 🔻 See	ərch	Q Show Al	· · ·				Order placed	▼ Lo	oad
		User name	Order Id	Document name	Product	Account Code	Pages	Copies	Date Submitted	Date required	
~	Status: Order p	laced									
	• 🕜 🖿	Anne Webb	0002936	Mail Merge with action	Simple	3	10	3	20/01/2020 09:25:00		
~	Status: Downlo	aded									
	• 🕜 🖿	Anne Webb	0002922	Austria	Simple	T369-C	10	5	13/01/2020 11:00:00		
	• 🕜 🖿	Anne Webb	0002921	PrintStation	Comb Bound	W587	100	з	13/01/2020 10:26:00		
	• 🕜 🖿	Anne Webb	0002920	ProductManager	Custom - Notes Bottom	P305	64	2	13/01/2020 09:37:00		
	• 🕜 🖿	Anne Webb	0002919	Website	Simple	852	96	5	13/01/2020 09:34:00		
	• 🕜 🖿	Anne Webb	0002918	Mail Merge with action	Simple	2589	10	1	08/01/2020 16:48:00		
	• 🕜 🖿	Anne Webb	0002917	Mail Merge with action	Simple	2589	10	6	07/01/2020 16:37:00		
	• 🕜 🖿	Anne Webb	0002917	Glasgow University Business Card	100 Business Cards	2589	2	1	07/01/2020 16:37:00		
	• 🕜 皆	Anne Webb	0002888	Administration	Portrait Staple	007	266	1	25/11/2019 14:20:00	26/11/2019 00:00:00	
			0000005	WorldWide		050	400	50	12/11/2019	16/11/2019	+
	Change page: 📕	< > >							Page 1 of 2, it	tems 1 to 100 (	of 11

Example of the Live Orders web page

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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.

Short	tcuts	Search		Date Ra	nge	Start Date	End Date		Status	
1		All 🔻 Sea	rch	Q Show A	<b>∎</b> •			<b></b>	Waiting for quote	Load
_									Waiting for quote	
		User name	Order Id	Document name	Product	Account Code	Pages	Copies	Quote Sent	
~	Status: Waiting for	quata							Waiting for Paper Originals	
•	Status: waiting for	quote							Order placed	
	o 🕜 🗎	Brian Dawson	0003271	Manual (602)	Quotation		602	4	Query Outstanding	
~	Status: Quote Sent	t							Downloaded	
									Paper Originals Received	20
		Theresa Green	0003272	Manual	Quotation		926	1	In Production	20
	o 🕜 🖿	Anne Webb	0003270	Cloud Printer	Quotation		492	4	Printed	
~	Status: Order place								Completed	
~	Status: Order place	ea							Hand Finishing Required	
	o 🕜 🗎	Theresa Green	0003274	ProductManager	Collated		64	16	Show all statuses	20
~	Status: Query Outs								Show Deleted Jobs	

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.

Live Orders										
Shortcuts	Search	h		Date Range		Start Date	End Date		Status	
	AL Y		۹	Last 3 Month	hs 🔻	01/07/2018	02/10/2018		Completed	<ul> <li>Load</li> </ul>
	AII AII									
U	er Usen	mame	Docur	nent Pr	oduct	Account Code	Pages	Copies	Date Submitted	Date required
	Orde	er ID -								
<ul> <li>Status: Order placed</li> </ul>	Docu	ument								6
- C - A	Prod	luct	Websi		ollated Sets		98	12	01/10/2018	
	Accou	unt	websi	e (1	onaced Sets		340	12	10:15:00	
and the second		ALACCONTRACT	Mail M	lerge with 10	0 80gsm				26/09/2018	and the second

Example of a search result.

To view the original job ticket click

If an order has been printed. A been printed. A been printed. A 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 *S* associated with an order to view further details. Details regarding the order are shown at the bottom of the page.

_		PrintStation		A4 Plas	tic Co	omb Bound				Lami	nated	Save
	Bayers	Document	A4 White 80gsm		w	Double Sided	w	Black and	White	Ŧ		Cance
		Front cover:	A4 White Card 160gsm		-	One Sided	-	Colour		Ŧ	V	
	مادساليل	Back cover:	A4 White Card 160gsm		w	Not Printed	Ŧ			Ŧ	1	
7	DOTAL N	Account Code	007	Binding		Plastic comb				-		
		Account Name	International Rescue	Pages	102	Copies 2		Price	16.36			
		Account Description	Help Required	Date requ	lired	19/04/2018 00:0	1	Calc	ulate Pric	e		

#### 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**.
- To amend this option click *P*.
- 5. Click 🖿 to save the setting.

To configure **Managers Can Edit Live Job Details** for all portals associated with Skyline use the <u>default</u> <u>configuration option</u><sup> $D_{78}$ </sup>. 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

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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  $D^{\text{ss}}$ .

Priority	Not urgent	Ŧ	Folding	w	Save
Delivery Method	Phone when ready	w	Hole punching	w	Cancel
Scaling		-	Stapling	-	
Custom - Notes Packaging		*	Proof Direction	*	
Form		*	Season	*	

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<sup> $D_{585}$ </sup>.

Overview Details	Customer Details History Printing N	lotes	Theresa Green 0002244 Order placed	
Name prefix	Ms	Organisation nam		
First name	Theresa	Street	Street name Can	ncel
Family name	Green	City	City Name	
Email address	annette.webber@eprint.net	Region	Region1	
Phone number	123456	Post Code		

Example of the Customer Details tab information.

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

10/04/2018 10:19:21 Order placed	Cancel
10/04/2018 10:30:48 Downloaded GSPC Anne Webb	
10/04/2018 10:31:04 In Production GSPC Anne Webb	

# Example of the History tab information.

Printing details are shown in the Printing tab.

ate Required	Date Printed	Printer Name	Product Name	Printed Pages	Printed Copies	Total Printed Pages	Printed Sides	Price	Save
9/04/2018 0:00:00	10/04/2018 10:31:04	Xerox Nuvera EA DPS PS	A4 Plastic Comb Bound	102	2	204	duplex	16.3600	
				Date la	ist printed: 10 /	April 2018 10:31	Delete from	reports	



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.

User Notes Vour Notes (Not visible to user) I have spoken to Theresa and if there are any queries please contact her on extension 568. 10/04/2018. Anne Webb	Overview	Details	Customer Details	History	Printing	Notes	Theresa Gree	0002244	Order placed	
	User No	tes					I have spoken to Theresa and if there are any qu	vies please c	ontact	

Example of the Notes tab information.

# Changing the Status of Live Orders

**Skyline Manual** 

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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 *is* 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.

Oven	view Details	Custome	r Details History Prin Waiting for quote	ting Note:	s		Theresa Green	0003272	Quote Sent	
_		Manual	Quote Sent		Quotation				Laminated	Save
1	Skylnd	Document	Waiting for Paper Originals	n	•	Double Sided	▼ Black and	d White	•	Cancel
	Name of Column	Front cover:	Order placed		•		•		-	
	مادساطسطية	Back cover:	Query Outstanding Downloaded		•		•		•	
	Manufacture of	Account Code	Paper Originals Received		Binding				·	
		Account Name	In Production *		Pages 926	Copies 1	Price	35.25	]	
		Account Descr	Printed * Completed *		Date required	23/09/2020 00:1	Cal	culate Price		
			Hand Finishing Required							
			Delete the selected document?							
Change	the status of sele	ected jobs to	Quote Sent 👻	Change						

3. Select the required status then click Change

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 <u>Changing the Wording in a Status Email</u><sup>D siz</sup>. 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

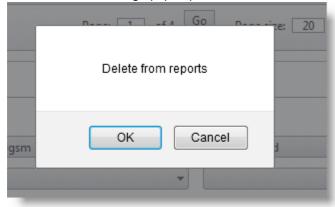
print icon is red then the order has been printed more than once. Hover your mouse over the 🖶 and an indicator will show the number of times that the order had been printed.

		🗆 🕜 🖹 🖨 Anne Webb	0000027	PriceManager	Comb Bound	12654	10	1	08/08/2016 10:43:00	No
--	--	-------------------	---------	--------------	------------	-------	----	---	------------------------	----

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.

Date Required	Date Printed	Printer Name	Product Name	Printed Pages	Printed Copies	Total Printed Pages	Printed Sides	Price	Cance
9/04/2018 0:00:00	10/04/2018 10:31:04	Xerox Nuvera EA DPS PS	A4 Plastic Comb Bound	102	2	204	duplex	16.3600	
				Date	ast printed: 10	April 2018 10:31	Delete from	n reports	
					_				

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.

Ĭ	Z	ľ	Ð	Anne Webb	0002225	Skyline Manual	A4 Plastic Comb Bound	W587	558	10	12/03/2018 12:30:00	,, 1 <sup>.1</sup>	Not urger
1	Ø	Ē		Theresa Green	0002244	PrintStation	A4 Plastic Comb Bound	007	102	2	10/04/2018 10:19:00	19/04/2018 00:00:00	Not urger
			-	Anne Webb	0002203	Manual	Binding	W587	602	1	05/03/2018 09:55:00	darba da sua sua sua sua	Not urger

# Skyline Manual

# **Deleting an Order**

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

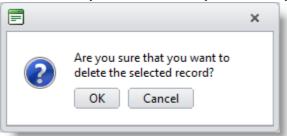
# To delete an order:

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  $\hat{\mathbf{m}}$

1	~~~~~ <u>~~</u> ~~~~~~~~~~~~~~~~~~~~~~~~~~~~~		"Without the "	°Comb®ouñ⊾		602	T "r	103400	1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 -	Trouventer	"Ofder mated"	Ъ
		Ē.	Skyline Website [20120402]	Simple Printing	12654	0	2	08/08/2016 10:58:00		Normal	Order Placed	Û
·		-	Shine	- Sintian	-03000-00-0-0-0-0-0-0-0-0-0-0-0-0-0-0-0	-70 44-004	2	05/08/2016		-	and the Dispand and	. ŵ

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:

- 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.

shor	cuts	Search		Date R	-	Start Date	End Date		Status		_
1	3 🔒 🧯	All V Se	sarch	Q Custon	n •	01/07/2018	02/07/2018	$\blacksquare$	Show Deleted Job:	s 💌 Loa	d
		User name	Order Id	Document name	Product	Account Code	Pages	Copies	Date Submitted	Date required	P
¥	Status: Deleted										
	• 7 •	Anne Webb	0002351	Bluescope Buildings Card - v1	Collated Sets	2589	2	8	02/07/2018 14:42:00	12/07/2018 00:00:00	N
	Z 🛛 🗎 —	Anne Webb	0002351	europe-2018-19	Collated Sets	2589	180	8	02/07/2018 14:42:00	12/07/2018 00:00:00	N
	• 7 6	Anne Webb	0002351	australia- 2018-19- brochure	Collated Sets	2589	172	8	02/07/2018 14:42:00	12/07/2018 00:00:00	N
	• 7 🖥	Anne Webb	0002351	far- east-2018-19- brochure	Collated Sets	2589	168	8	02/07/2018 14:42:00	12/07/2018 00:00:00	N
	• Z 🗎	Anne Webb	0002351	VirginHolidays- USA_Canada201	8 Collated Sets	2589	163	8	02/07/2018 14:42:00	12/07/2018 00:00:00	N
	• 7	Anne Webb	0002351	europe-2018-19	Collated Sets	2589	180	8	02/07/2018 14:42:00	12/07/2018 00:00:00	N
	• 7 6	Anne Webb	0002351	australia- 2018-19- brochure	Collated Sets	2589	172	8	02/07/2018 14:42:00	12/07/2018 00:00:00	N
				m							,
	Change page: H	4 <b>F</b> H							Page 1 of	f 1, items 1 to 7 o	of 7.
	ge the status of se	lasted jobs to	rder placed	▼ Change							

# **Changing Order Details**

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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:

Skyline Manual

- 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.

		PrintStation		A4 Plastic C	Comb Bound	La	minated	Save
	Bayers	Document	A4 White 80gsm	Ŧ	Double Sided *	Black and White		Cancel
		Front cover:	A4 White Card 160gsm	*	One Sided 👻	Colour	· 🗵	
	مادسانلديان	Back cover:	A4 White Card 160gsm	Ŧ	Not Printed *			
Ľ.	TOTAL N	Account Code	007	Binding	Plastic comb	-		
		Account Name	International Rescue	Pages 102	Copies 2	Price 16.36		
		Account Description	Help Required	Date required	19/04/2018 00:0	Calculate Price		

- 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.

User Notes           Your Notes (Not visible to user)         Sire             Cancel	Overview	Details	Customer Details	History	Printing	Notes	Т	Theresa Green	0002244	In Production	
Cancel	User Not	es					Your Notes (Not visible to user)				Save
											Cancel
	_										

- 3. If a change to the order will affect the price 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.

### **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.

horto			Search	ch	Q	Date Ran Show All	-	Start Date	I	End Date	III	Status Missing Jobs	▼ Loa	4
	₽	8			~	SHOW AI						Wissing Jobs		
			User name	Order Id	Docur name		Product	Accour	nt Code	Pages	Copies	Date Submitted	Date required	
~	Status: (	Completed												
	□ 🖉	È	Anne Webb	0000107	6 pag docur		Testing for Spaces			6	1	26/10/2021 13:31:00	28/10/2021 00:00:00	
		È	Skylinehost	0000076	Loren	n Ipsum	Collated Sets			6	201	06/09/2021 12:08:00	23/09/2021 00:00:00	
	□ 🖉		Skylinehost	0000075		ering a lesk call	XPIF Testing			22	42	06/09/2021 12:07:00	27/09/2021 00:00:00	
		È	Skylinehost	0000074	Loren	n Ipsum	Collated Sets			6	1	06/09/2021 12:07:00	22/09/2021 00:00:00	
	0 🖉		Jane Potts	0000017	North	America	Simple Printing	0123		289	1	04/05/2021 15:19:00		
	•	È	Theresa Green	000005	South	Pacific	Simple Printing	0123		108	4	24/11/2020 15:14:00	26/11/2020 00:00:00	

#### To re-assign orders to the PrintStation:

- 1. Create a <u>new custom status</u><sup>D⁵17</sup> e.g. "Missing Jobs".
- 2. <u>Change the status</u><sup>D402</sup> 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.

Setup Languages Theme Help									
n Demand Printing									
rtals	Orders								
est2	💌 🤅 📿 Refresh 🔳 🗷 Down	load All 退 Download 📀 Proof Prin	nt 😪 Status 👻 🔁 View	📋 Delete 🍓 Product	on Ticket 🔍 Search	n ↔ Fill Width 🕨 Current	Job		
	OrderID	Document	Name	Username	Status	Product	Copies	Submitted date	Price
Statuses Users PrintStatio	Order Placed								
😭 All Statuses (12)	0000117	Testing Notes for Additional Fields		Anne Webb	Order Placed	Quotation	2000 3	0/07/2024 14:16:00	25.00
Waiting for quote	0000113	Administration		Anne Webb	Order Placed	Collated Sets	2 3	0/07/2024 11:01:00	29.70
Quote sent	0000111	Manual		Anne Webb	Order Placed	Simple Printing	4 3	0/04/2024 14:03:00	1523.880
Awaiting Paper Originals	0000111	WorldWide Escorted Tours		Anne Webb	Order Placed	Simple Printing	4 3	0/04/2024 14:03:00	219.120
Paper Originals Received	<ul> <li>Downloaded</li> </ul>								
Order Placed (4)	🔁 📕 0000112	Manual		Anne Webb	Downloaded	Collated Sets	1 3	0/07/2024 10:55:00	43.670
Downloaded (4)	🟂 🔳 0000111	Word (6 pages) Mono		Anne Webb	Downloaded	Simple Printing	4 3	0/04/2024 14:03:00	9.960
Query Outstanding	2 🖬 0000111	TUI Iceland		Anne Webb	Downloaded	Simple Printing	4 3	0/04/2024 14:03:00	59.760
In Production (2)	📩 📕 0000110	Glasgow Poster		Nettie	Downloaded	Poster	1 2	7/02/2024 14:59:00	1.050
Printed (1)	<ul> <li>In Production</li> </ul>								
Completed (1)									Output
	Overview Details	Delivery History Job Tick	et Additional Fields						Drinkers Call
	Pages Copies	Priority	Date Submitted	Date Required		Jser Notes	CTRI Enter	to insert a new line	Printers Fold
eview	794 🗘 1		30 July 2024	<b>•</b>	-		erne erner		Print to P
		Paper	Printed Sides	Printer Type	Laminated				
Skyline	Document	A4 White 80gsm 👻	Double Sided	Black and White	-				Remote F
	Front Cover	· · · · · · · · · · · · · · · · · · ·		-	-				
Skyline Marual	Back Cover				•				Xerox Ver
Venice 73.0	Binding	Stapling	Hole Punching		ding	Price			
			*			+ 43.6700	Calculate P	rice	
ي الم يس الله بالله ا									
All a share and a	Downloaded 000		Manual			1	Des durable e Tieles	t 🖺 Save Changes	
	Downloaded 000	0112 Anne Webb Collated Sets	manuai			2	Production (icke	Save Changes	

# 🛈 Notes:

Details on <u>associating a PrintStation with a portal</u><sup> $D_{233}$ </sup> and <u>Transferring a PrintStation License</u><sup> $D_{255}$ </sup> 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.

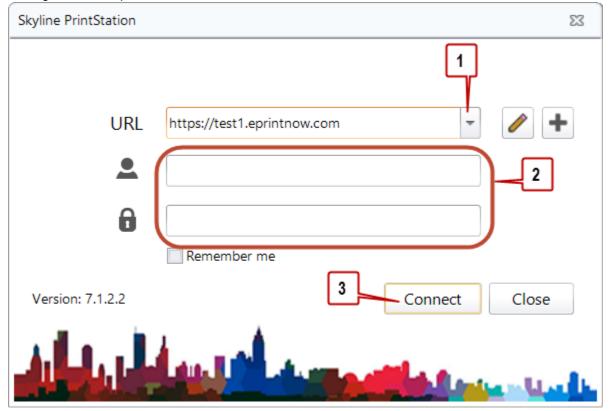
# **Starting PrintStation**

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 PrintStation
- 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:



- 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.

Skyline PrintS		2
Skyline Portal conne	ection details	7
Portal Details		
URL		Connect
UKL		Connect
Proxy details		
Use Proxy Server		
		Proxy port
Use Proxy Server		Proxy port
Use Proxy Server	Password	<b>0</b>
Use Proxy Server Proxy address		0
Use Proxy Server Proxy address		0
Use Proxy Server Proxy address		0

- 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.

# 7. The Log In with Microsoft window opens.

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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

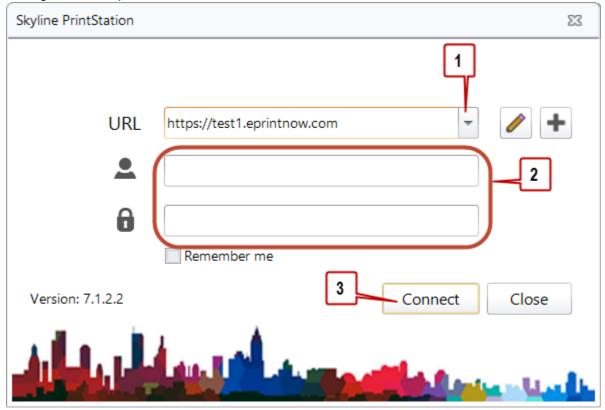
2. If you do not use Azure login click **Next**.

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

Setup complete			
	Back	Finish	Cancel

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# 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.

Error	23
	Username or Password incorrect
	ОК

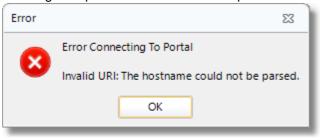
Example of access not granted.

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.

Error	23
	Error Connecting To Portal
•	Skyline portal not at the correct version at URL buildserver.eprintoffice.nets
	ОК

• 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.

	2	23
•	New version available A new PrintStation version is available to download. Your current version is Please uninstall this PrintStation and download the updated version from the Skyline po	rtal
	ОК	

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**.

Wiew Basket (0)   Preferences   Downloads   Edit   Admin   Management   Logout	l
--------------------------------------------------------------------------------	---

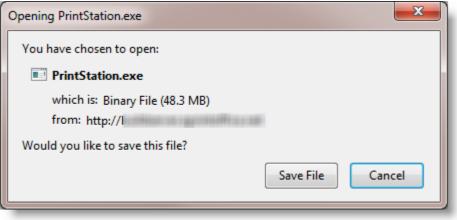
2. Click PrintStation.



<u>PrintStation</u>

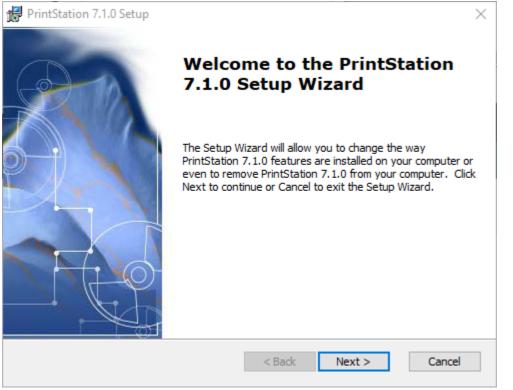
Download and install Printstation

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.

🛃 PrintStation 7.1.0 Setup	$\times$
End-User License Agreement	Day
Please read the following license agreement carefully	
	_
ePrint Direct Software Licence Agreement	^
This Licence states the terms and conditions upon which ePrint Direct Limited (registered in England under company number 3822615) whose registered office is at Second Floor, Gateway House, Fretherne Road, Welwyn Garden City, Hertfordshire, AL8 6NS. United Kingdom. ("ePrint Direct") offers to licence to you ("the Licensee") the Licensed Software. If you do not agree with these terms do not open the media package or install the Licensed Software, and return the entire media package to whoever you obtained it from within 30 days of receipt, for a full refund of the licence fee	~
○ I accept the terms in the License Agreement	
● I do not accept the terms in the License Agreement	
Advanced Installer	
< Back Next > Cano	el

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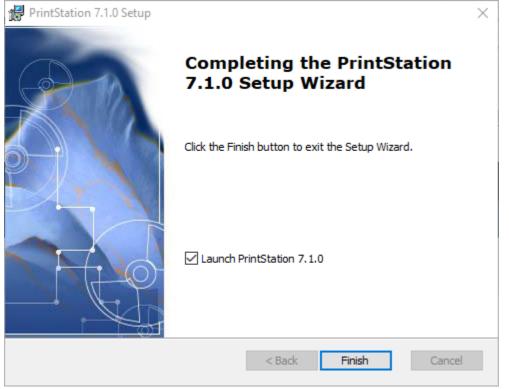
7. At the Destination Folder window it is recommended that you accept the default folder location. Click **Next** to continue.

🔀 PrintStation 7.1.0 Setup	_		$\times$
Select Installation Folder			Day!
This is the folder where PrintStation 7.1.0 will be installed.			
To install in this folder, click "Next". To install to a different folder, ent "Browse".	ter it bel	low or clic	k
Eolder:			
C:\Program Files (x86)\ePrintDirect\PrintStation\		Browse	
Advanced Installer			
< Back Next >	>	Cano	el

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

	V	
17 I	PrintStation 7.1.0 Setup	$\times$
R	leady to Install	
	The Setup Wizard is ready to begin the PrintStation 7.1.0 installation	X
	Click Install to begin the installation. If you want to review or change any of your installation settings, click Back. Click Cancel to exit the wizard.	
Adva	anced Installer	
	< Back Sack Cancel	

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.

Skyline PrintS kyline Portal conne		2
Portal Details		Connect
_		
Proxy details Use Proxy Server Proxy address		Proxy port
Use Proxy Server		Proxy port
	Password	
Use Proxy Server		0 🜲
Use Proxy Server		0 🜲

- 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

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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

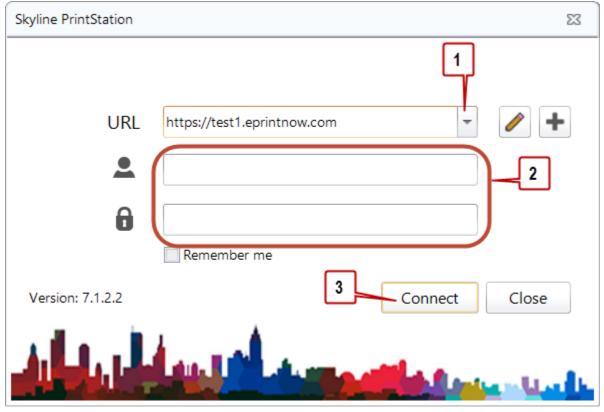
1. Select Enable Microsoft Login and click Next if you use Azure Login.

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	مړي:
< 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.

Skyline PrintStation :: Connected to -					
File Setup	Languages	Theme	Help		
	C Dutch				
On Demar	🚟 English				
	French				
Portals	🐖 German				
Annette	🚺 Italian	[			
	🥁 Polish				
Statu	US Englis	ih	ntStations		
Statu	Ses Users				
ALL	Jsers (16)	~~~	أسبعه يبعده		

# 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.

als	Orders							
t2	C Refresh 💵 Dov	nload All 🗕 Download 🕜 Proof Prir	nt 😪 Status 👻 🛪 View	🕅 Delete 🚵 Productio	n Ticket Q. Searc	th ↔ Fill Width 🕨 Current	Job	
örtals Pane 📩	Order			Username	Status	Product	Copies Submitted date	Price
Statuses Users PrintStations	Order Placed	o occanen	Order	's Pane			soonice oute	
All Statuses (15)	0000122	CostManager	oruci	Anne Webb	Order Placed	Collated Sets	200 05/08/2024 09:52:00	330,0000
Waiting for quote	0000122	Administration		Anne Webb	Order Placed	Portrait Staple	12 30/07/2024 16:21:00	178.200
Quote sent	0000119	ProductManager		Bob Jones	Order Placed	Portrait Staple	6 30/07/2024 15:29:00	26,400
Awaiting Paper Originals	0000117	Testing Notes for Additional Fields		Anne Webb	Order Placed	Quotation	2000 30/07/2024 14:16:00	25.000
Paper Originals Received	0000113	Administration		Anne Webb	Order Placed	Collated Sets	2 30/07/2024 11:01:00	29.700
Order Placed (7)	0000111	Manual		Anne Webb	Order Placed	Simple Printing	4 30/04/2024 14:03:00	1523.880
Downloaded (4)	0000111	WorldWide Escorted Tours		Anne Webb	Order Placed	Simple Printing	4 30/04/2024 14:03:00	219.120
Query Outstanding	<ul> <li>Downloaded</li> </ul>							
In Production (2)	10000112	Manual		Anne Webb	Downloaded	Collated Sets	1 30/07/2024 10:55:00	19.850
	😒 🔳 0000111	Word (6 pages) Mono		Anne Webb	Downloaded	Simple Printing	4 30/04/2024 14:03:00	9.960
iew	Overview Detai Pages Copies 30 (*) 200 Document	s Delivery History Job Tick Priority The second s	et Approval Addit Date Submitted 05 August 2024 Printed Sides Double Sided	Date Required  The printer Type  Black and White	- Laminated	User Notes Please produce 1 copy for my a Is produced.	CTRL Enter to insert a new line pproval before the complete order	Printers Fol
Preview	Front Cover Back Cover	· · · · · · · · · · · · · · · · · · ·			-			Xerox Ve
	Binding	Stapling	Hole Punching	Fol	ding	Price		
Pane			-	•		▼ 330.0000	Calculate Price	Outp
				Details	_			Jourb

The → Fill Width button will ensure that all the selected fields fill the orders pane width. In doing so, it disables the horizontal scroll bar. Click re-enable the scroll bar.

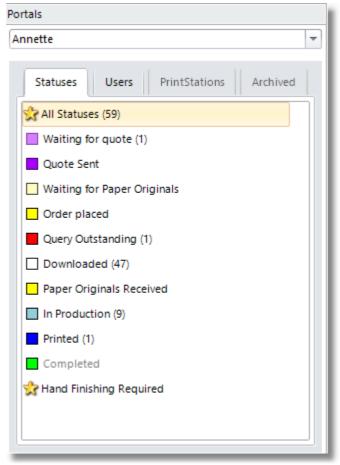
Version: 7.6.0.8

# 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. <u>Custom statuses</u> $D^{str}$  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

ortals						
Statuses Users	PrintStations					
🕄 All Users (22)						
🔮 Anne Webb (15)						
😫 Bryce Cannon (3)						
😫 Charles Taylor (1)						
😫 Richard Cross (1)						
😫 Tim Roosevelt (2)						

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 <u>Orders Pane</u><sup>145</sup>. 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 <u>selected to be displayed</u><sup>D so</sup> 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<sup>D 435</sup> received. When you select a job order the toolbar buttons applicable will become active.

	OrderID	Document Name	Username	Status	Product	Copies	Submitted date	Price
	ordeno	Document Nume	oscinanic	Status	riodact	copies	Submitted date	Thee
Order Plac	ced							
-	0000117	Testing Notes for Additional Fields	Anne Webb	Order Placed	Quotation	2000	30/07/2024 14:16:00	25.000
	0000113	Administration	Anne Webb	Order Placed	Collated Sets	2	30/07/2024 11:01:00	29.70
	0000111	Manual	Anne Webb	Order Placed	Simple Printing	4	30/04/2024 14:03:00	1523.88
	0000111	WorldWide Escorted Tours	Anne Webb	Order Placed	Simple Printing	4	30/04/2024 14:03:00	219.12
Download	led							
1	0000112	Manual	Anne Webb	Downloaded	Collated Sets	1	30/07/2024 10:55:00	43.67
7	0000111	Word (6 pages) Mono	Anne Webb	Downloaded	Simple Printing	4	30/04/2024 14:03:00	9.96
★	0000111	TUI Iceland	Anne Webb	Downloaded	Simple Printing	4	30/04/2024 14:03:00	59.76
🛪 📒	0000110	Glasgow Poster	Nettie	Downloaded	Poster	1	27/02/2024 14:59:00	1.05

The icons provide a visual details about the order.

4	Document not downloaded	7	PDF downloaded
	Zipped Document	$\square$	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

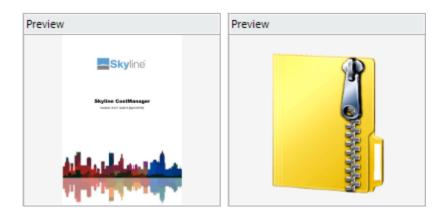


#### **The Preview Pane**

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 <u>select which tab</u><sup> $\square$  465</sup> is shown at the front in the Details Pane.

iges Copies	Priority		Date Submitted		Date Required	User Notes	CTRL Enter to insert a new line
94 🚔 1 🚔	Normal	-	30 July 2024	-			
	Paper		Printed Sides		Printer Type Laminated		
ocument	A4 White 80gsm	-	Double Sided	-	Black and White		
ont Cover		-		-			
ick Cover		-		-	<b>_</b>		
nding	Stapling		Hole Punching		Folding	Price	
	-	-			-	▼ 43	.6700 Calculate Price

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.

Downloaded	0000112	Anne Webb	Collated Sets	Manual	Production Ticket	Save Changes
	Exa	mple sho	wing the	summary information displayed at the base of the Det	tails 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.

ages Copies 94 🔺 1 📥	Priority Normal	Date Submitted     30 July 2024	Date Required	User Notes	CTRL Enter to insert a new line
	Paper	Printed Sides	Printer Type Laminated		
ocument	A4 White 80gsm 💌	Double Sided 💌	Black and White		
ont Cover	•	<b>•</b>	Image: A state of the state		
ack Cover			· · · · · · · · · · · · · · · · · · ·		
inding	Stapling	Hole Punching	Folding	Price	
	•	<b>•</b>	<b>•</b>	▼ 43.6700	Calculate Price
		Example of	the Overview Tab		

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

Changes not saved 🕅 The job details have been changed, but not saved. Click OK to DISCARD any changes made.

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<sup>1</sup> 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.

Overview Details Delivery History Job Ticket Additional Fields		
Staff Notes		
Account Code	Options1	
Account Name	Options2	
Account Description	Options3	
	Options4	
	Options5	
Impositon None 🔻	Options6	

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 Save Changes to save the changes

nanges in requ			ave the changes.	
Overview Details	Delivery History Job Ticket	Additional Fields		
Delivery	l'II pick it up			
Name Prefix	Mrs	Organisation Name	ePrint v	
First Name	Anne Webb	Street		
Family Name		City		
Phone Number	1234 567 890	Region	Long Road 💌	
Email	annette.webber@eprint.net	Post Code	ABC 123	

Example of the Delivery tab in the Details Pane

Status Changes					Printing						
Date	Status	Email User	Processed By		Date Printed Printer Used Pages		Pages	Copies	Colour / Mono		
30/04/2024 14:02:41	Order Placed			D	30/07/2024 10:3	Xerox Versant 31	1	4	Monochrome		
30/07/2024 10:34:00	Downloaded		Anne Webb								
30/07/2024 10:35:12	In Production		Anne Webb								

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 <u>additional fields</u><sup> $D_{\text{se}}$ </sup>, 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. .

Overview Details Delivery History	Job Ticket Additional Fields			
Print Job Ticket	Document		,	~
Collated Sets	Paper	A4 White 80gsm		
	Printed Sides	Double Sided		
	Printer Type	Black and White		
	Production	Digital		
Document Name: Manual	Title	Mrs		
Order Number: 0000112 Created: 30/07/2024 10:07 AM	Name	Anne Webb		
Owner: Anne Webb	Company Name	ePrint		
Pages: 794	Address 1	Big City		
Quantity: 1 Status: Downloaded	Address 2			
Account Code:	County	Long Road		
Account Name: Account Description:	Postal Code	ABC 123		
Price Estimate: 19.85	Phone Number	1234 567 890		
Original Price: 43.67	Priority	Normal		
Skylind	Delivery Method	l'II pick it up		~

Example of the Job Ticket Tab in the Details Pane

This tab is only shown if you use the <u>Approval process</u><sup>D132</sup>. Details of the dates that the order was placed and subsequently approved, together with any notes made by the approvers are shown.

Overview Details	Delivery History Job Ticket Approval	Additional Fields	
			Approval Notes
Date Submitted	30/07/2024 15:29		Approved 30 July 2024 16:26 by Anne Webb. Level 1 Notes: Meets the requirements
Level 1 Approval Date	30/07/2024 16:26:44 Level 1 Approver	Anne Webb	Level 2: Approved 30 July 2024 16:27 by Nettie. Level 2 notes:
Level 2 Approval Date	30/07/2024 16:27:19 Level 2 Approver	Nettie	Approved
Date Required			

Example of the Approval tab in the Details Pane

If the licensed feature which enables <u>additional fields</u><sup>D<sub>569</sub></sup> 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.

0	verview	Details	Delivery	History	Job Ticket	Additional Fields		
	Additonal Fields in this Product			-	Edit Additional Field			
		N	lame			Value		Course
D	Course				AE145 Part 1			AE145 Part 1

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.

Output
Printers Folder
<b>E</b>
Job Tickets

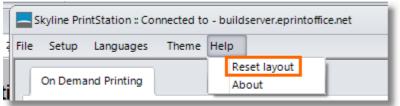
## Resetting PrintStation Layout

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:

**Skyline Manual** 

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.

Reset Layout	×
Resetting the layout will close the PrintStation. Do you want to proceed?	
OK Cancel	

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

tals	Orders						
örtals Pane 🔽	🗧 🕄 Refresh 🛛 💀 Download All	Download 💿 Proof Print 😪 Status 👻 🛣 Viev	/ 🎁 Delete 🍓 Production	Ticket Q Search	• ↔ Fill Width ▶ Current J	ob	
Statuses Users PrintStations	OrderID	Document Name	Username	Status	Product	Copies Submitted date	Price
	<ul> <li>Order Placed</li> </ul>	Urde	rs Pane				
All Statuses (15)	💽 🚽 0000122 CostMar	nager	Anne Webb	Order Placed	Collated Sets	200 05/08/2024 09:52:00	330.000
Waiting for quote	🛃 🔳 0000120 Administ	tration	Anne Webb	Order Placed	Portrait Staple	12 30/07/2024 16:21:00	178.200
Quote sent	💽 🔳 0000119 Product!	Manager	Bob Jones	Order Placed	Portrait Staple	6 30/07/2024 15:29:00	26.400
Awaiting Paper Originals	🥃 🔳 0000117 Testing I	Notes for Additional Fields	Anne Webb	Order Placed	Quotation	2000 30/07/2024 14:16:00	25.00
Paper Originals Received	🥃 🔳 0000113 Administ	tration	Anne Webb	Order Placed	Collated Sets	2 30/07/2024 11:01:00	29.70
Order Placed (7)	🛃 🔳 0000111 Manual		Anne Webb	Order Placed	Simple Printing	4 30/04/2024 14:03:00	1523.88
Downloaded (4)	🛃 🔳 0000111 WorldWi	ide Escorted Tours	Anne Webb	Order Placed	Simple Printing	4 30/04/2024 14:03:00	219.12
Query Outstanding	<ul> <li>Downloaded</li> </ul>						
In Production (2)	🔁 🔳 0000112 Manual		Anne Webb	Downloaded	Collated Sets	1 30/07/2024 10:55:00	19.85
	🐀 🔳 0000111 Word (6	pages) Mono	Anne Webb	Downloaded	Simple Printing	4 30/04/2024 14:03:00	9.96
Preview	Overview         Details         Delivery           Pages         Copies         Priority           30         \$\overline\$         Normal           Document         A4 Whits           Front Cover         \$\overline\$           Back Cover         \$\overline\$	Date Submitted	Date Required Printer Type Plack and White W	- F	lser Notes Tease produce 1 copy for my ap s produced.	CTRL Enter to insert a new line proval before the complete order	Printers F Print to Remot
Pane	Binding	Stapling Hole Punchin	Details	-	Price 330.0000	Calculate Price	Outp Pane

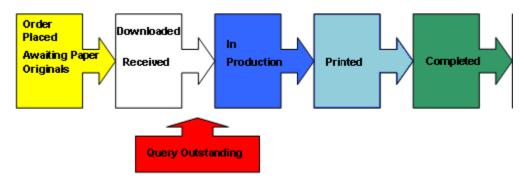
## **Processing Orders**

Any new job tickets sent to your PrintStation are shown in the <u>Orders pane</u><sup> $D_{425}$ </sup>. Your PrintStation can be configured to be <u>automatically check for new orders</u><sup> $D_{422}$ </sup>.

#### To show the new orders in the orders pane:

1. Click 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 <u>change the status</u><sup>149</sup></sup> 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.</sup>



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.
- <u>Custom statuses</u><sup>1</sup><sup>517</sup> 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 <u>displayed in the Orders grid</u><sup>D<sub>502</sup></sup> will be searched by default. If you only want to search a specific field you can select the field from the</sup></sub>

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.

$\langle \uparrow \rangle$	••• Username	~~~~~~status~	Pr	oduct	Pages Co	opies 🐴
1	• • 🕻	k 🕶				- 1
ξ		Search in columns	•	Mast	er template	
		Match case		IIA 💟		_1
2	Anne Web	Search from curre	nt position	•		Th
2				<b>·</b>		
2	Anne Webb	Downloaded	Simple	~		Th
į	Bryce Cannor	Downloaded	Binding O	Order	rID	Th
5		Downloaded	Booklet	Docu	ment Name	Th

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 Q 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.

🗄 🧭 Refresh 🕘 🖳 Download All 💽 Download 🕥 Proof Print 😪 Status 👻							
			OrderID	Document Name	Username	St	
2 1 of 2374 × • • •							
^	Orde	r plac	ced				
		н,	00025	Cloud Printer	Anne Webb	Order place	
	4	1	0002572	far-east- <mark>2</mark> 018-19-broc	Anne Webb	Order place	
	4	1	000 <mark>2</mark> 570	far-east- <mark>2</mark> 018-19-broc	Anne Webb	Order place	
	4	1	000 <mark>2</mark> 568	far-east- <mark>2</mark> 018-19-broc	Anne Webb	Order place	
	4	1	000 <mark>2</mark> 567	far-east- <mark>2</mark> 018-19-broc	Anne Webb	Order place	
		10	0002566	A4 Comb Bound	Anne Webb	Order place	

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.

Ord	Orders							
1	🗄 😂 Refresh 🔳 🖶 Download All 💿 Download 🕥 Proof Print 😪 Status							
				OrderID	Document Name	Username		
25	25 1 of 480 × • • •							
^	Orde	r pla	cec	ł			}	
		н.		00025	Cloud Printer	Anne Webb	Order pla	
	4	1		000 <mark>25</mark> 72	far-east-2018-19-broc	Anne Webb	Order pla	
	4	1		000 <mark>25</mark> 70	far-east-2018-19-broc	Anne Webb	Order pla	
	4	1		000 <mark>25</mark> 68	far-east-2018-19-broc	Anne Webb	Order pla	
		1		000 <mark>25</mark> 67	far-east-2018-19-broc	Anne Webb	Order pla	
J					A4 Comb Bound	Anne Webb	Order pla	

- Skyline Manual
- 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.

Ord	ers					
2	🕽 Refres	sh 🞩	Jownload Al	l 🛃 Download 🕥 Proof	i Print 😪 Statu	is 🔹 🔝 Viei
			OrderID	Document Name	Username	Sta
250	D			1 of 46 × ▲ ▼	0 -	
	1		0002501	CostManager	Anne Webb	Downloaded
	1		0002488	Manual Mono Title Page	Anne Webb	Downloaded
^	Printed					
	7	•	0002527	A4 Booklet	Anne Webb	Printed
^	Comple	eted				
	7	۱.	0002550	A4 Booklet	Anne Webb	Completed
	7	•	0002549	TemplateManager	Pippa Delve	Completed
	ماريها		Second Second	a company and the second	Same and the second	<sup>يەر</sup> ئىسمى ل

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.

Ord	Orders								
: 2	🗄 📿 Refresh 🔳 y Download All 🕘 Download 🞯 Proof Print 😪 Status 👻 🛸								
				OrderID	Document Name	Username			
250	09				1 of 15 🗙 🔺 🔻	Q -			
	1			0002509	Mono Website	David Donald	Complet		
		н.		000 <mark>2509</mark>	Skyline PriceManager	David Donald	Comple		
	7	н.		0002509	Lisbon	David Donald	Comple		
		н.		0002509	ProductManager	David Donald	Comple		
	74	н.		0002509	A4 Comb Bound	David Donald	Comple		
	1	<u>, 1</u> ,	~	000 <mark>2509</mark>	Simple	David Donald	Complet		

5. If the highlighted record is not the required record, use the **buttons to scroll through all the** matching records.

Or	ders				
8	📿 Refresh	🚚 🕹 Download A	II 退 Download 🥑 Pro	of Print 👷 Statu	ıs 🔹 🛃 View
		OrderID	Document Name	Username	Stati
2	509		12 of 15 ×	Q -	
		0002509	SkylineManual	David Donald	Completed
		0002509	TemplateManager	David Donald	Completed
			And the second s	Dayid Doorld	Completed

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## **Downloading Documents**

Any new orders sent to your PrintStation are shown in the Orders pane<sup>D425</sup> under the heading Orders Placed.

#### To download a document:

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

Ord	ers								
: 2	🕽 Refresh	Java Downloa	d All 📑 Download 🞯 Proof Print 😏	🕈 Status 👻 🛃 View 📋	🖥 Delete 🍓 Productio	n Ticket 🔍 Search	↔ Fill Width	Current Job	
		OrderID Document Name Username Status Product Copies Submitted date							
^	Order Plac	ed							
		🛃 📕 0000122 CostManager Anne Webb Order Placed Collated Sets 200 05/08/2024 09:52:00							
		0000120	Administration	Anne Webb	Order Placed	Portrait Staple	12	30/07/2024 16:21:00	
		0000110	DeaductManager	Pob long	Order Discod	Doctroit Stople	4	20/07/2024 15:20:00	

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

∧ 0	rde	r Place	d							
3	J.	а,	0000120	Administration	Anne Webb	Order Placed	Portrait Staple	12	30/07/2024 16:21:00	
		а,	0000119	ProductManager	Bob Jones	Order Placed	Portrait Staple	6	30/07/2024 15:29:00	=
		а,	0000111	Manual	Anne Webb	Order Placed	Simple Printing	4	30/04/2024 14:03:00	
▲ D0	owr	nloade	d							
-	۶ì		0000122	CostManager	Anne Webb	Downloaded	Collated Sets	200	05/08/2024 09:52:00	
2	人		0000112	wanuar	Anne webb	Downloaded	Collated Sets		30/07/2024 10.33.00	

- The 5 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.

# 🚺 Note:

• Skyline can be configured to automatically <u>send an email</u><sup>D<sup>217</sup></sup> 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 <u>Orders pane</u><sup>D 425</sup>. The orders displayed will vary depending on your selection in the <u>Portals Pane</u><sup>D 423</sup>.

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.

All the orders for the selected user will be downloaded. The progress is shown

Portals							
Annette			•				
Statuses	Users	PrintStations	Archived				
👥 All Use	rs (50)						
😫 Fred (26)							
Freda (	24)		and the second s				

2. Click Download All

n the Orders grid.		
Orders		▼ 📌 ×
	Downloading 8 of 26	
	Canada _Alaska	
	72 %	
	Cancel	

## **Reviewing the PDF**

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

Ord	ders										
1	😌 Refresh 🔋 Download All 🔋 Download 🖉 Proof Print 😵 Status 👻 🔁 View 📲 Delete 😓 Production Ticket 📿 Search \leftrightarrow Fill Width 🕨 Current Job										
			OrderID	Document Name	Username	Status	Product	Copies	Submitted date		
^	Order Placed										
	4	<b>a</b>	0000120	Administration	Anne Webb	Order Placed	Portrait Staple	12	30/07/2024 16:21:00		
		а.	0000119	ProductManager	Bob Jones	Order Placed	Portrait Staple	6	30/07/2024 15:29:00	≡	
	4	а.	0000111	Manual	Anne Webb	Order Placed	Simple Printing	4	30/04/2024 14:03:00		
^	Downloaded										
	-		0000122	CostManager	Anne Webb	Downloaded	Collated Sets	200	05/08/2024 09:52:00		
	*	а.	0000112	Manual	Anne Webb	Downloaded	Collated Sets	1	30/07/2024 10:55:00		

To review the PDF, select the order then:

1. Select the order then click the <sup>Solution</sup> button in the Orders pane toolbar.

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## **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 <u>change the status</u><sup>1</sup><sup>459</sup> 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 <u>query email</u><sup>D<sup>217</sup></sup> 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
1	View	CostManager	0000122	05/08/2024 09:52		Downloaded		

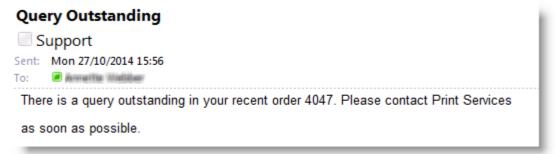
2. The PrintStation operator has a query regarding the job order. They <u>change the job order status</u><sup>1/49</sup> to Query Outstanding.

<ul> <li>Query Outstanding</li> </ul>								
📩 📕 0000122 CostManag	ger Anne Web	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.

1	PDF	Job Ticket	Document	Order Number	Order Date	Required Date	Status	Quote	Delete
	7	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.



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.

Overview Details	Delivery History Job Ticket	Approval Additional Fields	
Pages Copies	Priority Normal	Date Submitted Date Required User Notes	CTRL Enter to insert a new line
Document	Paper A4 White 80gsm	Printed Sides     Printer Type     Laminated       Double Sided     Image: Black and White     Image: Descent and White	
Front Cover Back Cover	<b></b>		
Binding	Stapling Touble Staple	Hole Punching Folding Price	Calculate Price

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<sup>D</sup><sup>512</sup>.

Query Outstanding	Show Orders on Printstation 🗹 🛛 Email User 🗹							
Query Outstanding	Allow order to be deleted							
Email Settings								
Query Outstanding								
Copy status emails. Separate multiple email addresses with a ; character								
Reference your order {OrderId} for {Copies} of {DocumentName} placed {SubmittedDate}.								
{UserNotes}								
	Query Outstanding Query Outstanding Copy status emails. Separate r							

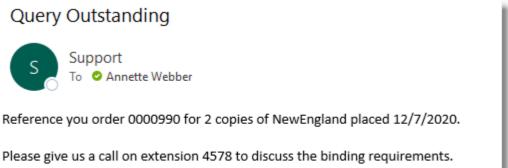
Example of a Query Outstanding email containing the UserNotes field.

## 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.

Pages Copies	Priority	Date Submitted	Date Required	User Notes	CTRL Enter to insert a new line
270 🚔 12 🚔	Normal	30 July 2024 💌	<b>•</b>	Please give us a call on extension	n 548 to discuss your binding
	Paper	Printed Sides	Printer Type Laminated	requirements.	
Document	A4 White 80gsm 🔻	Double Sided 🔻	Black and White		
Front Cover	<b>•</b>	<b></b>	<b></b>		
Back Cover	<b>•</b>	▼	<b>T</b>		
Binding	Stapling	Hole Punching	Folding	Price	
	Double Staple	•	-	▼ 178.2000	Calculate Price

- 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

Version: 7.6.0.8

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## **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.

🕽 Refresh 🧕	Downlo	ad All 💽 Downlo	oad 🕖 Proof Print	😪 Status 👻 🔁 View	🛅 Delete 🍓 Produc	tion Ticket 🔍 Sea	rch 🔶 F	ill Width	Current Job	
	OrderID	Docur	ment Name	Username	Status	Product		Copies	Submitted date	Price
Waiting for q	uote									
J 🖬	0000123	Manual		Anne Webb	Waiting for quote	Quotation		20	05/08/2024 11:39:00	0.0
Order Placed										
🛃 🖷 📕	0000119	ProductManager		Bob Jones	Order Placed	Portrait Staple		6	30/07/2024 15:29:00	26.4
J 🖬	0000111	Manual		Anne Webb	Order Placed	Simple Printing		4	30/04/2024 14:03:00	1523.8
Downloaded										
🔁 🔳	0000122	CostManager		Anne Webb	Downloaded	Collated Sets		200	05/08/2024 09:52:00	330.0
Pages 794 🛓	Copies	Priority Normal	-	Date Submitted 05 August 2024	Date Required	-		discuss the	most cost effective way to bir	insert a new line
		Paper		Printed Sides	Printer Type	Laminated	docume		most cost enceave way to bi	in these
Document		A4 White 80gsm	-	Double Sided	Black and White					
Front Cover										
Back Cover					<b>T-</b>					
Binding		Staplin	g	Hole Punching	F	olding		Price		
		<b>-</b>	-		-		-		0.0000 Calculate Pri	ce
Waiting fo	or quote	0000123 Anne	Webb Quotation	Manual					Section Ticker	Save Changes

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.

PDF	Job Ticket	Document	Order Number	Order Date	Required Date	Status	Quote	Delete
*	View	Manual	0000123	05/08/2024 11:39		Quote sent 562.94	<ul> <li></li> </ul>	×

• 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.

	Status Changes									
	Date	Status	Email User	Processed By						
D	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	<b>v</b>	Anne Webb						
	05/08/2024 11:49:59	Order Placed	<b>v</b>							

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

Overview Details	Delivery History Job T	icket Additional Fields		
		Staff Notes (69/2000 characters)		
Account Code	IT2	05/08/2024 11:46:53 Username: anne webb Aded comb binding and pricing	Options1	
Account Name	IT Brochures	Aded comb binding and pricing	Options2	
Account Description	Test Account		Options3	
			Options4	
			Options5	
Impositon	None 🔻		Options6	

• **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 <u>Detail Pane</u>  $D^{\text{arr}}$ . 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
- 2. Enter details explaining why the change was made.

Notes			
Please enter any change notes here			
Amended the quantity from 100 price.	to 10 and calculated the new		
Cancel	Save		

- 1. Details entered in this window are shown in the Details  $tab^{D_{429}}$ .
- 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.

Overview Details Delivery History Job T	icket Additional Fields		
	Staff Notes (120/2000 characters)		
Account Code	05/08/2024 15:23:27 Username: anne webb	Options1	
Account Name	Amended the quantity from 100 to 10 and calculate the new price	Options2	<b>•</b>
Account Description		Options3	<b></b>
		Options4	<b></b>
		Options5	<b></b>
Impositon None 💌		Options6	<b>•</b>

- 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

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## 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<sup>1</sup><sup>406</sup> 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  $D^{428}$ .

ages Copies	Priority	Date Submitted	Date Required	User Notes	CTRL Enter to insert a new line
94 🔺 1 📥	Normal	30 July 2024 💌	<b></b>		
	Paper	Printed Sides	Printer Type Laminated		
ocument	A4 White 120gsm 💌	Double Sided 🔻	Black and White		
ront Cover	▼	<b>•</b>	<b>_</b>		
ack Cover	▼	<b>•</b>	<b></b>		
inding	Stapling	Hole Punching	Folding	Price	

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.

Notes			
Please enter any change notes here			
Amended the quantity from 100 price.	0 to 10 and calculated the new		
Cancel	Save		

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.

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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.

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  $\frac{\text{Proof Print}}{\text{D}^{455}}$  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.

Skyline Generic Print	23
All and the second second	
General User / Account Details Document Finis	hing
Printer Name: Xerox Phaser 6180N PS T Document Name Website Product A4 Comb Bound Document	Price 147.20 Binding PlasticComb Folding Hole punching Stapling
Print range All Pages 1 to 94 to	Preview
Page handling       Copies     20 ★ Collate       ● Portrait     Landscape	Skyline Website Version: 6.8.7 bulk 3 (Kprl 2018)
Sides 1-Sided Print  Page scaling Scale to Printable Area	
Paper tray Tray 1 (MPT)	بهاديها والمارية
Printer Type Colour Monochrome	
Print from Acrobat	Print Cancel

- 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.

	Overview Details Delivery History	Original Additional Fields	
Г	Additonal Fields in th	Edit Additional Field	
	Name	Value	Type of packaging for each document
C	Type of packaging for each document	Plastic Bag	Plastic Bag

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.

Overview Details Delivery History	Original Additional Fields	
Additonal Fields in thi Name		Edit Additional Field Type of packaging for each document Plastic Bag Eco Bag - Free Plastic Bag Cardboard Box
		Wooden Box

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

Additonal Fields in th	s document order	Edit Additional Field
Name	Value	Type of packaging for each documen
Type of packaging for each document	Plastic Bag	Eco Bag - Free

3.	The Notes window opens.	Enter details of why	/ the change is required	and press Save
υ.	The Notes window opens.	Enter details of with	y the onunge is required	

Overview Details De Name	livery History Original Additional Fields	<sup>5</sup> dit Additional Field /pe of packaging for each document
D Type of packaging for each	Please enter any change notes here Cancel Save	co Bag - Free
Order placed 0005177	Anne Webb A4 Poster Poster 1	Print Job Ticket

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

Overview Details	Delivery History Original	Additional Fields			
Pages Copies	Priority	Date Submitted	Date Required	User Notes	CTRL Enter to insert a new line
	<b>~</b>	03 January 2023 🔹	-		
	Paper	Printed Sides	Printer Type Laminated		
Document	A4 80gsm White 🔻	Single Sided 🔻	Colour 🔻 🗌		
Front Cover	<b>•</b>	▼	<b>~</b>		
Back Cover	<b>•</b>	<b></b>	<b>•</b>		
Binding	Stapling	Hole Punching	Folding	Price	
	-		<b>v</b>	▼ 2.7000	Calculate Price

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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.

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.

Select Printer		SkylineManual - 0000018
	ies Class Driver	Preview
Brother DCP-129C		- Skyline
All     Pages     1	to 896 🖕	Skyline Manual Venter: 6.07 tule 3 (jel 2916)
Copies 1	armit	
		Page 1 of 896

## **Printing an Order**

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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**.

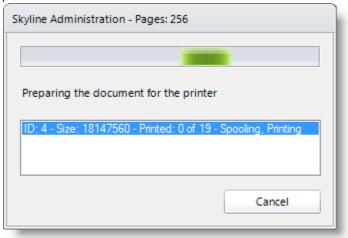
als	Orders							
12		ad All 🔳 Download 🕥 Proof Print	🛷 Statur 👻 📆 Viaur	🛱 Delete 🐣 Product		b + Fill Width & Current Job		
Statuses Users PrintStations	OrderID	Document Name	Username	Status	Product	Copies Submitted date	Price	
All Statuses (14)	<ul> <li>Downloaded</li> <li>0000122</li> </ul>	CostManager	Anne Webb	Downloaded	Collated Sets	200 05/08/2024 09:52:00	330.0000	
Waiting for quote	2 0000112	Manual	Anne Webb	Downloaded	Collated Sets	1 30/07/2024 10:55:00	19.8500	
Quote sent (1)	2 0000111	Word (6 pages) Mono	Anne Webb	Downloaded	Simple Printing	4 30/04/2024 14:03:00	9.9600	
Awaiting Paper Originals	10000111	TUI Iceland	Anne Webb	Downloaded	Simple Printing	4 30/04/2024 14:03:00	59.7600	
Paper Originals Received	🔁 📒 0000110	Glasgow Poster	Nettie	Downloaded	Poster	1 27/02/2024 14:59:00	1.0500	
Order Placed (3)	<ul> <li>Query Outstanding</li> </ul>							
Downloaded (5)	Overview Details	Delivery History Job Ticket	Additional Fields					Output Printers Folder
ew	Pages Copies	Priority	Date Submitted	Date Required		User Notes CTRL E	inter to insert a new line	
	794 🌲 1 🌲	Normal	30 July 2024	•	-			Print to PDF
Skyline		Paper	Printed Sides	Printer Type	Laminated			
	Document	A4 White 120gsm 👻	Double Sided	▼ Black and White	-			Remote Prin
Skytine Manual	Front Cover			<b>_</b>				JO T
	Back Cover	<b>~</b>		<b>-</b>	¥ 🔲			Xerox Versan
	Binding	stapling	Hole Punching	Fo	olding	Price	late Price	~~~2

- 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.

	Mar Ma		and a starting of the start of
General Use	/ Account Details Documen	t Finishing	
Printer		Price	7.80
Name: Can	on MG3600 series Printer	Document Body	Monochrome
Document Nam	e Website	Front Cover	Colour
Product	Comb Bound	Back Cover	Monochrome
Print range		Preview	
All			
Pages	1 🚖 to 96	÷	<b>Sky</b> line <sup>°</sup>
Page handling			
Copies	1 🚔 🔽 Collate		
Portrait	Landscape		Website Manual = 7.0.2 [November 2019]
Sides	2-Sided Print	-	
Page scaling	Scale to Printable Area	-	
Paper tray	Front Tray		1
Auto-Rotate a	nd Centre		
Printer Type	t in monochrome		A DESCRIPTION OF THE
aocamen			•
	Print ticket		t Cancel

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 <u>remove the printed job from the reports</u><sup>143</sup>. Alternatively you could use the <u>Proof Print facility</u><sup>145</sup> 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 <u>display a warning</u><sup>146</sup>. Click **Yes** to print the document.

PrintStation	
? Thi	is 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 <u>History tab</u><sup>D₄∞</sup> 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 <u>Live Orders</u><sup>D<sub>396</sub></sup> 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?"

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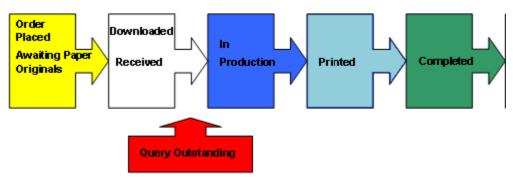
## **Changing the Status**

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 <u>automatic email</u><sup>D<sup>217</sup></sup> 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:

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1. View the list of orders and select the job that you want to change the Job Status of.

Ord	lers					-	
1	🖰 Ref	fresh	J Downlo	ad All 🔳 Download 🕥 P	roof Print	ŵ.	<mark>Status 🔻 🛃</mark> View  聞 Delete 🍓 Pr
			OrderID	Document Name			Waiting for quote
^	Dow	nloade	ed			Quote Sent	
	-		0003266	MIT Card	Anr		Waiting for Paper Originals
	73	а.	0003265	A4 Comb Bound	Bria		Order placed
	7	а,	0003264	Manual (602)	Bria		Query Outstanding
	73	а,	0003263	CostManager	Anr		Downloaded
	7	а.	0003258	Manual	Cut		
	7	а.	0003258	PacificNorthWestUSA	Cut		Paper Originals Received
	7	а.	0003258	A4 Comb Bound	Cut		In Production
	7	а.	0003257	A4 Comb Bound	Cut		Printed
	7		0003256	PacificNorthWestUSA	Cut		Completed
	73	а.	0003245	Manual	Anr	숬	Hand Finishing Required
	7	а.	0003244	Simple	Joh	ŵ	Delete
	7	а.	0003243	Website	Anr	IC 77	

 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.

U If a status is shown in blue it means that any jobs changed to that status are not shown on the PrintStation.

 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?"

Skyline	23
1	Do you want to record how this job was printed so that it is included in the reports? 0000029 - Skyline Website
	Yes No

 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.

Confirm	23
0	This job will not be included in any reports
	OK Cancel

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.

- 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

**Skyline Manual** 

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><sup>D<sub>217</sub></sup> 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.

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		OrderID	Document Name			2 Waiting for quote		
In Pr	oducti	on	1			Quote Sent		
📩 0003268 Manual Anr 🗌 Waiting for Paper Originals								
74	а,	0003224	Skyline Installation Manual	Anr		Order placed		
1		0003222	Manual (602)	Chr		Query Outstanding		
7	=/	0003200	PrintStation	Anr		Downloaded		
1	1	0003194	Canada	Anr				
7	<b>1</b>	0003194	Simple	Anr		Paper Originals Received		
74		0003194	A4 Comb Bound	Ann		In Production		
74	а.	0003194	USA	Ann		Printed		
74		0003194	Europe & The Artic	Ann		Completed		
					숬	Hand Finishing Required		
					龠	Delete		

- 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.

Warning	×
•	Please only select jobs with the same status.
	ОК

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.
- 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	2	23
•	Are you to sure you want to delete selected document	(s)?
	OK Cancel	

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 <u>automatic email message</u><sup>D<sup>217</sup></sup> 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.



When an order is deleted in PrintStation it is also removed from the users  $\underline{Orders \ tab}^{D^{39}}$ .

#### 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
1	View	Manual	0000123	05/08/2024 11:50		Order Placed		×
1	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 <u>Printed Status has been configured</u><sup>D<sub>518</sup></sup> to be hidden from the PrintStation.</sup></sub>

#### To delete multiple jobs:

1. View the list of orders.

C Re	fresh	J	Down	load All 退 Download 🄇	Proof Print	😪 Status 🔹	🔁 View 🛅 Delete 🈓 Prin	t Job Ticke	t Q Search
			OrderID	Document Name	Username	Status	Product	Pages	Copies Tot
inter te	ext to	sea	rch		• • \$	<b>-</b> C			
Dow	nload	ed						Ľ	
In Pr	oduct	ion							
-	а.	(	000002	Website	skylinehost	In Producti	Simple Printing	94	2
13	н.	(	000003	Website	Anne Webb	In Producti	Simple Printing	94	1
1	а.	(	000004	Website	Anne Webb	In Producti	Simple Printing	94	1
1	н.	(	000005	Website	Anne Webb	In Producti	Simple Printing	94	4
ß	а.	(	800000	Framework Document 1	Angus Mc	Product.	Collated Sets	45	6
-	н.	(	000009	UpgradeProcedurel	Anne Webb	In Producti	Collated Sets	28	1
*	н.	(	000010	Manual	George Edy	In Producti	ert Binding	602	14
-	10	(	0000010	Manual	George Edy	In Producti	Si 1 Printing	602	1
74									

- 1. Select the required job orders.
- 2. Click Delete.
- 2. The Confirm window opens.

Notes:

Confirm	23
0	Are you to sure you want to delete selected document(s)?
	OK Cancel

1. Click **OK** to delete the selected job order. The Job order status will be changed to Deleted.

# • 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 <u>automatic email message</u><sup>D277</sup> 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 <u>Orders pane</u><sup>145</sup>. The <sup>1</sup> 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.

Orders						
🗄 😂 Refresh 🔳 🐺 🛛	Download All 💽 Download 🔇	Proof Print	😪 Status 🔹	🔁 View 🛅 Dele	te े Prin	
Ord	ierID Document Name	Username	Status	Product		
Enter text to search	Enter text to search					
<ul> <li>Order Placed</li> </ul>	Order Placed					
000	0038 Administration	Anne Webb	Order Placed	A4 Comb Bound I	Document	
Awaiting Paper O	Awaiting Paper Originals					
<u>□</u> <u>■</u> 0000	0037 Original Documents	Anne Webb	Awaiting P	simple		
	ليحت متحرين المحمد والمحمد	- A summer that	a manager and a second	and the second second	لمستمل	

- 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 <u>change the status</u><sup>D459</sup> 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

**Skyline Manual** 

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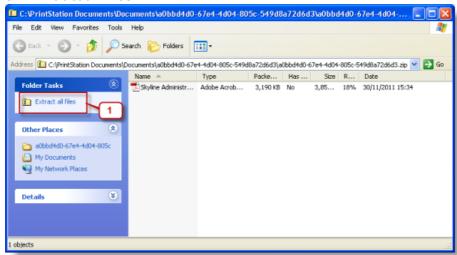
Job orders can be placed that are ZIP files. When you receive the job order you will not know that it is a ZIP file until the order is downloaded. When a ZIP file is downloaded the icon changes to 1. You need to process the ZIP file before it can be printed.

#### 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.

Ord	ers						4
1	🕽 Ref	iresh	🛃 🕹 Down	load All 🛃 Download 🄇	Proof Print	👷 Status 🔹	🔁 View 🛅 Delet
			OrderID	Document Name	Username	Status	Product
En	ter te	ext to se	earch		• • <	> <del>-</del>	
^	Awai	ting Pa	per Origina	als			
	Δ	•	0000037	Original Documents	Anne Webb	Awaiting P	simple
Downloaded							
		1	0000038	Administration	Anne Webb	Downloaded	A4 Comb Bound D
	74	1	0000036	UpgradeProcedurel	Anne Webb	Downloaded	Booklet
	7		0000036	UpgradeProcdure	Anne Webb	Downloaded	Booklet
	7		0000036	NorwegianTrainRoutes	Anne Webb	Downloaded	Booklet a
		L.		and the second sec	للم محمد الم		Same and the second second

- 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.



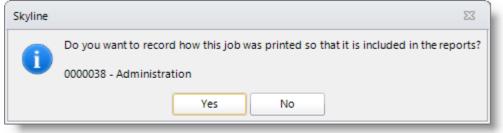
4. The Extraction Wizard window opens. Select a folder to extract the file into. Click **Next** to continue.

Extraction Wizard 🛛 🛛 🔀					
Select a Destination Files inside the ZIP a choose.	rchive will be extracted to the location you				
	Select a folder to extract files to. Files will be extracted to this directory: C:\PrintStation Documents Browse Password Extracting < Back Next > Cancel				

5. The Extraction Complete window opens. Click **Finish**.

Extraction Wizard 🛛 🛛 🔀					
Extraction Complete Files have been successfully extracted from the ZIP archive.					
	Files have been successfully extracted to the following directory: C:\PrintStation Documents To see your extracted files, check the box below: It show extracted files Press finish to continue.				
	K Back Finish Cancel				

- 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 status <sup>1/259</sup> 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**.

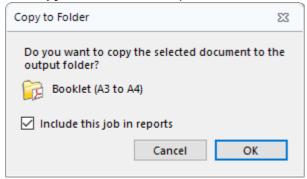
### Using Folders

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
- F 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.

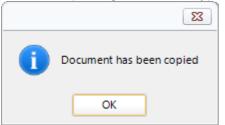
470

4.	The	Generic	Printer	window	opens

kyline Generic Print 🛛				
	Mary Mary			Later Levels
General User	Account Details Document	t Finishi	ng	
Output		1		
Name: Book	et (A3 to A4)		Price	26.62
			Document Body	Monochrome
	Item - Not Printed		Front Cover	×
	Booklet (A3 to A4)		Back Cover	*
- P	BusinessCards - 100 Half Fold Brochure			
Print range	Half Fold Standard	h	Preview	]
- M	Hand Finishing			
🔘 Pages 🕌 P	PDF with XML			
	Automate			
Page handli	PDF with CSV			
rax	Collate		المعطيب باد	
Copies 2	Collate		Sk	vline
Portrait	Candscape		Sk	vline
Sides	2-Sided Print	-		
Page scaling	Scale to Printable Area	-		
Paper tray		-		
Auto-Rotate and	d Centre			
Printer Type			Skyline Admi	inistration Manual
Print document	in monochrome		Vestor	e 6.7.2 (portrupt)
			Save	Cancel

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**.

Overview Details Delivery Histo	Job Ticket Additional Fi Body	elds
Quotation	Media	A4 White 80gsm
FOR QUOTE	Printed Sides	Double Sided
	Printer Type	Black and White
Document Name: Administration	Please enter any oth	er special requirements
Order Number: 0000124		
Created: 05/08/2024 02:08 PM		

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.

```
🗧 🍠 Refresh 🕘 🕘 Download All 👵 Download 🧭 Proof Print 😭 Status 👻 🖆 View 🛅 Delete 😓 Production Ticket 🔍 Search \leftrightarrow Fill Width 🕨 Current Job
```

2. The **Print Job Report** window opens. Select the required printer & make sure that the report to print is the required one.

Print Job Ticket						
Select Printer						
🛃 Canon MG3600	series Printer					
HP ENVY 4500 9	series [58DB49]					
🛃 Microsoft Print	to PDF					
🛃 Xerox Global P	rint Driver PCL6					
Paper Tray	Paper Tray Automatically select 💌					
Job ticket	Standard Job Ticket					
Print	€	Cancel				

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.

Installed Printers	
\grunter\HP ENVY 45	600 Series Class Driver
Adobe PDF Converter	r
Brother DCP-129C	
Buildserver	
Canon MG3600 series	
HP Photosmart D610	
H upropage aug range	<b>•</b>
Select Printer Type	
Generic	
~	
Print Job Report	1
Job ticket	Paper Tray
	<b>T</b>
Standard Job Ticket	
	icket when using this printer
	icket when using this printer

- 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.

Skyline Generic Print	22			
all all and an	Indiates and			
General User / Account Details Document Finis	ihing			
- Printer				
Name: HP Photosmart D6100 series	Price 118.88			
	Binding			
Document Name SkylineManual	Folding BookletWithStaples			
Product Booklet	Hole punching Stapling			
	stapling			
Print range	- Preview			
All				
○ Pages 1 🔹 to 896 ≑				
	Skyline			
Page handling				
Copies 4 🚔 🔽 Collate				
	Skyline Manual			
Portrait     Landscape	Version: 4.9.7 build 3 [April 2018]			
Sides 1-Sided Print				
Page scaling Scale to Printable Area				
Paper tray Main tray 💌	All and a seal of			
Auto-Rotate and Centre				
Delates Trace				
Printer Type     Colour     Monochrome	A. B. B. B. A. B. M. B. M. B. A.			
	· ·			
Print from Acrobat	Print Cancel			
	Print Cancel			

#### To print job tickets as required:

\_

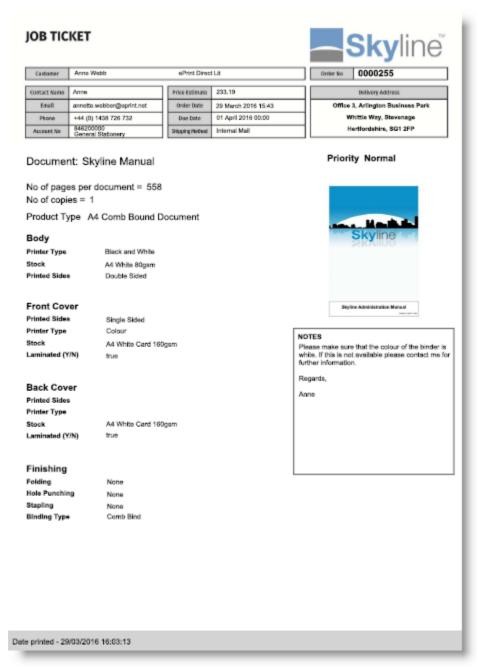
- 1. Select **Setup > Printers** from the drop down list.
- 2. The Printers window opens. Double click the installed generic printer to open the **Printers** window.

Buildserver			-
Canon MG3600 se	ries Printer		
ax Fax			=
HP ENVY 4500 ser	ies [58DB49]		
Microsoft Print to	PDF		
Microsoft XPS Do	cument Writer		_
R			
Select Printer Type			
Generic Generic	-	Display name	Office
Print Job Report			
		Paper Tray	
Job ticket		Automatically	select
Job ticket Delivery Note	-	Automatically	

- 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 <u>Standard Job Ticket Fields</u><sup> $D_{74}$ </sup> in the appendix.



Example of a standard job ticket.

### **Delivery Note Example**

For an explanation of where the information is stored see <u>Delivery Ticket Fields</u><sup>D738</sup> 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	FII pick it up

Item Code	Item Description	Total
A4 Plastic Comb Bound	Skyline Manual	3
	No of pages per document = 558	

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

----

### **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.

Overview Details	Delivery History Job Ticket	Additional Fields			
Pages Copies	Priority Normal	Date Submitted 05 August 2024	Date Required	User Notes	CTRL Enter to insert a new line
	Paper	Printed Sides	Printer Type Laminated		
Document	A4 White 80gsm 👻	Double Sided 💌	Black and White		
Front Cover			<b>•</b>		
Back Cover			<b></b>		
Binding	Stapling	Hole Punching	Folding	Price	
	•		<b>•</b>	▼ 89.5200	Calculate Price

• 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<sup>D st</sup>.

Overview Details	Delivery History Job	Ticket Additional Fields		
		Staff Notes (66/2000 characters)		
Account Code	IT2	05/08/2024 14:23:30 Username: anne webb Calculated quotation value	Options1	<b>•</b>
Account Name	IT Help Brochures		Options2	
Account Description	Test Account		Options3	<b></b>
			Options4	<b></b>
			Options5	▼
Impositon	None		Options6	<b></b>
inpositori				

• All the fields in the Delivery tab.

Overview Details	Delivery History Job Ticket	Additional Fields	
Delivery	<b>•</b>		
Name Prefix	<b>•</b>	Organisation Name	<b>v</b>
First Name	Anne	Street	Long Street
Family Name	Webb	City	Big City
Phone Number	0123 456 789 147	Region	The World
Email	annette.webber@eprint.net	Post Code	ABC 123

478

• The field name and field value in the Additional Fields tab if this option is available.

Overview Details Delivery History	Job Ticket Additional Fields	
Additonal Fields	in this Product	Edit Additional Field
Name	Value	Course
D Course	AE145 Part 1	AE145 Part 1
		x

• 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.

	Status Cl	hanges					Printing		
Date	Status	Email User	Processed By		Date Printed	Printer Used	Pages	Copies	Colour / Mone
30/07/2024 10:55:05	Order Placed			D	05/08/2024 16:	Xerox Versant 3	794	1	Monochrome
30/07/2024 14:18:53	Downloaded		Anne Webb						
05/08/2024 16:10:02	In Production		Anne Webb						

• The Approval date and Approver's name can be included in the customised job tickets if required.

Overview Details	Delivery History Job Ticket Approval Additional Fields	
Date Submitted	30/04/2024 14:03	Approval Notes
Level 1 Approval Date Level 2 Approval Date	Level 1 Approver       Level 2 Approver	
Date 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.

Print Job Ticket		23	
- Select Printer -			
Canon MG360	00 series Printer		
🛃 HP Photosma	rt D6100 series		
🛃 HP58DB49 (H	P ENVY 4500 series)		
Paper Tray	Front Tray		New report has
raper may	Tront hay		been added
Job ticket	Delivery Note	-	
	Delivery Note - Customised		
Print	Delivery Note		
	Standard Job Ticket		
L			

# Setting Up PrintStation

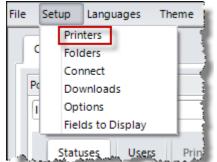
### Printers

### Adding a Printer

You can add printers to your PrintStation as well as <u>delete details of printers</u><sup> $D_{42}$ </sup> 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.

	Name	Display name	Printer Type	Add printer
	Canon MG3600 series Printer	LIVE (Home)	Generic	Poor primer
2	HP58DB49 (HP ENVY 4500 series)	LIVE (Work)	Generic	Remove
2	Xerox Phaser 6180N PS	Xerox Phaser	Generic	Edit

1. Click Add printer.

3. The Printers window opens.

Printers  Installed Printers
Adobe PDF HP Photosmart D6100 series HP Universal Printing PCL 6 (v5.5.0) HP58DB49 (HP ENVY 4500 series) HP7B00D6 (HP Photosmart B110 series)
Select Printer Type Generic Generic C C C C C C C C C C C C C
Print Job Report           Job ticket         Paper Tray           Standard Job Ticket              • Automatically Select
Print the selected Job Ticket when using this printer

- 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 <u>Job ticket  $D^{472}$  to be automatically printed and the paper tray required</u>.
- 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 <u>job ticket</u><sup>1</sup><sup>472</sup> 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.

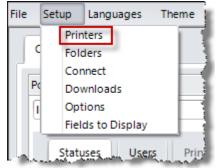
	rs			E
	Name	Display name	Printer Type	Add printer
5	HP Photosmart D6100 series	HP Photosmar	Generic	Add printer
2	Canon MG3600 series Printer	LIVE (Home)	Generic	Remove
5	HP58DB49 (HP ENVY 4500 series)	LIVE (Work)	Generic	Edit
5	Xerox Phaser 6180N PS	Xerox Phaser	Generic	

### **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.

_	Printer	5			23
		News	Distances	Reinter Runs	
	2	Name Canon MG3600 series Printer	Display name LIVE (Home)	Printer Type Generic	Add printer
	\$	HP58DB49 (HP ENVY 4500 series)	LIVE (Work)	Generic	Remove
	6	Xerox Phaser 6180N PS	Xerox Phaser	Generic	Edit
				_/	
			$\square$	2	
				لے	<u> </u>
				3	
				_	$\sim$
					Close
	_				

- 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**

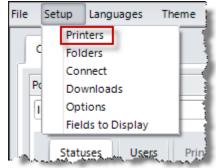
Once a printer has been added you can change any details by editing the printer. If a printer is no longer available then a  $\triangle$  is shown next to the printer. The printer can be removed from the listing as it is no longer

Remove

8	Name			
2		Display name	Printer Type	Add printer
387	HP Photosmart D6100 series	HP Photosmar	Generic	Poor printer
<b>_</b>	Canon MG3600 series Printer	LIVE (Home)	Generic	Remove
2	HP58DB49 (HP ENVY 4500 series)	LIVE (Work)	Generic	Edit
A	Send To OneNote 2016	Send To OneN	Generic	
5	Xerox Phaser 6180N PS	Xerox Phaser	Generic	-
				Close

### To edit a printer:

1. Select **Setup > Printers** from the drop down list.



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### 2. The Printers window opens.

Printe	15			23
	Name	Display name	Printer Type	Add printer
\$	Canon MG3600 series Printer	LIVE (Home)	Generic	
\$	HP58DB49 (HP ENVY 4500 series)	LIVE (Work)	Generic	Remove
8	Xerox Phaser 6180N PS	Xerox Phaser	Generic	Edit
	1			2 Ciose

- 1. Select the printer to be edited.
- 2. Click Edit.
- 3. The Printers window opens. Amend details as required and then click **Update**.

rinters		
Installed Printers		
Adobe PDF		<b>^</b>
Brother DCP-129C		
HP Photosmart D6100 seri	ies	=
HP58DB49 (HP ENVY 4500	series)	
HP7B00D6 (HP Photosmar	t B110 s	series)
Xerox Nuvera EA DPS PS		<b>•</b>
Select Printer Type		
Xerox FreeFlow	+	Display name Xerox Phaser
Print Job Report Job ticket		Paper Tray
	•	•
Print the selected Job Ticket	when u	using this printer
		Update Cancel

### **Folders and Groups**

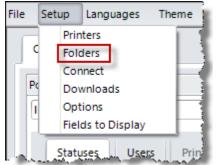
#### Adding a folder

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
- F 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.

ler Details		
Setup Layout		
Name	Folder Details	New folder
		Edit Folder
		Remove Folder

3. The Add new Folder window opens.

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Add new folder			23
New folder name	p	Output Forma	t 🙎
		PDF Only	<b>_</b>
Folder		 	
			wse
		Cancel A	dd

- 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.

23	
This location is associated with an existing Output Folder	
Booklet	
ОК	

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.

	Name	Folder Details	New folder
^ PI	DF only Booklet	C:\Annette\PrintStation\PDF Only	Edit Folder
E	Hand Finishing	C:\Annette\PrintStation\Hand Finishing	Remove Folder
▲ PI	DF with XML Job Ticket		
E	PDF with XML	C:\Annette\PrintStation\PDF with XML	
^ A	utomate - PDF with Job Ticket		
6	Automate	C:\Annette\PrintStation\Automate	
▲ PI	DF with CSV Job Ticket		
6	PDF with CSV	C:\Annette\PrintStation\PDF with CSV	

Example Folder Details Window.

### **Editing Folders**

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Once you have created a folder you can update and edit the folder as required.

Name		Folder Details			New folder
PDF only     Booklet		C:\Annette\PrintStation\	PDF Only		Edit Folder
Hand Finishing		C:\Annette\PrintStation\	Hand Finishing	Re	move Folder
<ul> <li>PDF with XML Job Ticket</li> <li>PDF with XML</li> <li>Automate - PDF with Job Ticket</li> <li>Automate</li> <li>PDF with CSV Job Ticket</li> <li>PDF with CSV</li> </ul>	Edit folder New folder name Hand Finishing Folder C:\Annette\PrintSt	ation\Hand Finishing	Output Format PDF Only Browse ncel Save		

- 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.

	Name	Folder Details	New folder
^ P	DF only Booklet	C:\Annette\PrintStation\PDF Only	Edit Folder
ſ	Hand Finishing	C:\Annette\PrintStation\Hand Finishing	Remove Folder
∧ P	DF with XML Job Ticket		2
6	PDF with XML	C:\Annette\PrintStation\PDF with XML	
^ A	utomate - PDF with Job Ticket		
6	Automate	C:\Annette\PrintStation\Automate	
∧ P	DF with CSV Job Ticket		
6	DF with CSV	C:\Annette\PrintStation\PDF with CSV	

- 1. Select the folder that you want to remove.
- 2. Click Remove Folder.
- 3. Confirm the deletion.

Remove Folder		×
Are you sure that you	u want to delet	e this folder?
	Yes	No

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.

Folder Details	23
Setup Layout	
Add g	group
Booklet Rename	e group
PDF with CSV	e group
Hand Finishing	
Send to Automate	
Contraction Automate	
PDF with XML	
Reset	Layout
Cia	
	120

If you use the **Reset Layout** button you will remove all the groupings created and return to just a list of folders.

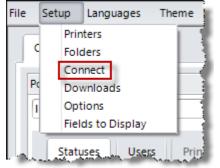
Folder Details	23
Setup Layout	
Image: Booklet     Add group       Image: Booklet     Add group       Image: Booklet     Rename group       Image: Booklet     Rename group       Image: Booklet     Remove group	5
PDF with CSV	
Reset Layout	
Close	

## **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.

Skyline PrintStation	23
http://	ing/ig/pp/10.491.co.mf
	Anne Webb
l	Remember me
① Version:	2 Connect Cancel

- 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.

File	Setup	Languages	Theme	
	Prin	ters		
0	Fold	ders		
l É c	Cor	Connect		
Po	Dov			
l l	Opt	Options		
	Fiel			
	Statu	ises User	s Prin	

2. The Download Options window opens.

ownload Options	23
- Downloads	
Please enter a download path	
C:\Skyline\Printstation\Documents	Browse
- Orders	
Check for new jobs every:	10 🚖 Minutes
POP-up notification  Enable  Pop-Up Message	10 💌 Seconds
New jobs are available to download. Please click the Refres	h button.
3	Save Cancel

- 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.

New Job Not	tification	23
	jobs are available to download. Please clic sh button.	k the
X Close	C Refresh	

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.

Order options	23
General Status Display Order Printing	0 D <b>XX</b>
Displayed decimal places Note : prices calculated to 4 decimal places 2 Decimal places 4 Decimal places Delete Unused Documents Documents from orders that are no longer display deleted at start up Delete unused documents at start up	Error Messages Show error messages to users Debug Mode Debug Mode can slow down the PrintStation yed on the PrintStation can automatically be
Default details page Overview	- 2
Warn users when reprinting a document	Close Save

- 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.

Removing unused files	23	
The PrintStation download folder on this PC contains files that are no longer used by the PrintStation. These unused files can slow down the loading of the list of orders. Do you want to clean the download folder?		
Unused files: 12		
Delete unused files at start up		
Clean Cancel		

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.

Order options	23	
General Status Display Order Printing	<b>53</b> () ()	
Displayed decimal places Note : prices calculated to 4 decimal places 2 Decimal places 4 Decimal places	Error Messages Show error messages to users Debug Mode Debug Mode can slow down the PrintStation	
Delete Unused Documents Documents from orders that are no longer displayed on the PrintStation can automatically be deleted at start up Delete unused documents at start up		
Default details page Overview	<b>•</b>	
Warn users when reprinting a document Close Save		

- 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.

Order options				23
General Status Display Ord	er Printing			0 D 23
Displayed decimal places Note : prices calculated to 4 de places 2 Decimal places 4 Decimal places	ecimal	🗌 Debug	error messages to user g Mode ode can slow down the	
Delete Unused Documents Documents from orders that are no longer displayed on the PrintStation can automatically be deleted at start up Delete unused documents at start up			ally be	
Default details page	Overview Overview	-		
Warn users when reprinting a d	Details		Close	Save
	History Original			

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

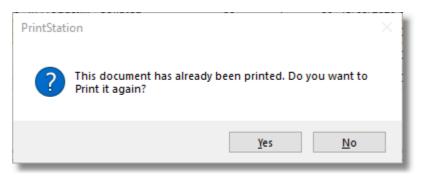
Save

to save your selection.

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### 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.

Order options	23
General Status Display Order Printing	( D 23
Displayed decimal places         Note : prices calculated to 4 decimal places         2 Decimal places         ④ 4 Decimal places         Delete Unused Documents         Documents from orders that are no longer display deleted at start up         □ Delete unused documents at start up	Error Messages Show error messages to users Debug Mode Debug Mode can slow down the PrintStation yed on the PrintStation can automatically be
Default details page Overview	-
Warn users when reprinting a document	Close Save

1. Select the option "Warn users when reprinting a document" if you want users to be warned when they reprint an order.



### 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.

rder options	23
General Status Display Order Printing	( ) <del>S</del>
<ul> <li>Displayed decimal places</li> <li>Note : prices calculated to 4 decimal places</li> <li>2 Decimal places</li> <li>4 Decimal places</li> <li>Delete Unused Documents</li> <li>Documents from orders that are no longer displated eleted at start up</li> <li>Delete unused documents at start up</li> </ul>	Error Messages Show error messages to users Debug Mode Debug Mode can slow down the PrintStation yed on the PrintStation can automatically be
Default details page Overview	-
	Close Save

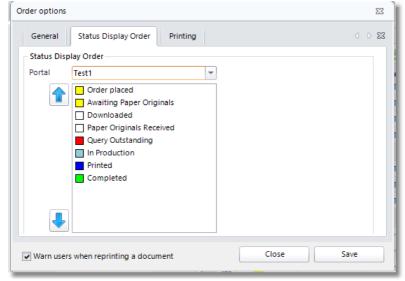
3. Select the options required and then click Save

#### Changing the Status Order

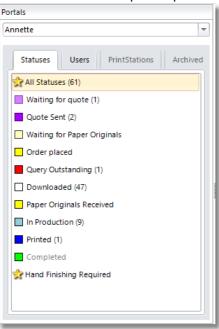
You can change the order that the statuses are displayed in PrintStation. If you create your own status you are able to move the display position in the listing. The default statuses can also be ordered as required.

#### 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.



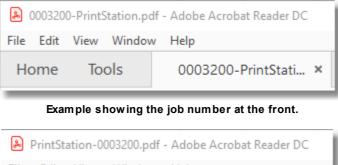
- 3. Select the status to be moved and click 👔 or 통 to move the status to the correct location.
- 4. Click Save to save your changes.
- 5. The status order in the portals pane will be updated when you click 2 Refresh.



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.



File Edit View Window Help Home Tools PrintStation-00032... ×

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.

Order options	23
General Status Display Order Output	0 D 53
Append the Job Number to the file sent to a printer or output folder	
O Do not add the job number to the document name	
Add the job number to the front of the document name	
Add the job number at the end of the document name	
Record all printing by default	
Warn users when reprinting a document	Save

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.

Order options	23
General Status Display Order Output	< > 23
Append the Job Number to the file sent to a printer or output folder	
Do not add the job number to the document name	
Add the job number to the front of the document name	
Add the job number at the end of the document name	
Record all printing by default	
Warn users when reprinting a document Close S	ave

- 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  $D^{455}$ .

### 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.

Order options	23
General Status Display Order Output	0 D 23
Append the Job Number to the file sent to a printer or output folder	
O not add the job number to the document name	
O Add the job number to the front of the document name	
Add the job number at the end of the document name	
Record all printing by default	
Warn users when reprinting a document Close Sa	ve

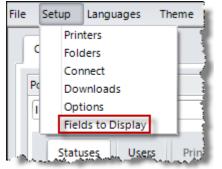
502

### 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.

Select the Fields to Display		23
Orders History		
Document Name	Name Prefix	Delivery
Username	First Name	Binding
✓ OrderID	Surname	Folding
Pages	Phone Number	Stapling
Copies	Email Address	Hole punching
✓ Total pages	Company name	Printer Type
✓ Status	Street	Custom Document Option1
Product	City	Custom Document Option2
Submitted date	Region	
Required Date	Post Code	
PrintStation	Account Code	
Priority	Account Name	
✓ Price	Account Description	
		Save Cancel

- **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 <u>ProductManager</u><sup>1</sup><sup>ses</sup>.
- **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.

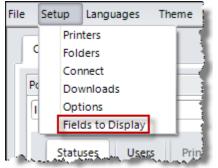
504

## Selecting Fields to Display in the History Tab

You can select the fields that you want to display in the <u>History tab</u><sup> $D_{430}$ </sup> 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.

Select the Fields to Display		23
Orders History		
Status Changes	Printing	
Date Changed	Date Printed	
Processed By	Printer Used	
Status Name	Printed Pages	
Email User	Printed Copies	
PrintStation PC Name	Colour / Monochrome	
PrintStation Alias	Printed Sides	
		Save Cancel

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.

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**.



3. Click PrintStation.



PrintStation Download and install Printstation

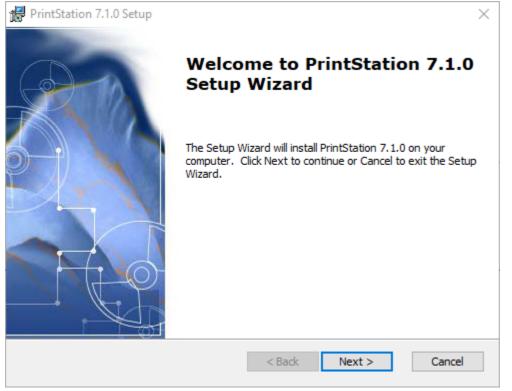
4. The Opening PrintStation window opens. Click **Save File**. The PrintStation installation file is saved to your computer.

Opening PrintStation.exe		×
You have chosen to open:		
PrintStation.exe		
which is: Binary File (48.3 MB)		
from: http://l		
Would you like to save this file?		
	Save File	Cancel
		]

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

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#### 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.

🖶 PrintStation 7.1.0 Setup	$\times$
End-User License Agreement	Day
Please read the following license agreement carefully	
ePrint Direct Software Licence Agreement	^
This Licence states the terms and conditions upon which ePrint Direct Limited (registered in England under company number 3822615) whose registered office is at Second Floor, Gateway House, Fretherne Road, Welwyn Garden City, Hertfordshire, AL8 6NS. United Kingdom. ("ePrint Direct") offers to licence to you ("the Licensee") the Licensed Software. If you do not agree with these terms do not open the media package or install the Licensed Software, and return the entire media package to whoever you obtained it from within 30 days of receipt, for a full refund of the licence fee	¥
○ I accept the terms in the License Agreement	
● I do not accept the terms in the License Agreement	
Advanced Installer	
< Back Next > Canc	:el

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

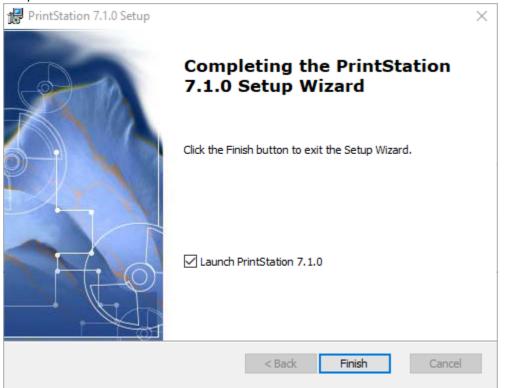
PrintStation 7.1.0 Setup	_		×
Select Installation Folder This is the folder where PrintStation 7.1.0 will be installed.			
To install in this folder, click "Next". To install to a different folder, en "Browse".	ter it be	low or clich	c
Eolder: C:\Program Files (x86)\ePrintDirect\PrintStation\		Browse	
Advanced Installer			
< Back Next >	>	Cano	el

9. The PrintStation can now be installed. Click **Install** to begin the installation.

v	
PrintStation 7.1.0 Setup	$\times$
Ready to Install	(D)
The Setup Wizard is ready to begin the PrintStation 7.1.0 installation	
Click Install to begin the installation. If you want to review or change any of you installation settings, click Back. Click Cancel to exit the wizard.	r
Advanced Installer    	Cancel
	Cancer

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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**.

Skyline PrintSta	tion
	This appears to be the first time that this verison of PrintStation has been run. This setup wizard will guide you through the steps required to connect the PrintStation to a Skyline portal.
	Back Next Cancel

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

Skyline Prin Skyline Portal cor		2	( <u>)</u> }_
Portal Details			Connect
Proxy details	ver	Proxy port	
Username	Password	Domain - (Optional)	
1	Back	Next	Cancel

- 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.

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

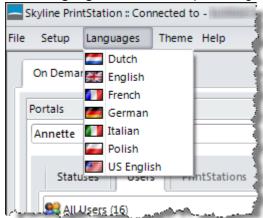
John Com
ancel

510

5. The Connect to Portal window opens.

Skyline PrintStation		23
URL	https://test1.eprintnow.com	/ +
<b>.</b>		
Ô		1
	Remember me	
Version: 7.1.2.2	2 Connect	Close
	Laught the second second	- undi

- 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  $\frac{\text{Order}}{\text{Placed email}}$  in Configuring PrintStation regarding these requirements.

You are limited to 100 characters in the email subject or 1000 characters in the email body. If you exceed the limit your changes are not saved. 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.

 The Email Body text is limited to 1000 charaters. Your changes to 'Waiting for quote' have not been saved

 Order Placed Emails
 Send one Order Placed email per document ordered

 Send one Order Placed email per order
 Send one Order Placed email per order

 New orders with no price
 Set the status to "Waiting for Quote" for new orders with no price



#### 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.

Туре	Name	End User Display	Email User	Allow order to be deleted	Show Orders on Printstation
Waiting for Quote	Waiting for quote	Waiting for quote	1	<b>V</b>	1
Awaiting Paper Originals	Waiting for Paper Originals	Awaiting Paper Originals			
Quote Sent	Quote Sent	Quotation Sent	<b>V</b>		
Paper Originals Received	Paper Originals Received	Paper Originals Received			
Order Placed	Order placed	Order placed	<b>V</b>		
Downloaded	Downloaded	Downloaded			
Query Outstanding	Query Outstanding	Query Outstanding	<b>V</b>		
In Production	In Production	In Production			
Printed	Printed	Printed	<b>V</b>		
Completed	Completed	Completed	1		
Archived	Archived	Archived			~
Deleted	Deleted	Deleted			

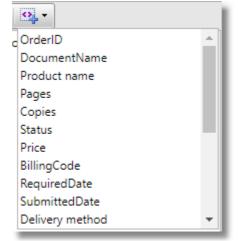
512

🥖 Qu	ery Outstanding	Query Outstanding	Query Outstanding	<b>a</b>	<b>v</b>
Status settings					
Name	Query Outstanding	Show Orders	on Printstation 🗹 🛛 Email	User 🔍	
End User Display	Query Outstanding	Allow order	to be deleted	U U	
Email Settings	<u>ج</u>	D			
Email Subject	Print Order Query				
CC List	Copy status emails. Sep	arate multiple email addresses	with a ; character		
Email Body			•		
BI ∐ab	. = = = = 🗾	律律目目 😣 😣			
🥕 Design 📢	HTML Q Preview			it.	

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.

	Туре	Name	End User Display	Email User	Allow order to be deleted	Show on Printstation
I	Awaiting Paper Originals	Awaiting Paper Originals				V <sup>2</sup>
I	Paper Originals Received	Recieved	Paper Originals Received		_	<b>V</b>
P	Order Placed	Order Placed			2 🗆	V
/	Downloaded	Downloaded	۲			V
P	Query Outstanding	Query Outstanding	Query Email Sent			4
P	In Production	In Production				V
م م م	Printed	Stripted .		AA.		

- 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

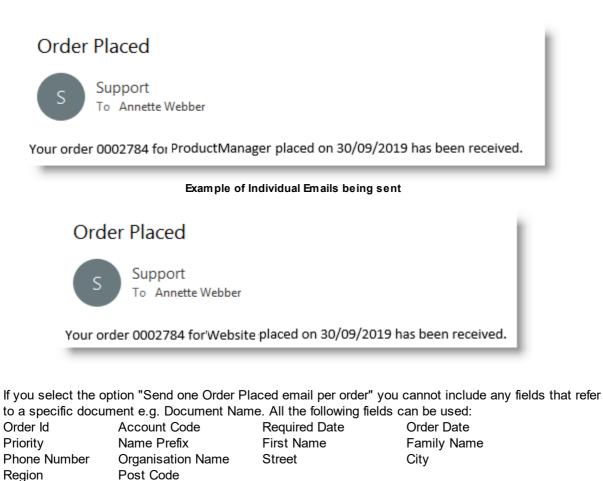
S

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.



## To amend the Order Placed email:

Skyline Manual

1. In the Orders section click Order Statuses.



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<u>Order Statuses</u>

Create, edit & delete order statuses

2. Select the required Order Placed Email.



3. Click  $\checkmark$  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.



## **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.

**V** 

<u>Order Statuses</u> 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**.

New Status		
Status Name:		
End User Display:		
Email User:		
Allow order to be deleted:	$\Box$	
Show Orders on Printstation:	$\Box$	
		Create New Status
	_	

5. You can amend the new status position in the status listing in PrintStation as required. For more information see <u>Changing the Status Order</u><sup>1498</sup>.

After any changes to the Order Statuses PrintStation should be restarted so that the changes take effect.

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## **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.

₩ <u>View Basket (0)</u>	Preferences	<u>Downloads</u>	<u>Edit</u>	Admin	<u>Management</u>	Logout

3. In the Orders section click Order Statuses.

<u>Order Statuses</u> 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.

	Туре	Name	End User Display	Email User	Allow order to be deleted	Show Orders on Printstation
۶	Waiting for Quote	Waiting for quote	Waiting for quote	<b>V</b>	1	~
1	Awaiting Paper Originals	Waiting for Paper Originals	Awaiting Paper Originals			
P	Quote Sent	Quote Sent	Quotation Sent	1	1	<b>v</b>
1	Paper Originals Received	Paper Originals Received	Paper Originals Received			
P	Order Placed	Order placed	Order placed	×	1	<b>V</b>
1	Downloaded	Downloaded	Downloaded	1		
1	Query Outstanding	Query Outstanding	Query Outstanding	1		
P	In Production	In Production	In Production	1		
Ì	Printed	Printed	Printed	1		
Ì	Completed	Completed	Completed	1		
1	Archived	Archived	Archived			<b>V</b>
1	Deleted	Deleted	Deleted			

5. Click 🖉 associated with the System Status you want to hide from view in PrintStation.

Ø	Deleted	Deleted	Deleted		
Status settings					
Name	Deleted		on Printstation 🖉 Email Us	er 🗌	
End User Display	Deleted	Allow order t	o be deleted 🛛 🔲 Ŭ		
Email Settings					
Email Subject	email not supported				
CC List	Copy status emails. Sep	parate multiple email addresses	with a ; character		
Email Body					
Br ∐r ab	6 🖹 🗮 🗮 🧱	] 律律注注 😫 😣	<b>○,</b> ▼		
email not suppo	rted for this status				
0 D ·					
🥕 Design 🔇	> HTML Q Preview				
📝 Design 🔇	> HTML Q Preview				
Design Save Cance					

#### 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.

Iter 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.



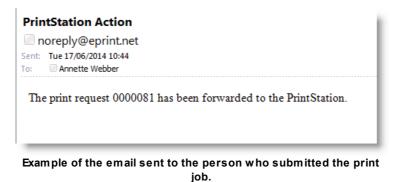
Example of email received by the nominated print room operator.

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.

Busi	iness Stal	tionery	Upload	Paper Origi	nals	Librarie	s New Job	Website
	Username	1	OrderID	Order Date				
~	Tony Cut	hbert	0000081	17/06/2014 10:41	:00		Approve	Reject
			Document		Price	Quantity	Account Code	Account Name
		view	Bulletin - Conv	ert AutoDesk Files	7.5000	25		

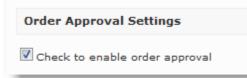
Example of the notification in the New Jobs tab.

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.



#### 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**. <u>Approval Options</u> Setup the options available to approvers
- 3. Select the option Check to enable order approval to turn approval ON and click



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 Approval Link	You have a new order request. Please go the ( <u>AwaitingApprovalLink</u> )				

- 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 o	order is approved
Subject	PrintStation Action
Message + Order Id	Your print request (OrderId) has been forwarded to the PrintStation

- 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

Version: 7.6.0.8

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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.



- 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 Paper Or Upload D Libraries My Orde Quotes	iginals Documents		Page Name New Jobs Save
- Approva			
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**.

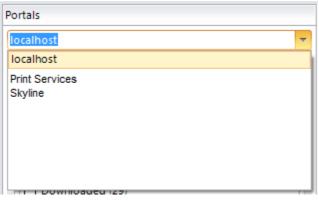


Manage PrintStation(189/1000) Administer PrintStation Options

3. The Administer PrintStation Options window opens.

Number of items per page	al 💌	Add/Remove a Portal T	o A PrintStation
PrintStation PC	Assigned Portals	PrintStation	INARA
1GRLFD1		× Portal	Annette
1MTN2M1	and - Teachan	×	Remove Add
2PRRH4J		× D	
45H752J		׼	3 Back
4LRP2Q1	1044104-1201	×	Ċ,
4SYFQ3J	101100 (Passage)	×	
Manufacture a service	المطلوبين ويرب والملطات والمعطول المستري والمطلوبين	and the second s	والمستجر والمستخلص عنى التكسية فرويني والكنفات وترور والم

- 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.



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# 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<sup>D539</sup>, document print production<sup>D541</sup> options and the delivery options. You can then create the products<sup>1545</sup> that are available to be ordered.



ProductManager You can print a hard copy of a manual by clicking 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.

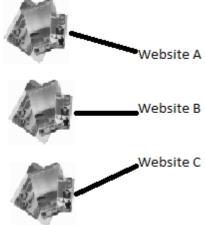
#### Global products are available to all portals.



Website A 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<sup>1553</sup>, 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:



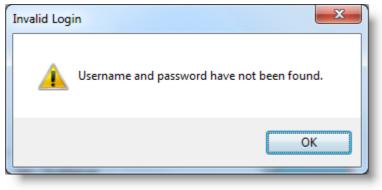
2. The Skyline ProductManager automatically opens with a log in screen.

Skyline ProductManager
1http://
Anne Webb  *
Remember me Login Cancel

- 1. Use the same log in that you use to access the Skyline Portal.
- 2. Click **login** to start ProductManager. The Print Room Options<sup>D538</sup> window opens.

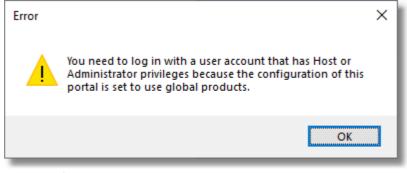
## **Access Not Granted**

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.

Skyline ProductManager		
The ProductManager version is not compatible with the selected portal.		
http://		
<b>Š</b>	Annie Webb	
ه و بين الله و اللَّوْ	member me Login Cancel	
Version: 6.9.9.1		

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

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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**.

₩ <u>View Basket (0)</u>   <u>Preferences</u>	<u>Downloads</u>	Edit   Adn	nin   <u>Managemen</u>	t   <u>Loqout</u>

#### 3. Click **ProductManager**.

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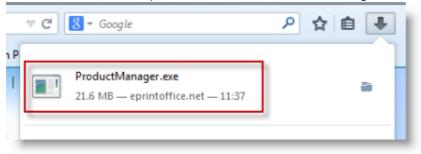
<u>ProductManager</u>

Download and install ProductManager

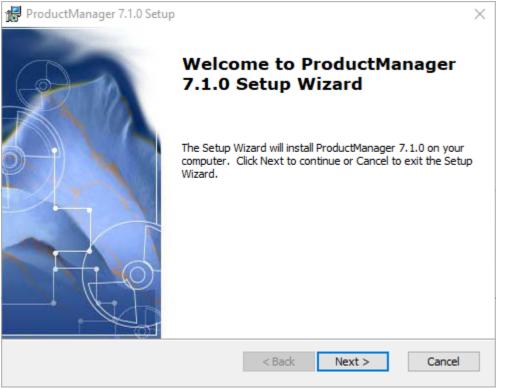
4. When you see the **Opening ProductManager** window, click **Save File**. The ProductManager installation file is saved to your computer.

Opening ProductManager.exe	×
You have chosen to open:	
ProductManager.exe	
which is: Binary File (21.6 MB)	
from: http://	
Would you like to save this file?	
	Save File Cancel

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.

🔀 ProductManager 7.1.0 Setup	$\times$
End-User License Agreement Please read the following license agreement carefully	
ePrint Direct Software Licence Agreement	^
This Licence states the terms and conditions upon which ePrint Direct Limited (registered in England under company number 3822615) whose registered office is at Second Floor, Gateway House, Fretherne Road, Welwyn Garden City, Hertfordshire, AL8 6NS. United Kingdom. ("ePrint Direct") offers to licence to you ("the Licensee") the Licensed Software. If you do not agree with these terms do not open the media package or install the Licensed Software, and return the entire media package to whoever you obtained it from within 30 days of receipt, for a full refund of the licence fee	
◯ I accept the terms in the License Agreement	
◉ I do not accept the terms in the License Agreement	
Advanced Installer	
< Back Next > Can	cel

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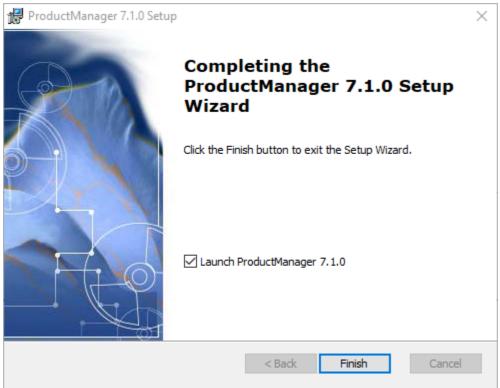
8. At the Destination Folder window it is recommended that you accept the default folder location. Click **Next** to continue.

ProductManager 7.1.0 Setup	_		$\times$
Select Installation Folder			02
This is the folder where ProductManager 7.1.0 will be installed.			
To install in this folder, dick "Next". To install to a different folder, ent "Browse".	er it be	low or clid	k
<u>F</u> older:			
C:\Program Files (x86)\ePrintDirect\ProductManager\		Browse	
Advanced Installer			
< Back Next >		Cano	el

9. The ProductManager can now be installed. Click **Next** to begin the installation.

🕼 ProductManager 7.1.0 Setup	$\times$
Ready to Install	OF
The Setup Wizard is ready to begin the ProductManager 7.1.0 installation	
Click Install to begin the installation. If you want to review or change any of your installation settings, click Back. Click Cancel to exit the wizard.	r
Advanced Installer	
< Back Install	Cancel

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.

Skyline ProductManager
Please wait while Windows configures Skyline ProductManager
Gathering required information
Cancel

3. The Setup window opens.

Skyline ProductManag	er		×
Connect to portal		1	5
http://			Connect
Proxy details Use Proxy Server Proxy address	2	Proxv	3 port
Username	Password	0	in (Optional)
Version: 6.9.3.10	6	Ok	Cancel

- 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.

Skyline ProductManager
1http://
Anne Webb *
Remember me Login Cancel
Version: 6.9.9.1

- 1. Use the same log in that you use to access the Skyline Portal.
- 2. Click Log in to start ProductManager.

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## 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.

	Constant Constant - Second	<u>n suzon</u>
\$ Remember me	Login	Cancel
rsion: 6.9.9.1		and the state

2. The connections setup window opens.

Skyline ProductMana	ger		X
Connect to portal			
http://	111111111111111111111		Connect
Use HTTPS			
	1		
Proxy details	9		0
Use Proxy Server	1	Proxv	port
		0	: 3
Username	Password	Doma	ain (Optional)
Version: 6.9.3.10	4_	Ok	Cancel

- 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.

Skyline ProductManager	×
Connect to portal	
http://	Connect
Use HTTPS	Connect
1	2
	-
Proxy details	
Use Proxy Server	

- 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.

https://	Skyline ProductManager	
https://		
https://		
	nttps://	
Anne Webb		Anne Webb

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# **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.

- <u>Media</u><sup>1</sup><sup>50</sup></sup> allows you to create and maintain the paper stocks available to your customers. These are used to create the products available to your customers.
- <u>Document Options</u><sup>1</sup> displays options relating to the actual document to be created such as Printed Sides, Number of Images per Side, Binding etc.
- <u>Delivery Options</u><sup>D543</sup> 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.

#### Note:

G.

The paper stocks need to be added in the print room options as a Media Type before products can be created.

Print Room (	Options	Products /	Address Deliv	ery Help								
dia Document	Options	Delivery Optio	ns									
Create and main	ntain a list	of all the med	a types you have	available. The list o	f Media Typ	es shown herew	II be used wh	en creating job tick	its for			
products offere	ed on a Skyl	ine Portal.										
👃 Indicates m	andatory fi	elds										
Media Type				Type	Size		Colour	Weig	iht		Holes	-
Legal White 120g	c.m.			Paper	Leg		White	120				
Legal White 80gs				Paper	Leg		White	80 g				
Legal White 90gs				Paper	Leg		White	90 g				
				Paper	Let		White	120				-
Quality White Paper Satndard Colored Coil Punch Paper			Paper	Let		Ivory	80 g	-		Coil or spiral		
Satudard White C				Paper	Let		White	80 g			Coll or spiral	
Standard Write C				Paper	Let		Salmon	250			contenspiral	_
scandard Colored	Card Cove	1		Paper	Let	Ler	Samon	230	gam.			
Description Legal White 80gr			Add	Remove	Upd	ate						
tegai write oogi					- op -							
🕕 Туре		👃 Size		U Colour		🕕 Weight		Holes		Grade		<b>^</b>
Paper		Letter	-	White		80 gsm		Ring Binder 2 hole	<u> </u>			
Transparency		Legal	_	hory		90 gsm		Ring Binder 3 hole				
Other		11 × 17		Salmon		100 gsm		Ring Binder 4 hole	s			F.
		Slip				120 gsm		Coil or spiral				
						160 gsm						
						200 gsm						
						250 gsm						
Front Coating		Back Coati	~ _									
right coating	/	back coath	· /									
												+

#### 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  $\checkmark$  above the option block you want to use.
- 2. The selected option widow opens. Enter the details of the new media option.

— Holes		
Please choo	ise an option	
2 Holes		
3 Holes		Remove
1 Name	4 Holes	New
1		
Value	Ring binding 2 holes	3
	Ring binding 3 holes	
	Ring binding 4 holes	
2	Plastic comb US spacing	Add
-	Plastic comb European spacing	Close
	Wire comb round holes	
	Wire comb square holes	
	Coil or spiral	*

- 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 <u>cost per document</u><sup>Des</sup> 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 <u>cost per document</u>  $\square^{615}$  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.

Skyline ProductManager	r										
File Print Room Options P			Help								
Media Document Opti	ions DeliveryOpti	ons									
Create and maintain a list o products offered on a Skyle	if all the Document Op ne Portal.	tions you	have available. The I	list of Opt	ions shown here will b	e used wi	hen creating job ticket:	s for			
Printed Sides	Scaing		Images Per Side		Binding		Printer Type	1	Production	1	î
None Single Sided Double Sided			2		None Wiro Bind Comb Bind Other		Black and White Colour		Digital WideFormat Offset		
Laminating 🥒	Folding				Hale Punch						
	Booklet				E Bing Bi	nder 4 Hol nder 3 Hol nder 2 Hol	le				
Stapling			Custom Document Options1		Custom Document Options2		Custom Document Options3		Custom Document Options4		
None Single Staple											×

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#### To add new document options:

- 1. Click *P* above the document option you want to add a new option to.
- 2. A window opens where the details of the option are entered.

📥 Binding		
Please choos	e an option	
None Wiro Bind Comb Bind Other	1	Remove
Name	Ring Binder	New
Value	Channel binding Coil binding Edge gluing Hard cover Stack of pages Plastic comb	Add Close
	Ring Sewn 👻	
		9

- 1. Enter a name for the document option.
- 2. Select a value from the drop down list. The value can only be used once.

i 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.

											-	F
Print Room	Options	Products Address	Delivery	Help								
Media D	locument Op	tions Delivery Op	tions									
Create and ma products offer	aintain a list red on a Sky	of all the Delivery Op line Portal.	tions you h	ave available. The li	ist of Option	s shown here will be	used whe	n creating job tickets f	'or			
Name Prefix		Street		City		Region		Organization Name	1	Priority		
Mr Mrs								ePrint Xerox		Normal Next Day		
										Urgent See Notes		
Miss Ms Delivery Method		Custom Delivery Options1		Custom Delivery Options2		Custom Definesy Options3		Custam Delivery Options4				

## To add new delivery options:

- 1. Click *P* above the delivery option you want to amend.
- 2. A window opens where the details of the option are entered.

📥 DeliveryMet	hod		
Please choose	an option		
Phone when rea E-mail when rea I'll pick it up Deliver to addre See notes	dy		Remove
Name	Send Text		New
		2	Add Close

- 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 preconfigured 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 <u>adding additional fields</u><sup>D</sup><sup>see</sup>

Documen Pages:	t name: SkylineManual 896		
No category	Basic Printing	Multi Paged Documents	Specialised Printing
	Collated Sets Multiple collated sets.		Proceed
V	Simple A4 A5 or A3 document printed boxed.	in mono or colour on white paper. No covers or	finishing straight Proceed
$\langle \rangle$	Portrait Staple Portrait collated set with top lef	t staple	Proceed

## **Creating a Product**

When the print room options have been configured you can create new products. When the products are made available  $\square$  so 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.

Paper	A3 White 80 gsm	٠	0	
Mono/Colour	Black and White	•	0	
Printed Sides	Two sided	*	0	
Production	Digital printer 1	Ψ		
Images Per Side	Tiwo Up	Ψ	•	
Finishing	Booklet With Staples	*	0	

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.

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#### To create a new product:

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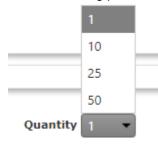
Add at least one Document Part
Add at least one Document Part

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.

Product Images		
Stack_of_paper.gif	Add	160 x 160 px Maximum
	2222 =	Delete Select
	·	Close

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.



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2. The components comprise of our main parts that can be selected as required along with a selectable 'Notes' field.

Form Details       Options         Product Image       Add at least one Document Part         Select Image       Image         Description       0,500         Image       Image         Description       0,500         Image       Image         Image       Image         Description       0,500         Image       Image         Image       Image	Skyline ProductManager     File Print Room Options Products Address     Document options	Delivery Help	-	×
Description 0/500 Minimum number of pages 0 : Maximum number of pages 0 : Document Parts Preset Quantity Preset Quantity	Form Details Options Product Image	Add at least one Document Part		
	Description       0/500         Minimum number of pages       0         Maximum number of pages       0         Document Parts       0         Image: Pront Cover       Image: Binding         Image: Pages       Image: Notes         Image: Back Cover       Image: Preset Quantity	Enter a caption Front Cover OK		

- 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  $D^{58}$  that have been setup can now be selected for the new product.

Skyline ProductManager					
File Print Room Options Products Address Deliver	γ Help				
Document options					
Form Details Options	Front Cove				
Click and drag fields you want onto the job tick es	Provide Cover				
Clock and diag rields you want once the jub licke	Media	A4 Ivory Card 120gem		/ 🗙 🖡 🕇	
<u> </u>	Laminating				
· Document Options	Laminaong				
Media					
Binding					
- Printed Sides	🥖 Pages				7 I
- Scaling					
- Image: Per Side Printer Type	Media	A4 White 80gsm			
Production	Printed Sides			/ X 🖡 🕇	
Laminating					
- Folding					
- Stapling - Hole Punch	<u></u>				- 1
Custom Document Options1	🖉 Back Cove	I			
	Media		•	/ X 🖡 🕇	
Additional Fields					
Tick box Text box	Laminating			/ × 🖡 🕇	
Multiline Textbox					
New Save As Save					

- 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.

Ulf 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**.

📕 Edit dropdown list	$\mathbf{X}$
Edit dropdown tist Caption Media Available Options I1 x 17 White 120gsm 11 x 17 White 160gsm 11 x 17 White 160gsm A3 White 160gsm A3 White 160gsm A4 White 160gsm A5 White 80gsm	×
AS White 80gsm Business Cards Legal White 120gsm Legal White 150gsm Letter White 150gsm Letter White 150gsm Set Default	

**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

Front Co	ole click 🤎. The option i	s shown greyed ou	ut.
Media	A4 Ivory Card 120gsm	• •	
Laminating		•	

- Use local to edit the option. For example, you might want to add another media choice to the option.
- Use 🔀 to delete the document option.

• Use I 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

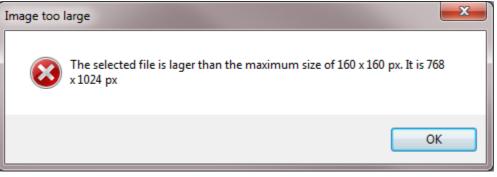
Product images are portal specific and are stored in the portal GUID in \\wwwroot\images\Products. Any images in GIF, JPEG or PNG format can be uploaded as long as they are not larger than 160 x 160 pixels.

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.



6. The image will be added to the available images.

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## **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.

# 🚺 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.



## 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.



<u>Select Products</u>

Manage and assign products for your portal

3. A window opens showing all the products that are available to your portal users.

Available Products 100 Business Cards A4 Booklet A4 Plashic Comb Bound Binding Collated Sets Add Selected Product to	Portal 2	4 Product Categories
111	Collated Sets Multiple collated sets.	3 Remove
	Simple A4 A5 or A3 document printed in mono or colour on white paper. No covers or finishing straight boxed.	1 Nove Up

- 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 T 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	Þ.	to <u>assign</u>	products	to cateo	ories <sup>0553</sup>	
----	-------	--------------------	----	------------------	----------	----------	-----------------------	--

## **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 <u>added products to the portal</u><sup>D<sub>552</sup></sup> you will see the same window.</sup></sub>

Product Categories		Products in this category			Products not in any category
Basic Printing		Collated Sets			
Manuals		Portrait Staple			
pecialized Printing	*			* * *	
Basic Printing			E Save		
Nign Tabs 🛛 🔊 Left 🔊	Centre 🔘 R	ight 🖲 Justify			
Basic Printing		Manuals			Specialized Printing
Select Products					Beck

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#### To create a new Category:

1. Enter a new category name in the product category field at the bottom of the window.

2. Click <b>I</b> to add the categol	2
New Category	× 🕂 🛍 🖹
Select Products	

#### 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.

roduct Categories		Specialised Printing	Products not in any category	2
asic Printing	6	Document Finishing	A4 Booklet	
anuals	1	Laminated		
pecialised Printing		Laminated Sheet		
			+ 3	
			*	
			**	
			44	
			4	
	1 B		E Save	

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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

lign Tabs					
ingri taba	🖲 Left 🛛 🔘	Centre 🔘 Right	C Justify		
Basic Printing Manu	als Specialise	ad Printing			

## **Centre Aligned Tabs**

Tab Settings					
Align Tabs	🖱 Left 🛛 🤋 Centre	© Right © Ju	stify		
		Basic Printing	Manuals	Specialized Printing	

## **Right Aligned Tabs**

Tab Settings							
Align Tabs	© Left	Centre	🖲 Right	© Justify			
					Basic Printing	Manuals	Specialised Printing

## **Justified Tabs**

Tab Settings				
Align Tabs	🖱 Left 🛛 Cen	tre 🔘 Right	Justify	
	Basic Printing		Manuals	Specialized Printing

## **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.

Document options         Prom Details       Options         Product Image       Image         Image       Image         Image       Image         Image       Image         Product Image       Image         Image       Image         Image       Image         Image       Image         Product Name       Image         Image       Image	Skyline ProductManager     File Print Room Options Products Address	Delivery Help				—	×
Product image   Select image   Select image   Product Name   Orber Bound   Description   40/500   Cover   A3 Booklet Card   Product Name   Orbe Bound   Cover   A3 Booklet Card   Product Name   Orbe Bound   Cover   A3 Booklet Card   Product Name   Orbe Bound   Cover   A3 Booklet Card      Product Name   Orbe Bound   Cover   A3 Booklet Card      Product Name   Orbe Bound   Cover   A3 Booklet Card           Product Name   Covers   Minimum number of pages   O   O   Paper   A4 80gsm White   Paper   A4 80gsm White   Poluble Sided   Production   Digital	•	2					
Cover A3 Booklet Card     Printed Sides     Product Name   Comb Bound   Description   40/500   Comb bound document with optional covers   Comb bound document with optional covers   Minimum number of pages   0   Document Parts   Printed Sides   Document Parts   Printed Sides   Document Parts   Printed Sides   Document Parts   Pinter Type   Binding   Printed Sides   Document Parts   Pinter Type   Biack Cover   Production   Digital   Poduction   Digital   Document Parts   Pinter Type   Biack Cover   Production   Digital   Production   Digital	Form Details Options	Front Cover					^
Product Name   Comb Bound   Description   40/500   Comb document with optional covers   Comb document with optional covers   Minimum number of pages   0   0   Paper   A4 80gsm White   Poduction   Pinted Sides   Document Parts   Poduction   Pinter Type   Black and White   Poduction   Pinter Type   Black and White   Poduction   Pinter Type   Black Cover   Cover   A3 Booklet Card		Cover	A3 Booklet Card	*	•		
Product Name   Comb Bound   Description   40/500   Comb bound document with optional   Comb document with optional   Comb bound document with optional   Minimum number of pages   0   0   Paper   A4 80gsm White   Poduction   Pinted Sides   Document Parts   Poduction   Pinter Type   Black and White   Poduction   Digital   Poduction   Pinter Type   Black Cover   Cover   A3 Booklet Card	Select Image	Printed Sides		•	•		
Comb Bound   Description   40/500   Comb bound document with optional covers     Minimum number of pages   0   0   Printed Sides   Document Parts   Image: Cover   Image: Cover   Image: Cover   Image: Cover   Production   Image: Cover   Im		Printer Type	Colour	•	•		
Comb bound document with optional covers     Laminating     Not Laminated     Minimum number of pages     0     Maximum number of pages   0     Pocument Parts     Pinted Sides     Document Parts     Pinter Type     Black and White     Production     Digital     Production     Digital     Preset Quantity     Preset Quantity     Notes     Preset Quantity     Notes     Preset Quantity     Preset Quantity     Notes     Preset Quantity     Preset Quantity   <		Production	Digital	Ŧ	•		
Minimum number of pages   0   Maximum number of pages   0   0   Printed Sides   Document Parts   Printer Type   Black and White   Production   Digital   Production   Digital   Preset Quantity	Comb bound document with optional	Laminating	Not Laminated	٣	•		
Minimum number of pages   0   Maximum number of pages   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0   0    0   0 <td>COVEIS</td> <td>Document</td> <td></td> <td></td> <td></td> <td></td> <td>=</td>	COVEIS	Document					=
Maximum number of pages   Document Parts   Image: Speed of the store of the		Paper	A4 80gsm White	•	•		
Pront Cover   Pages   Notes   Back Cover		Printed Sides	Double Sided	•	•		
Pages     Notes       Back Cover       Preset Quantity	Document Parts	Printer Type	Black and White	•	•		
Preset Quantity		Production	Digital	٣	•		
		Back Cover					=
Printed Sides Double Sided	Preset Quantity	Cover	A3 Booklet Card	Ŧ	•		
,		Printed Sides	Double Sided	•	കിനി		>
New Save As Save	New Save As Save						

For more information on amending the document options see <u>Creating a Product</u><sup>D<sup>545</sup></sup> 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.

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📧 Skyline ProductManager					- 🗆	×
File Print Room Options Products Address	Delivery Help					
Document options						
Form Details Options	Front Cover					^
Product Image	Cover	A3 Booklet Card	•	•	<b>× 1</b>	
Select Image	Printed Sides		•	•		
	Printer Type	Colour	*	•		e
Product Name Comb Bound	Production	Digital	Ŧ	•	✓ X ↓ ↑	
Description 40/500 Comb bound document with optional	Laminating	Not Laminated	•	•	✓ X ↓ ↑	
covers	Document					=
	Paper	A4 80gsm White	•	•		
Minimum number of pages 0 🛟 Maximum number of pages 0 🛟	Printed Sides	Double Sided	•	•		
Document Parts	Printer Type	Black and White	•			
Front Cover 🕑 🕵 Binding	Production	Digital	¥	•	<b>× 1</b>	
Back Cover	Back Cover					=
Preset Quantity	Cover	A3 Booklet Card	*	•		
	Printed Sides	Double Sided	•			> ~
New Save As Save						

4. The Save As Window opens. Enter a new product name and description then click Save.

🖶 Save As	- 🗆 X
New Name	New Product
New Description	Brief description of the new product
	Cancel 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.

2	This product is assigned to a portal are you sure you want to remove it from the system?
	Yes No Cancel

# To remove a product from a Skyline portal:

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

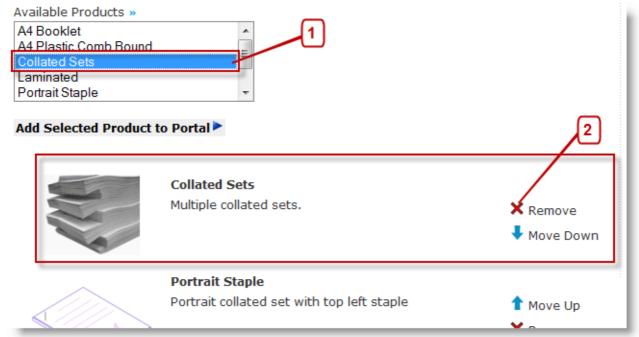
Select Products

- 2. In the Products section click **Select Products**.

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Manage and assign products for your portal

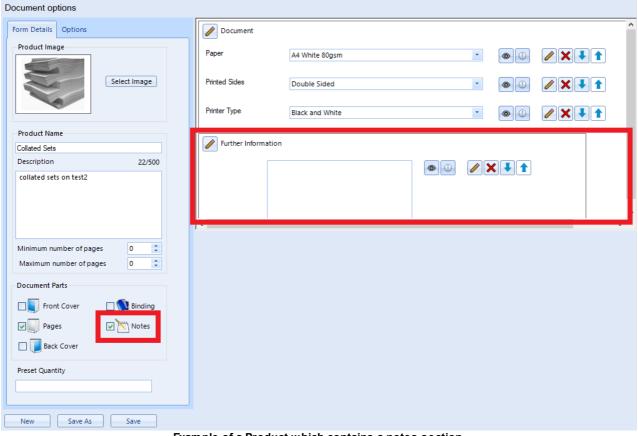
3. A window opens showing all the products that are available to your portal users.



- 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.

Print Job Ticket Collated Sets	Document	Î
	Paper	A4 White 80gsm
	Printed Sides	Double Sided
	Printer Type	Black and White
Document Name: CostManager		
Order Number: 0000122	Further Information	
Created: 05/08/2024 09:08 AM		
		Please produce 1 copy for
Owner: Anne Webb		my approval before the
Pages: 30		complete order is produced.
Quantity: 200		
Status: Order Placed		
Account Code: IT2		
Account Name: IT Brochures		
Account Description: Test Account		
Price Estimate: 330.00	First Name	Anne
Original Price: 330.00	Family Name	Webb
Skylnd	Street	Long Street
Example showing th	e product notes on the orig	ginal job ticket

If you use the Approval feature the product notes are shown on the Notes tab.

Overview Details Customer Details History Notes Additional Fields
User Notes         Please produce 1 copy for my approval before the complete order is produced.    Your Notes (Not visible to user)

Example showing the product notes on the Notes tab when viewing the order for approval

Overview Details	Delivery History Job Ticket	Approval Additional	Fields		
Pages Copies	Priority	Date Submitted	Date Required	User Notes	CTRL Enter to insert a new line
30 🚔 200 🚔	Normal	05 August 2024 👻	<b>_</b>	Please produce 1 copy for my appro	val before the complete order
	Paper	Printed Sides	Printer Type Laminated	is produced.	
Document	A4 White 80gsm 👻	Double Sided 🔻	Black and White		
Front Cover	<b></b>				
Back Cover					
Binding	Stapling	Hole Punching	Folding	Price	
	-		<b>v</b>	▼ 330.0000	Calculate Price

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.

Overview Details Customer Details History Printing N	otes	nne Webb	0000122	Order Placed
User Notes Please produce 1 copy for my approval before the complete order is produced.	Your Notes (Not visible to user)			

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.

ЈОВ ТІС	KET					<b>Sky</b> line
Caistomer	Angus Me	cDonaid	ePrint			Order No 0002265
Contact Name	Angus		Price Estimate	6,138.00	_	Belivery Address
fmal	annette.w	ebber@eprint.net	Order Date	24 April 2018 11:21	-	Long Street
Phone	4567 123	49876	Bue Date		_	Any City
Account No			Shipping Pathod			The World
Document:	Skyline	CostManager				Priority Not urgent
Pages per do No of copies Product Type Body Primer Ty Stock Primed Si Primed Si Primed Si Primer Ty Stock Back Cover Primed Si Primer Ty Stock Laminates	pe ides ides pe s (Y/N) ides pe	558 200 Collated Sets Black and White A4 White 80gsm Double Sided				Byline Administration Menual Horsenand
Finishing Folding Hole Pun Stapling Binding T	-					
NOTES Please prod	uce 1 copy	y for my approval befo	ore the complete	e order is produced.		
e printed - 24						

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.

Pages				
Paper	A3 White 80gsm	•	•	
Mono/Color	Black and White	•	•	
Printed Sides	Double Sided	•	•	
Images Per Side	2	•	•	
Production	Digital	•	•	
Details				
Folding	Booklet With Staples	•	•	
Front and Back Co	ver			
Media	A3 Booklet Card	•	•	
Mono/COlour	Black and White	•	•	
Printed Sides	Not Printed	•	•	
Images Per Side	2	*	•	

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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 p	page Monochrome	Monochrome printing per page		Media cost Laminating	
	Double sided   Single	e sided Double sided	I   Single sided	(Optional)	(Optional)	
A3 Booklet Card	0.0600 0	0.0600 0.0600	0.0600	2.0000	0.0000	
A3 White 80gsm	0.3000 0	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  $19 \ge 0.06 = 1.14$ 

## 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.

Body				
Media	A4 White 80gsm	•	•	
Printed Sides	Double Sided	•	•	
Mono/Colour	Black and White	•	•	
Production	Digital	Y		
Binding				
Binding				
binding	Plastic Comb Bound	•	۵ (	
Cover				
Media	A4 White Card 160gsm	•	0	
Printed Sides	One Sided	•	•	
Mono/Colour	Black and White	-	0	
Laminating	Laminated	•	•	
Back Cover				
Media	A4 White Card 160gsm	•	۲	
Printed Sides	One Sided	•	•	
Mono/Colour	Black and White	•	0	
Laminating	Laminated	•	•	
L				

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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 print	Colour printing per page		nting per page	Media cost Laminating	
	Double sided	Single sided	Double sided	Single sided	(Optional) (Optional)	
A3 Booklet Card	0.2000	0.2000	0.0300	0.0300	0.1000 0.2500	2
A3 White 80gsm	0.0500	0.0500	0.0300	0.0300	0.0500 0.2500	1
A4 Green Card 160gsm	0.0000	0.0000	0.0000	0.0000	0.5000 0.2500	2

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  $20 \times 0.05 = 1.00$ Printing cost is  $39 \times 0.03 = 1.17$ 

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 Pag	e Cost Per Document Cost Per Order	
	Binding	Price
<ul> <li>Binding</li> <li>Stapling</li> </ul>	None	0.0000
<ul> <li>Hole punching</li> <li>Folding</li> </ul>	Hard Cover	0.0000
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<sup>1477</sup>.

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 <u>defined</u><sup> $D_{571}$ </sup> and then <u>added</u><sup> $D_{579}$ </sup> 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 <u>check</u><sup> $D_{575}$ </sup> or <u>drop down</u><sup> $D_{576}$ </sup> fields are added, if required.

🚺 Note:

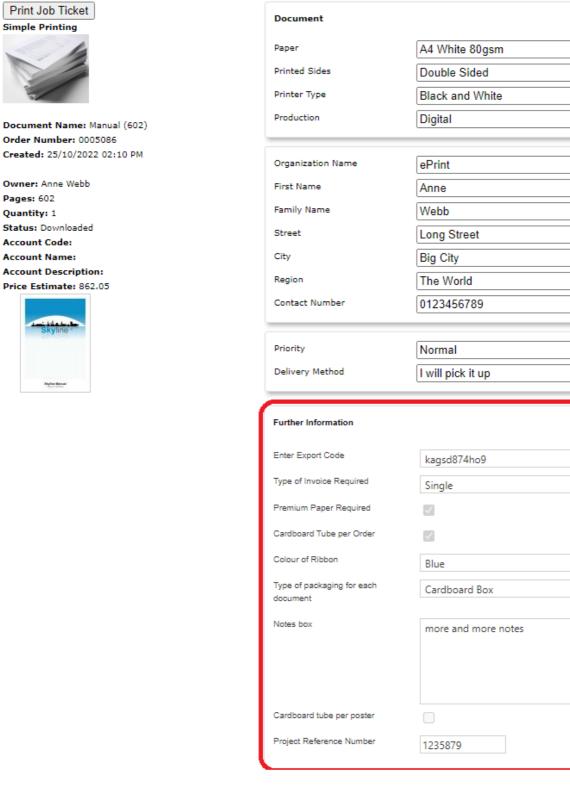
Changes should not be made to live orders if you are using pricing on Additional fields.

Document Type Product Option	15 Basket Address Shipping	Account Confirm
Bocument Pages: 60 Pages with o Monochrome	olour: 556	
	Body	
	Media	A4 White 80gsm 👻
Simple Printing	Printed Sides	Double Sided 🗸
Single or double sided printing with no finishing	Printer Type	Black and White
options.		
	Additional Fields	
	Text Field	
	Numeric Field	
	Tick Box	
	Drop Down Choice	
	Lots of Notes	
Return to Library	ve Job Ticket	Quantity Next

An example of a product with 5 different additional fields added.

Pages: 602

Quantity: 1



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 - <u>Textbox</u><sup>572</sup>, <u>Multiline Textbox</u><sup>573</sup>, <u>Numeric Field</u><sup>574</sup>, <u>Checkbox</u><sup>575</sup>, <u>Dropdown List</u><sup>576</sup> and <u>Date Picker</u><sup>578</sup>. 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  $\underline{assign}^{D_{579}}$  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.

All Additional Fields	-	TextBox	
To edit an existing Additional Field, click	on the field		
name below		Multiline TextBox	
A1 Poster	<u>^</u>	Numeric Field	
Cardboard Tube			
Checkbox if not urgent		CheckBox	
Checkbox if VERY urgent			Setting up Additional Fields
Commercial Items only		🚆 DropDown List	You can get help with setting up the Addtional Field in the online user manual
Commercial Sample		Date Picker	Online Manual
Confidential Document		Date Picker	
Cost Code (Office Use only)			
Customer Name			
Date of Publication			
Department			
Documents			
Enter Export Code			
Flower			

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**.

New TextBox				
Field Name	Field Name Required			
Empty Text	Text if the field is empty			
Default Text				
Make this field mandatory				
Mandatory Message	Mandatory message to users			
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.

All Additional Fields	TextBox	TextBox	
To edit an existing Additional Field, click on the field name below	Multiline TextBox	Field Name	Name of Customer
Cost Code (Office Use only)	Numeric Field	Empty Text	Text if the field is empty
Customer Name		Default Text	
Customer Reference Number Date of Publication	CheckBox	☐ Make this field man	datory
Department	🖶 DropDown List	Mandatory Message	Message to users if field is empty
Documents			
Enter Export Code	Date Picker		
Enter Further Information		Save Delete	
Flower			
Further Information			
Gift			
Name Changed		Assigned to product:	No Assigned Product
Name of Customer			
New Employees Name			
numbers 🗸		Setting up Additio	onal Fields
		You can get help with s	etting up the Addtional Field in the online u
		Online Manual	

#### **Defining a Multi Lined 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**.

New Multiline TextBox			
Field Name	Field Name Required		
Empty Text	Text if the field is empty		
Default Text			
Make this field mandatory			
Mandatory Message	Mandatory message to users		
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.

All Additional Fields 🔹	TextBox	Multiline TextBox
To edit an existing Additional Field, click on the field name below	Multiline TextBox	
		Enter Further Information
Cost Code (Office Use only)	Numeric Field	Empty Text Text if the field is empty
Customer Name		Default Text
Customer Reference Number	CheckBox	
Date of Publication	<b></b>	Make this field mandatory
Department	🚆 DropDown List	Mandatory Message Message to users if field is empty
Documents	Mark and	
Enter Export Code	Date Picker	Save Delete
Enter Further Information		Save Delete
Flower		
Further Information		
Gift		
Name Changed		Assigned to product: No Assigned Product
Name of Customer		
New Employees Name		
numbers		Setting up Additional Fields
······································		You can get help with setting up the Addtional Field in the online user ma
		Online Manual

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#### **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.

New Numeric Field				
Field Name	Field Name Required			
Minimum Value				
Maximum Value				
Make this field mandatory				
Mandatory Message	Mandatory message to users			
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.

All Additional Fields	TextBox	Numeric Field
To edit an existing Additional Field, click on the field name below	Multiline TextBox	Field Name Customer Reference Number
Cost Code (Office Use only)	Numeric Field	Minimum Value
Customer Name		Maximum Value
Customer Reference Number	CheckBox	Make this field mandatory
Date of Publication	🚆 DropDown List	· · · ·
Department Documents		Mandatory Message Message to users if field is empty
Enter Export Code	🛗 Date Picker	
Enter Further Information		Save Delete
Flower		
Further Information		
Gift		
Name Changed		Assigned to product: No Assigned Product
Name of Customer		
New Employees Name		Setting up Additional Fields
numbers 🗸		
		You can get help with setting up the Addtional Field in the online us
		Online Manual

#### 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.

New CheckBox				
Field Name	Field Name Required			
Checked by default				
Make this field mandatory				
Mandatory Message	Mandatory message to users			
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.

CheckBox		
Field Name	Urgent Order	
Checked by default		
O Make this field manda	atory	
Mandatory Message	Message to users if field	l is empty
Save Delete		
Pricing can be added t	o an order when the Che	eckBox is ticked
Price per page	Price per document	Price per 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.

New DropDow	n List	
Field Name	Field Name Required	
O Make this field m	andatory	
Mandatory Message	Mandatory message to users	
DropDown list		
DropDown Options	£	
	•	
New option name	• 💼 🗈	
Start with blank	entry	
Default option	Select option to Set as Default	
	Set Default Clear Default	
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 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.

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.

New Date Picker	
Field Name	Field Name Required
Allow Dates in the Pas	t
Allow Weekends	
Minimum Lead Time	Days
Make this field mandat	tory
Mandatory Message	Mandatory message to users
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.

Additional Fields	TextBox	Date Picker
edit an existing Additional Field, click on the field me below	Multiline TextBox	Field Name Date Required
1 Poster	Numeric Field	Allow Dates in the Past
ardboard Tube	Numeric Field	
heckbox if not urgent	CheckBox	Allow Weekends
heckbox if VERY urgent		Minimum Lead Time Days
ommercial Items only	🚆 DropDown List	Make this field mandatory
ommercial Sample		· · · · ·
onfidential Document	Date Picker	Mandatory Message Message to users if date is not sele
ost Code (Office Use only)		
ustomer Name		Save Delete
ustomer Reference Number		
Date of Publication		
Date Required		
Department		Assigned to product: No Assigned Product
Documents		
inter Export Code		
inter Further Information		Setting up Additional Fields
		You can get help with setting up the Addtional Field in the onlin
		Online Manual

## **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.

Document Type Product Options	Basket Address Shipping Acc	ount Confirm
Document n Pages: 602 Pages with co Monochrome	olour: 556	
New York		
	Body	
	Media	A3 White 80gsm 👻
	Printer Type	Black and White 💌
A4 Booklet	Printed Sides	Double Sided 🔻
Create a booklet from documents printed onto A3 and folded to create an A4 booklet	Binding	
	Binding	Booklet
	Front and Back Cover	
	Media	<b>•</b>
	Printer Type	<b></b>
	Printed Sides	None
(		
	Additional Fields	
	Project Name	
	Project Code	
	Do you require a proof print?	
Return to Library	e Job Ticket	Quantity Next 🕨

#### **To Add Additional Fields:**

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- 1. Log in with Administrator rights and go to Admin.
- 2. In the Products section click Assign Additional Fields
  - A

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Assign Additional 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.

oducts	Selected Additional Fields		Available Additional Fields
A4 Booklet (3)	Project Name		Project Stage
Collated Sets	Project Code		Additional Information
Comb Bound	Do you require a proof print?		
Deploy Test			
Portrait Staple			
Simple Printing			
		<ul> <li></li> &lt;</ul>	
		*	
		_	

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.

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## **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.

Title .	·	
Name	Admin Department	
Company Name	ePrint Direct Ltd	
Address 1	Unit 3, Gateway 1000	
Address 2	Stevenage	
County	Hertfordshire	
Postal Code	SG1 2FP	
Phone Number	+44 (0) 01 438 842 420	

## **Creating Address Forms**

Skyline is delivered with a default address form which can be <u>amended</u><sup>Dss</sup> 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.

## 1 Note:

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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 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.

File       Print Room Options       Products       Address options         Address options       Print Datability       Options       Options         Set the address term name and description files       Image: Control options       Image: Control options       Image: Control options         Form Datability       Form Datability       Image: Control options       Image: Control option and the option file option       Image: Control option file option         Form Datability       Form Name       Image: Control option file option       Image: Control option file option       Image: Control option file option         Address form for use with the Alpha Pottal       Image: Control option       Image: Control option       Image: Control option         Address form for use with the Alpha Pottal       Image: Control option       Image: Control option       Image: Control option         Address form for use with the Alpha Pottal       Image: Control option       Image: Control option       Image: Control option         Image: Control option       Image: Control option       Image: Control option       Image: Control option       Image: Control option         Image: Control option       Image: Control option       Image: Control option       Image: Control option       Image: Control option         Image: Control option       Image: Control option       Image: Control option       Image: Control option	Skyline ProductManager		_ 🗆 🗙
Form Details       Options         Set the address form name and description then click on the options tab to add the required fields       Image: Click on the options tab to add the required fields         Form Details       Form Name         Algha Campus:       Description         Address form for use with the Alpha Pontal       Image: Click on the Alpha Pontal		у Неф	
Set the address from name and description then click on the options tab to add the required fields Form Datals Form Name Alpha Campus: Description Address form for use with the Alpha Portal			
Set the address form name and description than crick on the options tab to add the required fields Form Datals Form Name Alpha Campus Description Address form for use with the Alpha Portal	Forn Details Options		
Form Details Form Name Apha Campus Description Address form for use with the Alpha Portal	Set the address form name and description then		
Form Name Alpha Campus: Description Address form for use with the Alpha Portal	cack on the options rap to app the required refus		
Alpha Campus Description Address form for use with the Alpha Portal	Form Details		
Description Address form for use with the Alpha Portal			
Address form for use with the Alpha Portal	Alpha Campus		
42/250	Address rom for use with the Alpha Portal		
42/250			
42/250			
	42/250		
New Sare	New Save		

 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**.

Skyline ProductManager			- C 🛛 -
File Print Room Options Products Address	Delivery Help		
Address options			
Form Details Options			
Click and drag the address fields you need onto the panel an the right			
Address Options	🗕 Edit dropdown list		
Name Prefix			
- First Name	Caption Name Prefix		
- Family Name	Available Options	Selected Options	
<ul> <li>Phone Number</li> <li>Organization Name</li> </ul>	Mr	Mr	
- Street	Mis Miss	Mina Missa	
- City	Ms	MESS	
- Region			
- Custom Delivery Options1			
- Custom Delivery Options2		-	1
- Custom Delivery Options3			
Custom Delivery Options4		•	€
Custom Delivery Option:5			
<ul> <li>Additional Fields</li> </ul>			
Tick box			
Text box			
Multiline Textbox			
	4		
		Set Default	
	Allow Blank Selection	Cancel Save	
	=		
New 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.

Phone Number			

- 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 I 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 <u>preferences link</u>  $D^{_{312}}$  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.



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.

the second second



<u>Select Address Form</u> Assign a delivery form to a portal

3. Select the address form that you want to be used on the portal.

## 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**.

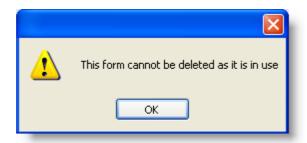


3. The form details for the selected address is shown. Make the amendments as required and click **Save** to update your amended product.

For more information on amending the address options see <u>Creating Address Forms</u><sup>D</sup><sup>se2</sup> 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.



<u>Select Address Form</u> 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.

Use	
Alpha Campus	
<ul> <li>Standard Delivery Address</li> </ul>	
	Bac
and a second second second	

- 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**.

📥 Open Address Form	×
Select an Address Form	
Alpha Campus Standard Delivery Address	
	_
Cancel Delete	Open

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.

Document Type Produ Back	ict Options Basket Address Shipping Account Confirm	
Priority	Normal	
Delivery Method	I'll pickit up	
Notes	Please call extension 3928 when ready for collection.	
	,	Vext 🖕

## Creating Delivery Forms

Skyline Manual

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Skyline is delivered with a default delivery shipping form which can be  $\frac{amended}{D}$ <sup>562</sup> to fit your requirements.</sup> 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.

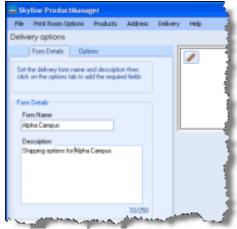
If a delivery form has not been associated with the portal an error message will show when you try to place an order.

Document name

The system has not been configured. There are no delivery options selected. Please contact the administrator

### 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**.

Skyline ProductManager			🗙
File Print Room Options Products Address Delive	ery H	telp	
Delivery options			
Form Details Options		e	1
Dick and drag the delivery options you need onto the panel an the right       Delivery Options       Princitly       Date Required Calendar       Delivery Method   Additional Fields Tick box Multime Textbox			
		Allow Blank Selection Cancel Save	
New Save	1		

590

- 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 O. The field name colour changes to red indicating that the field must be completed.

Priority	•	0	
Please select a delivery date	04 October 2011	0	XII
Delivery Method	E-mail when ready		

- Use it 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



#### To associate delivery shipping form to a Skyline portal:

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

₩ <u>View Basket (0)</u>	Preferences	Downloads	<u>Edit</u>	Admin	<u>Management</u>	Logout
--------------------------	-------------	-----------	-------------	-------	-------------------	--------

2. In the Orders section click Select Delivery Form.



<u>Select Delivery Form</u> 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**.

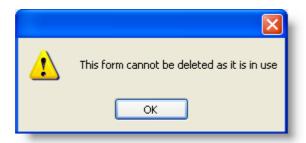
Open Delivery Form	<
Select a Delivery Form	
Delivery Options Alpha Campus	
Alpha Campus	
Cancel Delete Open	

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 <u>Creating Delivery Forms</u><sup>1588</sup> 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.
  - <u>Select Delivery Form</u> Assign a delivery form to a portal
- 3. Make sure that the delivery shipping form that you want to delete is not associated with the portal.

Use	
<ul> <li>Delivery Options</li> </ul>	
Alpha Campus	
	Back

- 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**.

— Open Delivery Form	$\mathbf{X}$
Select a Delivery Form	
Delivery Options Alpha Campus	
Cancel Delete Oper	n

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  $D^{\infty}$  for a product.

Each product type can have a setup cost and tax rate applied if applicable.

ce Type Cost Per Page Cost Per Document Cost Per Order	Calculated price	Fixed price	Price each	Setup cost	Tax rate %	
20 Business Cards	0		15.2200	0.00	0.00	2
poklet	۲	0		0.00	0.00	
minated	۲	0		0.00	0.00	2
indscape Staple	۲	0		0.00	0.00	1
imple Printing	۲	0		0.00		1
				0.00	0.00	l
				0.00	0.00	
				0.00	0.00	

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 <u>Skyline configured</u><sup>D<sup>158</sup></sup> to use the prices.

### To open CostManager:

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2. A log in window opens.

Login
1
Portal URL buildserver,eprintoffice.net
2 Anne Webb
3 Remember me next time 4 Connect Cancel Version: 6.9.8.2

- Type in the name of your portal.
   If you enter an incorrect portal name you will receive an incorrect portal<sup>D™</sup> error message.
- 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<sup>D597</sup>.
- 3. Select the option 'Remember me next time' if you regularly use CostManager from the same computer.
- Click **Connect** to start CostManager. If you do not have the correct access rights to CostManager you will see an <u>incorrect username</u> or password<sup>1597</sup> 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.

Cor	nnected to portal	https://
File	Help	
- J- Deine		- And Backing and

## 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<sup>1598</sup>.

## Running CostManager on a Proxy Server

Skyline Manual

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:

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1. At the log in window click on the connection icon to open the connection details window.



2. The Proxy setup window opens.

Proxy setup			x
Proxy details		[2	2
Proxy address		Proxy port	-
		¢	3
Username	Password	Domain (Optional)	كر
			1
		4 Save	Cancel

- 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 <u>open CostManager</u><sup>1596</sup> 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.

Error	
A newer version of the CostManager is available to download. Server Version: 6.9.8.2 Your version: 6.9.7.3	
ОК	

Example of the message shown when a new version is available.

## Updating CostManager

Skyline Manual

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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.

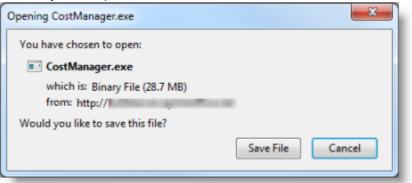
₩ <u>View Basket (0)</u>	Preferences	Downloads	<u>Edit</u>	Admin	Management	Logout

3. Click CostManager.

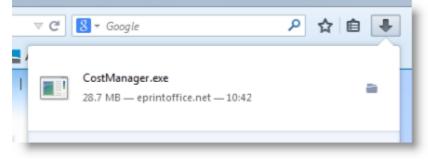


<u>CostManager</u> Download and install CostManager

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.

记 CostManager 7.1.0 Setup	$\times$
End-User License Agreement	Day
Please read the following license agreement carefully	
ePrint Direct Software Licence Agreement	^
This Licence states the terms and conditions upon which ePrint Direct Limited (registered in England under company number 3822615) whose registered office is at Second Floor, Gateway House, Fretherne Road, Welwyn Garden City, Hertfordshire, AL8 6NS. United Kingdom. ("ePrint Direct") offers to licence to you ("the Licensee") the Licensed Software. If you do not agree with these terms do not open the media package or install the Licensed Software, and return the entire media package to whoever you obtained it from within 30 days of receipt, for a full refund of the licence fee	
○ I accept the terms in the License Agreement	
● I do not accept the terms in the License Agreement	
Advanced Installer	
< Back Next > Can	el

602

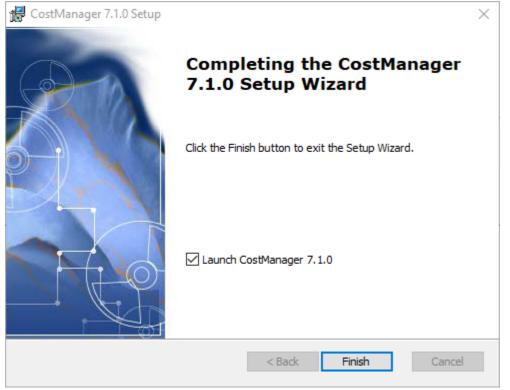
8. At the Destination Folder window it is recommended that you accept the default folder location. Click Next to continue.

🙀 CostManager 7.1.0 Setup			$\times$
Select Installation Folder			Day
This is the folder where CostManager 7.1.0 will be installed.		Ń	
To install in this folder, click "Next". To install to a different folder, en "Browse".	ter it bel	ow or click	:
<u>F</u> older:			
C:\Program Files (x86)\ePrintDirect\CostManager\		Browse	
Advanced Installer			
< Back Next >	>	Cance	el

9. The CostManager can now be installed. Click Next to begin the installation.

ŏ	
记 CostManager 7.1.0 Setup	$\times$
Ready to Install	OF
The Setup Wizard is ready to begin the CostManager 7.1.0 installation	
Click Install to begin the installation. If you want to review or change any of you installation settings, click Back. Click Cancel to exit the wizard.	r
Advanced Installer	
< Back 💙 Install	Cancel

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:



- 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.

Login
1
Portal URL buildserver,eprintoffice.net
2 Anne Webb
Remember me next time
Version: 6.9.8.2
Version, 0.5.0.2

- 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**.

Con	nected to	o portal:	1000
File	Help		1
Price	Abo	ut ge	Cost
Prod	luct nam	en.	

2. The About Skyline CostManager window opens. Your current software version number is shown.

bout Skyline Co	stManager	×
Version: Website: Support: Copyright @	Version 6.7.2.49 SP1 www.eprint.net support@eprint.net 2000-2012 ePrint Direct Ltd. All rights reserved.	
Unauthorised	omputer program is protected by copyright law and international treaties. eproduction or distribution of this program, or any portion of it, may resul nd criminal penalties, and will be prosecuted to the maximum extent poss	

## **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:

2.

1. Click associated with the required product.

Skyline CostManager - Global Products						-	
le Help							
Price Type Cost Per Page Cost Per Document Cost Per Order							
Product name	Calculated price	Fixed price	Price each	Setup cost	Tax rate %		
100 Business Cards	0	۲	15.2200	0.00	0.00	1	
Booklet	۲	$\bigcirc$		0.00	0.00	<b>*</b>	
Laminated	۲	0		0.00	0.00	1	
Landscape Staple	۲	$\bigcirc$		0.00	0.00	<b></b>	
Simple Printing	0	۲	0.0000	0.00	0.00	8	
	(	J	2	J	0	5	

- 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 💾 to save your changes.

Once the parts that are used to calculate the <u>cost of the product</u> have been entered the pricing can be applied to the product.

### To specify a Calculated price:

1. Click ssociated with the required product.

#### 2. The fields can be amended.

Skyline CostManager - Global Products						-	
File Help Price Type Cost Per Page Cost Per Document Cost Per Order							
Product name	Calculated price	Fixed price	Price each	Setup cost	Tax rate %		
100 Business Cards	0	۲	15.2200	0.00	0.00	1	]
Booklet	۲	$\bigcirc$		0.00	0.00	1	]
Laminated	۲	0		0.00	0.00	1	]
Landscape Staple	۲	$\bigcirc$		0.00	0.00	1	]
Simple Printing	•	0		0.00	0.00	Ľ	]
	0			থ	3	<b>O</b>	

- 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 to save your changes.

## **Calculated Prices**

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The parts that make up the calculated price are entered in three areas:

- <u>Cost per page</u><sup>D<sup>600</sup></sup> 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 document Cl<sup>615</sup> cost details of the finishing required for each document ordered e.g. stapling, binding, punching or folding.
- Cost per order 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.

Sky	line CostManager - Glob	al Products
File	Help	
Co	nnect to portal	Cost Per Do
Re	fresh	
Exi	t	
100	Business Cards	

## **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.

Digital Printer	Media Name	Colour printing per page	ochrome printing per page Double sided   Single sided	Media cost Laminating (Optional) (Optional)
Wide format	A3 Booklet Card	3.0000 3.0000		0.7500 0.5000
Offset	A3 White 100gsm	0.5000 0.5000	0.2000 0.2000	0.7500 0.5000
	A3 White 160gsm	2.5000 2.5000	1.5000 1.5000	0.7500 0.5000
	A3 White 80gsm	0.4000 0.4000	0.5000 0.5000	0.7500 0.5000
	A4 Green Card	2.5000 2.5000	1.5000 1.5000	0.7500 0.5000
	A4 Red Card	2.5000 2.5000	1.5000 1.5000	0.7500 0.5000
	A4 White 100gsm	0.2000 0.2000	1.5000 1.5000	0.7500 0.5000
	A4 White 80gsm	0.1500 0.1500	0.0400 0.0400	0.7500 0.5000
	A4 White Card	2.5000 2.5000	1.5000 1.5000	0.7500 0.5000
	A5 White 80gsm	0.1500 0.1500	0.0400 0.0400	0.7500 0.5000 +
	Business Cards	0.0000 0.0000	0.0000 0.0000	0.0000 0.0000

Example layout of the Cost Per Page.

The media listed on the page was created in ProductManager in the Media tab.

Print Room Options Products Address Deliv	ery Help					
dia Document Options Delivery Options						
Create and maintain a list of all the media types you	have available. The list o	of Media Types shown he	re will be used when creat	ing job tickets for		
products offered on a Skyline Portal.		a research providence		and has served to:		
Indicates mandatory fields						
Media Type	Type	Size	Colour	Weight	Holes	*
	- 17 -			-	1.000	
A3 100 gsm semi-gloss	Paper	A3	White	100 gsm		
A3 100 gsm white	Paper	A3	White	100 gsm		
A3 120 gsm semi-gloss	Paper	A3	White	120 gsm		
A3 160 gsm matt	Paper	A3	White	160 gsm		
A3 160 gsm white	Paper	A3	White	160 gsm		
A3 170 gsm gloss	Paper	A3	White	170 gsm		
A3 250 gam matt	Paper	A3	White	250 gsm		-

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.

	🧫 Skyline CostManager - Global							
File Help								
F	Price Type Cost Per Page	c						
	Digital Printer							
	◯ Wide format							
	Offset							

- 2. Click sociated 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 Double sided   Single sided	Monochrome printing per page Double sided   Single sided	Media cost Laminating (Optional) (Optional)	
A3 100 gsm semi-gloss	0.7000 0.7000	0.5000 0.5000	0.0000 0000.0	î.
A3 100 gsm white 3	0.0000 0.0000	0.2000 0.2000	0.0000 0.0000	I
A3 120 gsm semi-gloss	0.0000	0.0000	0.0000 0000.0	I
A3 160 gsm matt	0.0000 0.0000	0.0000	0.0000 0.0000	I
A3 160 gsm white	0.0000	0.0000	0.0000 0000.0	1
42.170.asm	and the second states of the second states and the	Numeral and a second		J

## 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  $20 \times 0.35$  (7.00 per document) if it was printed double sided and  $20 \times 0.40$  (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		

 (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

fedia Name	Colour printi Double sided	ng per page   Single sided	Monochrome prin Double sided	ting per page Single sided	Media cost (Optional)	Laminating (Optional)		
A3 100 gsm semi-gloss	0.7000	0.7000	0.5000	0.5000	0.0000	0.0000	1	ľ
A3 100 gsm white	0.0000	0.0000	0.2000	4	0.0000	0.0000	1	
A3 120 gsm semi-gloss	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	1	
A3 160 gsm matt	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	1	
A3 160 gsm white	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	2	

## **1** 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 printin Double sided	ng per page Single sided	Monochrome prin Double sided	nting per page Single sided	Media cost Laminating (Optional) (Optional)		
A3 100 gsm semi-gloss	0.7000	0.7000	0.5000	0.5000	0.0000 0000.0	1	Â.
A3 100 gsm white	0.0000	0.0000	0.2000	0.2000	5 000 0.0000	1	I
A3 120 gsm semi-gloss	0.0000	0.0000	0.0000	0.0000	0.0000 0.0000	1	
A3 160 gsm matt	0.0000	0.0000	0.0000	0.0000	0.0000 0.0000	1	I
A3 160 gsm white	0.0000	0.0000	0.0000	0.0000	0.0000 0000.0	1	
Al 179 menologis - and a second		A A A AGORA	0.0000	- <u>0.0000</u>	0.0000		

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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  $D^{\text{ss}}$ , Click to view the banding options.

Price banding			x					
The cost per page can be dependent on the number of pages in a document. To create a new price band, enter a value in the To field and click the + button								
From To	Colour printing per page	Monochrome printing per page	Media cost Laminating					
	Double sided   Single sided	Double sided   Single sided	(Optional) (Optional)					
1 200000000	2.0000 2.0000	1.0000 1.0000	0.5000 1.5000 +					
'n								

- 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.

Price banding			X
The cost per page can be click the + button	dependent on the number of page	s in a document. To create a new pric	e band, enter a value in the To field and
From To	Colour printing per page	Monochrome printing per page	Media cost Laminating
	Double sided   Single sided	Double sided   Single sided	(Optional) (Optional)
1 500	2.0000 2.0000	1.0000 1.0000	0.5000 1.5000
501 200000000	1.9000 1.9000	0.9000 0.9000	0.4500 1.4000 + 🗙
			Save Cancel

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 printin ouble sided					Media cost Laminating (Optional) (Optional)	
A3 Booklet Card	0.0000	0.0000	0.0000	0.0000	0.0000 0.0000	1	
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	2	
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	1	
A4 C		0.0000	0.0300	0.0300	0.1000 0.0500		

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)

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# Example B

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The cost per page has been entered using a combined printing and media cost.

Media Name	Colour printin ouble sided			ing per page   Single sided	Media cost Laminating (Optional) (Optional)	
A3 Booklet Card	0.0000	0.0000	0.0000	0.0000	0.0000 0.0000	1
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	2
A4 120gsm	0.1500	0.1500	A 0.0500	B 0.0500	0.0500 0.2500	?
A4 80gsm	0.4000	0.6500	0.0550	0.0800	0.0000 0.0000	1
M.C		0.0000	0.0000	0.0300	0.1000 0.0500	

The cost of printing a 7 page document on A4 80gsm in monochrome single sided would cost:

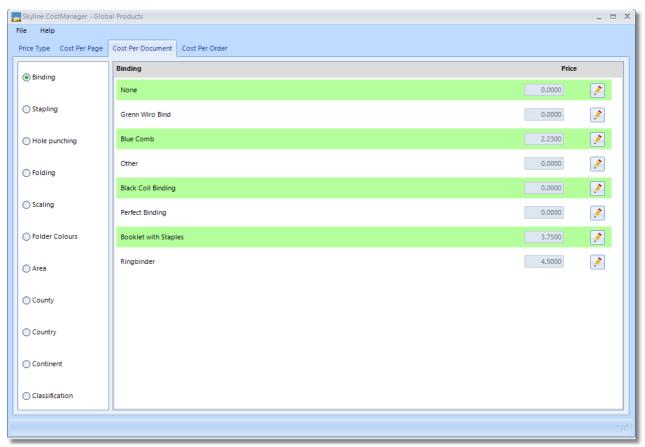
• Printing cost of 7 x 0.08 [B] = 0.56 (using 7 sheets of media and 7 sides of printing)

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 <u>Document Options tab</u>  $\square^{\text{set}}$ . 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.

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#### 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 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 + to add banding values.

🌄 Skyline CostManager - Globa	al Products			_ = ×
File Help				
Price Type Cost Per Page	Cost Per Document	t Cost Per Order		
Binding	Folder Colours			Price
0	Red			1.0000 🕂 💾
Stapling	Black	Folder Colours - Red	x	4.0000
O Hole punching	White			5.0000
O Folding	Blue	To create a new price band, ente	er a value in the To field and click the + button Price	6.0000
	Green	1 10	1.0000	7.0000
○ Scaling	Brown	11 20	2.0000	8.0000
Folder Colours		21 200000000	3.0000	
Area				
O County		,	Save X Cancel	
Country				
O Continent				
Classification				
				.:

5. Click to save your changes.

# **Cost Per Order**

Skyline CostManager			
ile Options Help			
Price Type Cost Per Page	Cost Per Document Cost Per Order		
	Priority	Price	
Priority     Delivery Method	Normal	0.0000	1
	Next Day	10.0000	1
	Urgent	0.0000	1
	See Notes	0.0000	1
	Fixed Transport Handling Charge	15.0000	1
	Proof Required	10.0000	1
	No Proof Required	0.0000	1

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> 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.

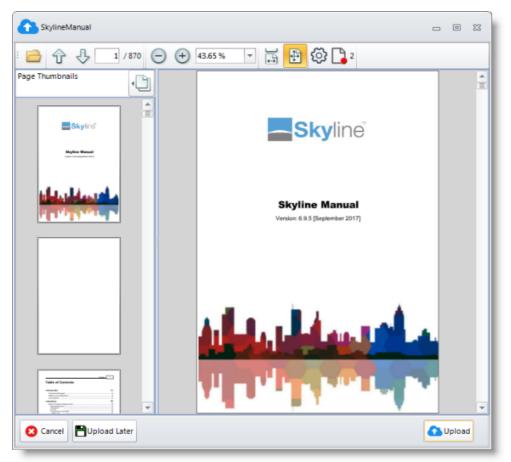
#### To enter a cost per order:

- 1. Select the type of cost Priority or Delivery Method.
- 2. Click *for edit a particular cost.*
- 3. Enter the cost.
- 4. Click to save your amendments.

This page intentionally left blank.

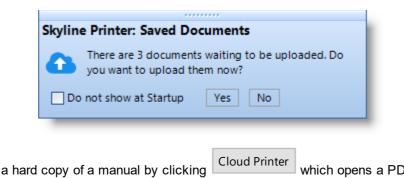
# **Skyline Cloud Printer**

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 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:

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

₩ <u>View Basket (0)</u>	Preferences	Downloads	Edit	Admin	<u>Management</u>	Logout

In the Configuration section click Skyline Cloud Printer Settings. 2.



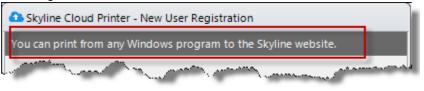
Skyline Cloud Printer Settings Add and update the Skyline Cloud Printer settings

Details of your Skyline Cloud Printer settings need to be entered. 3.

Skyline Cloud Printer Set	tings	
Printer Name	Skyline Cloud Printer	
Log in with Username		
Use SSL		
Licence Name		
Activation Code		
Website URLs	5	
	an a	
	Contribution and Support and Proceeding	
	Constitute of a second se	
Message to new users	You can print from any Windows	
	program to the Skyline website.	
	6	8
Existing Printer	Delete	Back Save

- Enter a name for the printer. This is the name that the user will see when they select the Skyline 1. 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.



# 0

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.

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# 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**.
- To amend this option click *P*.
- 5. Click 🖿 to save the setting.
- 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.



Edit the subject and text of system emails

Click 🖋 by the Activation email sent to new Skyline Cloud Printer users to make any changes to 3. the email.

	vation email sent to new Skyline ter users	Activate your account	Click <u>Activate</u> to activate	your account on the website	
Email Bod	your account				
Website Uf	annette.eprir buildserver2.	itnow.com eprintoffice.net e <mark>printoffice.net</mark>	Select the Website URL used Restore default text	Skyline Printer Settings Restore	

Click **Save** when the changes have been made. 4.

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# 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.

🛃 Skyline Cloud Printer Setup	0	
License Agreement You must agree with the licer	nse agreement below to proceed.	F
ePrint Direct Software Lice	nce Agreement	•
(registered in England unde at Second Floor, Gateway H Hertfordshire, AL8 6NS. Unit ("the Licensee") the License open the media package or media package to whoever y	is and conditions upon which ePrint D r company number 3822615) whose ouse, Fretherne Road, Welwyn Garde ed Kingdom. ("ePrint Direct") offers to d Software. If you do not agree with th install the Licensed Software, and ret rou obtained it from within 30 days of ment for the Licence to use the Licens	registered office is in City, I licence to you hese terms do not um the entire receipt, for a full
1. Definitions.		1 -
	I accept the license agreement	
Wise Installation Wizard (B)	I do not accept the license agreement	2
	Reset < Back Nex	(t > Cancel

- 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.

岁 Skyline Cloud Printer Setup	
Ready to Install the Application	
Click Next to begin installation.	
Click the Back button to reenter I the wizard.	the installation information or click Cancel to exit
Wise Installation Wizard (R)	< Back Next > Cancel

8. When the installation is complete click **Finish** to complete the installation.

B Skyline Cloud Printer Setup	
	Skyline Cloud Printer has been successfully installed.
	Click the Finish button to exit this installation.
	Restart your computer to finish installing Skyline Cloud Printer
	< Back Finish Cancel

9. Restart your computer to complete the installation.

# **Using Skyline Cloud Printer**

# **Creating an Account**

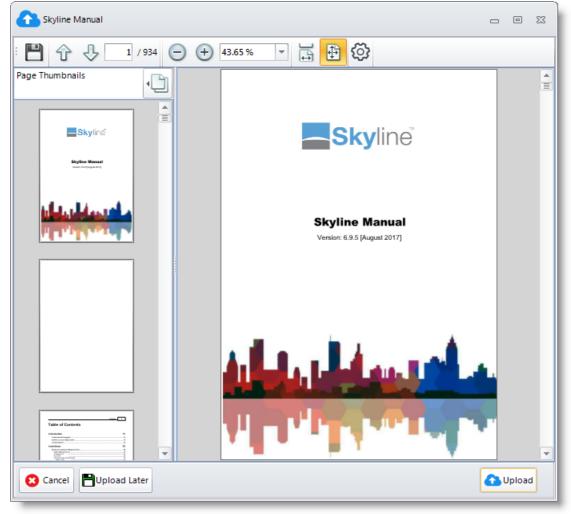
You can upload a document to be printed in your print room from any windows program. The first time you do this you will need to create account for the Skyline Cloud Printer. If you will be using your corporate user name and password to log into Skyline Cloud Printer the procedure is slightly different. Please refer to the section on Creating a LDAP Account<sup>1</sup> <sup>sss</sup> 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.

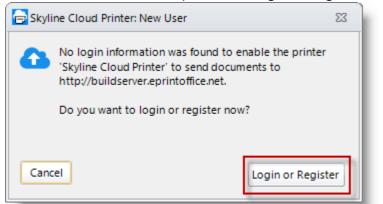
Pri	int		2
	Printer		
	Name:	Skyline Cloud Printer 🔹	Prope
	Status:	Ready	Comments
	Туре:	Skyline Cloud Printer	Documen
	A. 440 (MAR) (MAR)	and a start of the second start and the second start and the second start and the second start and the second s	Sauce and the second

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.



🚹 Upload

3. Click **Click** 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**.



4. The New User Registration window opens.

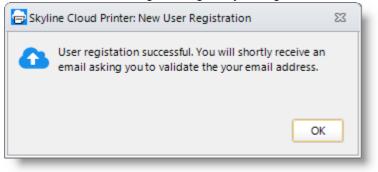
Skyline Cloud Printer - New User Registration
You can print from any Windows program to the Skyline website.
Register as a new user
O Log in existing user
Print Provider Website
http://
A validation message will be sent to this address
@ Email address
Lisername
Password Confirm Password
Cancel 3 4 Register

- 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.

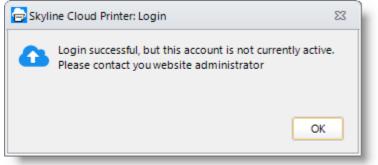
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5. You will receive a message stating that your registration was successful. Click OK.



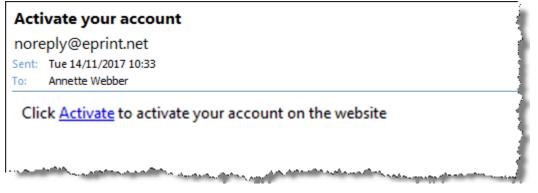
6. You will then receive a message stating that your account is not currently active. Click OK.



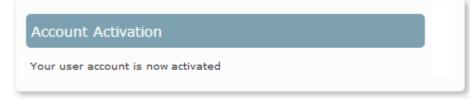
7. At the bottom of your Skyline Cloud Printer window there is a message stating 'User not Activated'. You can either leave the window open so that the document can be uploaded or click **Upload Later**.

Cancel Dpload Later	User not activated	🚹 Upload

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.



Skyline Cloud P	Printer 629
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10. Return to your Skyline Cloud Printer window and click **Upload**.

Cancel Upload Later User not activated	C 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.

Document Type Produ	uct Options Basket Address Shipping Confirm	
Docu Docu Docu Docu Docu Docu Docu Docu	ment name: Using GotoMeeting 2 2	
	<b>Simple</b> A4 A5 or A3 document printed in mono or colour on white <u>Pr</u> paper. No covers or finishing straight boxed.	roceed ►
	Collated Sets Multiple collated sets.	roceed 🕨

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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**.

(III)	<b>#</b>			
Document Type Product	Options Basket Address	Shipping Confirm		
Docum Pages:	ent name: Using GotoMe 2	eting		
	Body			
Simple	Media	A4 White 80gsm	-	
A4 A5 or A3 document	Printed Sides	Double Sided	-	
printed in mono or colour on white paper. No covers or finishing straight boxed.	Printer Type	Black and White	•	
Return to Library	🗹 Save Job Ticket	Quanti	ity 30	Next 🕨

13. The costing of the document is shown if applicable. Click **Next** to continue placing the order.

Document Type	Product Options E	Basket Address S	hipping	Confirm			
_			_		-		
Document		Product	Quantity	Price	Pages	Edit	
Using GotoMeet	ing	Simple	30	2 3.75	2	Edit	×

14. Enter your address details and then click Next.

	ct Options Basket Address Shipping Confirm	
Back		
lame	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 ad	dress Ne:	×t 🕨
ter vour deliverv requi	irements and then click <b>Next</b>	
ter your delivery requi	irements and then click <b>Next</b> .	
	irements and then click <b>Next</b> .	-
Document Type Produ		
Ocument Type Produ		

17/11/2017

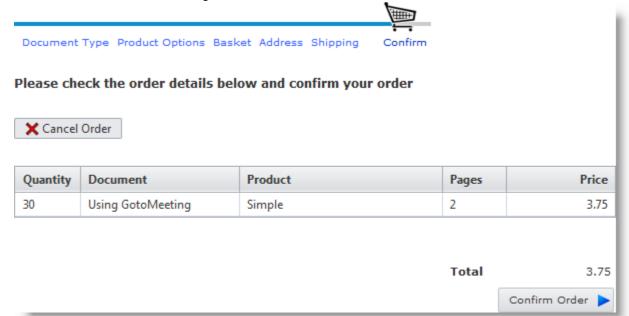
Next

Date Required by:

15.

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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.

	order was	s successful. 83				
Docu	ments will	not be printed unti	they are approve	d.		
Il order notifications will be sent to your registered email address which is: Annette.webber@eprint.net						
		•	tered email address w	nich is: Anne	tte.webber@	eprint.net
		•	tered email address w		ette.webber@ Pages	eprint.net

#### **Creating a LDAP Account**

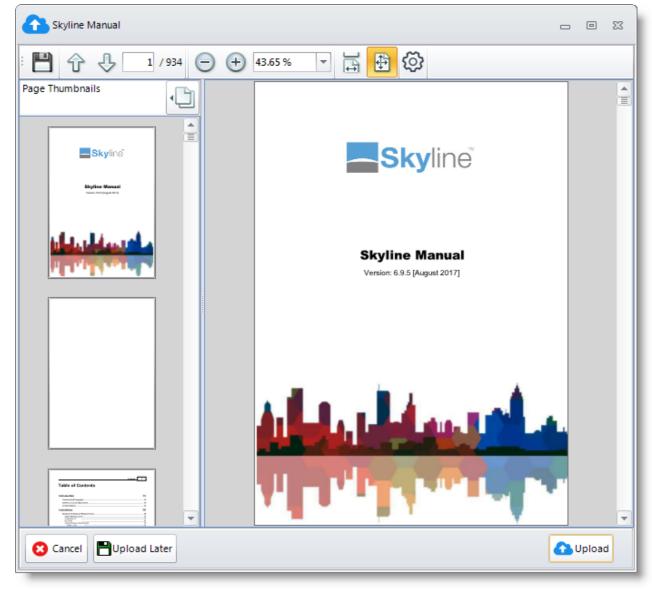
If you will be using your corporate user name and password to log into Skyline Cloud Printer please follow the instructions below to create a LDAP Account.

#### 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.

Pr	int		
	Printer		
	Name:	Skyline Cloud Printer 🔹	Prope
	Status:	Ready	Comments
	Туре:	Skyline Cloud Printer	Documen
	A 444 APA 44	and a state of the second	A CARLON AND A CARLON AND A

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.



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- 3. Click Opload to upload your document to Skyline.
- 4. During the upload a progress bar is displayed showing the progress.

Cancel Uploading	15728640

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.

Username		
Password		
Log In		
Please log in 1	with your company username and pa	ssword.

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.

Document Type Produ	ct Options Basket Address Shipping Confirm	
Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum Docum	nent name: Using GotoMeeting : 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 ►

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**.

Document Type Product	t Options Basket Address	Shipping Confirm		
Docum Pages:	ent name: Using GotoMe 2	eting		
Simple A4 A5 or A3 document printed in mono or colour on white paper. No covers or finishing straight boxed.	Body Media Printed Sides Printer Type	A4 White 80gsm Double Sided Black and White	•	
Return to Library	Save Job Ticket	Quanti	ity 30	Next 🕨

8. The costing of the document is shown if applicable. Click **Next** to continue placing the order.

Document	Product	Quantity	Price	Pages	Edit
Document	Product	Quantity		Pages	Edit
Using GotoMeeting	Simple	30	2 3.75	2	Edit 🗙

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Priority

Date Required by:

9. Enter your address details and then click Next.

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 ad	Ne
ter your delivery requi	rements and then click <b>Next</b> .

Normal

17/11/2017

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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

Simple 2 3.75	Quantity	Document	Product	Pages	Price
	30	Using GotoMeeting	Simple	2	3.75
		5 5			

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.

our (	order was	s successful.			
rder Nu	mber: 00011	.83			
Decu		not be printed upti	they are approved	1	
Docu	ments will	not be printed unti	i they are approved		
		•		_	
		will be sent to your regis		_	webber@eprint.net
		•		_	

# Sending a document to Skyline

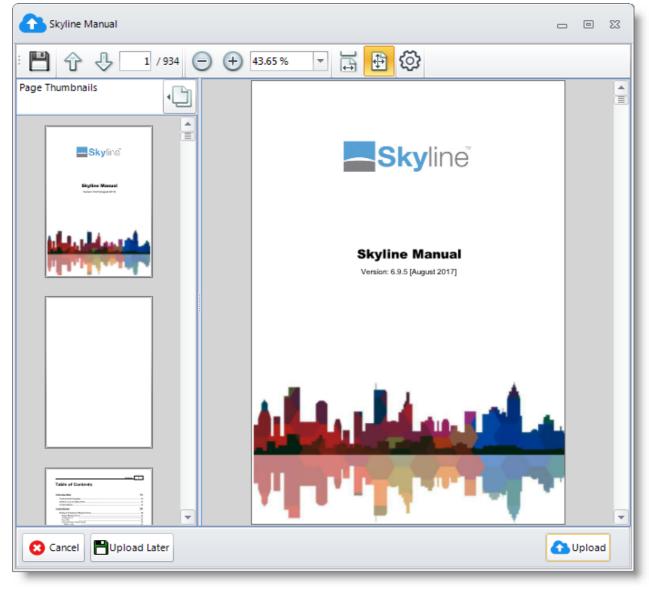
#### To upload a document:

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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.

F	Prir	nt		
	n.	Printer		
		Name:	Skyline Cloud Printer	Prope
	Ľ	Status:	Ready	Comments
		Туре:	Skyline Cloud Printer	Documen
ų,	h		and a second	Sector State

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.

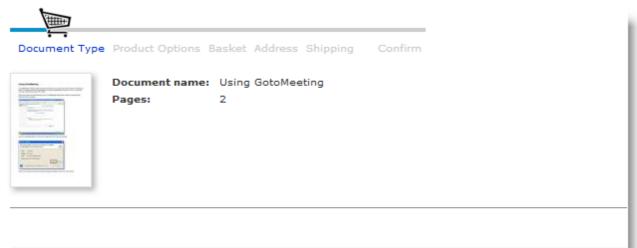


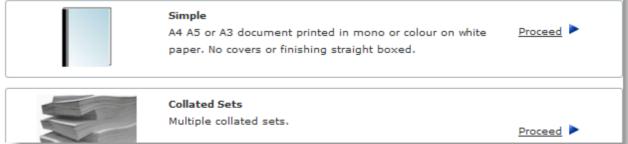
Your document has been converted to a PDF. If you want to save the PDF use

- 3. Click Opload to upload your document to Skyline.
- 4. During the upload a progress bar is displayed showing the progress.

Cancel Uploading	15728640

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.





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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**.

(III)	#			
Document Type Product	Options Basket Address	Shipping Confirm		
Docum Pages:	ent name: Using GotoMed 2	eting		
	Body			
Simple	Media	A4 White 80gsm	*	
A4 A5 or A3 document	Printed Sides	Double Sided	*	
printed in mono or colour on white paper. No covers or finishing straight boxed.	Printer Type	Black and White	¥	
Return to Library	🗹 Save Job Ticket	Quanti	ity 30	Next 🕨

7. The costing of the document is shown if applicable. Click **Next** to continue placing the order.

Document Type Product (	Options Basket Address	s Shipping	Confirm		
Document	Product	Quantity	Price	Pages	Edit
Using GotoMeeting	Simple	30	2 3.75	2	Edit 🗙

Enter your address details and then click Next 8.

ame	Anno Mahh	
ompany Name	Anne Webb	
ddress 1	ePrint Ltd	
ddress 2	2nd Floor, Gate House,	
	Fretherne Rd, Welwyn Garden	City
county	Hertfordshire	
ostal Code	AL8 6NS	
hone Number	+44(0) 1438 726 732	
Save this delivery ad	dress	Next 🕨
er your delivery requ	irements and then click <b>Next</b> .	
ocument Type Produ	ct Options Basket Address Shipping	Confirm

Normal

17/11/2017

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Next

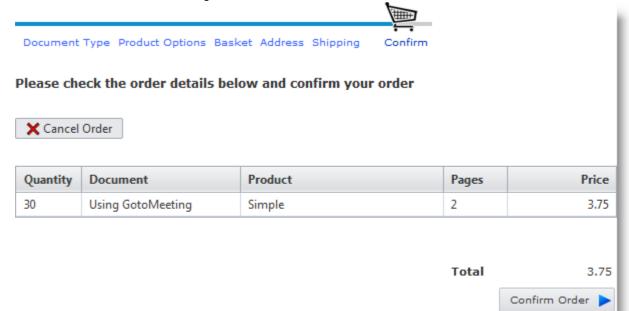
.

Date Required by:

9.

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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.

	order was	s successful. 83				
Docu	ments will	not be printed unti	I they are approve	d.		
		·····				
		will be sent to your regis	tered email address w	nich is: Anne	tte.webber@	eprint.net
		•	tered email address w		tte.webber@	Deprint.net

### **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**.

C User Roles		• **
E 💾 ☆ 🕂 1 /4 😑 🕂 43.65 % 🔻 拱 🔂		
Page Thumbnails		<u>*</u>
12/09/2017 - somewell interace & Firste to Translandianager     209/30077 - Updeted & completive evitien.     12/09/2017 Updeted & completive evitien.		
Example in the set of the se		=
I and the second sec		
E Constanting of the second se		
Image: Constraint of the second se		
		Ŧ
S Cancel Upload Later	<b>0</b> 0	pload

3. The document is saved and the window closes.

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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.

	Show Saved Documents
	Open
	Exit
1	• 🖿 👯 🚰 📶 🕪

#### 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.

Click the Open button to load a PDF	•	23
: 🗀 🛧 🕹 💿 / 0 😑 🕂 100.00 % 🔽 拱 🔁 🚱 🚺 1		
	 	-

5. The Saved Documents window opens. Select the document to upload and click Upload.

Saved Documents	23	
Off-Line Printing		
	Show Pop-up Message at StartUp 🔽	
Close	C Upload	

6. A new window opens displaying your saved document. You can now click to upload the document into Skyline and place your order.

Skyline Printer

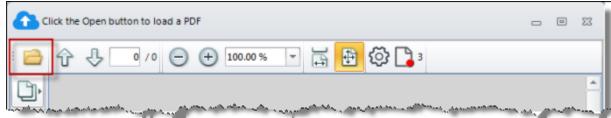
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## Uploading PDFs

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.

Favorites   Desktop   Downloads   Recent Places   Dropbox   Desktop   Documents   Music   Pictures   Videos   Annette Webber   Computer   File name:   SkylineManual.pdf   Videos   Porputer	Organize 🔻 New folder				H • 🗔	0
■ Desktop       Image: De	Favorites	-	Name	^	Date modified	Т
Recent Places   Dropbox   Desktop   Libraries   Documents   Nusic   Pictures   Videos   Annette Webber	-		🔁 Administration	.pdf	12/09/2017 15:30	A
<ul> <li>Computer</li> </ul>	〕 Downloads		🔁 CostManager.p	df	12/09/2017 15:58	A
■ Desktop       Image: pdf       12/09/2017 15:55       A         Image: Desktop       Image: pdf       12/09/2017 16:22       A         Image: Documents       Image: pdf       12/09/2017 15:44       A         Image: Documents       Image: pdf       Image: pdf       Image: pdf	Recent Places		🔁 Installation.pdf		12/09/2017 15:04	A
Desktop       I 2/09/2017 15:55       A         Image: Desktop       Image: Desktop       I 2/09/2017 16:22       A         Image: Documents       Image: Documents       Image: Documents       Image: Documents       Image: Documents         Image: Documents       Image: Documents       Image: Documents       Image: Documents       Image: Documents         Image: Documents       Image: Documents       Image: Documents       Image: Documents       Image: Documents         Image: Documents       Image: Documents       Image: Documents       Image: Documents       Image: Documents         Image: Documents       Image: Documents       Image: Documents       Image: Documents       Image: Documents         Image: Documents       Image: Documents       Image: Documents       Image: Documents       Image: Documents         Image: Documents       Image: Documents       Image: Documents       Image: Documents       Image: Documents         Image: Documents       Image: Documents       Image: Documents       Image: Documents       Image: Documents         Image: Documents       Image: Documents       Image: Documents       Image: Documents       Image: Documents         Image: Documents       Image: Documents       Image: Documents       Image: Documents       Image: Documents         Imag	👯 Dropbox		🔁 PrintStation.pd	f	12/09/2017 15:49	A
Libraries   Documents   Music   Pictures   Videos   Annette Webber   Computer		=	🔁 ProductManag	er.pdf	12/09/2017 15:55	A
Documents  Music  Pictures  Videos  Annette Webber  Computer  Videos	Desktop		🔁 SkylineManual	pdf	12/09/2017 16:22	A
Music  Pictures  Videos  Annette Webber  Computer  Videos	🥽 Libraries		🔁 Website.pdf		12/09/2017 15:44	A
	Documents					
Videos Annette Webber	J Music					
Annette Webber						
Computer	📑 Videos					
	Annette Webber					
File name: SkylineManual.pdf	🖳 Computer	-	•			•
	File name: Sky	/lineManu	ial.pdf	- P	DF Files (*.pdf)	•

- 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.

View of Contents	A. L. L. L. A	
Cancel Uploading		15 <mark>728640</mark>

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.

#### Skyline Manual

# **Changing Your Settings**

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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

🚹 Skyline Printer

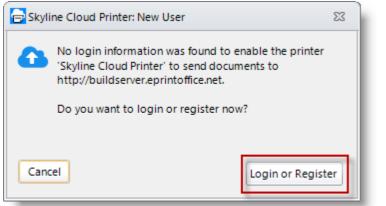
- 2. Click Settings
- 3. The Skyline Cloud Printer Settings window opens. Click Change Password or Email.

Skyline Cloud Printer Settings					
Printing to the printer <b>Skyline Cloud Printer</b> will upload the document to the website http://buildserver.eprintoffice.net					
Change Password or Email     anne webb					
Show Saved Documents message at Start Up					
Cancel Save					

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 <u>password</u><sup>1313</sup> and/or <u>email address</u><sup>1311</sup> 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.

Skyline Cloud Printer - Login Existing User
You can print from any Windows program to the Skyline website.
<ul> <li>Register as a new user</li> <li>Log in existing user</li> </ul>
Print Provider Website
http://l
2
Losername
Password 3
Cancel

- 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.

This page intentionally left blank.

# **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

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.
Name *
Please enter your name
Are you a home worker? Select if your main place of work is not in the office
Best time of day to contact you. *
07:30 to 09:00
🗆 09:01 to 12:00
□ 12:01 to 14:00
14:01 to 17:00
Please select the best time to contact you. More than one time can be selected.
Contact Method *
O Mobile
Email     In Person
Please select the best way to contact you
Mobile Number
07 Please enter the number that you us to use
Office Location
Please select the location of the meeting
Please enter a brief reason for request *
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
Submit

Example of a form that can be created within Skyline

# **Creating Cutomer Forms**

### To create a new form:

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- 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.

Customer Forms				Preview Form	Assign Form 🕨
Existing Forms		Form Description			٦
Select a form	Load New Form	Form Description Required	2		
Form Name					
Form Name Required					
Submit Button Text Submit		Confirmation message Thank you for submitting the form			]
Import Form from XML file					
Select XML File Upload					
	3				
Form Fields	Heading				
To edit an existing field, click on the field name below	Sub Heading				
	Html Field Editor				
	Text Box				
	Multiline Text Box				
	Masked Text Box				
No fields added to form	CheckBox				
	≣ CheckBox List				
	Dropdown List				
	≣ Option List				
	🛗 Date Picker				
Save Form 4	← File Upload				
	Q Seach Box				

- 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 <u>following pages</u><sup>1651</sup>.

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 <u>assigned</u><sup>D <sup>664</sup></sup> 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 only1 Sub Heading per form is available.

Sub Heading		
Sub Heading Text	Enter sub heading text	
Add to Form		

### **HTML Field Editor**



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.

		_
Html Field Editor		
HTML Field Name	HTML Field Name required	
Size A - B I U	e e e e e e e e 😣 🧶 📓 🚍 🔳 🔹	
Insert content for the HTML fi	eld	
🦯 Design 🔇 HTML		.11
Width 🔘 Half Width		
O Full Width		
Add to Form		

### **Text Box**

Name *			
Please e	nter your name		

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.

Text Box	
TextBox Name	TextBox Name Required
TextBox Caption	TextBox Caption Required
Help Message	
Empty Text	Text if the field is empty
Default Text	
Mandatory	Width () Half Width
	O Full Width
Mandatory Message	*
Hide the TextBox on the	e form
Add to 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.

Iultiline 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
	O Full Width	🔿 Large
Mandatory Message	*	
☐ Hide the Multiline TextBo	w on the 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	If you select one of the examples the layout of the mask will
Uppercase letters and numbers e.g. LLL ####	displayed in the Masked TextBox example field so that you can
Upper and lower case letters and numbers e.g. LLII ####	test the mask.
Any letter or number with text e.g. aaa aaa	
Phone Number e.g. (+##) ##### ### ####	If you create a custom mask the following 3 masks are the most
Mobile Number e.g. 07### ###	commonly used ones.
Post Code e.g. LL##LL	L = Uppercase letter
Fixed Options e.g.	
Custom	I = Lowercase letter
# = Number	m

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 or	the form
Add to Form	

### **Check Box**

Are you a home worker? Select if your main place of work is not in the office

#### 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.

CheckBox	
CheckBox Name	CheckBox Name Required
CheckBox Caption	CheckBox Caption Required
Help Message	
Mandatory	
Mandatory Message	*
Hide the CheckBox on the form	
Add to Form	

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**

Best time of day to contact you. *	
07:30 to 09:00	
☑ 09:01 to 12:00	
□ 12:01 to 14:00	
✓ 14:01 to 17:00	
□17:00 to 18:30	
Please select the best time to contact you. More than one time can be selected.	
Example of a Chaok Bay 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.

CheckBox List Name	CheckBox List Name Required	
CheckBox List Caption	CheckBox List Caption Required	]
Help Message		]
CheckBox List Options		
New option text	+	
New option text		

# **Dropdown List**

Office Location
▼
Meeting room 1
Meeting room 2
Canteen
Foyer
Coffee Shop

### 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.

Dropdown List		
DropDown Name	DropDown List Name Required	
DropDown Caption	DropDown List Caption Required	
Help Message		
DropDown List Options		
		•
New option text	+ 🛍 🖺	
Start with blank entry		
Default option Sel	ect option to Set as Default	
Se	et Default Clear Default	
Mandatory		
Mandatory Message	*	
Add to Form		

# **Options List**

Contact Method *	
O Telephone	
O Mobile	
<ul> <li>Email</li> </ul>	
○ Facebook	
○ In Person	
Please select the best way to contact you	

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.

Option List	
Option List Name	Option List Name Required
Option List Caption	Option List Caption Required
Help Message	
Option List Options	
	·
New option text	+ 🛍 🖺
Default option Selec	t option to Set as Default
Set	Default Clear Default
Mandatory	
Mandatory Message	
Add to Form	

### **Date Picker**

0	Date	of p	orob	lem			
	•		May	2023		•	••
	м	т	w	т	F	s	s
17	24	25	26	27	28	29	30
18	1	2	3	4	5	6	7
19	8	9	10	11	12	13	14
20	15	16	17	18	19	20	21
21	22	23	24	25	26	27	28
22	29	30	31	1	2	3	4

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.

Date Picker	
Date Picker Name	Date Picker Name Required
Date Picker Caption	Date Picker Caption Required
Help Message	
Mandatory	
Mandatory Message	*
Add to Form	

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# 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.

File Upload		
Message to users	Message to users about uploading files	
	Maximum file size for uploads: 2GB. Uploaded files will be used in processing the data in the form and will not be available to users	
Upload button text	Select	
Allowed File Types	PDF Files .pdf       JPG Image .jpg         JPEG Image .jpeg       PNG Image .png         GIF Image .gif       CSV file .csv         ZIP file .zip       Excel file .xls         Excel file .xlsx	
Add to 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.

Seach Box		
Search Box Name	Search Box Name Required	
Search Box Caption	Search Box Caption Required	
Help Message		
Mandatory		
Mandatory Message	*	
Excel Spreadsheet Name	Excel Spreadsheet Name Required Load	
Worksheet Number	1 First Row is the header	
Item		
No records to display.		
Select the Column Number containing the search data 1		
Test Data Source	▼ Test	
Add to Form		
Add to Form		

# **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

xisting Forms		Form Description	
Contact Request   Load	New Form	Contact Request Form	
orm Name Contact Request Delete	Export		
ubmit Button Text		Confirmation message	
Submit		Thank you for submitting the form	

- 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.

Customer Forms	Preview Form Assign Form
Existing Forms	Form Description
Select a form   Load New Form	Form Description Required
Form Name	
Form Name Required	
Submit Button Text	Confirmation message
Submit	Thank you for submitting the form
Select XML File	

7. The file name will displayed. Click **Upload** to complete the process of importing the form. You will receive a confirmation message.

Customer Forms	Preview Form Assign Form
Existing Forms	Form Description
Select a form   Load New Form	Form Description Required
Form Name	
Form Name Required	
Submit Button Text	Confirmation message
Submit	Thank you for submitting the form
Import Form from XML file	
ContactRequest.xml	

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 <u>edited</u><sup>D91</sup> to display a more relevant description if required.

Home Up	oad Paper Originals	Library O	rders User Forms	FBI Business Card	FBI Production Page
			-		
Form Name		F	orm Description		
Birthday List			Retrieves the agents list o	f people having their birth	hday next period
Open Form					
Form Name		F	orm Description		
Product requ	est	5	Select single or multiple p	products and personalizati	tion
Open Form					

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  $\checkmark$ .
- 5. Click 💾 to save the setting.

### To Assign Forms to Users:

In the Products section click Assign Customer Forms. 1.



Assign Customer Forms Assign Customer Forms to Users and User Groups

The Assign User Forms window opens. Forms can be assigned to All Users, Selected Users or User 2. Groups.

Assign selected form to:	Unassigned	O All Users	O Selected Users	O User Groups	R Save	
ect a form						
rthday List						
rthday Template						
I - Business Card						
I - Change Request						
oduct request						

All Users Click Save to To Assign a form to All Users select the Form and then select 3. confirm the change. Birthday List

The form will show that is has been made available to everyone:

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users	ssign a form to <b>Selected</b> will be shown in a list. t the required users and t	<b>Users</b> select the Form and then s then click	elect 🛛	Selected Use nae.	ers	. The available
Assi	ign Customer Forms to Users an			Save		Customer Forms
Birth FBI - FBI -	a form irthday List day Template Business Card Change Request uct request	Assigned Users Adam Becks Bob Jones Carrie Osp	+	Users S admin Anne Webb developer Edgar Falls Fred Bear George Hill India Jewel Karl Levine Minnie Netherfield Nettie Oliver Pine Paul Peter skylinehost SteveD	Search	۵

Tester2969

-

The form will show that is has been made available to everyone: Birthday Template

-	<b>Froups</b> select the Form and then s shown in a list. Select the require		
onfirm the change. Assign Customer Forms to User	s and User Groups	Customer Fo	rms
Assign selected form to: O Unassigned	All Users O Selected Users O User	Groups Save	
Select a form Birthday List Birthday Template FBI - Business Card FBI - Change Request Product request	Assigned User Groups North East	User Groups South West	
		*	

The form will show that is has been made available to everyone: Product request

This page intentionally left blank.

# **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 <u>helpdesk@eprint.net</u> 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.

w Basket (0)   Preferenc	es Downloads	<u>s   Edit   Adn</u>	nin   <u>Manaq</u>	ement   Logout
Paper Originals	Libraries	Approval	Google	
	6.6.3.33	35 Logged in as:	Portal Admir	nistrator   <u>Admin Home</u>

### 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.

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# **Start the Upgrade Procedure**

### To start the upgrade procedure:

- 1. Browse to <u>download.eprint.net</u> 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.

<b>1</b>	Skyline Upgrade Utility			-		×
<b>\$</b> U	Jpgrade Skyline to version					
	This utility must be run on the Skyline server.	IIS version .NET Version	4.7.2 or later			
	This utility will upgrade the Skyline web site and databases. Some manua after running this upgrade. Please read the <u>upgrade manual</u> .	al configurati	ion changes may requ	uired		
	Before starting the upgrade, you will need to contact ePrint Support and	l supply the f	following information	:		
	<ul> <li>Your company name</li> <li>The name of the Skyline server</li> <li>The Skyline version number displayed on the website Admin page</li> </ul>					
	Please email these details to helpdesk@eprint.net.					
	If you have a current support contract, you will be supplied with an Upgr	rade PIN Nu	mber.			
	Upgrade PIN Number Validate					
				LL,	-	L
(?)	Help			Can	ncel	

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 <u>Skyline Website root folder</u><sup>D<sup>254</sup></sup>. In the example the default folder location has been selected.

Skyline Upgrade Utility		-	×
Skyline details			
	Check Skyline version number Check Version		

6. Click **Check Version**. Your current version of Skyline is shown and it is checked to make sure that it can be upgraded.

Skyline Upgrade Utility	- 🗆	×
Skyline details		
1- Browse to the Skyline Website root folder 2- The current version of Skyline is: 7.6.0.0		
C:\Skyline\www.root-deploy Browse Check Version		
3- Select a folder for the website backup		
Browse Clean up CSS files		
SQL Instance \skyline		
Databases SkylineDeploy SQL Username skyline-admin SQL Password	Test SQL Login	
Email errors Email any errors to: comma seperated email addresses		٦
Skyline version 7.6.0.0 can be upgraded OK         Check Free space on drive selected for backup         Skyline SQL Server         Take Skyline offline         Backup Website Files         Update Skyline Database         Update SkylineMembership Database         Delete old Website files		
① Help	Cancel	

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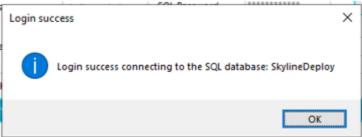
7. Enter a folder to be used to backup the Skyline Website.

Skyline de	tails				
1- Browse to t	he Skyline Website root	t folder	2- The current version of Skyline	e is: 7.6.0.0	
C:\Skyline\wv	wroot-deploy	Browse	Check Version		
3- Select a fold	der for the website back	cup			
E:\Backup		Browse	Clean up CSS files		
SQL Instance	.\skyline		Clean up CSS lifes		
Databases	SkylineDeploy SkylineMembership		skyline-admin SQL Password	d *********	Test SQL Login
Email erro	rs	Email any errors to:	comma seperated email addresse	5	
	ce on drive selected fo	or backup 79.85 GB			
Skyline : Take Sk Backup Update	SQL Server yline offline Website Files Skyline Database				
Skyline : Take Sk Backup Update	SQL Server yline offline Website Files				

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.

Backup Datab	ases							
đ	SQL Server name: .\skyline Skyline Database name: SkylineDeploy SkylineMembership Database name: SkylineMembershipDeploy							
	ure that the databases "Skyline" a up before proceeding with the up		embership"					
then it will	If the upgrade process should fail or be interrupted before it is complete then it will not be possible to return to the previous version. The Skyline installation may be damaged and data could be lost.							
Do you war	t to continue with the upgrade?							
I underst	and the risks of possible data loss	Continue	Quit					
are backed If the upgra then it will installation Do you war	up before proceeding with the up de process should fail or be intern not be possible to return to the pre may be damaged and data could t nt to continue with the upgrade?	ograde. upted before it vious version. be lost.	is complete The Skyline					

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.

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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.

Skyline details	Jtility					
1- Browse to the Skyline	Website root folde	r	2- The current v	ersion of Skyline is: 7	.6.0.0	
C:\Skyline\wwwroot-de	ploy	Browse	Check Versi	on		
3- Select a folder for the	website backup					
E:\Backup		Browse		16 Al		
SQL Instance .\skyline	e		Clean up CS	ss files		
-		QL Username	skyline-admin	SQL Password	***	Test SQL Login
_	MembershipDeplo	-				
Email errors	E	mail any errors to:	paul.clark@eprint.	net		
Skyline version 7.6						
-	e selected for bac					
Free space on driv	ve selected for bac me is .\skyline					
Free space on driv	e selected for bac me is .\skyline ffline					
Free space on driv The SQL Server nar	re selected for bac me is .\skyline ffline te					
Free space on driv The SQL Server nar Skyline Website of Backing up websit	e selected for bac me is .\skyline ffline te stabase	kup 79.85 GB				
Free space on driv The SQL Server nar Skyline Website of Backing up websit Update Skyline Da	re selected for bac me is .\skyline ffline te atabase embership Databas	kup 79.85 GB				
Free space on driv The SQL Server nar Skyline Website of Backing up websit Update Skyline Da Update SkylineMe	re selected for bac me is .\skyline ffline te atabase embership Databas	kup 79.85 GB				
Free space on driv The SQL Server nar Skyline Website of Backing up websit Update Skyline Da Update SkylineMe	re selected for bac me is .\skyline ffline te atabase embership Databas	kup 79.85 GB				

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 ir version 7.6.0.8	Last Upgrade: 2025 January 15	Logged in as:	Portal	Administrator	<u>Admin Home</u>

- 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 <u>PrintStation</u><sup>D</sup><sup>∞</sup>, <u>CostManager</u><sup>D</sup><sup>∞</sup> and <u>ProductManager</u><sup>D</sup><sup>∞</sup> 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.

Туре	Name	End User Display	Email User	Allow order to be deleted	Show Orders on Printstation
Waiting for Quote	Waiting for quote	Waiting for quote	<b>V</b>	<b>V</b>	<b>V</b>
Quote Sent	Quote sent	Quote Sent	<b>V</b>		<b>V</b>
Order Placed	Order placed	Order Placed	1		<b>1</b>
Awaiting Paper Originals	Awaiting Paper Originals	Awaiting Paper Originals			<b>V</b>
Downloaded	Downloaded	Downloaded	1		1
Paper Originals Received	Paper Originals Received	Paper Originals Received			<b>V</b>
Query Outstanding	Query Outstanding	Query Outstanding	1		1
In Production	In Production	In Production	1		
Printed	Printed	Printed	1		
Completed	Completed	Completed	1		
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><sup> $D_{2^{16}}$ </sup> in the <u>Administration</u><sup> $D_{2^{5}}$ </sup> section.

You are also able to create Custom Statuses. For more information see <u>Creating a Custom Status</u><sup> $D_{57}$ </sup> in the <u>Skyline PrintStation</u><sup> $D_{400}$ </sup> 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:

- 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<sup>155</sup>.
- 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 <u>Selecting the</u> Pricing<sup>1</sup> \*\*\*.

File Help Price Type Cost Per Page Cost Per Document Cost Per Order						
Product name	Calculated price	Fixed price	Price each	Setup cost	Tax rate %	
Booklet	۲	$\bigcirc$		0.00	0.00	
Collated	۲	$\bigcirc$		0.00	0.00	<b>,</b>
Quotation	0	۲	0.0000	0.00	0.00	
Simple	۲	0		0.00	0.00	1

- 3. Assign the product to the required portal. For more information, please refer to the section on Adding Products to a Portal<sup>0</sup><sup>552</sup>.
- 4. Open the website and sign in with Administrator rights. View the **Admin** page and In the Orders section click **Order Statuses**.



<u>Order Statuses</u> Create, edit & delete order statuses

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

Order Placed Emails	Send one Order Placed email per document ordered Send one Order Placed email per order
New orders with no price	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 <u>Changing the Wording in a Status Email</u><sup>1512</sup> 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<sup>D<sub>30</sub></sup>.

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

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email will be sent to the user and they will be able to reject or accept the order. For more information, please refer to  $\underline{\text{Quotation Requests}}^{D_{445}}$ .

### **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
1	View	Administration	0000124	05/08/2024 14:20		Waiting for quote		×
-			0000400	05/00/000144/50		0.1.01.1		

- 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	Body	
luotation	-	
REQUEST FOR QUOTE	Media	A4 White 80gsm
N ( Male 1)	Printed Sides	Double Sided
	Printer Type	Black and White
Ocument Name: Administration		
Order Number: 0000124		
Created: 05/08/2024 02:08 PM	Please enter any oth	er special requirements
Dwner: 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	First Name	Anne
Pages with colour: 256	Family Mana	
Monochrome Pages: 14	Family Name	Webb
Bigton Administration Byonst	Street	Long Street

5. To accept the quotation click 🤎 and place the new order. To decline the quotation click 본 and your

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order will be marked with the status deleted and will not show in your list of orders.

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# 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 Calculate Price button. Enter a value in the price field and save your changes. Add any notes as required when the changes are saved.

Skyline Printstation :: Connected to - buildse	rveræprintonice.net										- 9 %
File Setup Languages Theme Help											
On Demand Printing											
Portals	Orders										
Annette	😂 Refresh 🔳 🕔 Downle	oad All 🔳 Download 🥑 Proof	Print 👷 Status 👻	🔁 View 🏢 Delete 🍓 Print	l Job Ticket 🔍 Searc	h ↔ Fill Width	Current	dot			
Statuses Users PrintStatio	OrderID	Document Name	Username	Status	Product	Pages	Copies	Total pages Submit	tted date Required	I Date Price	Priority 🚊
	<ul> <li>Waiting for quote</li> </ul>										
All Statuses (60)	0003271	Manual (602)	Brian Dawson	Waiting for quote	Quotation	602	2 4	2408 22/09/2020 0	09:26:00	0.00	Normal
Waiting for quote (1)	▲ Quote Sent										
Quote Sent (1)	0003270	Cloud Printer	Anne Webb	Quote Sent	Quotation	492	2 4	1968 22/09/2020 0	09:18:00	89.25	Normal
Waiting for Paper Originals	<ul> <li>Query Outstanding</li> </ul>										
Order placed	2 🖬 0003260	America	Cuthbert Sewell	Query Outstanding	Simple	116	5 52	6032 11/09/2020 1	14:29:00	331.76	Ψ
	Overview Details	Delivery History Origi	nal							Output Printers Fo	der
Preview	Pages Copies	Priority	Date Submitte	d Date Required		User Notes					
	602 🔺 4 📥	Normal	22 September	2020 💌	-		t to our south	hern branch. Also need to	be hard	Canon N	IG3600
		Paper	Printed Sides	Printer Type	Laminated	bound.					
	Document	A4 White 80gsm 💌	Double Sided	Black and Whit	e 💌 🗆					HP ENV	4500
	Front Cover			-	-						
	Back Cover	· · · · · · · · · · · · · · · · · · ·		-	-					PDF	
	Binding	Stapling	Hole	Punching	Folding		Price		, II		
		-	-	*		-	100.0	0 Calculate Price	J	Xerox G	obal
	Waiting for quote	0003271 Brian Dawson Q	uotation Manual	(602)				Nrint Job Ticket	Save Changes		

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.

Status Changes							
	Date	Status	Email User	Processed By			
D	05/08/2024 11:39:19	Order Placed					
	05/08/2024 11:39:22	Waiting for quote	~				
		Quote sent	<b>v</b>	Anne Webb			
		Order Placed	<b>v</b>				

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

Overview Details	Delivery History	Job Ticket Additional Fields		
		Staff Notes (69/2000 characters)		
Account Code	IT2	05/08/2024 11:46:53 Username: anne webb Aded comb binding and pricing	Options1	
Account Name	IT Brochures		Options2	
Account Description	Test Account		Options3	<b>•</b>
			Options4	
			Options5	<b>•</b>
Impositon	None	1	Options6	<b>•</b>
mpositon				

#### • Rejected Quotation.

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

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# 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. <u>Amend the System Status</u><sup>D<sub>216</sub></sup> 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.

Syste	em Statuses								
	Туре	Name	End User Display	Email User	Allow order to be deleted	Show Orders on Printstation			
1	Waiting for Quote	Waiting for Quote	Waiting for Quote		<b></b>	×			
1	Quote Sent	Order Amended	Amended Order						
1	Awaiting Paper Originals	Awaiting Paper Originals	Awaiting Paper Originals	1	~	<b>V</b>			
1	Paper Originals Received	Paper Originals Received	Paper Originals Received						
P	Order Placed	Order Placed	Order Placed	<b>V</b>	<b>V</b>	<b>V</b>			

- 2. An order is received in PrintStation and is amended by either <u>Amending the Order Details</u><sup>1/247</sup> or <u>Changing</u> <u>the Price of an Order</u><sup>1/248</sup>. 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".

1	ſ	Order Amended									
		<b>I</b>	0002194	Website	Anne Webb	Order Amended	Collated Sets	96	1 The World	96 06/10/2020 12:17:00	
1	Crider Flaced										
		J 🖬	0002193	Texas	Anne Webb	Order Placed	Collated Sets	16	1 The World	16 06/10/2020 10:35:00	C

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
1	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 <u>approval message</u><sup>D <sup>150</sup></sup> 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 <u>automated email messages</u><sup>D151</sup> can be changed to suit your requirements.

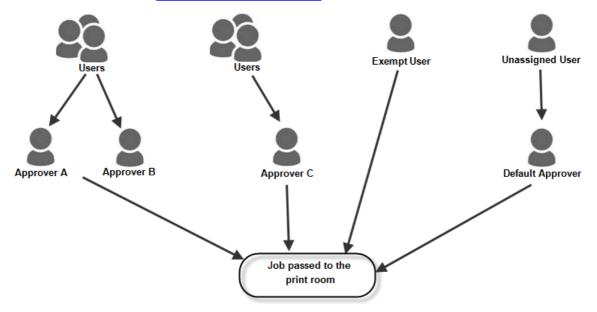
The system can be configured to allow approvers to change the following parts of the order if appropriate and to help approvers decide whether an order should be passed to the PrintStation the system can be configured to allow them to download the associated  $PDF^{D + 47}$ .

- Order details<sup>143</sup> 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<sup>D</sup><sup>144</sup> amend the account code, name or description.
- <u>Recalculate prices</u><sup>D145</sup> 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<sup>146</sup> 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<sup>D</sup><sup>152</sup>.

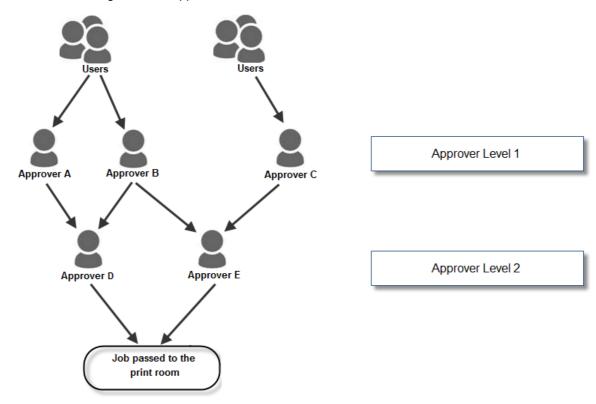
In some cases you might have users that will not require their orders to be approved. You can make the <u>user</u>  $exempt^{D_{157}}$  so that any orders they place are passed directly to the PrintStation in the print room. For more information see the section on assigning users to approvers<sup>D\_{152}</sup>.



#### **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 <u>Configuring Approval Settings</u><sup>[1139]</sup>
- 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<sup>D</sup><sup>150</sup>.

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.

Orde	ers Needing App	roval								
Orders need to be approved before they are released Refresh										
		User name Order	Id Document name	Product	Account Code	Pages	Copies	Date Submitted	Date required	Priority
	[									
~	0003049									ń
		Angus 00030 McDonald	Journey to 49 GDPR Compliance	A4 Booklet	007	18	2	05/06/2018 16:16:00		-
>	0003057									
-	0003058									-
-					_		_			
	erview Detail	s Customer Details CostManager	History Notes		rtrait Staj	ple			Lamina	ted 🖺 Save
2		Document	A4 White 80gsm		•	Double Sideo	i •	Black and W	/hite 🔻	8
		Front cover:			•		•		•	8
	the strengt	Back cover:			•	_	•		•	8
	de la car	Account Code	007	Bind	-		_	1	•	
		Account Name	International Resc			Copies	_	Price	7.70	
		Account Description	Help Required	Dat	e required	23/06/2018	<u></u>	Calculat	te Price	
_										
fth	e order is being ap	ejected please enter one oproved please enter the Approval Code c] Cost	following information:							
Rea	son for Approval o	r Rejection		Approver	5					
				Select a	Level 2 appr	rover for this d	ocument	•		
~	Approve	Reject								
-										

## 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 <u>custom job tickets</u><sup>1477</sup>.

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 <u>defined</u><sup>D<sub>571</sup></sup> and then <u>added</u><sup>D<sub>579</sub></sup> 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 <u>check</u><sup>D<sub>575</sup></sup> or <u>drop down</u><sup>D<sub>576</sup></sup> fields are added, if required.</sup></sub></sup></sub></sup></sub>

## 1 Note:

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

Document Type Product Optio	<b>ns</b> Basket Address Shipping	Account Confirm	
Document Pages: 6 Pages with Monochrom	colour: 556		
Simple Printing Single or double sided printing with no finishing options.	Body Media Printed Sides Printer Type	A4 White 80gsm Double Sided Black and White	• • •
	Additional Fields Text Field Numeric Field Tick Box Drop Down Choice Lots of Notes		
Return to Library	ve Job Ticket	Quantity	Next 🕨

An example of a product with 5 different additional fields added.

Print Job Ticket

Order Number: 0005086

Owner: Anne Webb

Pages: 602

Quantity: 1 Status: Downloaded

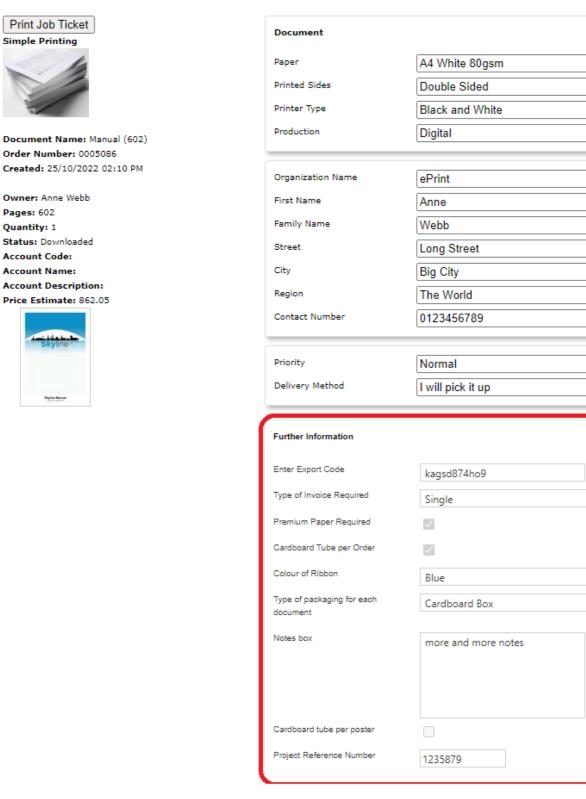
Account Code:

Account Name:

Account Description:

Price Estimate: 862.05

Simple Printing



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 -  $\underline{\text{Textbox}}^{D_{572}}$ , <u>Multiline Textbox</u>  $\underline{D}^{573}$ , <u>Numeric Field</u>  $\underline{D}^{574}$ , <u>Checkbox</u>  $\underline{D}^{575}$ , <u>Dropdown List</u>  $\underline{D}^{576}$  and <u>Date Picker</u>  $\underline{D}^{578}$ . 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  $\underline{assign}^{D_{579}}$  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.

o edit an existing Additional Field, click or ame below 1 Poster	n the field	TextBox	
1 Poster		Multiline TextBox	
		Numeric Field	
ardboard Tube		Numeric Field	
heckbox if not urgent		CheckBox	
heckbox if VERY urgent			Setting up Additional Fields
commercial Items only		🚆 DropDown List	You can get help with setting up the Addtional Field in the online user manual
ommercial Sample		100	Online Manual
onfidential Document		Date Picker	
ost Code (Office Use only)			
ustomer Name			
ate of Publication			
epartment			
ocuments			
nter Export Code			
lower			

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**.

New TextBox					
Field Name	Field Name Required				
Empty Text	Text if the field is empty				
Default Text					
□ Make this field mand	latory				
Mandatory Message	Mandatory message to users				
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.

To edit an existing Additional Field, click on the field   name below   Cost Code (Office Use only)   Customer Name   Customer Name   Customer Reference Number   Date of Publication   Department   Documents   Enter Export Code   Enter Further Information   Flower   Further Information   Gift   Name of Customer   Name Changed   Name of Customer   Numeric Field   CheckBox   Image DropDown List   Documents   Enter Further Information   Flower   Further Information   Gift   Name of Customer   Name of Customer   Name of Customer   Name of Customer   Numeric Field   CheckBox   Image Department   Documents   Enter Further Information   Gift   Name of Customer   New Employees Name   numbers	All Additional Fields 🔹	TextBox	TextBox	
Cost Code (Office Use only) Customer Name Customer Reference Number Date of Publication Department Documents Enter Export Code Enter Further Information Flower Further Information Gift Name Changed Name Changed Name Changed Name Source Name Source Name Changed Name Source Name Source		Multiline TextBox		Name of Customer
Customer Reference Number Date of Publication Department Department Documents Enter Export Code Enter Further Information Flower Further Information Gift Name Changed Name Ch		Numeric Field	Empty Text	
Date of Publication   Department   Documents   Enter Export Code   Enter Further Information   Flower   Further Information   Gift   Name Changed   Name Changed   Name Changed   Name of Customer   numbers	Customer Name		Default Text	
Department Department Decuments Enter Export Code Enter Further Information Flower Further Information Gift Name Changed N		CheckBox	☐ Make this field man	datory
Documents Enter Export Code Enter Further Information Flower Further Information Gift Name Changed Name Changed Name Changed Name Shame Name Changed Name Chang		🚆 DropDown List	Mandatory Message	Message to users if field is empty
Enter Export Code Enter Further Information Flower Further Information Gift Name Changed Name of Customer New Employees Name numbers				Pressage to users q neta a empty
Enter Further Information Flower Further Information Gift Name Changed Name of Customer New Employees Name numbers	Enter Export Code	Date Picker		
Further Information Gift Name Changed Name of Customer New Employees Name numbers			Save Delete	
Gift Name Changed Name of Customer New Employees Name numbers	Flower			
Name Changed Name of Customer New Employees Name numbers	Further Information			
Name Changed Name of Customer New Employees Name numbers Setting up Additional Fields	Gift			
New Employees Name numbers Setting up Additional Fields	Name Changed		Assigned to product:	No Assigned Product
numbers Setting up Additional Fields	Name of Customer			
numbers	New Employees Name			
	numbers _		Setting up Addition	onal Fields
	· · · · · · · · · · · · · · · · · · ·		You can get help with s	etting up the Addtional Field in the online (

#### **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**.

New Multiline TextBox					
Field Name	Field Name Required				
Empty Text	Text if the field is empty				
Default Text					
🗌 Make this field manda	tory				
Mandatory Message	Mandatory message to users				
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.

All Additional Fields	TextBox	Multiline TextBox		
To edit an existing Additional Field, click on the field name below	Multiline TextBox	Field Name Enter Further Information		
Cost Code (Office Use only)	Numeric Field	Empty Text Text if the field is empty		
Customer Name		Default Text		
Customer Reference Number	CheckBox			
Date of Publication		Make this field mandatory		
Department	DropDown List	Mandatory Message Message to users if field is empty		
Documents	100			
Enter Export Code	Date Picker			
Enter Further Information		Save Delete		
Flower				
Further Information				
Gift				
Name Changed		Assigned to product: No Assigned Product		
Name of Customer				
New Employees Name				
numbers		Setting up Additional Fields		
· · · · · ·		You can get help with setting up the Addtional Field in the online user man		
		Online Manual		

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#### **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.

New Numeric Field					
Field Name	Field Name Required				
Minimum Value					
Maximum Value					
Make this field mand	atory				
Mandatory Message	Mandatory message to users				
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.

All Additional Fields	TextBox	Numeric Field
To edit an existing Additional Field, click on the field name below	Multiline TextBox	Field Name Customer Reference Number
Cost Code (Office Use only)	Numeric Field	Minimum Value
Customer Name		Maximum Value
Customer Reference Number	CheckBox	Make this field mandatory
Date of Publication	🚆 DropDown List	· · · ·
Department Documents		Mandatory Message Message to users if field is empty
Enter Export Code	🛗 Date Picker	
Enter Further Information		Save Delete
Flower		
Further Information		
Gift		
Name Changed		Assigned to product: No Assigned Product
Name of Customer		
New Employees Name		Setting up Additional Fields
numbers 🗸		
		You can get help with setting up the Addtional Field in the online us
		Online Manual

### 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.

New CheckBox					
Field Name	Field Name Required				
Checked by default					
Make this field mandatory					
Mandatory Message	Mandatory message to users				
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.

CheckBox						
Field Name	Urgent Order					
Checked by default						
🗌 Make this field mand	atory					
Mandatory Message	Message to users if field	l is empty				
Save Delete						
Pricing can be added t	Pricing can be added to an order when the CheckBox is ticked					
Price per page	Price per document	Price per 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.

New DropDown	List	
Field Name	Field Name Required	
Make this field man	datory	
Mandatory Message	Mandatory message to users	
DropDown list		
DropDown Options		
		_
New option name	+ 🛍 🖹	
Start with blank ent	ry	
Default option Se	lect option to Set as Default	
s	Clear Default	
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 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.

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.

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#### 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.

New Date Picker	
Field Name	Field Name Required
Allow Dates in the Pas	t
Allow Weekends	
Minimum Lead Time	Days
Make this field manda	tory
Mandatory Message	Mandatory message to users
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.

Additional Fields	TextBox	Date Picker
edit an existing Additional Field, click on the field me below	Multiline TextBox	Field Name Date Required
1 Poster	Numeric Field	Allow Dates in the Past
ardboard Tube	Numeric Field	
heckbox if not urgent	CheckBox	Allow Weekends
heckbox if VERY urgent		Minimum Lead Time Days
ommercial Items only	🚆 DropDown List	Make this field mandatory
ommercial Sample		· · · · ·
onfidential Document	Date Picker	Mandatory Message Message to users if date is not sele
ost Code (Office Use only)		
ustomer Name		Save Delete
ustomer Reference Number		
Date of Publication		
Date Required		
Department		Assigned to product: No Assigned Product
Documents		
inter Export Code		
inter Further Information		Setting up Additional Fields
		You can get help with setting up the Addtional Field in the onlin
		Online Manual

## **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.

Document Type Product Option	s Basket Address Shipping Acc	ount Confirm
Document n Pages: 602 Pages with co Monochrome	olour: 556	
Byfer Bana		
	Body	
	Media	A3 White 80gsm 👻
	Printer Type	Black and White 🔻
A4 Booklet	Printed Sides	Double Sided 👻
Create a booklet from documents printed onto A3 and folded to create an A4 booklet	<b>Binding</b> Binding	Booklet
	Front and Back Cover	
	Media	<b>•</b>
	Printer Type	<b></b>
	Printed Sides	None
(	Additional Fields	
	Project Name	
	Project Code	
	Do you require a proof print?	
Return to Library	e Job Ticket	Quantity Next

#### Skyline Manual

#### **To Add Additional Fields:**

700

- 1. Log in with Administrator rights and go to Admin.
- 2. In the Products section click Assign Additional Fields
  - A

٦

Assign Additional 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.

oducts	Selected Additional Fields		Available Additional Fields
A4 Booklet (3)	Project Name		Project Stage
Collated Sets	Project Code		Additional Information
Comb Bound	Do you require a proof print?		
Deploy Test			
Portrait Staple			
Simple Printing			
		<ul> <li></li> &lt;</ul>	
		*	
		_	

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 d		

#### To create a catalogue:

1. Log in as an Administrator and click **Preferences**.

₩ <u>View Basket (0)</u>	Preferences	<u>Downloads</u>	<u>Edit</u>	<u>Admin</u>	Management	Logout
		10 million (1997)				

#### 2. Select Libraries.

Libraries	1		
		PROFILE	
		uraries	

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	a	
My Personal Libraries	•	
Library Name		Default
My Library		<b>X</b>
Past Exam Papers	Share Library	<b>X</b>
Shared Library Name     Manuals     Shared libraries belonging to other users	Manage Catalogue Permissions	×
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'.

Past Exam Papers Give other users access	to your Shar	ed Library.	Back
Order by Date Submitted		Order by Document Name	
Ousers  Roles Search Add Selected Roles			
Administrator	_		Give users full access
Approver	<b></b>	Assigned Roles	Assigned Users
Editor		-	-
Host		No Roles Assigned	No Users Assigned
Manager			
Staff			
User			
	-		
L			

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'.

Home Upload Paper Originals Libra	ies Orders Products FAQS
My Library	Shared libraries & Catalogues
Select All My Library	Search 🛛 📿 😂 Manuals
Created: 07/12/2020 Pages: 602 Size: 20.39 MB Owner: Charles Taylor	Order 🔐 Download 🔊

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 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 *P* associated with the document.

Past Exam Papers	-	ŵ	×	• 🗎	- [	2 🍸		0
Select All	Past Exam Papers					Search		<b>Q</b>
C. Skyline	Created: 12/01/2021 Pages: 80 Size: 3.28 MB Owner: Anne Webb						Order Download	
Regime Print Research								
	A4 Booklet						Order	

- 3. Amend the document name and add a description of the document. When finished click Save.
  - >> New Document Name
    Skyline CostManager
    Description
    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
    4
    Save Cancel 500

4. The updated details are shown in the catalogue.



- 4. The job ticket for the document needs to be defined.
  - 1. Click is 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.

hals Libraries	Orders Prod	lucts FAQ			
	Vitterer				
ument Type Product C	÷	ess Shipping	Account Confirm	n	
ument	Product	Quantity	Price	Pages	Edit
			ument Type Product Options Basket Address Shipping /	ument Type Product Options Basket Address Shipping Account Confirm	ument Type Product Options Basket Address Shipping Account Confirm

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.

My Library	• 🛋 🔛 •	🕒 • 🔯 👮	* 📰 🔹 😮
Select All	Past Exam Papers	Search	
Report Participants	Skyline CostManager Skyline CostManager has been designed to make the pricing process more flexible. The price of an order can be calculated based on the number of p type, number of sides that are printed and whether the printing is in colou Each document ordered can have a separate cost added to cover binding, Finally a cost for the whole order can be applied to cover delivery & priorit Created: 12/01/2021 Pages: 80 Size: 3.28 MB Owner: Anne Webb	ages, the media ur or black and white. stapling, folding etc.	Order 💮 Download 🔁
Q	A4 Booklet		Order 📾

7. Click i 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.

				D
Skyline CostManager			Pages:	8
Collate	d Sets			
Multiple	collated sets.			
Skyline				
Region Problem Research				
		Quantity	Add To Baske	t
				_

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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 <u>Skyline Form</u>  $1^{664}$  to all users, specific users or groups of users.
- 2. A <u>Skyline Subscription</u><sup>D<sup>252</sup></sup> Service has been created. Details of how to update the subscription are included.
- 3. You can now <u>create groups of users</u><sup>137</sup> which can then be used when assigning forms. Users can also belong to more than one group.
- 4. Page errors<sup>1</sup><sup>301</sup> are recorded and Administrators can view the details.
- 5. The Role a library is shared to is now shown on the Libraries page  $\square^{399}$ .
- 6. When a quote is accepted the same order ID is used as when the quote  $D^{445}$  was requested.
- 7. A new field has been added to the <u>Job Ticket</u> <sup>1</sup>/<sub>431</sub> called Original Price. This new field is also available in the <u>Managemet Reports</u><sup>1</sup>/<sub>394</sub>.
- 8. An <u>Accessibility Theme  $D^{227}$  can be applied if one is available.</u>
- 9. A <u>Search field</u><sup>D</sup><sup>™</sup> 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 <u>product categories</u><sup>1</sup><sup>553</sup> on different portals without needing to re-name the product.
- 2. Additional fields are now shown during the approval process<sup>1377</sup> and can be amended by the approver.
- 3. 3 types of Colour Analysis<sup>1</sup><sup>159</sup> have been added. You are also able to amend the colour thresholds.
- 4. The Forgotten Password<sup>1</sup><sup>308</sup> process has been made simpler.
- 5. Forms<sup>1</sup><sup>669</sup> 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<sup>1</sup><sup>501</sup>.
- 7. The Log In message is now configurable when you are using LDAP Authentication <sup>185</sup>.
- 8. The <u>Additional fields</u><sup>1</sup><sup>660</sup> 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<sup>D<sup>731</sup></sup> and <u>Default<sup>D</sup><sup>728</sup></u> configuration option 'Password Maximum Number of Characters' has been removed.

## Version 7.5.0

708

Updates in version 7.5.0 released September 2023 include:

- 1. Several new field types have been added to <u>Skyline Forms</u><sup>1</sup> including the Date Picker.
- 2. A Date Picker field has been added to the <u>Additional Field Types  $D^{578}$  available.</u>
- 3. The option to add a Lead Time to orders when using the Smart Calendar<sup>114</sup>
- 4. A new portal configuration <u>upload.showorderstab</u><sup>2<sup>21</sup></sup> 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  $\Box^{649}$ .

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<sup>D⁵₄⁵</sup>

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 <u>Additional fields</u><sup>D</sup><sup>see</sup> 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 7.2.0

Updates in version 7.2.0 released October 2022 include:

- 1. Azure login<sup> $D_{304}$ </sup> is now available.
- 2. When you <u>edit</u><sup>D</sup><sup>353</sup> or <u>merge</u><sup>D</sup><sup>353</sup> 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 <u>Smart Calendar</u><sup>114</sup> 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 <u>logging in</u><sup>140</sup>. When you are in PrintStation you can change using the Connection<sup>1491</sup> option on the Setup menu.
- 5. Administrators are able to change the wording of the Document Name label that users see when <u>submitting paper originals</u><sup>D 98</sup>. 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 <u>upload documents<sup>196</sup></u> to a portal or not. You can also change the message displayed when a <u>PDF is</u> <u>being converted<sup>197</sup></u>.
- 7. A new licensed feature has been added called <u>Additional fields</u><sup>D</sup><sup>∞</sup>. 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<sup>D<sup>215</sup></sup>.

## Version 7.1.1

Updates in version 7.1.1 released February 2022 include:

- 1. Colour analysis<sup>1</sup><sup>341</sup> of documents is now done when the documents are uploaded by the PDF converter.
- 2. A portal specific<sup>D<sup>731</sup></sup> 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<sup>157</sup> to be accepted before a user can login.
- 4. The <u>Stripe payment</u><sup>D<sup>207</sup></sup> facility has been updated to be able to use 3D secure 2 for customer authentication.
- 5. A message can be added  $^{160}$  to the login and home pages for specific portals or all portals.

## Version 7.1.0

710

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 <u>Single Hole Punch</u><sup>D ₅41</sup> was added to the ProductManager.
- 4. <u>Live Orders</u><sup>D</sup><sup>408</sup> 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<sup>D</sup><sup>207</sup>.
- 6. There are four new configurations options available for use when using <u>Skyline Publisher</u><sup> $D_{241}$ </sup>:-
  - Product Editor: Full screen height;
  - Product Editor: Use full screen;
  - Product Editor: Back button return URL;
  - Products: Hide the products tab from users<sup>D87</sup>.
- 7. An error message is displayed if a PDF merge<sup>D</sup><sup>338</sup> 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. <u>Product categories</u><sup>1 so</sup> 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 <u>output options</u><sup>D</sup><sup>465</sup> as shown below. You also have the ability to group folders<sup>D</sup><sup>460</sup>.
  - 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<sup>D</sup><sup>111</sup> 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<sup>1</sup> 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 <u>status email</u><sup>143</sup> 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 <u>Staff Notes area</u><sup>D47</sup> is automatically updated with the operators name. This is in addition to the date and time stamp which is saved.
- Enhancements to the <u>Quotation process</u><sup>D<sub>677</sub></sup> which can now be used by organisations using third party payment providers e.g. Stripe. The work flow has also been amended so that <u>details of the quotation</u><sup>D<sub>445</sup></sup> are shown in the staff notes area and in the history tab within PrintStation.</sup></sub>
- The PDF Converter Services are checked and an email is sent to all Administrators if there are any services that are not running. The <u>Upload Page</u><sup>D92</sup> will allow PDF's to be uploaded but no other documents until the service is restarted.

## Version 7.0.7

712

The following features have been added or updated in version 7.0.7. released October 2020.

- A <u>simple quotations process</u><sup>D 678</sup> has been added. An administrator will need to <u>configure the system</u><sup>D211</sup> before <u>quotations can be requested</u><sup>D 300</sup> by a user. The <u>quotation is sent out</u><sup>D 46</sup> by the print room using PrintStation.
- If you use Global products you can now use the Approval<sup>1</sup><sup>12</sup> 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 <u>edit a document</u><sup>1</sup><sup>355</sup> that has been uploaded into your library and create a new document. You can also <u>merge documents</u><sup>1555</sup> together using the Edit function.
- When using Global Products the <u>administrator</u><sup>139</sup> 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 <u>Custom Document options can be priced up</u><sup>Des</sup> and banding can be applied to all custom document options.
- Localised date portal time zone<sup>1</sup><sup>232</sup>.
- When you print from Acrobat in PrintStation you can select to display the job number<sup>1</sup> at the front of the document name or at the end.
- Status emails<sup>1</sup><sup>512</sup> can be send to multiple people using the CC option.
- There is a change to the way you can reset the PrintStation layout<sup>143</sup>.

## Version 7.0.4

The following features have been added or updated in version 7.0.4. released March 2020.

- The feature <u>Smart Calendar</u><sup>114</sup> has been introduced to allow Print Rooms to set printing levels.
- The layout of the Orders web page<sup>D339</sup> has been simplified.
- In PrintStation there is an option to show <u>error messages</u><sup>1497</sup> 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 <u>sorted</u><sup>1</sup><sup>32</sup> by User Name, Email, Last Login Date and by the new field Orders. There is also a facility to export the details<sup>1</sup><sup>27</sup>.
- Skyline Publisher<sup>D</sup><sup>241</sup> 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 <u>Account Name field</u><sup>12</sup> as another field to input a code.
- <u>Account Code masking</u><sup>Dav</sup> can now be applied when using any <u>Checkout Mode</u><sup>D117</sup>. Earlier releases did not support account masks when you were using the Checkout Mode 'Combine Address Delivery and Accounts'.

## Version 7.0.2

714

The following features have been added or updated in version 7.0.2. released November 2019.

- Website landing pages<sup>D45</sup> can be made portal specific.
- <u>Skyline Publisher</u><sup>D<sup>242</sup></sup> can be installed on a proxy server. You can then associate your Publisher server with Skyline.
- Documents in shared libraries<sup>1364</sup> can be listed alphabetically or in date uploaded order.
- More fields are available to be included in customised job tickets<sup>1</sup><sup>477</sup> including Approver details
- Approver details can now be included in Management reports<sup>1365</sup>

## Version 7.0.1

There were several features that have been added or updated in version 7.0.1. released October 2019.

- <u>Make Payments using Stripe</u><sup>D</sup><sup>332</sup> 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<sup>D<sup>334</sup></sup> 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.
- <u>Summary Email for orders placed</u>.<sup>D</sup>⁵⁵</sup> 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.

- <u>Deleting Users</u><sup>D36</sup> 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.
- <u>PrintStation Detail Pane</u><sup>1427</sup> 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 <u>search</u><sup>1</sup><sup>348</sup> facility on the Libraries page allows users to order documents directly from the search results.
- Colour Analysis<sup>D 341</sup>

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 6.9.8

There were several features that have been added or updated in version 6.9.8. released June 2018.

#### Approval<sup>D 372</sup>

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<sup>D 328</sup>

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**<sup>1553</sup>

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 <u>Multiple Documents</u><sup>1] 323</sup> are ordered at the same time a thumbnail of each document is shown during the ordering process.
- New way to Search on Live Orders<sup>1</sup><sup>366</sup>.
- <u>Unused documents</u><sup>D</sup><sup>494</sup> can be deleted manually or automatically which will prevent PrintStation taking a long time to update the Orders Grid.
- The new configuration <u>Authentication Login Cookie Expiry (hours)</u><sup>155</sup> 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<sup>1</sup><sup>383</sup> report lists all the documents that are waiting to be approved.
- 2. A warning threshold<sup>D142</sup> can be set against the time that orders are waiting for approval.
- 3. A <u>second level of Approval</u><sup> $D_{141}$ </sup> can be used before an order is sent to the PrintStation.
- 4. You can now make it compulsory that <u>notes</u><sup>1/48</sup> are added when an order is approved or rejected.
- 5. The message<sup>D149</sup> Approvers see when reviewing an order can be amended to give specific instructions.

#### Custom document options have been updated:

1. Custom document options  $D^{541}$  can be renamed in ProductManager.

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- 2. Live orders<sup>1397</sup> show the custom document options in the details tab. Notes are now in a separate tab.
- 3. Reports<sup>1</sup><sup>3</sup> 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 <u>document for approval</u><sup>1</sup><sup>377</sup>.Notes are now in a separate tab.
- 5. Custom document options are shown in the original job ticket<sup>1471</sup>.

#### Various other enhancements:

1. When you preview a document<sup>1</sup><sup>349</sup> the number of pages being displayed is shown.



- 2. The default configuration option Library Cache document thumbnails<sup>1300</sup> has been added for documents stored on a remote drive.
- 3. <u>Product images</u><sup>D</sup><sup>so</sup> are now specific to each portal. They can easily added or removed in ProductManager.
- 4. You can add a website landing page  $D^{45}$  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<sup>Dee</sup> was added.
- 2. TemplateManager has been discontinued.
- 3. The Management Reports<sup>D</sup><sup>366</sup> have been updated & re-designed.
- 4. <u>Shared libraries</u> <sup>1</sup>/<sub>364</sub> 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<sup>1315</sup> directly into the user's library.
- 6. Some minor bug fixes
- 7. When re-ordering  $D^{325}$  you are able to edit the original job ticket.

## Version 6.9.5

There were several features that have been added or updated in version 6.9.5. released June 2017.

- Self Registration can be configured so that approval is required before a Skyline account is active<sup>D48</sup>
   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.
- Administration of shared libraries<sup>D</sup><sup>30</sup>
   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.
- Manage portal users window updated<sup>D27</sup>
   You are able to apply a filter to show all users or just users that require approval.
- System Emails<sup>D</sup><sup>2∞</sup>
   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<sup>0</sup><sup>606</sup> 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 6.9.4

718

There were several features that have been added or updated in version 6.9.4. released June 2016.

1. Approval has been updated<sup>1372</sup>.

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<sup>1242</sup> and the website log in window has been updated.
- 3. Two extra fields available when you <u>manually enter account codes</u><sup>D</sup><sup>™</sup> 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.
- The look & feel of shared <u>libraries</u><sup>D №</sup> 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.

My Library 👻 🚨	ú	🖮 🖹 📩 👘	🕒 - 😂 🔒	•••	Shared Libraries
Course Notes			Search	Q	
File Name	Date	Size	Number of Pages	Owner	
] 🔍 🛃 🎰 Veosimite 🗸	Personal Libraries	0.10 MB	Libraries Shared to	a Group	Help Manuals
🛛 🔍 🔂 🧰 🛛 Word Document	28/11/2016 11:57:01	0.01 MB	Libraries Silared to	mine evans	S Instruction Manuals
Website	28/11/2016 11:57:00	5.95 MB	0	Mike Evans	Instruction Manuals
] 🔍 🔁 🎰 🛛 Website	28/11/2016 11:57:00	6.15 MB	98	Mike Evans	
UpgradeProcdure	28/11/2016 11:56:59	4.72 MB	0	Libraries Sha	red to Users
] 🔍 🔁 🎰 UpgradeProcdure	28/11/2016 11:56:59	4.86 MB	74	Mike Evans	
1 🔍 📆 🎰 🛛 This is an AS page	28/11/2016 11:56:58	0.08 MB	1	Mike Evana	

## Version 6.9.3

There were several features that have been added or updated in version 6.9.3. released June 2016.

- <u>Assigning Specific Accounts to Users</u><sup>D</sup><sup>171</sup> 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.
- <u>Approval</u><sup>D 372</sup> More information about the order is now available and comments can be added when an order is approved or rejected. The method used to <u>turn approval on</u><sup>D 137</sup> has also been updated.
- CostManager<sup>1</sup><sup>599</sup> and ProductManager<sup>1</sup><sup>599</sup> can now be run on a proxy server.
- <u>Live Orders</u><sup>D</sup><sup>397</sup> 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<sup>D<sup>252</sup></sup> has been simplified.

- Global products can be costed using CostManager.
- A Standard job ticket<sup>D475</sup> & a Delivery note<sup>D476</sup> 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 <u>Purge Utility</u><sup>1297</sup> 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.

skynner br	Converter	Setup							
etup Activi	ty Errors								
SkylineConv	verter Datab	base Location	I		Services	and Time	outs		
SQL Instanc	e				Docume	nt Conver	rter (DCStart)	Running	Restart
Username					Skyline P	DF Conve	erter Service	Service not found	Stop
Password	Г Г								
	•							fault 15 minutes) 15	
Connected				Connect	Docume	nt Conver	rter Timeout (d	default 7 minutes) 7	Save
PDF Conve	ters								
1	Name	Priority	Busy	Online	Status	*	PDF Con		pdate
+ FIREFL	Y	50		F F	Ready			Multiple PDF Converters configured to handle	
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## Version 6.9.1 SP2

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There was a bug fix applied to the PrintStation software in version 6.9.1. SP2. released June 2015.

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.

Orders	-	ø	×
Downloading 8 of 26			
Canada Alaska			
Canada <u>_</u> Alaska			
72 %			
	1		
Cancel			
		_	

- 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<sup>1</sup><sup>422</sup> has been re-designed to make it faster & more responsive.
  - Orders are grouped by status<sup>1/25</sup> and you can change the order that the status is displayed<sup>498</sup>.
  - You can view orders<sup>1/423</sup> by all users, a specific user or by a specific status.
  - You can now easily change the price details of a product using the simplified pricing tab.
  - The history of an order can be seen in the <u>overview</u><sup>1427</sup> tab in the Details pane when an order is selected.
  - The price of the order is included on the printed job ticket<sup>[]471</sup>,
  - You can now run a test print<sup>1</sup><sup>455</sup> of an order which will not appear on the management reports,
- The <u>reporting feature</u><sup>D385</sup> 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 <u>Excel</u><sup>D30</sup>.
- When you view the list of orders placed <sup>339</sup> you are now able to see the account code associated with your order.
- Pricing is now shown on the job ticket<sup>133</sup> which can be printed when the order is placed.
- You can amend the order that the <u>tabs</u><sup>D91</sup> in the Website are shown and see all the available tabs, even the ones which are not currently available for the users.
- The <u>upload facility</u><sup>135</sup> has been enhanced to allow easier uploading of multiple documents.

### Version 6.7.3 Sprint 3

722

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 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 6.7.1

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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 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<sup>D752</sup>.
- <u>A list of language country codes</u><sup>D755</sup>.
- A list of the portal configurations options<sup>D</sup><sup>731</sup>.
- List of the default configuration options<sup>D728</sup>.
- Details of the supported file formats<sup>D<sup>741</sup></sup>.
- An overview of the System Statuses used by Skyline and how they can be changed to suit your organisation.<sup>1677</sup>

### **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.

- <u>Authentication Login Cookie Expiry (hours)</u><sup>155</sup> Sets the amount of time that the login details are saved the login cookie.
- <u>Authentication Remember Me Checked</u><sup>D56</sup> Enables or disables the remember me check box on the log in screen.
- <u>Authentication Remember Me Visible</u><sup>D54</sup> Toggles the visibility of the remember me check box on the log in screen.
- <u>Authentication Require Email</u><sup>153</sup> Sets whether an email address is required to register as a new user or not.
- <u>Checkout Save Delivery Address</u><sup>D</sup><sup>113</sup> Toggles whether the checkout delivery address check box is visible.
- <u>Checkout Mode</u><sup>D177</sup> 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.
- <u>Document Preview Mandatory</u><sup>D</sup><sup>™</sup> Sets whether users have to preview the PDF of their job before they place an order.
- Download Link Visible to Users<sup>1</sup><sup>62</sup> Sets whether the skyline driver download is displayed or not.
- Forgotten Password Show Link<sup>162</sup> Toggles whether users can see the "I forgot my password" link when they log in.
- Global Products<sup>1</sup><sup>55</sup> If True Global options are available, if false portal specific options are used.
- <u>Global Errors Show Friendly Error Messages</u><sup>D76</sup> Toggles debug display mode. True = show friendly error, False = show full error on screen.
- Help link for Library page<sup>D</sup><sup>111</sup> 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 1<sup>102</sup> Toggles whether custom libraries are enabled or not.
- <u>Library Users Can Download PDF</u><sup>109</sup> Toggles whether users are able to download their documents as PDF.
- <u>Library Cache Document Thumbnails</u><sup>D</sup><sup>∞</sup> If true the document thumbnails are copied to the local wwwroot\ThumbnailCache directory. If false all thumbnails are deleted.
- <u>Library Click Thumbnail</u><sup>1</sup><sup>107</sup> Toggles whether users preview or order a document when they click on a thumbnail.
- Library Enable Colour Analysis of uploaded documents<sup>1</sup><sup>341</sup> Turn on/off the Colour Analysis feature.
- Library Colour Analysis Model<sup>1341</sup> Select the colour analysis model to be used.
- Library Default View<sup>1</sup><sup>101</sup> Sets whether library items are shown in list, details or thumbnail view.

- <u>Library Number of Preview Pages</u><sup>107</sup> Select how many pages of the document can be previewed from a drop down list.
- <u>Library Process Black Threshold Percentage</u><sup>159</sup>. Select the percentage of colour to be treated as processed black when using Colour Analysis.
- <u>Login Host Message to users</u><sup>D60</sup> Used to configure a message that will show on the login window and home page of all portals.
- Login Host Message expiry date<sup>160</sup> Used to set an expiry date for the message to all users.
- Login LDAP login prompt<sup>185</sup> Enter a message that will show on users login window.
- Login Show Host Message<sup>160</sup> Used to make the message visible.
- Look And Feel Language<sup>D</sup><sup>100</sup> Sets default language.
- Look And Feel Tab Style<sup>189</sup> Sets the look of the tabs on the website.
- Look And Feel Use Menu Tabs<sup>D87</sup> Toggles menu tabs on and off.
- Managers Can Edit Live Job Details<sup>1</sup><sup>36</sup> If True Manager will be able to edit jobs in Live Orders.
- Managers Can View Live Job PDFs<sup>1</sup><sup>397</sup> If True Manager will be able to view a PDF in Live Orders.
- <u>New users Redirect to external website</u><sup>D45</sup> If users are redirected to a Website Landing page.
- New users Redirection website URL<sup>D45</sup> The Location of the Website Landing page.
- <u>Ordering One Document Only</u><sup>D<sup>215</sup></sup> restrict the number of documents that are ordered per order number to one document.
- Ordering Order Number Mask<sup>D214</sup> Sets the system order number mask.
- Ordering Show Price<sup>D</sup><sup>112</sup> Toggles whether the price is shown when the user places an order.
- Paper Originals Missing Information Error<sup>198</sup> Change the wording of the error message.
- Paper Originals Document Name Label<sup>[]</sup>98 Change the wording of the label.
- Password Reset Token Timeout (minutes)<sup>165</sup> Sets how long the password rest token lasts.
- Password Expiry Days<sup>D71</sup> Value specifies the number of days until a password has to be changed.
- Password Minimum Number of Characters<sup>167</sup> Value specifies the minimum length of a password.
- <u>Password Numbers Required</u><sup>68</sup> Value specifies the number of numbers that a password must contain.
- Password Regular Expression<sup>D72</sup> Formula specifies the password requirements.
- Password Special Characters Required<sup>D69</sup> Value specifies the number of special characters that a password must contain.
- Password Uppercase Characters Required<sup>170</sup> Value specifies the number of upper case letters that a password must contain.
- PrintStations all see each other Not Currently Supported.
- <u>PrintStation Automatically assign to portal</u><sup>233</sup> 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.

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- <u>PrintStation Show all portals by default</u><sup>233</sup> 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<sup>1241</sup>.
- Product Editor: Use full screen Specifies whether to display the Product Editor in full screen or not. Used with Skyline Publisher<sup>D241</sup>.
- 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<sup>1241</sup>.
- Products: Hide the products tab from users Hides the Products tab when logged in as a User. Used with Skyline Publisher<sup>1</sup><sup>241</sup>.
- 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.
- <u>Registration New Users Must Be Approved</u><sup>D33</sup> New users are set as inactive until they are approved.
- Registration Show Register new user link<sup>147</sup> 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.
- <u>Session Timeout</u><sup> $D_{20}$ </sup> Sets the session timeout in minutes.
- <u>Theme Show Accessibility Selector</u><sup>1227</sup> Turns on the Accessibility Selector if an Accessibility theme is available.
- Upload Allow Paper Originals<sup>D98</sup> Toggles whether paper originals can be uploaded or not.
- <u>Upload Check the Status of the PDF Converter services</u><sup>D92</sup> Toggles whether the PDF Converter Services are monitored.
- Upload Conversion Timeout Minutes Sets the document conversion timeout in minutes.
- Upload Directory<sup>1</sup><sup>231</sup> 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<sup>D95</sup> Toggles the Upload types link on and off.
- User Forms Show Tab<sup>1</sup><sup>664</sup> 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.

- <u>Authentication Login Cookie Expiry (hours)</u><sup>155</sup> Sets the amount of time that the login details are saved the login cookie.
- <u>Authentication Remember Me Checked</u><sup>56</sup> Enables or disables the remember me check box on the log in screen.
- <u>Authentication Remember Me Visible</u><sup>154</sup> Toggles the visibility of the remember me check box on the log in screen.
- <u>Authentication Require Email</u><sup>1</sup><sup>53</sup> Sets whether an email address is required to register as a new user or not.
- <u>Checkout Save Delivery Address</u><sup>113</sup> Toggles whether the checkout delivery address check box is visible.
- <u>Checkout Show Delivery Priority Page</u><sup>112</sup> Sets whether users see the delivery options page as part of the order process.
- <u>Checkout Mode</u><sup>D 117</sup> Enables the you to combine the Address, Delivery and Accounts pages into one page.
- <u>Document Preview Mandatory</u><sup>1</sup><sup>100</sup> Sets whether users have to preview the PDF of their job before they place an order.
- Download Link Visible to Users<sup>1</sup><sup>622</sup> Sets whether the skyline driver download is displayed or not.
- Forgotten Password Show Link<sup>162</sup> Toggles whether users can see the "I forgot my password" link when they log in.
- <u>Global Errors Show Friendly Error Messages</u><sup>176</sup> Toggles debug display mode. True = show friendly error, False = show full error on screen.
- Help link for Library page<sup>1</sup><sup>111</sup> Enables you to link to a web page, a PDF or an email.
- Library Allow Custom Libraries<sup>1</sup><sup>102</sup> Toggles whether custom libraries are enabled or not.
- Library Allow User Libraries<sup>110</sup> Toggles whether libraries are enabled or not.
- <u>Library Users Can Download PDF</u><sup>109</sup> Toggles whether users are able to download their documents as PDF.
- <u>Library Click Thumbnail</u><sup>D<sub>107</sub></sup> Toggles whether users preview or order a document when they click on a thumbnail.
- Library Enable Colour Analysis of uploaded documents<sup>1</sup><sup>341</sup> Turn on/off the Colour Analysis feature.
- <u>Library Colour Analysis Model</u><sup>341</sup> Select the colour analysis model to be used.
- Library Default View<sup>1</sup><sup>101</sup> Sets whether library items are shown in list, details or thumbnail view.
- <u>Library Number of Preview Pages</u><sup>1</sup><sup>107</sup> Select how many pages of the document can be previewed from a drop down list.
- <u>Library Process Black Threshold Percentage</u><sup>159</sup>. Select the percentage of colour to be treated as processed black when using Colour Analysis.
- Login Message to users<sup>160</sup> Enter a message that will show on users login window and home page.

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- Login LDAP login prompt<sup>185</sup> Enter a message that will show on users login window.
- Login Show Message on Login and Home pages<sup>160</sup> Turn the message to users on.
- Login Show Terms and Conditions Checkbox<sup>D57</sup> Turn the Terms and Conditions Checkbox on.
- Login Terms and Conditions Expiry<sup>157</sup> Set an expiry date for the Terms and Conditions cookie.
- Login Terms and Conditions Link Text<sup>157</sup> Enter the text for the link to the Terms.aspx page.
- Look And Feel Tab Style<sup>D89</sup> Sets the look of the tabs on the website.
- Look And Feel Use Menu Tabs<sup>D87</sup> Toggles menu tabs on and off.
- Managers Can Edit Live Job Details<sup>12</sup> If true Manager will be able to edit jobs in Live Orders.
- Managers Can View Live Job PDFs<sup>1</sup><sup>307</sup> If true Manager will be able to view a PDF in Live Orders.
- New users Redirect to external website<sup>D45</sup> If users are redirected to a Website Landing page.
- <u>New users Redirection website URL<sup>D45</sup> The Location of the Website Landing page.</u>
- Ordering One Document Only<sup>1215</sup> If true Users will only be able to order one document at a time.
- Ordering Order Number Mask<sup>D214</sup> Sets the system order number mask.
- Ordering Show Price<sup>D</sup><sup>162</sup> Toggles whether the price is shown when the user places an order.
- Paper Originals Missing Information Error<sup>D98</sup> Change the wording of the error message.
- Paper Originals Document Name Label<sup>D 98</sup> Change the wording of the label.
- Password Reset Token Timeout (minutes)<sup>165</sup> Sets how long the password rest token lasts.
- Password Expiry Days<sup>171</sup> Value specifies the number of days until a password has to be changed.
- Password Minimum Number of Characters<sup>1</sup>67</sup> Value specifies the minimum length of a password.
- <u>Password Numbers Required</u><sup>68</sup> Value specifies the number of numbers that a password must contain.
- Password Regular Expression<sup>D72</sup> Formula specifies the password requirements.
- <u>Password Special Characters Required</u><sup>D69</sup> Value specifies the number of special characters that a password must contain.
- Password Uppercase Characters Required<sup>170</sup> 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<sup>1241</sup>.
- Product Editor: Use full screen Specifies whether to display the Product Editor in full screen or not. Used with Skyline Publisher<sup>D241</sup>.
- 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 <u>Skyline Publisher</u><sup>1241</sup>.
- Products: Hide the products tab from users Hides the Products tab when logged in as a User. Used with <u>Skyline Publisher</u><sup>1241</sup>.

- <u>Registration New Users Must Be Approved</u><sup>D33</sup> 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<sup>147</sup> Toggles the register new user link on the log in page.
- Security Watermarking Enabled Not currently supported.
- <u>Session Timeout</u><sup> $D_{20}$ </sup> Sets the session timeout in minutes.
- <u>Theme Show Accessibility Selector</u><sup>127</sup> Turns on the Accessibility Selector if an Accessibility theme is available.
- <u>Upload Allow Paper Originals</u><sup>198</sup> Toggles whether paper originals can be uploaded or not.
- Upload Allow users to upload documents<sup>D96</sup> 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.
- <u>Upload Custom PDF Conversion Message</u><sup>D97</sup> Enables you to change the message displayed when a PDF is being converted.
- Upload Show Orders Tab<sup>D21</sup> Allows you select if you want to show/hide the Orders tab.
- <u>Upload Show Paper Originals Tab</u><sup>198</sup> True/False Toggles paper Originals web page.
- Upload Show Supported Formats link<sup>D95</sup> Toggles the Upload Types link on or off.
- Upload Use Default Library Only Not currently supported.
- User Forms Show Tab<sup>D 664</sup> True/False Toggles paper User Forms web page.

#### **Standard Job Ticket Fields**

734

The <u>Standard Job Ticket</u><sup>D472</sup> contains information on the <u>product</u><sup>D737</sup> selected during the ordering process and information from the <u>delivery address</u><sup>D735</sup> and <u>delivery options</u><sup>D736</sup>. The Skyline website log in user name is shown as the Customer with the associated email address.

JOB TIC	KET							<b>Sky</b> line	3
Customer	Anne Web	b		ePrint Direct	t Ltd	Orde	r No	0005126	
Contact Name	Anne Web	ь	Pr	ice Estimate	99.78			Delivery Address	
Email	Annette.we	bber@eprint.net		Order Date	23 May 2016 16:38		(	Office 3 Gateway 1000	
Phone	+44(0) 143	8 726 732		Due Date	27 May 2016 00:00		A	rlington Business Park	
Account No	01888517 Teaching	1XXXXX	shi	ipping Method	TII pick it up		St	evenage, Hertfordshire	
Document:	Skyline	Manual				Priority	у	Not Urgent	
Pages per do No of copies Product Type		558 3 A4 Plastic Comb B	ound	1					
Body							-	kyline	
Printer Ty	pe	Black and White					2	<b>KAIID</b>	
Stock		A4 White 80gsm							
Printed Si	des	Double Sided							
Front Cover									
Printed Si		One Sided					Skyline	Administration Manual	
Printer Type Stock		Colour A4 White Card 160	asm						
Laminated	d (Y/N)	true							
Back Cover									
Printed Si Printer Ty		Not required							
Stock	pe	Ad Million Court 400							
Laminated	d (Y/N)	A4 White Card 160 true	gam						
Finishing Folding Hole Pun	ching								
Stapling	-								
Binding T	Type	Plastic comb							
NOTES Please make Regards, Anne	e sure that	the colour of the bind	ter it	s white. If th	iis is not available please contar	t me for	furthe	r information.	

Date printed - 23/05/2016 16:38:07

#### Delivery Address Form Fields Used:

Address Options	
Name Prefix	
First Name	
Family Name	
Phone Number	
Organization Name	
Street	
City	=
Region	
Custom Delivery Options1	
Custom Delivery Options2	
Custom Delivery Options3	
Custom Delivery Options4	
Custom Delivery Options5	-
Additional Fields	
Tick box	
Text box	
Multiline Textbox	

First Name	Contact Name
Phone Number	Phone
Street	Delivery Address
City	Delivery Address
Region	Delivery Address
Organization Name	Customer
Post Code	Postcode

These fields are completed according to the details that have been entered in the address fields. Details are either stored in the <u>Delivery Address Form</u><sup>D312</sup> or completed each time an order is placed. The Address form is created using <u>ProductManager</u><sup>Dset</sup> 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.

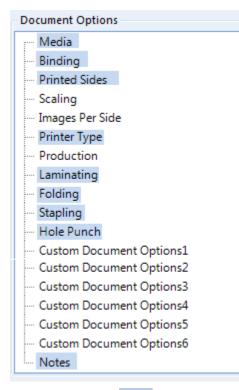
The following Address Options are used in the Standard Job Ticket in the following fields.

736

#### Delivery Options Form Fields Used:

Delivery Options Priority Date Required Calendar Delivery Method		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 <u>ProductManager</u> <sup>1</sup> <sup>ser</sup> 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
Additional Fields Tick box Text box Multiline Textbox		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 M	lethod

#### Product Option fields used:



\*

Stock
Binding
Printed Sides
Printer Type
Laminated (Y/N)
Folding
Stapling
Hole Punching
Notes

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:

### **Delivery Ticket Fields**

738

The Standard Job Ticket contains information on the <u>product</u>  $D^{TST}$  selected during the ordering process and information from the <u>delivery address</u>  $D^{TST}$  and <u>delivery options</u>  $D^{TST}$ .

elivery Address				
Print Direct Ltd Office 3 Gateway Arlington Busines Stevenage, Hertfo	s Park			
Date		Order No	0005126	
Shipping Date	27 May 2016 00:00	Shipping Method	I'll pick it up	
Item Code		Item De	scription	Total
4 Plastic Comb Jound	Skyline Manu	document = 55	8	3

#### Delivery Address Form Fields Used:

Address Options			
Name Prefix		*	
First Name			
- Family Name			
Phone Number			
Organization Name			
Street			
City		=	
Region			
Custom Delivery Opt	ions1		
Custom Delivery Options2			
Custom Delivery Options3			
- Custom Delivery Opt	ions4	-	
- Custom Delivery Opt	ions5	Ŧ	
Additional Fields			
Tick box			
Text box			
Multiline Textbox			
Organization Name	Customer		
Street Delivery Address			
City Delivery Address			
Region Delivery Address			

These fields are completed according to the details that have been entered in the address fields. Details are either stored in the <u>Delivery Address Form</u><sup>D312</sup> or completed each time an order is placed. The Address form is created using <u>ProductManager</u><sup>D301</sup> 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.

740

#### Delivery Options Form Fields Used:

Delivery Options Priority Date Required Calendar Delivery Method	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 <u>ProductManager</u> <sup>1567</sup> 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
Additional Fields Tick box Text box Multiline Textbox	The following Delivery Options are used in the Delivery Ticket in the following fields.
Date Required Calendar Shipp	ng Date

Delivery Method

nipping i

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 <u>helpdesk@eprint.net</u>.

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.

#### 1 Note:

In order to convert some file formats, additional software may need to be purchased and loaded on the Skyline server.

- Supported Applications<sup>D742</sup>
- Spreadsheet Formats<sup>D</sup><sup>743</sup>
- Presentation Formats
   <sup>1743</sup>
- <u>Graphic Formats</u><sup>174</sup>
- Vector Graphic Formats<sup>D</sup><sup>745</sup>
- <u>CAD Formats</u><sup>1745</sup>

#### Supported Applications

The following file formats are supported:

- Generic Formats Adobe PDF
- Microsoft Publisher formats

   (requires MS Publisher to be installed used as a parser)
- Lotus WordPro formats (requires Lotus WordPro to be installed – used as a parser)
- ASCII Text
- Microsoft RTF
- Microsoft Word for PC v3
- Microsoft Word for PC v5.5
- Microsoft Word for Macintosh v5
- Microsoft Word for Macintosh v98
- Microsoft Word for Windows v6.0
- Microsoft Word for Windows 97
- Microsoft Works v1.0
- Microsoft Works v3.0
- Microsoft Windows Write v1.0
- Microsoft Windows Write v3.0
- WordPerfect v6
- WordPerfect v8
- WordPerfect for Macintosh v2

- Encapsulated PostScript (EPS)
- Microsoft Visio formats (requires MS Visio to be installed – used as a parser)
- Word Processing Formats (requires MS Word to be installed – used as a parser)
- ANSI Text
- Microsoft Word for PC v2
- Microsoft Word for PC v4
- Microsoft Word for Macintosh v4
- Microsoft Word for Macintosh v6
- Microsoft Word for Windows v2.x
- Microsoft Word for Windows 95
- Microsoft Word for Windows 2000
- Microsoft Works v2.0
- Microsoft Works v4.0
- Microsoft Windows Write v2.0
- WordPerfect v5.x
- WordPerfect v7
- WordPerfect v9/2000
- 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**

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Requires Image Conversion pack – used as a parser. Supported graphic formats are:

• AVS - AVS X image file

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- BMP OS/2 Bitmap
- DIB MS Windows Device Independent Bitmap
- FAX Group 3 FAX encoding
- FPX FlashPix Format
- GIF87 CompuServe graphics interchange format 
   ver 87
- ICO OS/2 lcons
- JBIG Joint Bi-level Image experts Group file interchange format
- JPEG Joint Photographic Experts Group JFIF format
- MIFF Magick image file format
- MPC Magick Persistent Cache image file format •
- OTB On-the-air Bitmap
- PCD Kodak PhotoCD Base/16, Base/4 and Base only
- PCT Macintosh PICT
- PGM Portable GrayMap
- PNG Portable Network Graphics
- PPM Portable PixelMap
- P7 XVs visual schnauzer format
- RGBA Raw red, green, blue, and matte samples •
- SUN Raster SunMicrosystems
- TIFF Tagged Interchange File Format
- VID Visual Image Directory
- WMF Windows Meta File
- XPM X Windows system pixmap file (colour)

- BMP MS Windows Bitmap image file
- DCX ZSoft IBM PC multi-page Paintbrush file
- DPX Digital Moving Picture Exchange
- FITS Flexible Image Transport System
- GIF CompuServe graphics interchange format
  - ICO MS Windows Icons
- IPTC Newswire profile
- JP2 JPEG-2000 JP2 File Format Syntax
- JPG Joint Photographic Experts Group JFIF format
- MNG Multiple-image Network Graphics
- MTV MTV Raytracing image format
- PBM Portable Bitmap
- PCDS Kodak PhotoCD Base/16, Base/4 and Base only
- PCX PC PaintBrush
- PICT Apple Macintosh QuickDraw/PICT file
- PNM Portable Any Bitmap
- PSD Adobe Photoshop
- RAS Raster Sun Microsystems
- SGI Irix RGB image file
- TGA TrueVision Targa
- VICAR V.I.C.A.R. Image file format
- VIFF Khoros Visualization image file
- XBM X Windows system bitmap, black and white only
- 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
- DWG AutoCAD Drawing
- EMF Enhanced Metafile
- FH4 FreeHand 4
- FH7 FreeHand 7
- PDD Adobe Photoshop
- SVG SVG file format
- VDA Targa vda file format
- VST Targa vst file format
- CDX CoreIDRAW compressed
- CDT CorelDRAW template
- CMX Corel Presentation Exchange
- AI Adobe Illustrator
- WMF Windows Metafile
- CGM Computer Graphics Metafile
- SVGZ SVG Compressed file format
- DWG AutoCAD Drawing
- FH4 FreeHand 4
- FH7 FreeHand 7
- SHW Corel Presentations

### CGM - Computer Graphics Metafile

- DXF AutoCAD Interchange
- FLM Film strip file format
- FH5 FreeHand 5
- FH8 FreeHand 8
- PXR Pixar file format
- SVGZ SVG Compressed file format
- ICB Targa icb file format
- Vector Graphic Formats II (requires CorelDraw to be installed– used as a parser) CDR -CorelDRAW graphics
- PAT Pattern File
- CLK Corel R.A.V.E
- CPX Corel CMX compressed
- WPG Corel WordPerfect Graphic
- EMF Enhanced Windows Metafile
- SVG SVG file format
- PCT Macintosh PICT
- DXF AutoCAD Interchange
- FH5 FreeHand 5
- FH8 FreeHand 8

### **CAD** Formats

Requires Autodesk VoloView or AutoCAD to be installed – used as parsers.

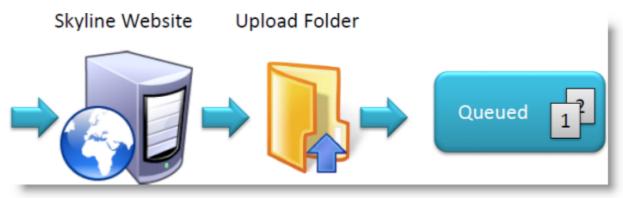
- DWF Drawing Web Format
- DXF Auto CAD DXF
- IPT Inventor Part Document
- IDW Inventor Drawing Document

- DWG Auto CAD Drawing
- RML RedlineXML
- IAM Inventor Assembly Document

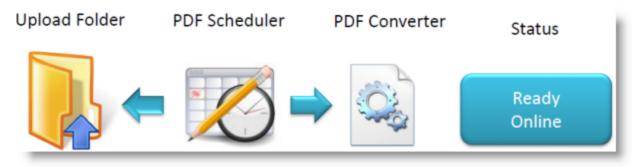
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### **Converting Documents to PDFs**

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.

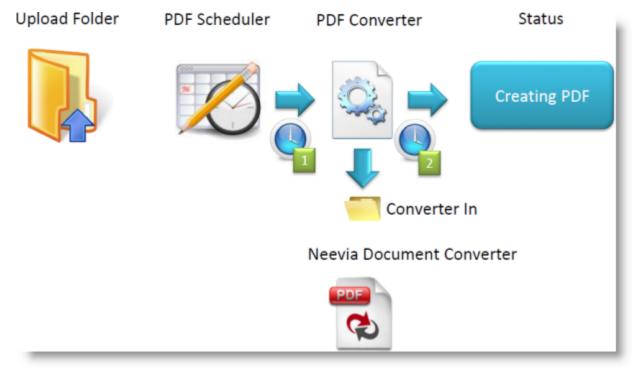


The PDF Scheduler monitors the upload folder for new documents. When an uploaded file is detected, the PDF Scheduler looks for a PDF Converter that is at the status Ready and Online.

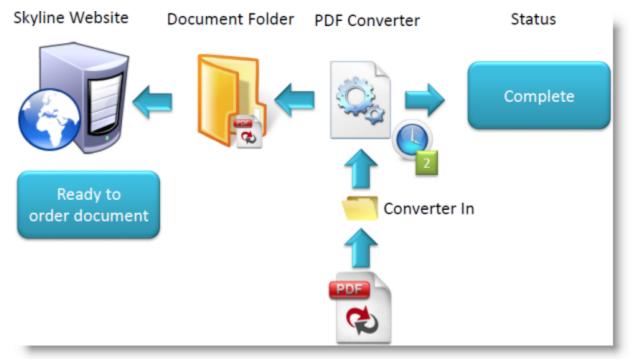


1 41

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].

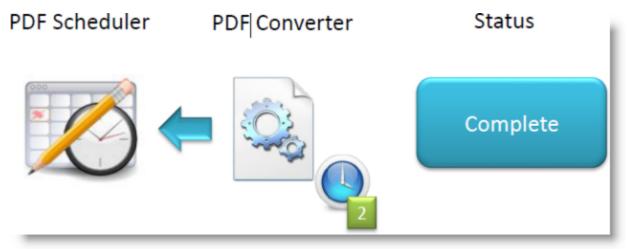


When the Neevia Document Converter has converted the file to PDF, the PDF converter moves it to Skyline Document folder and it appears in the user's Library, ready to order. The PDF Converter sets its status to Complete.

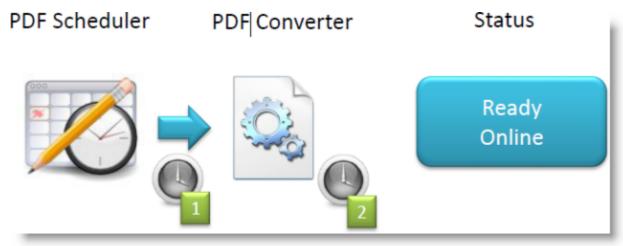


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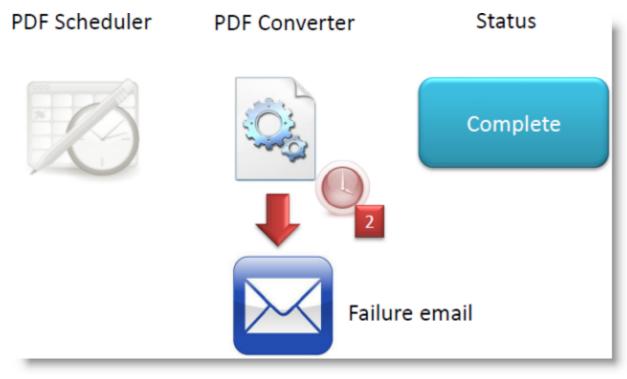
The PDF Converter then waits for the PDF Scheduler to change the status to ready.



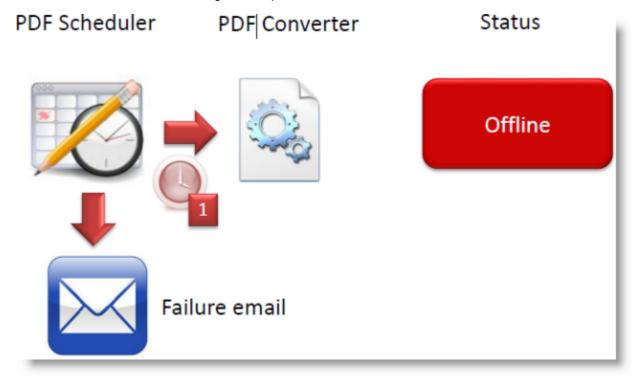
When the PDF Scheduler changes the status to Ready, the PDF Converter stops its timer and waits for another file.



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.

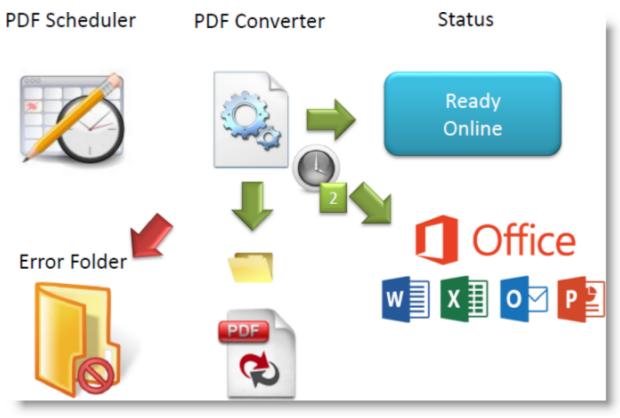


If the PDF Converter does not respond within 7 minutes, the PDF Scheduler will assume that it has crashed, send out a Failure Email to the configured recipients and mark the PDF Converter Offline.

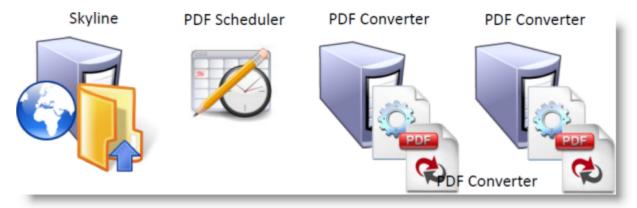


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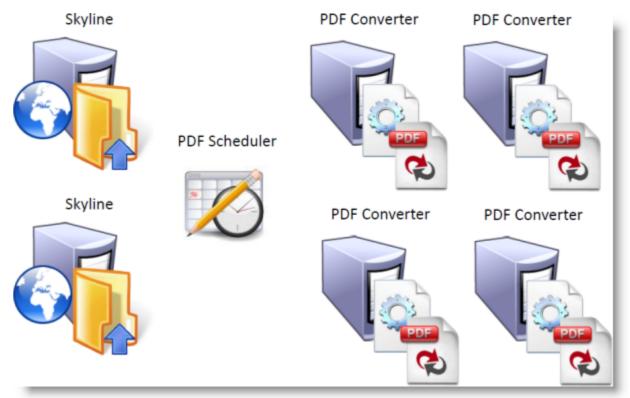
If the PDF Converter has not crashed but not responded in time it will reset itself. It restarts the Neevia Document Converter, clears the ConverterIn and Neevia temp folders, closes any hung copies of Word, Excel, PowerPoint or Publisher, sets the uploaded document status to Error, moves the uploaded 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 configured for the Skyl	contact your IT department to check that this has been ine server.	
required when you mal	e URL that the Skyline Website will be using, The URL is the website available to users. Please contact your IT nat this has been configured.	
URL is		
User Access Control - Turr	ned off during installation process.	
Internet Information Serv	ices (IIS) - Must be installed.	
.Net Framework 4 or 4.5 -	Must be installed.	
Microsoft Office - The insta Installation section of t	allation MUST be a CUSTOM installation as detailed in the Pre- he manual.	
Enhanced Security - Turne	ed off during the installation process.	
Skyline Installation CD - N from the website.	Make sure that this is available if you are not installing directly	
Internet Access - You may download.eprint.net/Ins	r need to download any Skyline updates from <u>http://</u> stallation/Skyline/	
Pin Code - Only required if	you need to install any Skyline updates.	
Skyline License Number	-	
Neevia PDF Converter Se	rial Number -	
	Neevia Document Converter needs to be tested with example led e.g. a Word, Excel, PowerPoint and Publisher files.	
Adobe Acrobat Reader - I later.	Required to check the PDF creation. This can be uninstalled	
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 require	ed programs.
Adobe Acrobat Reader - version 8 or greater should be installed of a full ve Acrobat 8 or greater.	ersion of Adobe
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	СА	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)

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DE-CH	German (Switzerland)	DE-AT	German (Austria)
DE-LU	German (Luxembourg)	DE-LI	German (Liechtenstein)
EL	Greek	HE	Hebrew
н	Hindi	HU	Hungarian
IS	Icelandic	ID	Indonesian
IT	Italian (Standard)	ІТ-СН	Italian (Switzerland)
JA	Japanese	ко	Korean
IV	Latvian	IT	Lithuanian
МК	Macedonian (FYROM)	MS	Malaysian
МТ	Maltese	NO	Norwegian
PL	Polish	PT-BR	Portuguese (Brazil)
РТ	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)	тн	Thai
TS	Tsonga	TN	Tswana

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TR	Turkish	UK	Ukrainian
UR	Urdu	VE	Venda
VI	Vietnamese	ХН	Xhosa
JI	Yiddish	ZU	Zulu

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## **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.

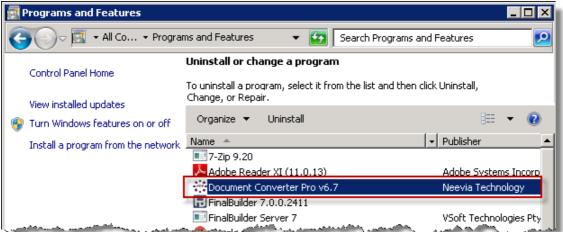
### 1. Preparing for the Upgrade

#### 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.

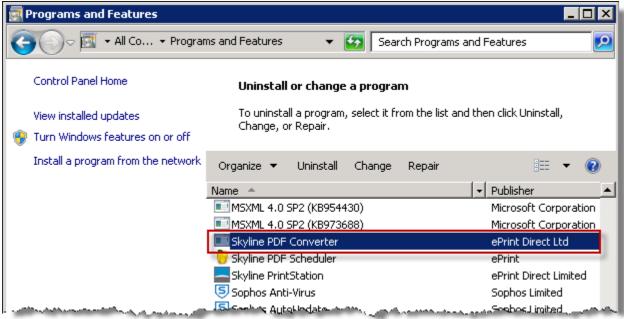


- 3. Check that Neevia has been completely removed using explorer.
  - 1. If the folders C:\Program Files (x86)\neevia.com or C:\Program Files (x86)\neeviaPDF.com are still listed you need to uninstall the image pack.

م - مسلوم می بادر این <sup>۲</sup> ۰۰۰ می در سام <sup>ی</sup> میروند از <sup>۲</sup> ۰۰۰ میلی میروند از <sup>۲</sup> ۰۰۰ میلی سارد مادر با در ا		and the second second	Section 2	• .
Uninstall or change a program				
To uninstall a program, select it from the list and t	hen click Uninstall, Change,	or Repair.		
Organize 🔻 Uninstall				
Name 🔺	- Publisher	👻 Install 👻 Size		V
O Google Chrome	Google Inc.	21/08/2013		4
Image Pack v6.4.1		10/09/2013		
🙀 JetBrains ReSharper 8.2	JetBrains Inc	24/10/2014	144 MB	8
Microsoft .NET Framework 4 Multi-Taraetina Pack	Microsoft Corporation	21/08/2013	83.4 MB	4

2. Manually remove any Neevia folders using explorer.

4. Uninstall the Skyline PDF converter.



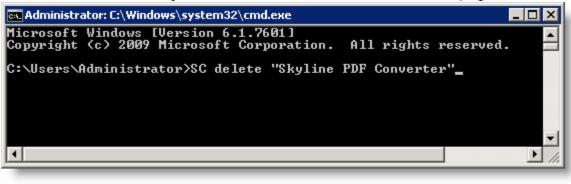
If the Skyline PDF Converter is not listed in the control panel > Programs and Features window you will need to delete it from the command line prompt.

a) Open the command line in administrator mode. Right mouse click **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:

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- 1. Browse to <a href="http://download.eprint.net/Installation/Skyline/">http://download.eprint.net/Installation/Skyline/</a> 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**.

🕞 dcpro.exe Pi	operties		
Security General	Details Previous Versions Compatibility Digital Signatures		
15	dcpro.exe		
Type of file:	Application (.exe)		
Description:	Neevia Document Converter Pro Setup		
Location:	C:\Temp		
Size:	21.2 MB (22,277,224 bytes)		
Size on disk:	21.2 MB (22,278,144 bytes)		
Created:	11 January 2016, 13:44:22		
Modified:	07 January 2016, 10:26:36		
Accessed:	11 January 2016, 13:44:22		
Attributes:	Read-only Hidden Advanced		
Security:	This file came from another computer and might be blocked to help protect this computer.		
	OK Cancel Apply		

- 3. Double click **B**dcpro.exe to start the installation.
  - a) The License Agreement window opens. Select **I accept the agreement** then click **Next** to continue.

ß	Setup - Neevia Document Converter Pro 🛛 💻 🗙
Lic	ense Agreement Please read the following important information before continuing.
	Please read the following License Agreement. You must accept the terms of this agreement before continuing with the installation.
	NEEVIA TECHNOLOGY
	ELECTRONIC END USER LICENSE AGREEMENT
	For One (1) Computer/Server
	This is an End User License Agreement. This is a contract. If you install this software, you must abide by the terms of this agreement. This license is applicable to all software ~
	● I accept the agreement
	○ I do not accept the agreement
	Next > Cancel

b) The Destination Location window opens. Click **Next** to continue.

Setup - Neevia Document Converter Pro 📃 🗖 🗙
Select Destination Location Where should Neevia Document Converter Pro be installed?
Setup will install Neevia Document Converter Pro into the following folder.
To continue, click Next. If you would like to select a different folder, click Browse.
C:\Program Files (x86)\neevia.com\docConverterPro Browse
At least 52.0 MB of free disk space is required.
< <u>B</u> ack <u>N</u> ext > Cancel

c) The Start Menu Folder window opens. Click **Next** to continue.

Setup - Neevia Document Converter Pro 📃 💻	x
Select Start Menu Folder Where should Setup place the program's shortcuts?	PDF
Setup will create the program's shortcuts in the following Start Menu folder.	
To continue, dick Next. If you would like to select a different folder, dick Browse.	
Neevia Document Converter Browse	
< <u>B</u> ack <u>N</u> ext > Canc	el

d) The lcons window opens. Click Next to continue.

ß	Setup - Neevia Document Converter Pro 🛛 🗕 🗖 🗙
	Select Additional Tasks Which additional tasks should be performed?
	Select the additional tasks you would like Setup to perform while installing Neevia Document Converter Pro, then click Next. Additional icons: ✔ Create a desktop icon
	< <u>B</u> ack <u>N</u> ext > Cancel

e) The summary window opens. Click Install to continue.

😥 Setup - Neevia Document Converter Pro 📒 🗖 🗙
Ready to Install Setup is now ready to begin installing Neevia Document Converter Pro on your computer.
Click Install to continue with the installation, or click Back if you want to review or change any settings.
Destination location: C:\Program Files (x86)\neevia.com\docConverterPro
Start Menu folder: Neevia Document Converter
Additional tasks: Additional icons: Create a desktop icon
✓
< <u>B</u> ack [Install] Cancel

f) The Product Registration window opens. Select **Enter registration info** and enter the registration details that ePrint supplied. Click **Next** to continue.

B Setup - Neevia Document Converte	r Pro 💶 🗖 🗙
Product Registration Please enter the following information	♥DF ♥DF
<ul> <li>Evaluate product (no registration info is required)</li> <li>OR</li> </ul>	
• Enter registration info	
User Name:	
Company Name:	
Serial Number:	
N	lext >

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g) The program is installed. When the installation has been completed the window opens where you can click **Finish** to exit the installation.

19	Setup - Neevia Document Converter Pro
	(*) restrict the computer now
	< Back Finish

3. Check that a program called Image Pack is listed.

الم مسلم بالمربول المالي المراجع المربول المربول المربول المربول المربول المربول المربول المربول المربول المربو			Seal and the seal of the seal	·	
Uninstall or change a program					
To uninstall a program, select it from the list and t	hen click Uninstall, Change, o	r Repair.			
Organize 🔻 Uninstall			•	0	
Name 🔺	- Publisher	🔹 🔹 Install 💌 Siz	:e 🔽	Versi	
Coogle Chrome	Google Inc.	21/08/2013		49.0	
🎾 Image Pack v6.4.1		10/09/2013			
🐺 JetBrains ReSharper 8.2	JetBrains Inc	24/10/2014	144 MB	8.2.(	
Microsoft .NET Framework 4 Multi-Targeting Pack	Microsoft Corporation	21/08/2013	83.4 MB	4.0.	

If the program is missing you will need to install it.

- 1. Browse to <a href="http://download.eprint.net/Installation/Skyline/">http://download.eprint.net/Installation/Skyline/</a> and download the file 4-Neevia Image Pack.zip.
- 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 III imagepack.exe to start the installation & follow the instructions.



- Open • Neevia Converter and from the **Settings** drop down menu select **Advanced Settings**. 4.
  - The Advanced Settings window opens. Select Launch as Windows Service and then click a) Configure.

Advanced Settings				
Enable / Disable Parsers         ✓ Microsoft Word         ✓ Microsoft Excel         ✓ Microsoft PowerPoint         ✓ Microsoft Internet Explorer         Microsoft Project         Microsoft Visio         ✓ Microsoft Snapshot         Corel WordPerfect         CorelDraw         WordPro         Autodesk Design Review	Configuration  ✓ Folder-specific configuration  ✓ Show DC Pro Tray Icon  Don't prompt for closing confirmation  Create log file  Debug Mode  ✓ Launch as Windows service configure Enable clustering  Fonts lookup: use mapped fonts  Max Conversion Threads: 8  Scan input folder(s) every 1000 ms Color Scheme: Gray ✓			
🖋 ОК	💥 Cancel			

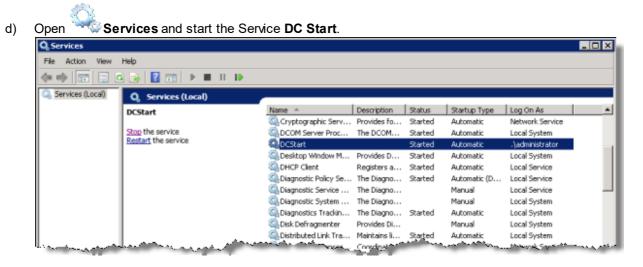
#### b) The Configure Windows Service window opens.

Configure Windows Service			
Log On As account:	NeeviaPDF Browse		
Password:	*****		
Confirm Password:	******		
Startup type:	Automatic 🗸		
Adjust DCOM settings for MS Office Apps			
Restart Service aft	ter 1000 conversions		
Restart Service aft	ter 10 consecutive conversion errors		
	V OK Cancel		

- Click Browse and select NeeviaPDF. 1.
- 2. Enter the password & confirm the password for the NeeviaPDF account which should be Rem0tePr1nter.

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- 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.



### 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.



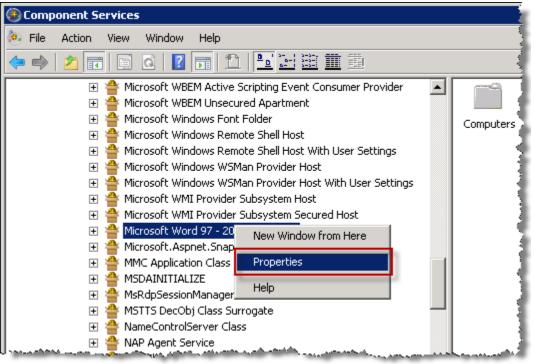
1. Select Component Services > Computers > My Computer > DCOM Config.

U 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.

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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.

#### 0 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**.

Microsoft Word 97 - 2003 Document Properties	? ×
General Location Security Endpoints Identity	
Launch and Activation Permissions	
Use Default	
C Customize	E dit
Access Permissions	
<ul> <li>Use Default</li> </ul>	
C Customize	Edit
Configuration Permissions	
C Customize	Edit
Learn more about <u>setting these properties</u> .	
OK Cano	el Apply

5. Repeat the procedure for each software program that NeeviaPDF will need to convert e.g Excel, PowerPoint etc.

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## 4. Checking the Neevia Settings

To check the Neevia Settings:

- Open ◆ Neevia Converter and from the Settings drop down menu select Folders.
- 2. The Input Folders window opens.

older to scan	Output format
C:\Program Files (x86)\neevia.com\docConverterPro\DEF_FOLDERS\IN\	PDF
1	
Add Folder Settings	

- 1. Click Edit Settings.
- 3. The Edit Input Folder Settings window opens.

t Input Folder Settings	2
eneral Settings Scripting Document Parsers File Associations Advanced Settings	
Folder to scan:	
C:\Program Files (x86)\neevia.com\docConverterPro\DEF_FOLDERS\IN( ,	
Process Subfolders 🗌 Delete empty subfolders 🔽 Process All Files in the input folder	
Destination (Output) folder:	
C:\Program Files (x86)\neevia.com\docConverterPro\DEF_FOLDERS\OUT\	
Copy "Folder to scan" structure Keep original file extension in the output file name	1
Error folder:	_
C:\Program Files (x86)\neevia.com\docConverterPro\DEF_FOLDERS\ERROR\	
Copy "Folder to scan" structure	1
Folder for original files:	
C:\Program Files (x86)\neevia.com\docConverterPro\DEF_FOLDEFS\ORIG\	ı E
Copy "Folder to scan" structure	1
Output Format: PDF  Output Settings Watermark / Stationery	
Use Printer:   reeviaPDF addins	
Import Export 🖌 Apply	ancel
	_

1. Click the **Document Parsers** tab.

4. The Edit Input Folder Settings window opens.

Edit Input Folder Settings				×
General Settings Scripting	Document Parsers	File Associations	Advanced Setting	25
PSPDF WORD	EXCEL POWER	PO PUBLISHER	D HTML SN	APSHOT
	XPS DESIGNE	EV		
and the second second	<i>N 2</i> 22301			
2				
Add Edit Delet	te		1	Restore Defaults
Import Export			🛷 Api	oly 🔀 Cancel

- 1. Select the **PSPDF** icon.
- 2. Click Edit.
- 5. The Edit Parser Settings window opens,

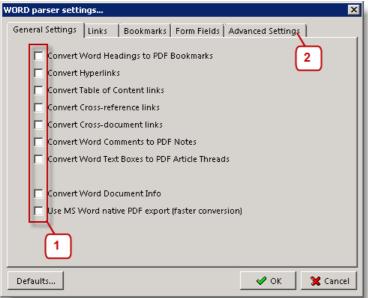
Edit Parser Settings	×
Parser ID: PSPDF	
Thread timeout: 360 🚖 (seconds)	
Description:	
PostScript/EPS/PDF parser	
Advanced Settings V Cancel	
	_

1. Click Advanced Settings....

- 772 Skyline Manual
- 6. The PSPDF parser Settings window opens.

PSPDF parser settings 🗙
PostScript/EPS files
✓ Crop EPS files to the bounding box
PDF files
✓ Disable PDF to PDF conversion
🔽 Use CropBox as Page Size
🔽 Reparse PDFs on Error
Open Password for encrypted PDFs:
Rendering Threads: Default
Virtual Memory: 30 MBytes 2
Defaults OK X Cancel

- 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 **w** 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.

WORD parser settings X
General Settings Links Bookmarks Form Fields Advanced Settings
Convert custom page sizes     Gupdate links before converting     Repaginate before converting     Macros: Disable All
Page Size: DEFAULT   Margins (inches)
Left: -1.00 • Right: -1.00 •
Note: enter -1.00 to preserve the default document margins.
.TXT open format: Auto
.TXT encoding: Auto Detect
Defaults

- 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.

EXCEL parser settings X
General Settings Links Bookmarks Advanced Settings Convert Hyperlinks Convert Excel Document Info Jse MS Excel native PDF export (faster conversion) Convert:
Defaults 🔗 OK 🕺 Cancel

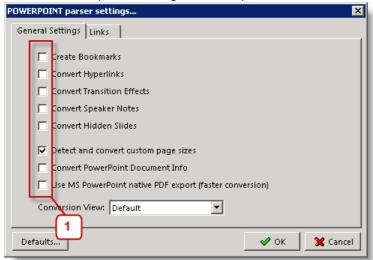
- 1. Remove all the ticks.
- 2. Click the Advances Settings tab.

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16. The Excel parser settings window opens.

EXCEL parser settings 🗙
General Settings Links Bookmarks Advanced Settings
Detect and convert custom page sizes
🗖 AutoFit columns 👘 Enable Excel Addins 🖊 🙎
Clear Print Areas before converting Macros: Disable All
Page Size: DEFAULT 💌 Orientation: DEFAULT 💌
Margins (inches)
Left: -1.00 • Right: -1.00 •
Top: -1.00 - Bottom: -1.00 -
Note: enter -1.00 to preserve the default document margins.
Content scaling: 100 🔹 %
Defaults

- 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 **u** 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 **Publisher** icon
- 23. The Edit Parser Settings window opens. Click Advanced Settings.
- 24. The Publisher parser settings window opens.

PUBLISHER parser settings	×
General Settings Links	
Convert Hyperlinks	
Detect and convert custom page sizes	
🗖 Convert Publisher Document Info	
Jse MS Publisher native PDF export (faster conversion)	
Opriversion View: Default style	
Defaults 🖌 🖉 OK	<u>.</u>

- 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

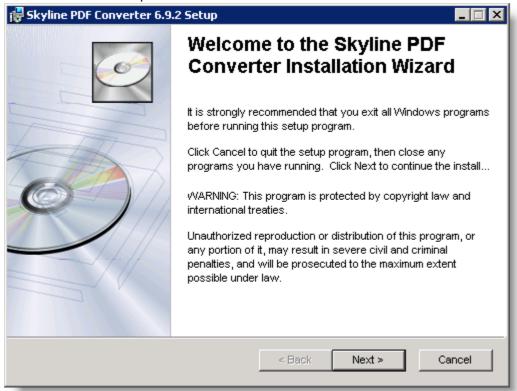
#### To install the PDF Converter:

Download the Skyline upgrade utility if not already done from <a href="www.eprint.net/support/downloads.aspx">www.eprint.net/support/downloads.aspx</a>.

- 1. Browse to <a href="http://download.eprint.net/Upgrade/PDF\_Converter\_6\_9\_2/">http://download.eprint.net/Upgrade/PDF\_Converter\_6\_9\_2/</a> 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**.

🚰 Skyline PDF	Converter 6.9.2.exe Properties	×
Security General	Details Previous Versions Compatibility Archive	
<b>9</b>	Skyline PDF Converter 6.9.2.exe	
Type of file:	Application (.exe)	
Description:	Skyline PDF Converter	
Location:	C:\Temp	
Size:	9.84 MB (10,320,896 bytes)	
Size on disk:	9.84 MB (10,321,920 bytes)	
Created:	11 January 2016, 13:35:57	
Modified:	18 December 2015, 12:44:43	
Accessed:	11 January 2016, 13:35:57	
Attributes:	Read-only Hidden Advanced	
Security:	This file came from another computer and might be blocked to help protect this computer.	1
-		
	OK Cancel Apply	

- 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.

🙀 Skyline PDF Converter S	etup 📃 🗖 🕽
License Agreement You must agree with the lic	cense agreement below to proceed.
ePrint Direct Software Lic	ence Agreement
(registered in England und at Building 3, Arlington Bus 2FP. United Kingdom. ("eP Licensed Software. If you o package or install the Licer whoever you obtained it fro	ms and conditions upon which ePrint Direct Limited er company number 3822615) whose registered office is iness Park, Whittle Way, Stevenage, Hertfordshire, SG1 rint Direct") offers to licence to you ("the Licensee") the do not agree with these terms do not open the media insed Software, and return the entire media package to m within 30 days of receipt, for a full refund of the licence e to use the Licensed Software.
1. Definitions.	<b>_</b>
Wise Installation Wizard (R) —	<ul> <li>I accept the license agreement</li> <li>I do not accept the license agreement</li> </ul>
	Reset < Back Next > Cancel

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c) The Installation Prerequisites window opens. Click Next to continue.

🖶 Skyline PDF Converter Setup		
Installation Prerequisites Checking that Microsoft .NET and the Neevia Do installed.	ocument Converter have been	Ó
Neevia installation path = C:\Program Files (x86)\nea	evia.com\docConverterPro\	
Microsoft .NET Framework 3.5 = 'C:\Program Files (;		ft/FraV
Microsoft .NET Framework 4.0 = '4.0.0'		
Wise Installation Wizard (R)		
	< Back Next >	Cancel

### d) The Ready to Install window opens. Click Next to continue

🙀 Skyline PDF Converter Setup	_ 🗆 🗙
<b>Ready to Install the Application</b> Click Next to begin installation.	Ĩ
Click the Back button to reenter the installation information or click Cancel to exit the wizard.	
Wise Installation Wizard (R) < Back	Cancel

\_ 🗆 X

e) The Completed window opens. Click **Finish** to exit the installation.

🙀 Skyline PDF Converter Set	ир 💶 🗵
	Skyline PDF Converter has been successfully installed.
	Click the Finish button to exit this installation.
	< Back <b>Finish</b> Cancel

3. The PDF converter program is open.

Setup Activity Errors						
SkylineConverter Database Location		Services and Ti	meouts			
SQL Instance		Document Con	verter (DCStart)			Restart
Username		Skyline PDF Co	nverter Service			Stop
Password		Office Applicat	ions Timeout (defai	ult 15 minutes)	15	
Not Connected	Connect	Document Con	verter Timeout (def	ault 7 minutes)	7	Save
PDF Converters						
			PDF Converte	r		Update
No.c	lata to display		Priority	50 🜩		Delete
	iata to display		Online			
			Busy			
This PC Name BUILDSERVER	Priority 50	\$ Add				Refresh
Skyline Websites	Website Name			Online	Add	Delete
	Website URL				Test	
	Documemnts Folde	er			Test	
	Errors Folder				Test	
	Driver Upload Fold	ier			Test	
	Upload Folder				Test	Update
Close Close after the curre	nt PDF conversion is con	nplete			Ve	ersion 6.9.2.0

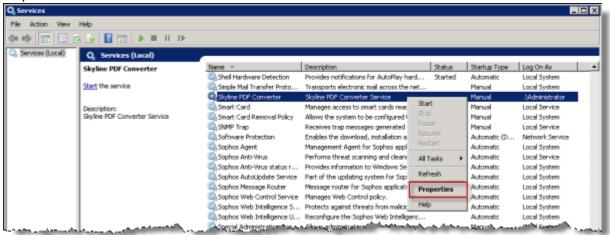
4. Minimize the Skyline PDF Converter Setup window.

### 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.

5kyline PDF Converter Properties (Local Computer) 🛛 🛛 🗙
General Log On Recovery Dependencies
Service name: Skyline PDF Converter
Display name: Skyline PDF Converter
Description: Skyline PDF Converter Service
Path to executable: "C:\Program Files (x86)\Skyline\Skyline PDF Converter\SkylinePDFconvert
Startup type: Automatic
Help me configure service startup options.
Service status: Stopped
Start Stop Pause Resume
You can specify the start parameters that apply when you start the service from here.
Start parameters:
OK Cancel Apply

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.

Skyline PDF Converter P	roperties (Local Computer)	×
General Log On Reco	very Dependencies	
Log on as:		
C Local System account		
This account:	Administrator	Browse
Password:	•••••	
Confirm password:	•••••	
Help me configure user a	account log on options.	
	OK Cancel	Apply

- 5. Click **Apply** then **OK** to save the changes.
- 6. Start the PDF Converter Service.

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## 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.

ikyline PDF Conve	rter Setup
etup Activity Erro	ors
-SkylineConverterD	atabase Location
SQL Instance	\skyline
Username	Skyline
Password	www.www.
Not Connected	Connect

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.

	erter Data	base Location	۱ — — I			Services and Time	eouts			
QL Instance		age on a sign				Document Conve	erter (DCStart)	Running		Restart
sername		Talifi I				Skyline PDF Conv	verter Service	Stopped		Stop
assword		******				Office Application	ns Timeout (defa	ult 15 minutes)	15	
onnected				Connect		Document Conve	erter Timeout (def	fault 7 minutes)	7	Save
DF Convert	ers									
Na	ame	Priority	Busy	Online		Status	PDF Converte	Pr		Update
FIREFLY		50			Ready		Priority	50 0		Delete
						-	, nong			Delete
							Online			
							Online Busy			
							Online Busy			
ihis PC Nam	ie Bulli	anaervere,	4	Configured	l as a PD	→ DF Converter				Refresh
ihis PC Nam		o convex	•	Configured	l as a PD	→ DF Converter				Refresh
	sites	2.0245-434		Configured	_	PF Converter			Add	Refresh
kyline Web:	sites	DODRADA	We		_	_	Busy		Add Test	
kyline Web:	sites	0100%	We	bsite Nami	e	Guildsener Guildsener ap	Busy	Online		
kyline Web:	sites	DEPAR	We We Do	bsite Name bsite URL	e	Guildsener Guildsener ap	Busy minuffica net	Online	Test	
kyline Web:	sites	DICERWER	We We Do	bsite Nam bsite URL cumemnts	e Folder	Buildiamar Buildiamar ag NGG 41/Stora	Busy minuffica net	Online	Test Test	
kyline Web:	sites	d server	We Do Erro Driv	bsite Nam bsite URL cumemnts ors Folder	e Folder I Folder	Buildiamar Buildiamar ag NGG 41/Stora	Busy Busy age(Documents) age(Errors) ge(UploadedDriv	Online	Test Test Test	

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.

Q Services						_	
File Action View	Help						
(+ +) 📰 🖸 🖸	i 🌛 🛛 📷 🕨 🔳 🕕 🕨						
🔍 Services (Local)	🔕 Services (Local)						
	Skyline PDF Converter	Name 🔺	Description	Status	Startup Type	Log On As	-
	-	Simple Mail Transfe	Transports		Maqual	Local System	
	Stop the service	Skyline PDF Conver	Skyline PD	Started	Automatic	.\Administ	
	Restart the service	Sinart Card	manages a		Mariual	Local Service	·
		🔍 Smart Card Remov	Allows the		Manual	Local System	
	Description:	🔍 SNMP Trap	Receives tr		Manual	Local Service	
	Skyline PDF Converter Service	Software Protection	Enables th		Automatic (D	Network S	
		🧟 Sophos Agent	Manageme	Started	Automatic	Local System	
الربيسفيتين	Carlos Ca	Sophos Anti-Virus	Performs t	Started	Automatic	Local Service	

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.

🚳 SkylinePDFconverter.XmlSerializers.dll	14/12/2015 09:38	Application extension	62 KB
📇 SkylinePdfConverterSetup.exe	17/12/2015 10:27	Application	233 KB
SkylinePdfConverterSetup.exe.config	Open		6 KB
SkylinePdfConverterSetup.vshost.exe.mar		ity	3 KB
🚳 SkylinePdfConverterSetup.XmlSerializers.dl	Scan with Sophos Anti-	/irus	61 KB
🚳 Telerik.OpenAccess.35.Extensions.dll	Add to archive		401 KB
Stelerik.OpenAccess.40.Extensions.dll	Add to "SkylinePdfConv Compress and email	erterSetup.rar"	25 KB
Stelerik.OpenAccess.Config.dll	📜 Compress to "SkylinePd	fConverterSetup.rar" and ema	il 6 KB

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