Skyline Website

Version: 7.6.0.8

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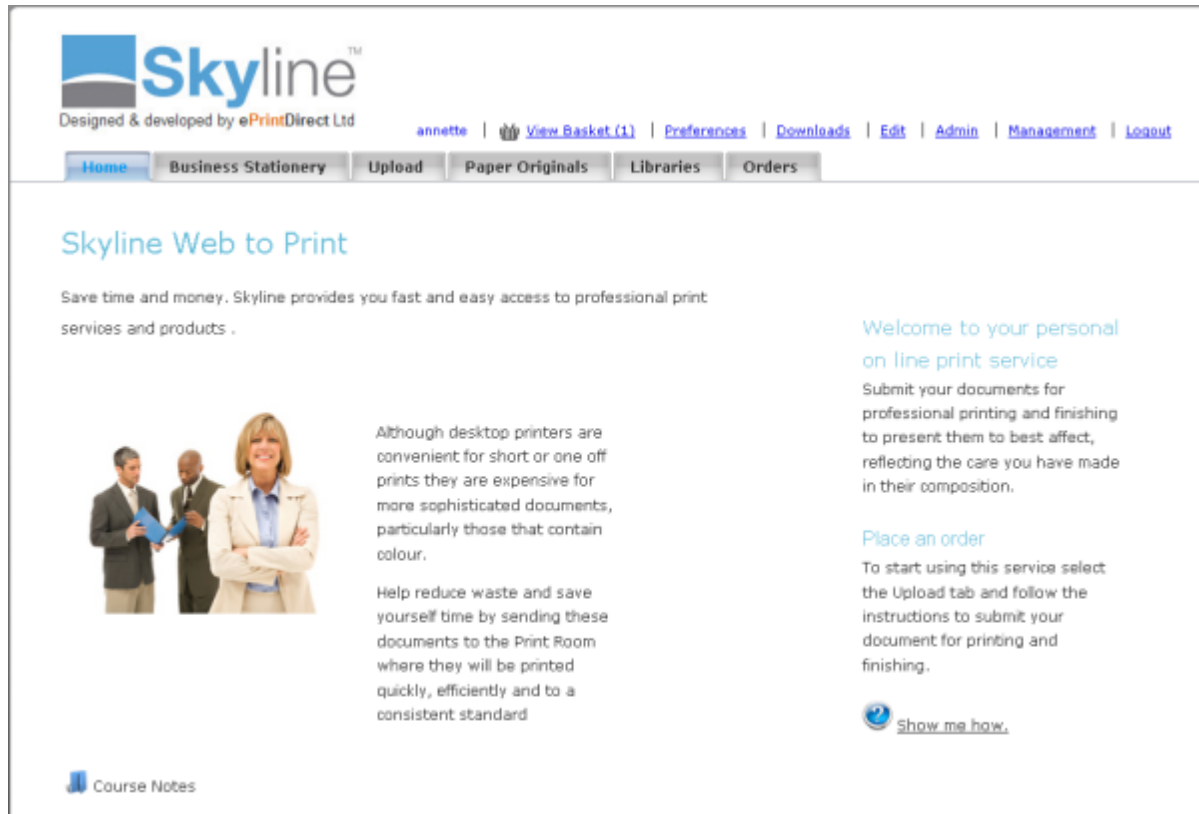
You can print a hard copy of a manual by clicking [Website] which opens a PDF copy of the manual. You can then download or print the document.

Starting Skyline

When you use Skyline for the first time you will be told how to log in. There are several ways that you will be able to log in for the first time.
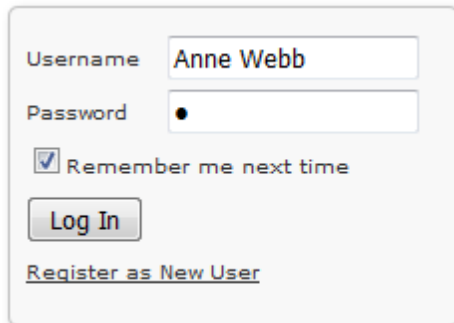
- Some users will have been set up so that they can log in using their corporate user name and password.

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

- Users may be able to register as a new user[8] and create their own account.

To open Skyline:

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

2. At the log in window enter your details.

| Username | Anne Webb |
| Password | • |

☑ Remember me next time

Log In

Register as New User

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

To open Skyline using Azure:

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

2.   At the log in window click **Sign in with Microsoft**.
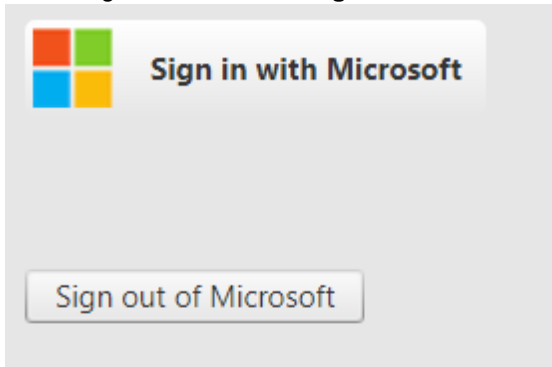
3.   Enter your details and click **Next**.
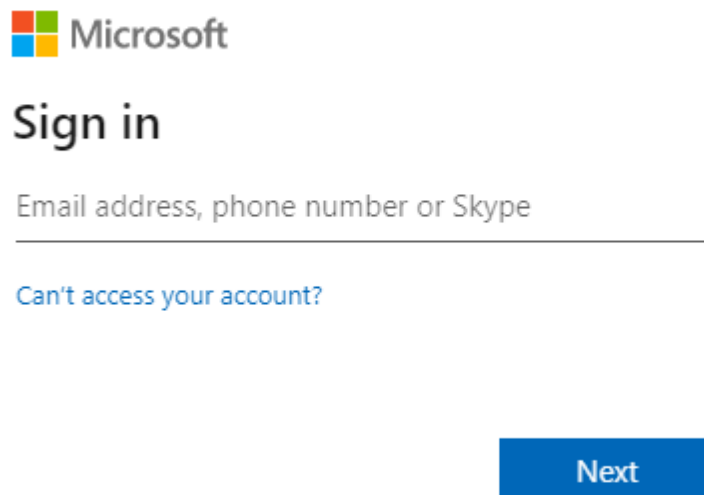
4.   Enter your password and click **Next**. The Skyline main window opens.

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

Register as a New User

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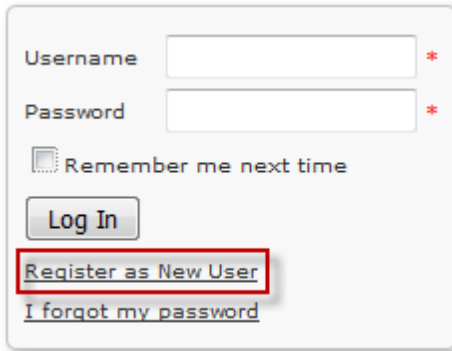
To register as a new user:

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

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

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

4.   Your user account will be created. You will receive a message telling you if your account needs to be approved before you can use it. Click **Continue**.
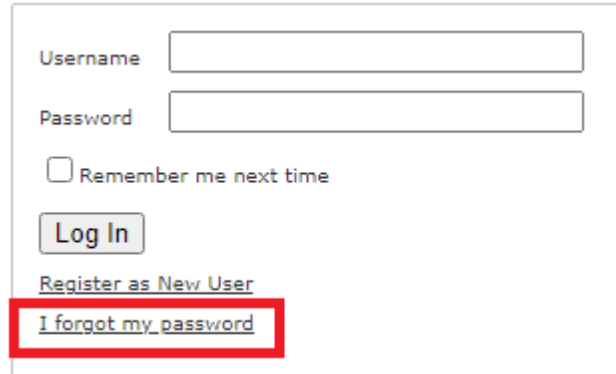
5.   You are returned to the Log in window. If your account doesn't require approval enter you user name and password to start using Skyline.

Using the Forgotten Password Link

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

To reset your password:

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

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

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

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

Password Request

S   Support
    To ✅ Annette Webber   11:02

A new password has been requested. If you did not request a new password, please ignore this email. Your password will not be changed yet been changed.

To reset your password please click the following link:
Reset Password

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

New Password   [   ]
Confirm Password [   ]
[Change Password]

Changing your Preferences

You can update your personal account details at any time after your initial log in. To view the preferences that you can update click the preferences link at the top of the window. You can update your email address[13], change your password[15] and enter a delivery address[14] for printed items you order.

Depending on the way your particular system has been configured, you might have a choice of languages. If your Skyline Portal has been set up for multiple language selection you can select a language by clicking on the nationality flag in the top right hand corner of the Skyline Portal.
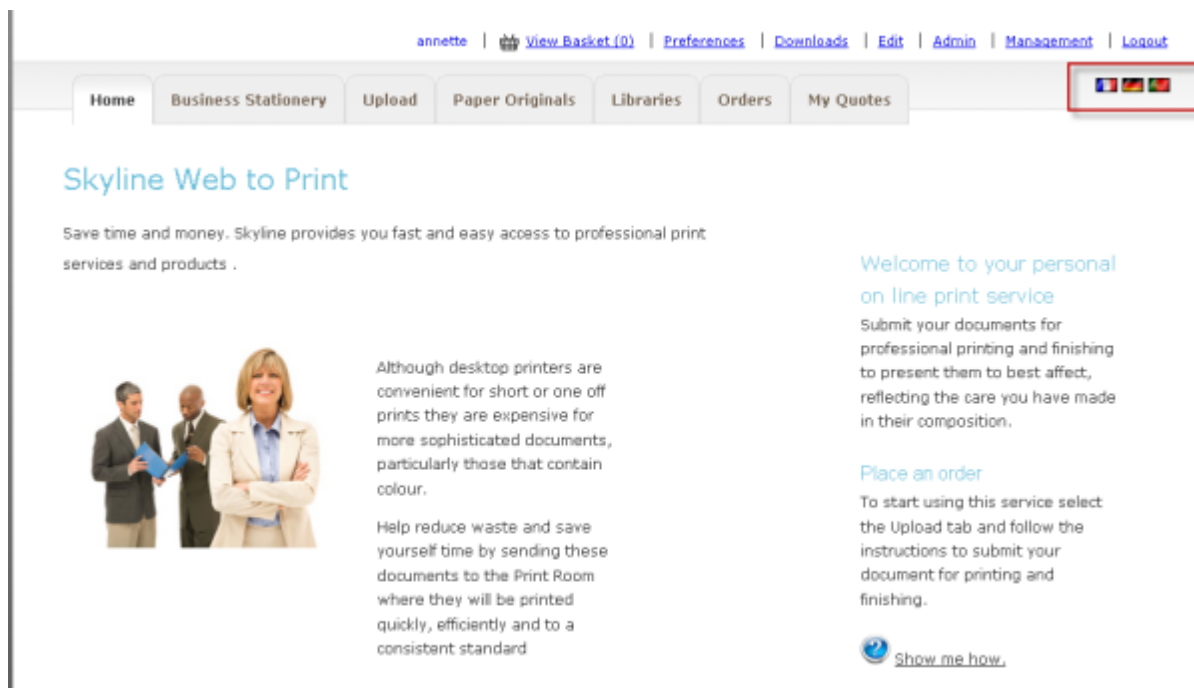
All text and graphics are language specific. When a Skyline Portal is used in more than one language different content such as text and graphics has to be added for each language. Below is an example of the home page being displayed in French where some of the text and graphics are missing.
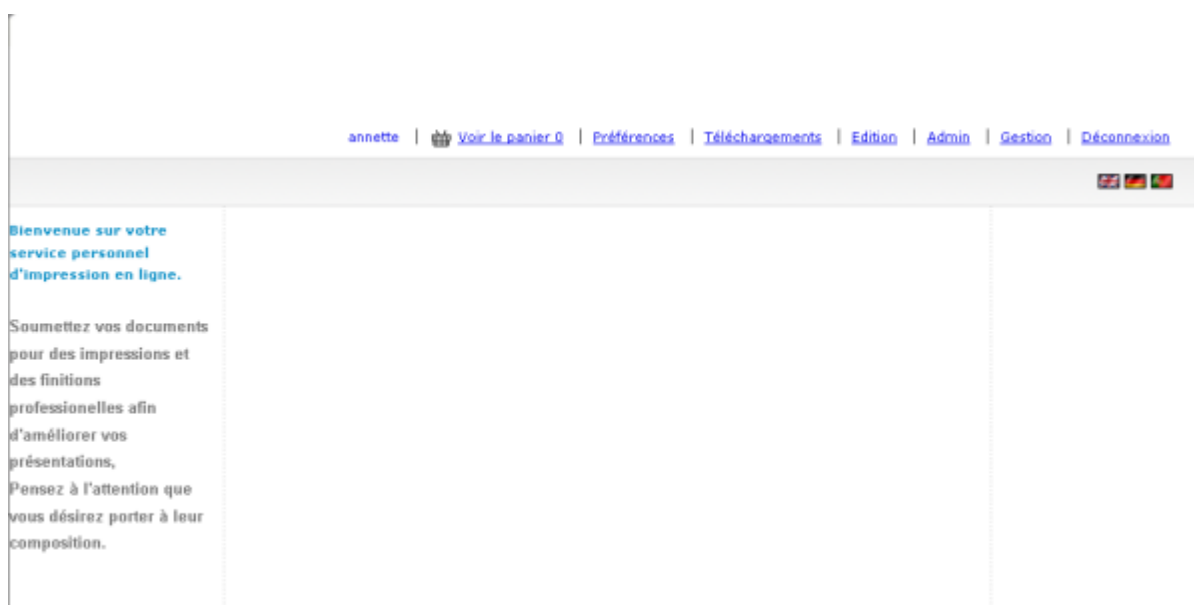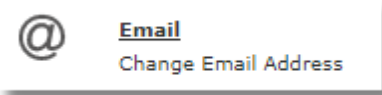
Changing your Email Address

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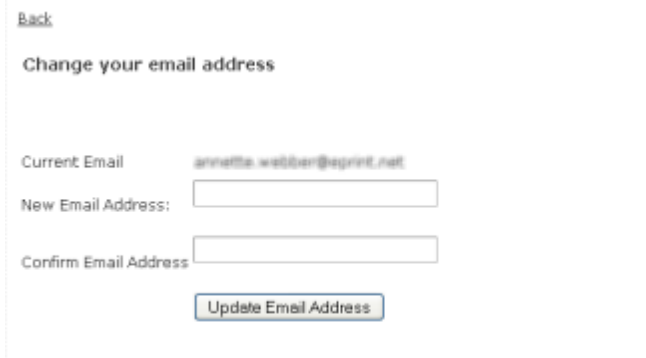
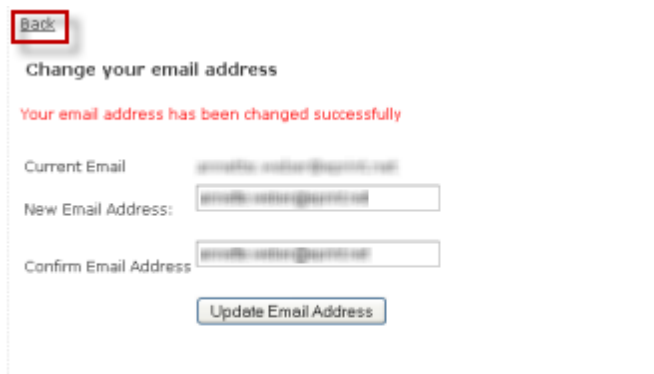**To change your email address:**

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

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

2. Select **Email**.

@ **Email**
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 email address

Your email address has been changed successfully

Current Email
New Email Address:
Confirm Email Address

Update Email Address

Changing your Delivery Address

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

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

To change your delivery address:

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

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

2. Select **Delivery**.

   Delivery
   Change your Address Details

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

   Back

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

   Save

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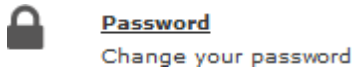
Changing your Password

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

To change your password:

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

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

2. Select **Password**.

    🔒 **Password**
    Change your password

3. The Change your password form opens.

    Change your password

    New passwords must meet the meet the password policy requirements

    Current Password [   ]
    New Password   [   ]   ①
    Confirm Password [   ]

    [Update Password] — ②

    1. Enter your current and new password details.

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

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

Change your password

The Current Password entered is not correct

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

Placing a Print Order

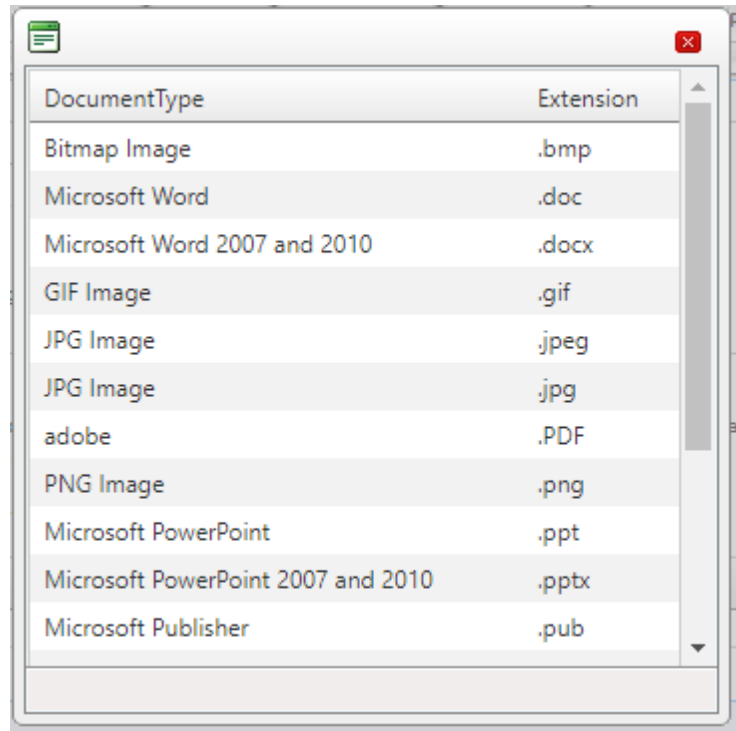There are several ways that you can order printed documents using Skyline.

- The easiest way is to simply upload[17] the document that you wish to have printed and choose from the finishing options that are displayed.

- You can also order items that are stored in libraries[47].

- There may be times that you do not have an electronic copy of items that you want printed. If this is the case you can use the Paper Originals[29] web page to place an order.

Using Upload

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

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

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

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

Example of the Supported File Formats Window

To upload a document:

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

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

Upload Your Document to Print

Select

Proceed   Supported File Formats

Your documents are being converted.

Position	File Name
No records to display.	

3. The documents are uploaded.

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

  Document being uploaded

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

  Example of a file format of document not supported.

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

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

Ordering Documents

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

To order a document:

1.   Click the **Libraries** tab.

2.   Locate the document that you want to print.
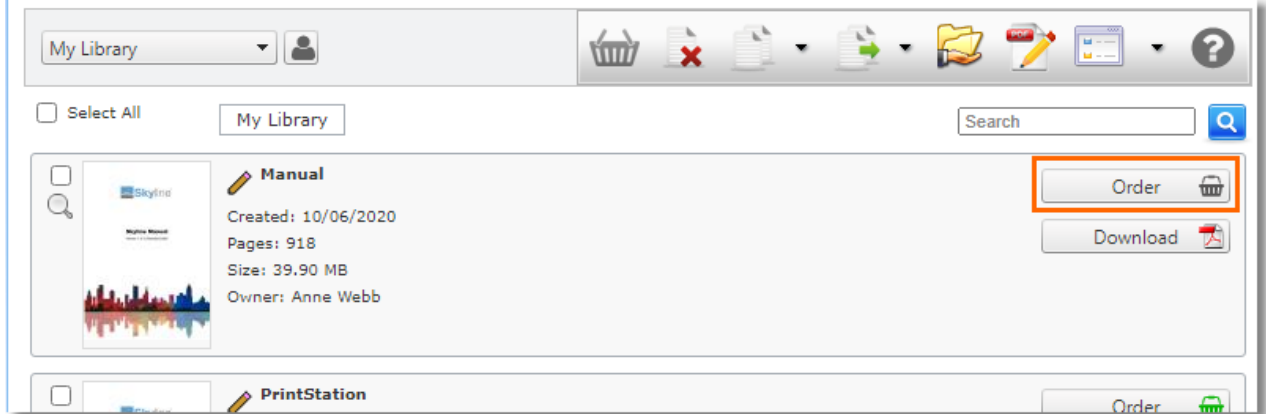
1.   Click the   Order   🛒   by the document that you want to order.
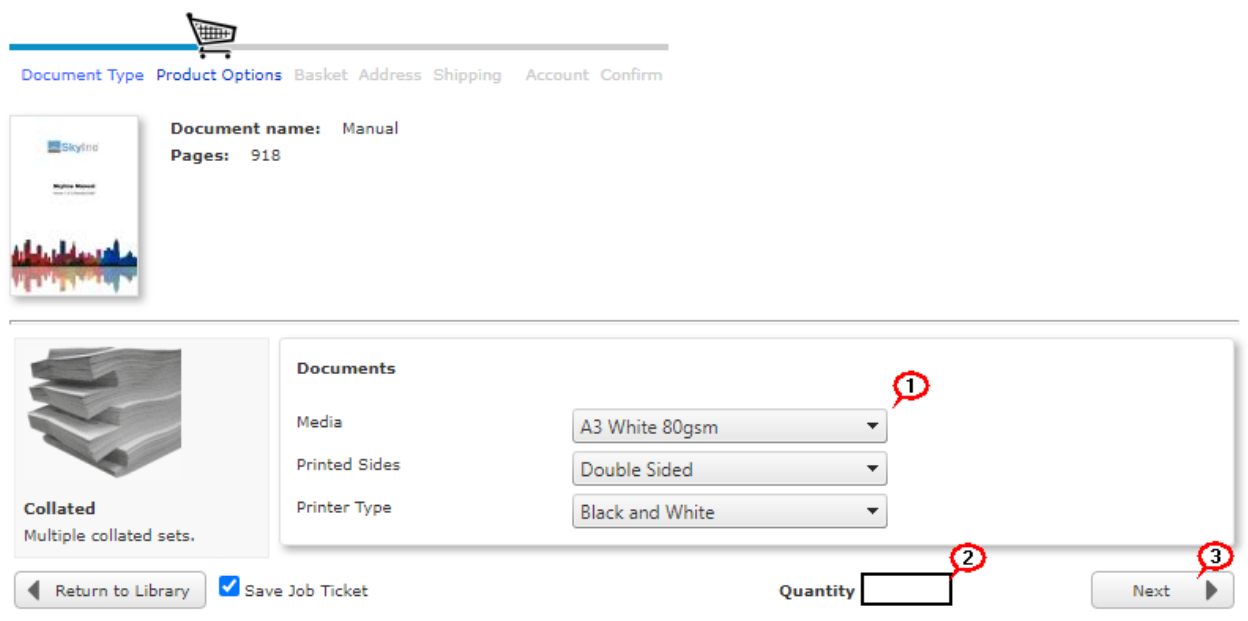
If you get the message "You must preview your document before continuing" click 🔍 next to the document that you want to preview. For more information see the section on previewing documents 🗎51 .

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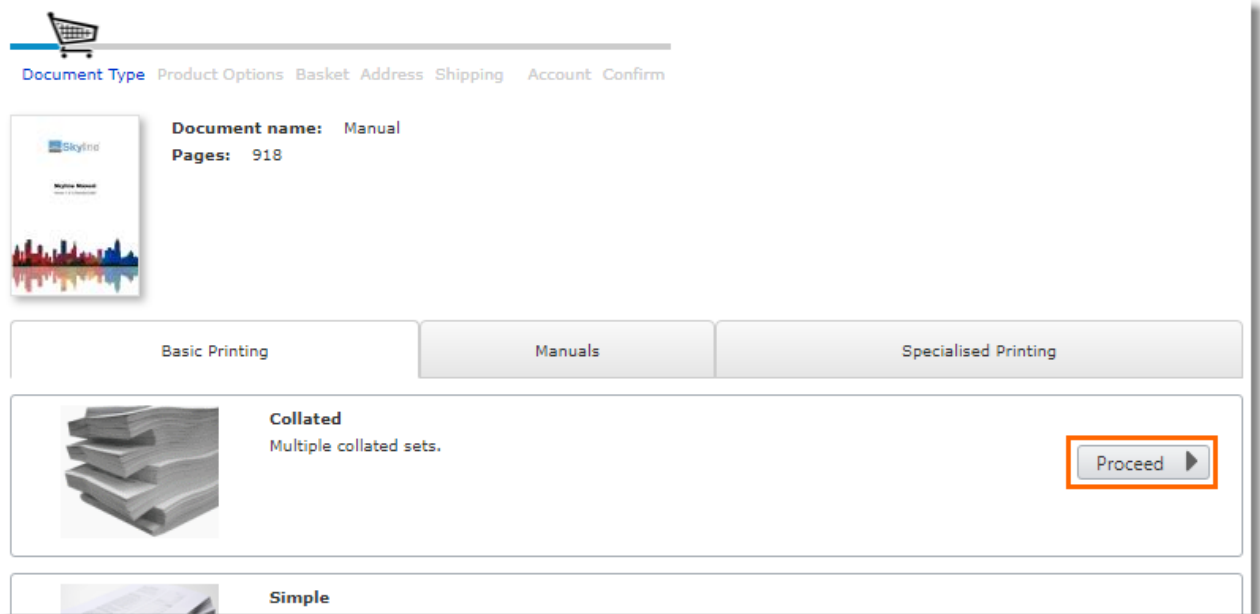
1.   Click the **Proceed** link corresponding to the type you require

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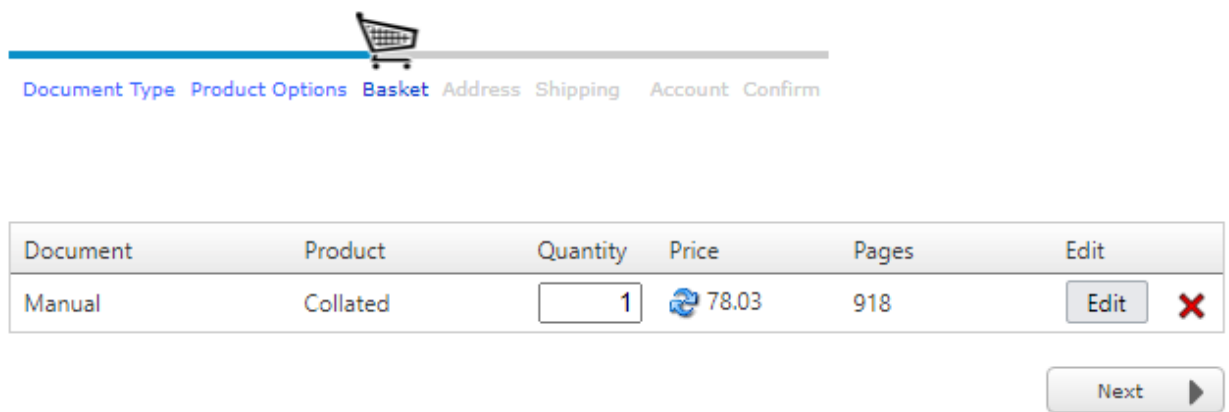
1. Select the options for the product that you have selected.

2. Enter the number of document copies required.

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

5. A quotation for the job may be displayed depending on the arrangements that you have with your print provider. You can change the quantity of documents that you want printed. Click refresh to update the price. Click **Next** to continue placing the order.
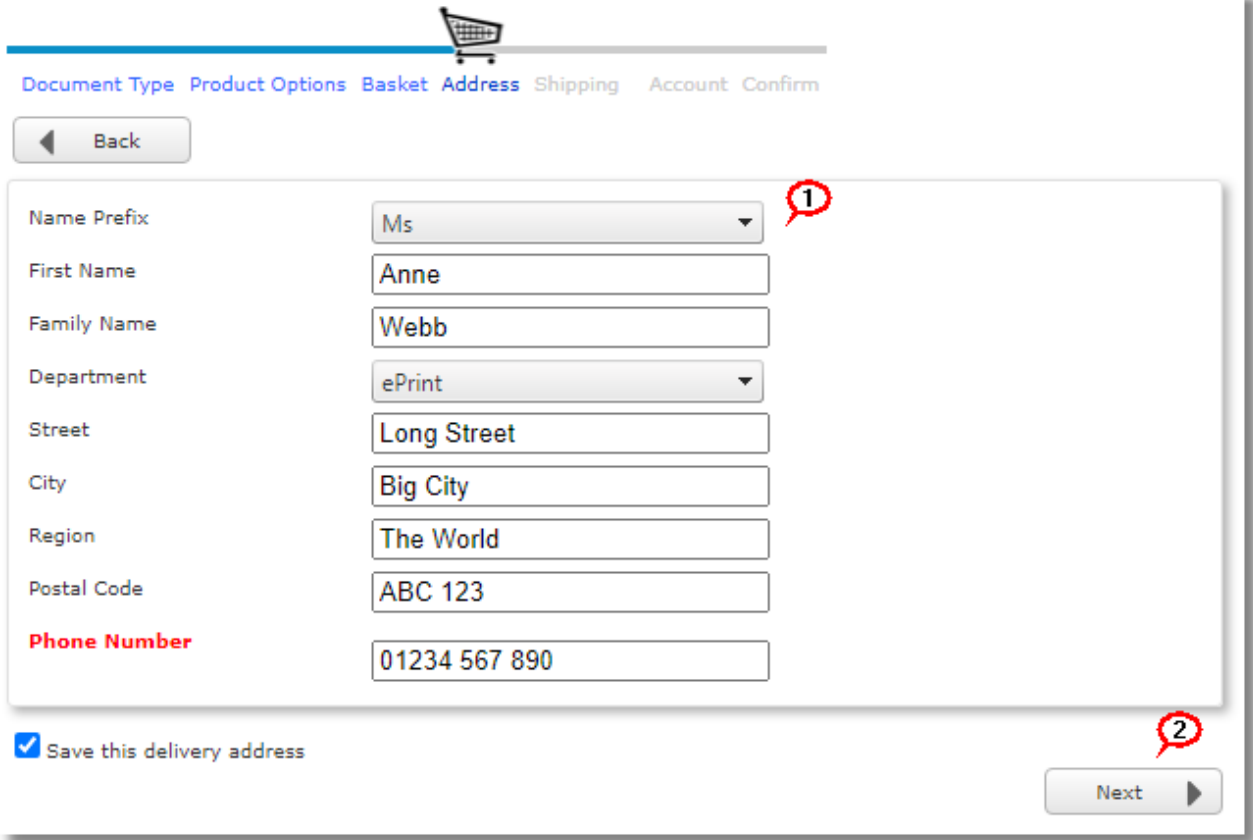
6. The delivery address information is automatically completed if you have entered a [delivery address](#)[14]. You can amend the address if you require the documents to be delivered to a different location. Field names showing in red are required fields.

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

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

7. The shipping requirements form opens.

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

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

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

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

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

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

Document Type Product Options Basket Address Shipping   Account Confirm

✗ Cancel Order

Please select a date

Select date required

○ Date available

● Reduced printing capacity

● Printroom very busy

● Closed - Contact printroom

● Closed or date in the past

	June 2020					
Mon	Tue	Wed	Thu	Fri	Sat	Sun
25	26	27	28	29	30	31
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	1	2	3	4	5

Quantity	Document	Product	Pages	Price
1	Manual	Collated	918	78.03

Total   78.03

Confirm Order ▶

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

Document Type Product Options Basket Address Shipping   Account Confirm

Your order was successful.
Order Number: **0003205**

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

	Quantity	Document	Product	Pages	Price
🖨	1	Manual	Collated	918	78.03
				Total	78.03

Skyline can be configured to automatically send an email 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**
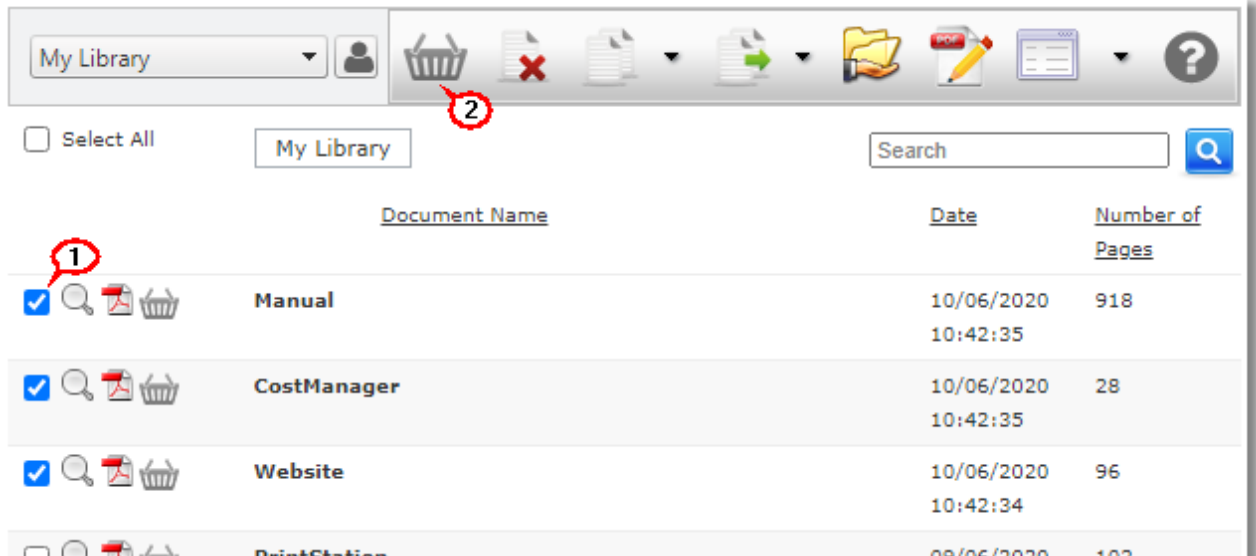
Example Email that is received when an order has been placed.

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.
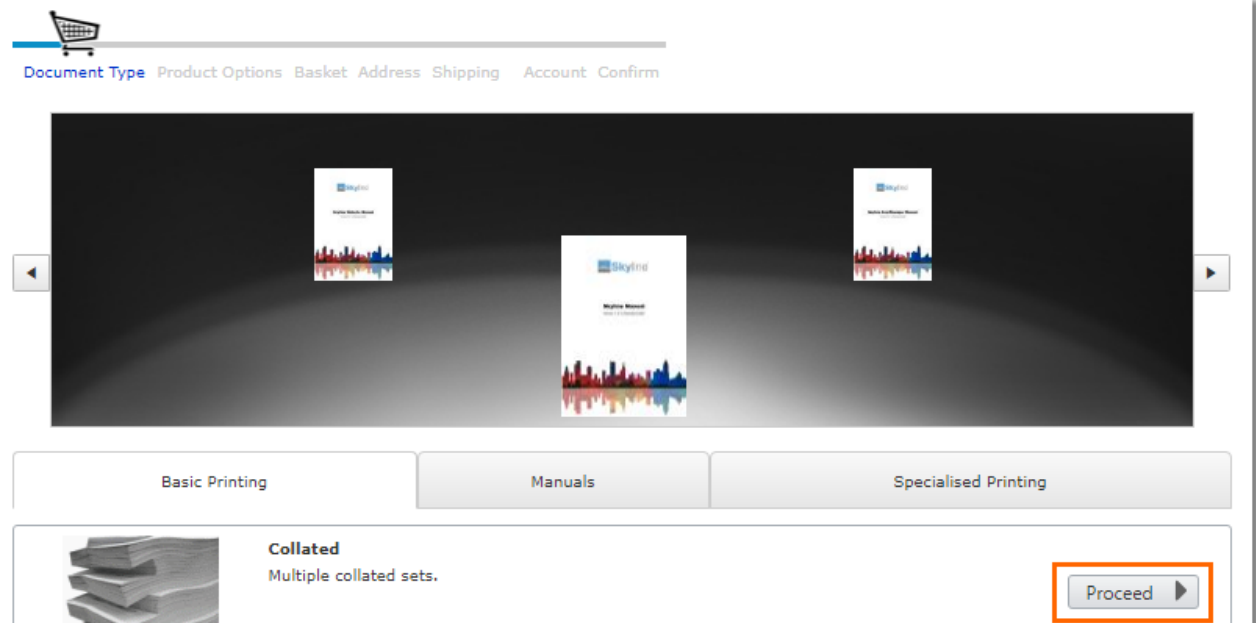
To order multiple documents in the same order:

1. Click the **Libraries** tab.

2. Select the documents that you want printed.

1. Each of the selected documents are shown by a tick in the selection box.

2. Click the **Order** button in the toolbar.

3. The Document Type Window opens.

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

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

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

6.   The Address window opens. The delivery address information is automatically completed if you have entered a delivery address ▯14. You can amend the address if you require the documents to be delivered to a different location. Check the delivery address and amend the details if required. Click **Next** to continue placing the order.

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

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

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

10. Your order confirmation is now shown and an order number provided together with details of the cost if pricing is being used. The Print room will now receive your document and may (dependent on configuration settings) send you an email confirming receipt. If the option Approval 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 to the person who placed the order to confirm that their order has been placed. An example email is shown below. The wording can be amended to suit the requirements of your organisation.

Order Placed
Build Server
To: Annette Webber

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

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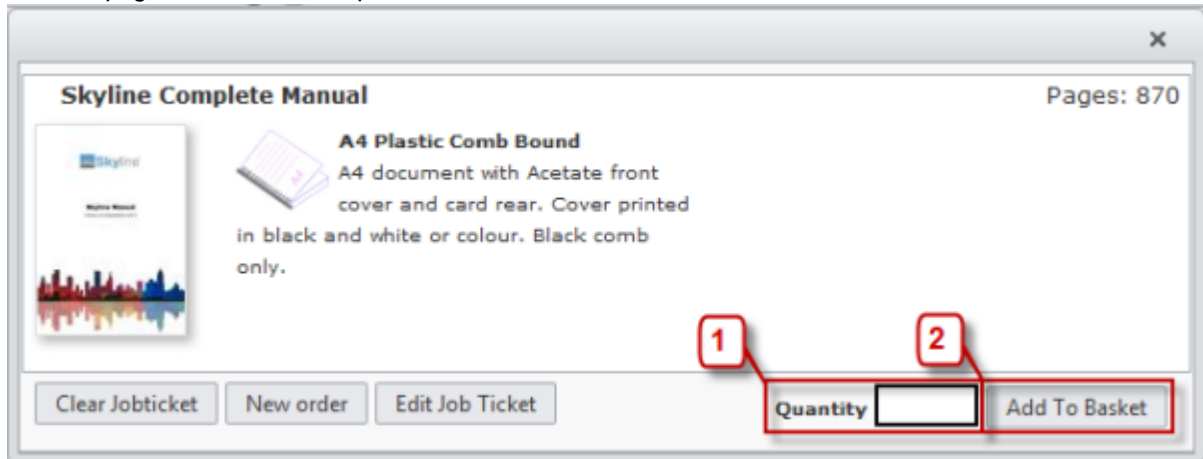Date required: 05/02/2012 12:00:00

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

Re-ordering a Document

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

To re-order a document:

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

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

     1. Enter the quantity you require.

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

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

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

4. The delivery address information is automatically completed if you have entered a [delivery address](#)▯¹⁴ . You can amend the address if you require the documents to be delivered to a different location. Click **Next** to continue placing the order.

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

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

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

Please check the order details below and confirm your order

✖ Cancel Order

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

Total   71.04

Confirm Order ▶

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

Ordering Paper Originals

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

To place an order for a paper original:

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

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

   2. Click **Next** to continue.

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

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

   1. Select the product options required

   2. Enter the quantity of documents required.

   3. Click **Next** to continue

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

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

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

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

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

9.   Your order confirmation is now shown and an order number provided. Together with details of the cost if pricing is being used. The Print room will now receive your document and may (dependent on configuration settings) send you an email confirming receipt.
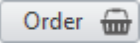
Ordering Documents in Zip Files
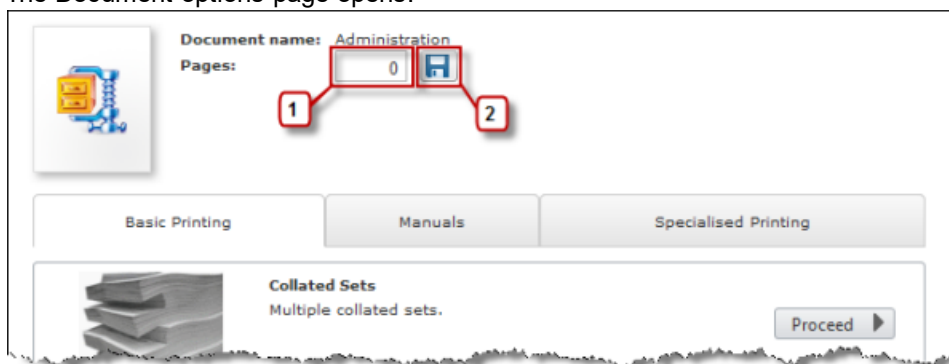
Large documents can be placed in zip files and ordered using Skyline in the usual way. When you upload a zip file you will need to enter the number of pages in the documents to be able to cost and continue placing the order.

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

To order a document in a Zip file:

1. Click the **Libraries** tab.

2. Click **Order** associated with the zip file that you want to order.

3. The Document options page opens.

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

   2. Click Save.

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

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

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

7. The Address window opens. The delivery address information is automatically completed if you have entered a delivery address 14. You can amend the address if you require the documents to be delivered to a different location. Click **Next** to continue placing the order.

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

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

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

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

configuration settings) send you an email confirming receipt. If the option Approval 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 to the person who placed the order to confirm that their order has been placed.

Requesting a Quotation

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

To request a quotation.

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

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

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

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

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

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

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

Using Stripe to Pay for an Order

When Skyline has been configured to accept Stripe payments for orders you are automatically directed to the Stripe site when you place an order. If you request a quotation[32] you are not required to pay using Stripe until you have accepted the quotation.

To make a payment using Stripe:

1.   Place your order[16] in the usual way.

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

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

Pay Now	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 Skyline
£678.72

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

Powered by stripe | Terms | Privacy

Pay with card

Email

Card information
1234 1234 1234 1234   VISA
MM / YY   CVC

Name on card

Country or region
United Kingdom
Postal code

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

Pay

Note:

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

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

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

![info icon] **Note**:

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

Subtotal	£678.72
🏷 20OFF ✕	-£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: ▓▓▓▓▓▓▓▓▓▓▓▓▓

![info icon] **Note**:

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

Your order has been placed

Order Number: 0000134

Using WPM Education to Pay for an Order

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

To make a payment using WPM:

1. [Place your order][16] in the usual way. After entering your address and delivery details you will be taken to the summary page. Click [Pay now].

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

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

Your order has been placed

Order Number: 0002765

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

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

Order Placed

S **Support**
To   Anne Webb

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

Document	Copies	Pages	Price
ProductManager	1	64	6.09
Website	1	94	7.49
CostManager	1	28	4.11
Priority			0.50
Total			**18.19**

Example of an Order Placed email sent from Skyline.

Ordering a Product

To order a Skyline Publisher product:

1.   Click the **Products** tab.

2.   Locate the document that you want to print by viewing the contents of a folder.
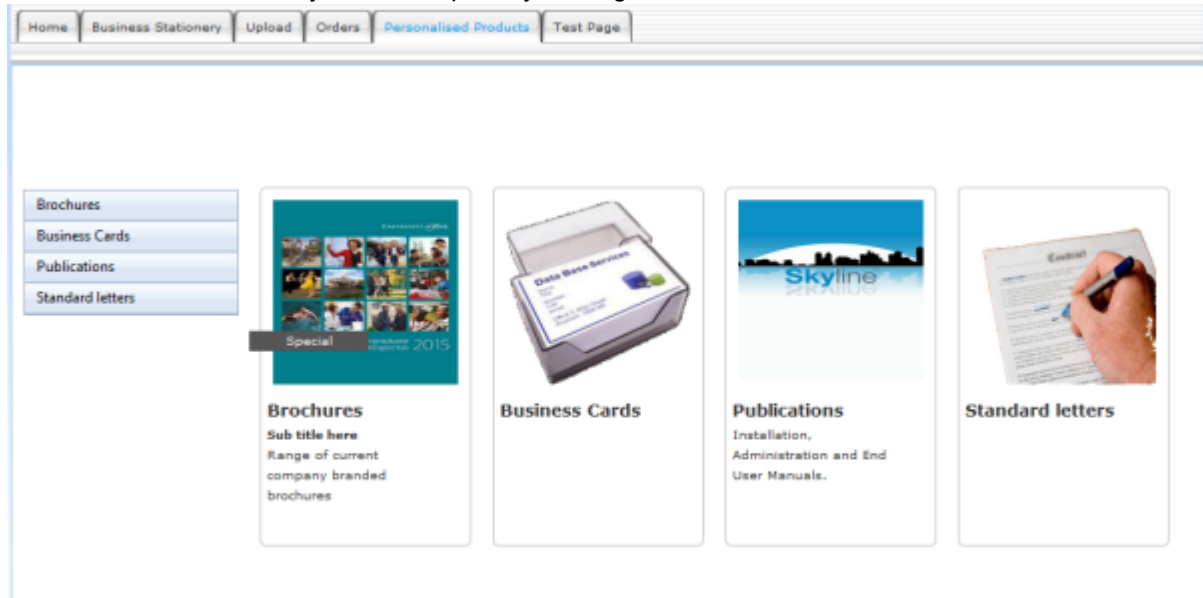
1. Click **Select** by the required product.

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

1. Amend the variable data as required.

2. Click **Save**.

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

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

4. Select the required product options.

1. Select your required product options

2. Enter the quantity you require

3. Click **Next**.

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

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

    2. If prices are displayed click 🔄.

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

6. The Address window opens. The delivery address information is automatically completed if you have entered a [delivery address](#)¹⁴ . You can amend the address if you require the documents to be delivered to a different location.

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

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

7. The shipping requirements form opens.

    1. Enter the delivery instructions and any additional information.

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

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

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

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

9. Check your order details.

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

10. Your order confirmation is now shown and an order number provided together with details of the cost if pricing is being used. The Print room will now receive your document and may (dependent on configuration settings) send you an email confirming receipt. If the option Approval 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 to the person who placed the order to confirm that their order has been placed. An example email is shown below. The wording can be amended to suit the requirements of your organisation.

Order Placed

Build Server

To: Annette Webber

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

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

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

Viewing Orders Placed

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

Note: When an order is deleted in PrintStation it is also removed from the users Orders tab.

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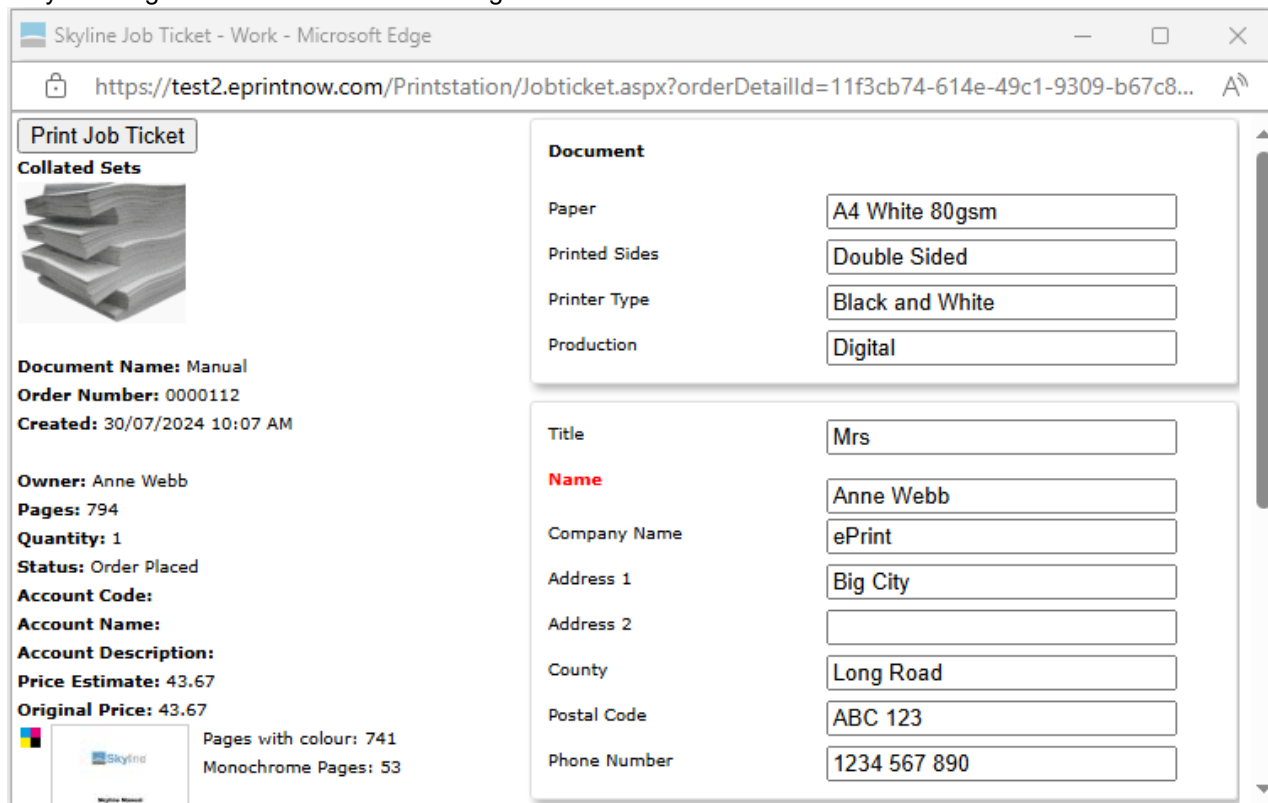
Example of the Orders Web Page

When viewing you orders you can:

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

test2.eprintnow.com says

Are you sure you want to delete this order?

[OK]   [Cancel]
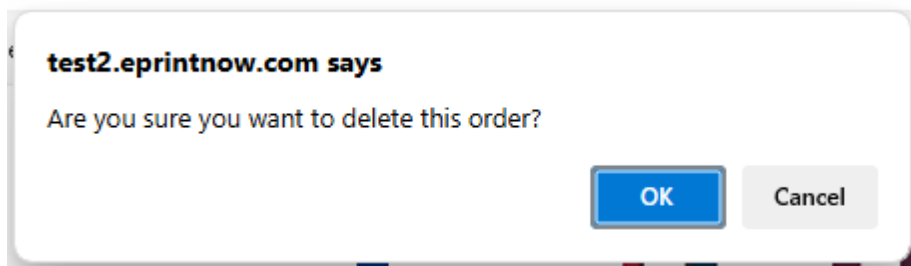
2.   Click 📕 to open the document PDF.

3.   Click [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.

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

5.   You can accept a quotation by clicking ✅. For more information please refer to Requesting a Quotation 📄32.

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

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

Colour Analysis

If colour analysis in turned on 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.

CostManager
Created: 15/02/2022
Pages: 30, 24 pages contain some colour
Size: 3.39 MB
Owner: Anne Webb

Order
Download
Colours

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

Document name: CostManager
Pages: 30
Pages with colour: 24
Monochrome pages 6

Download
Back

Colour Analysis

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

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

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

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

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

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

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

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

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

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

Running Colour Analysis

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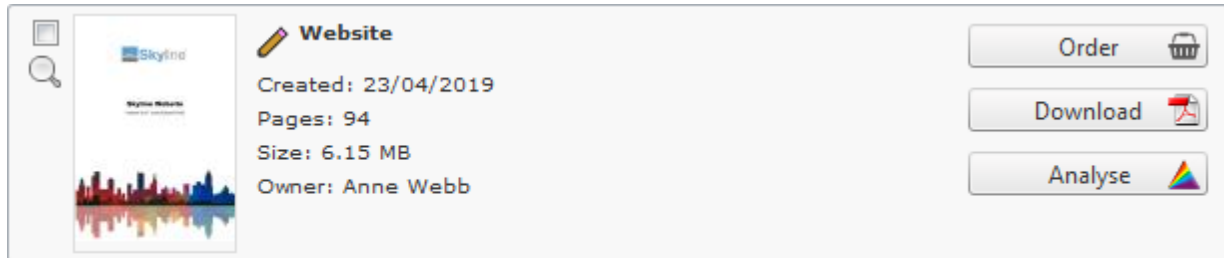
Example of a document before colour analysis has been run.

To run the analysis:

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

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

Colour Analysis

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

3. Click [Back] to return to the Libraries page. The document will show in the library with the colour analysis results.
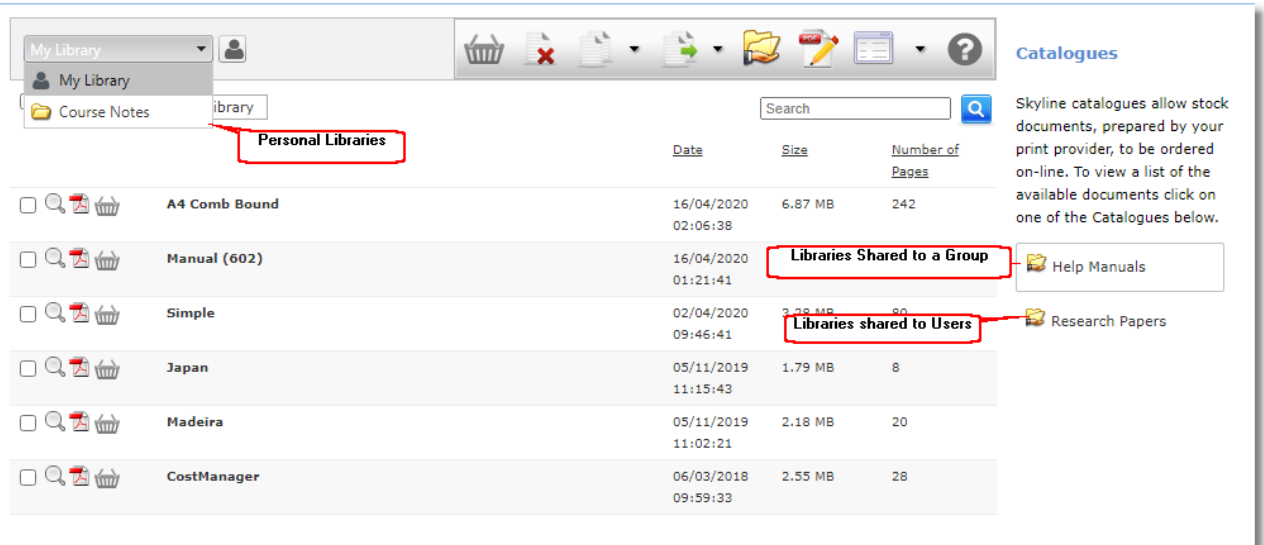
4. If you want to view the colour breakdown of the document click [Colours].

Using Libraries

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

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

📂 Shared Libraries are the same as personal libraries but you have given other users access to your documents. Users are able to view or print documents in a shared library. Only the owner of the document is able to delete, merge or move it unless hey choose to give access rights. However, an Administrator can create a document which has a [job ticket](#)⁶⁸ where by users will only be asked how many copies that they require. They will be unable to select how the document will be printed. The shared libraries are shown in a box if they are shared to a group.

Changing the Library View

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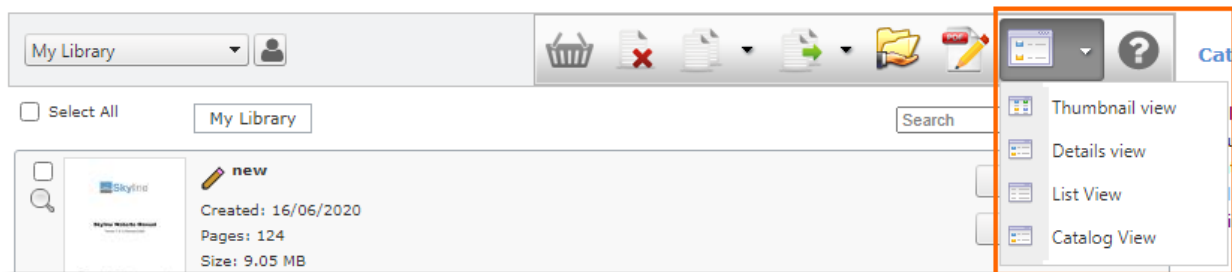
Examples of the different layouts are shown below.
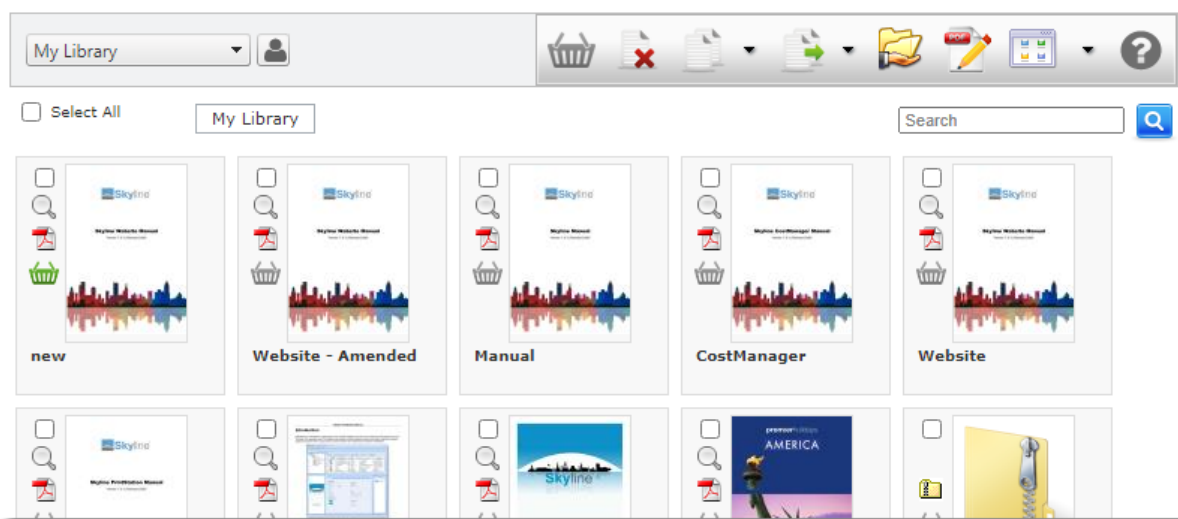
Thumbnail View of the Library

Detals View of the Library

List View of the Library

Catalog view of the Library

Searching Libraries

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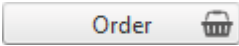
To search for a document:

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

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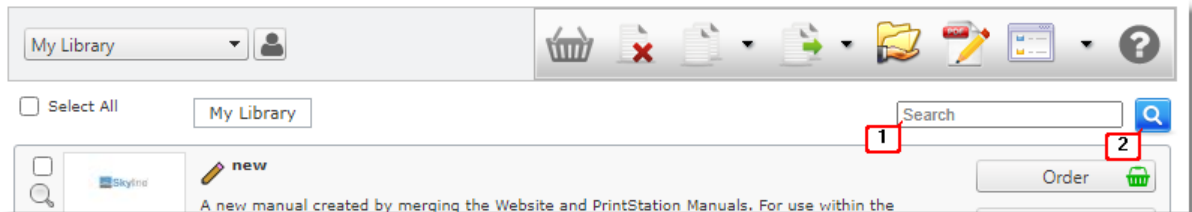
    1. Enter the details of the document that you are searching for. You can enter the document name or part of the document description.

    2. Click the search button.

3. The results of your search are listed.
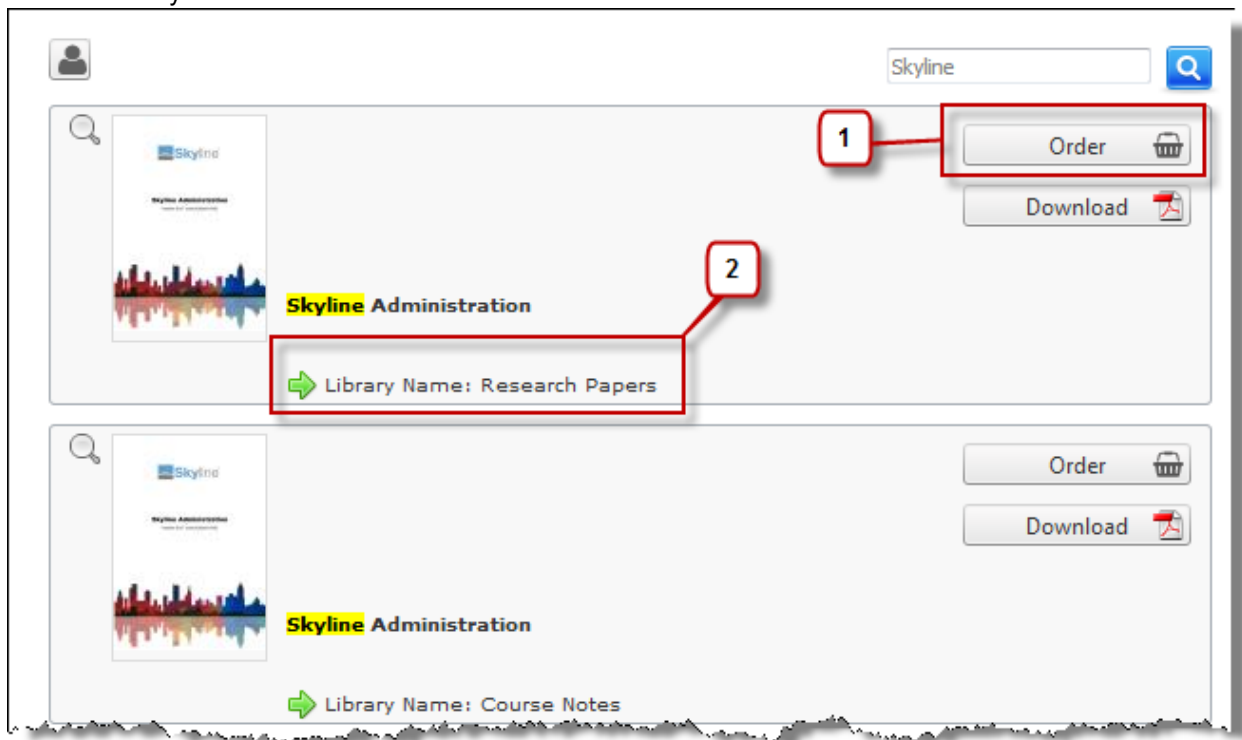
    1. You can place an order for the document using .

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

Managing Documents in your Libraries

Documents that have been uploaded into your personal library can be deleted[54] , copied[53] or moved[54] to another library. You can also merge[55] selected documents to make one combined document. The icons at the top of the libraries window are used to perform these actions. You can also use the controls available beside each uploaded document to preview[51] the document before printing as well as viewing the PDF[52] .

You are also able to order documents[19] as well as re-order documents[27] that are stored in the library.

Previewing Documents

When you preview a document you will be able to see a number of pages. The number of pages depends on how your system has been configured. You system administrator will have configured the system to show the first 10, 20, 50 or all paged in the document. You can view the whole document by opening the PDF[52] associated with the document.

To preview a document in your library:
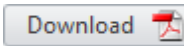
1.   Click 🔍 next to the document that you want to preview.

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

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

Opening a PDF

To open a document in your library as a PDF:

1. Click either 📕 or [Download 📕] next to the document that you want to view.

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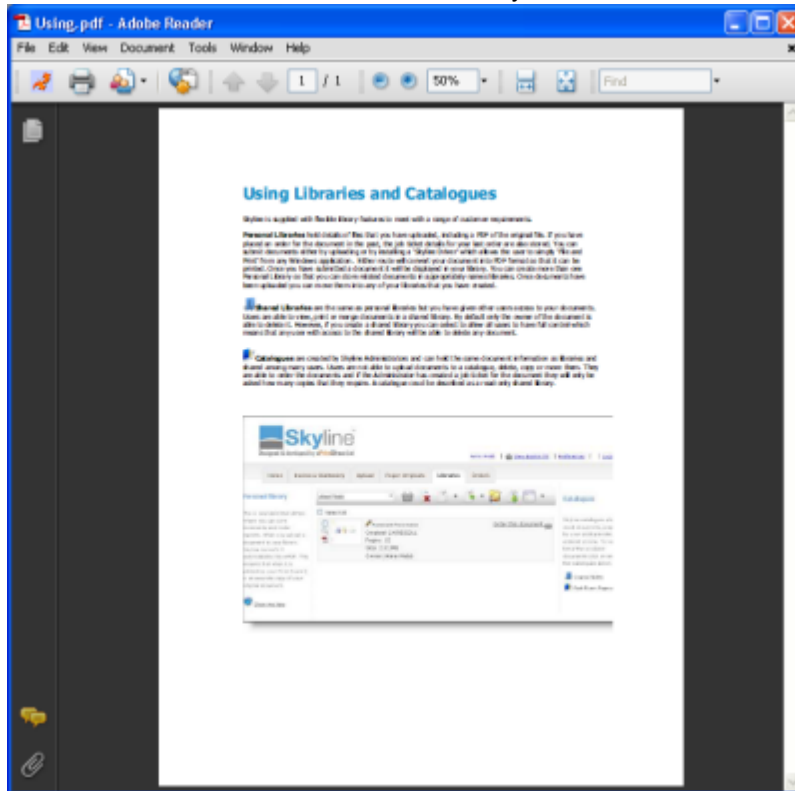
Copying a Document

To copy a document to another library:

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

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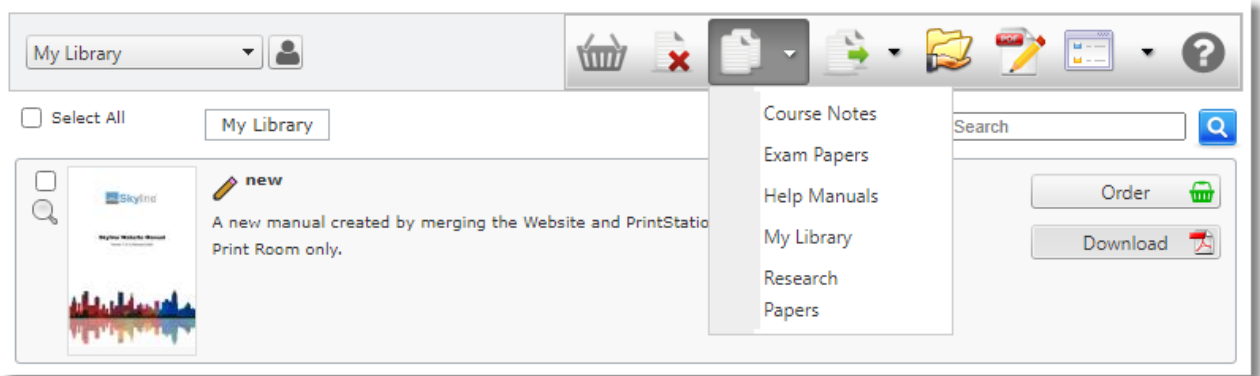
3. Select the library that you want to copy the selected documents into. The document will be available in the original library as well as the selected library.

Moving a Document

To move a document to another library:

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

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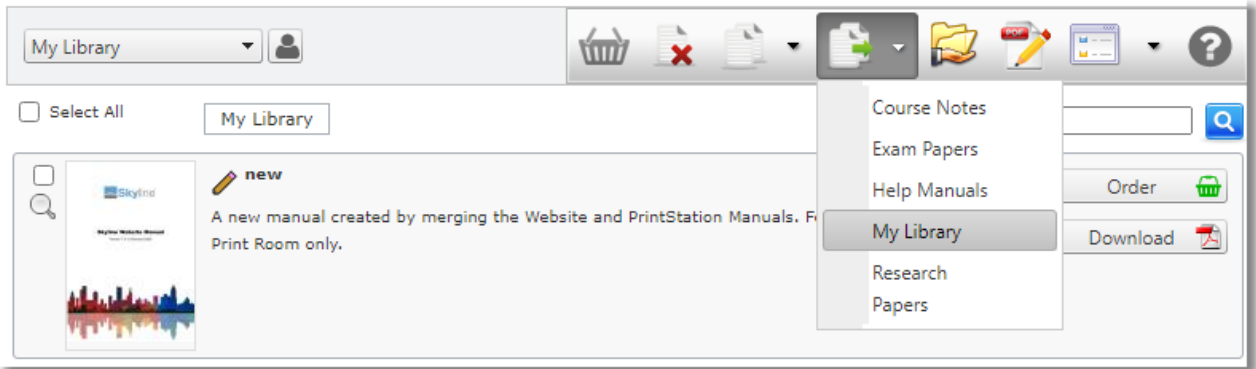
3. Select the library that you want to move the selected documents into. The document will be moved from the original library into the selected library.

Deleting a Document

To delete a document from your library:

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

2. Click ✖ **Delete Selected**.

3. You will be asked to confirm the deletion.
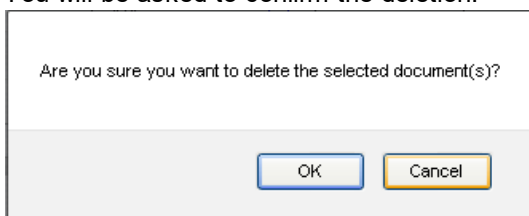
4. Click **OK**. The selected documents will be deleted.

Editing Documents

You can edit a document you have uploaded into your library by adding blank pages or deleting specific pages. You can also use the edit feature to [merge documents](#)⬚ 60 in either your own library or in a shared library.

ⓘ   Each document must contain less than 100 pages.

To edit a document:

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

2.   Click 🗎 **Edit**.

3.   The Edit Document page opens.

4.   Enter a title for the edited document.

5.   Preview the document by flipping through the pages.

6.   You can use the navigator buttons to go to a specific section of the document or a specific page.
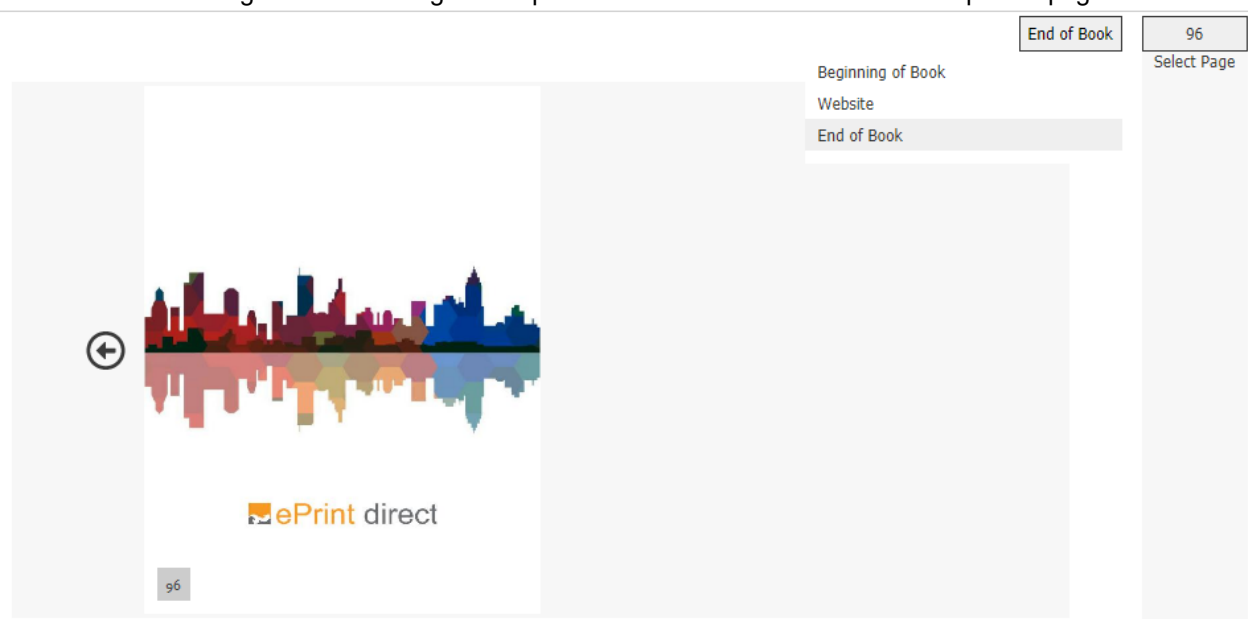
Example of using the Navigator button to view the end of the book.
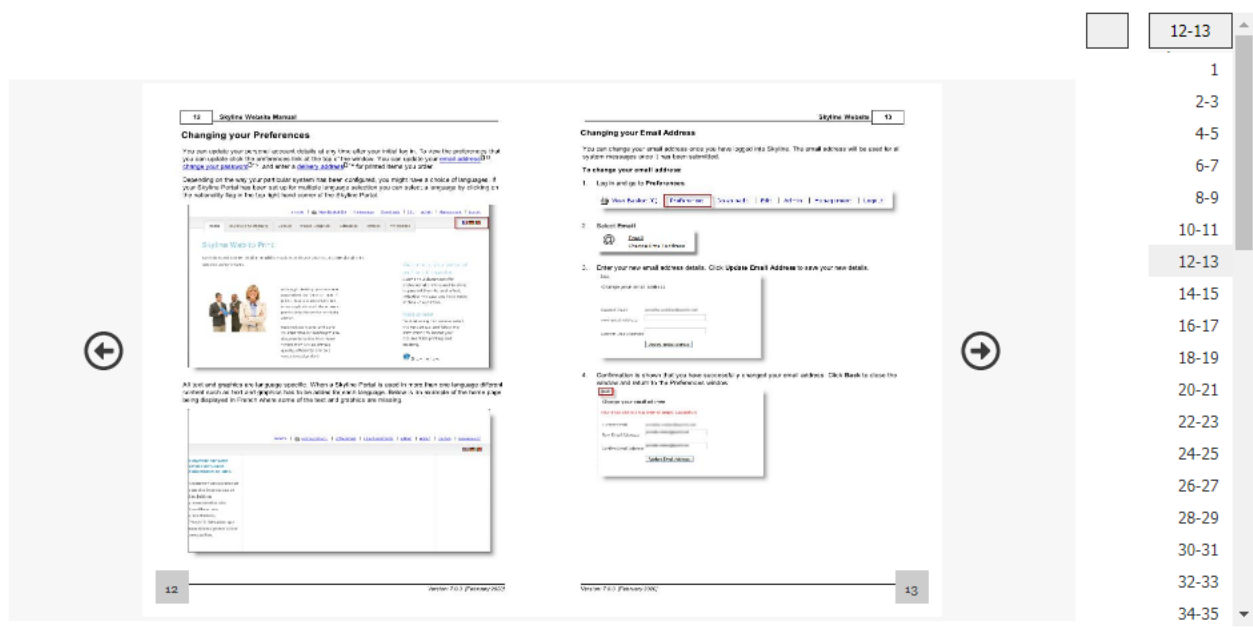
Example of using the Page button to view pages 23 & 13

7. You can add a blank page into your document by selecting the page that you want to insert the blank page either before or after.
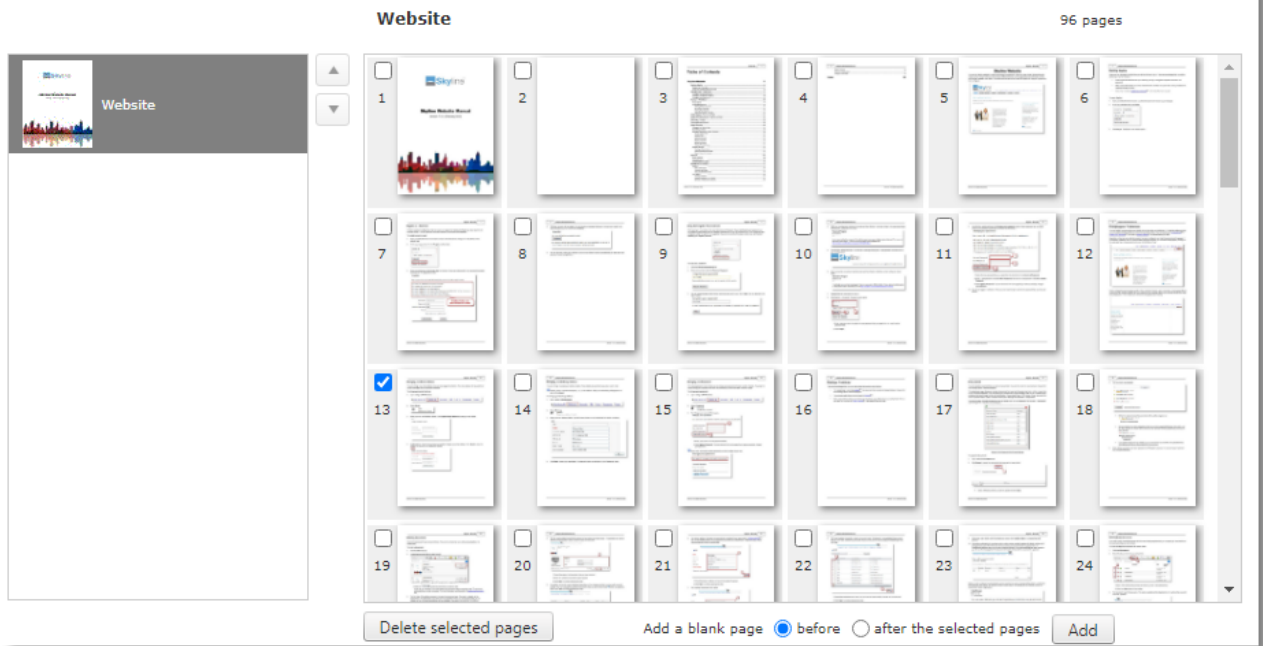
Inn this example a blank page will be inserted before page 13.

8. Click [Add] to add the blank page.
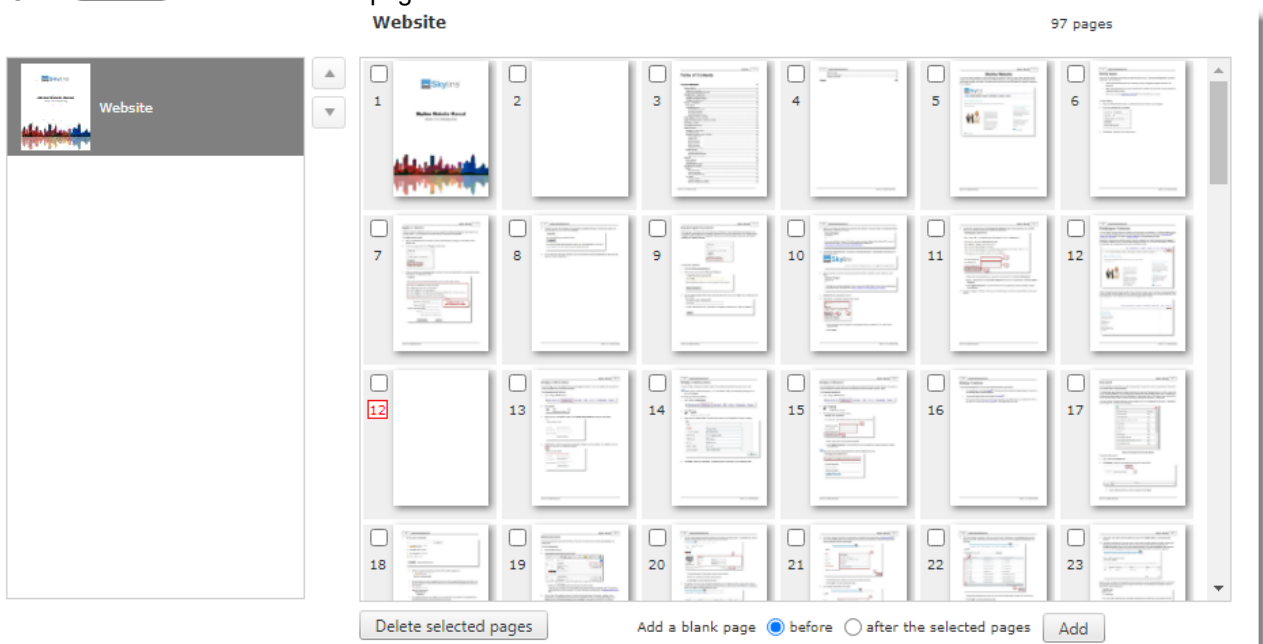
Example showing the blank page inserted before page 13.

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

Example showing the blank page inserted before page 13.

10. To remove pages from a document select the page to be removed in section at the bottom of the page then click ![Delete selected pages].
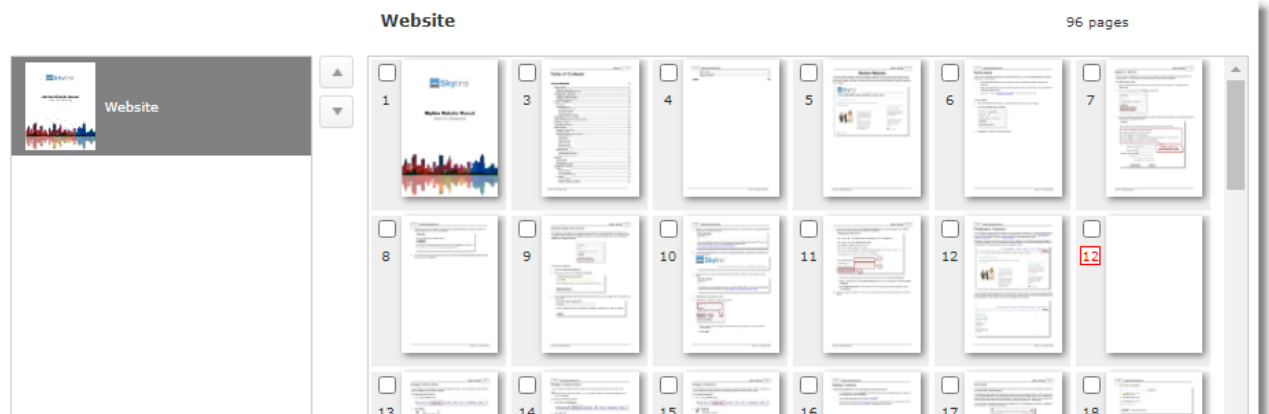
In the above example page 2 has been removed. The number of pages has also been updated from 97 to 96.

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

12. The edited document is sent to the PDF Conversion Queue and will then be available in the same library as the original documents.
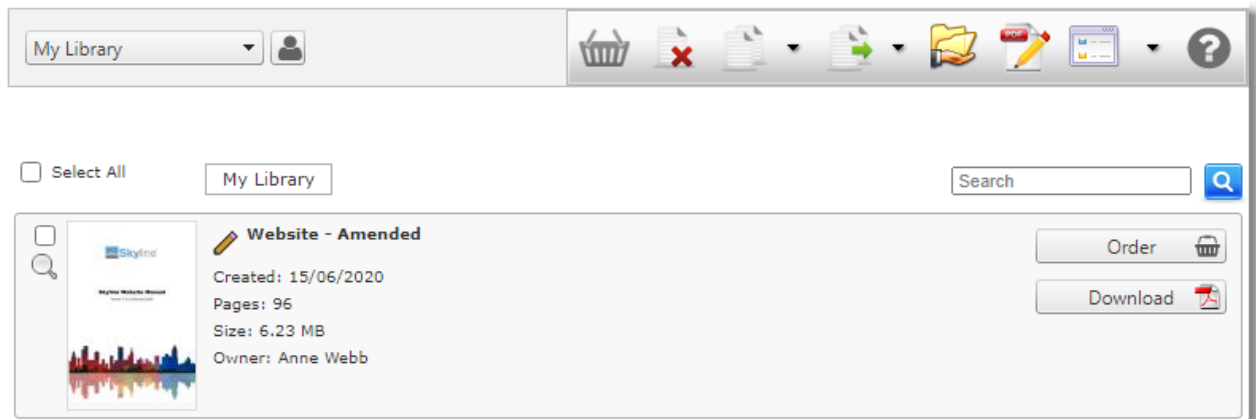
Example showing the amended document that has been saved into the library. The date created and number of pages is updated automatically

Merging Documents

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

Each document must contain less than 100 pages.

To merge documents:

1. Select the documents you want to merge using the individual document selection box. Do not use the

   Select All option. Then click [PDF edit icon]. The time taken to creating the thumbnails will depending on the size of the documents that you have selected to merge.

2. Enter a name for your new merge document.

3.   If required you can amend the order that the documents will be merged using the arrows in the bottom section of the page.
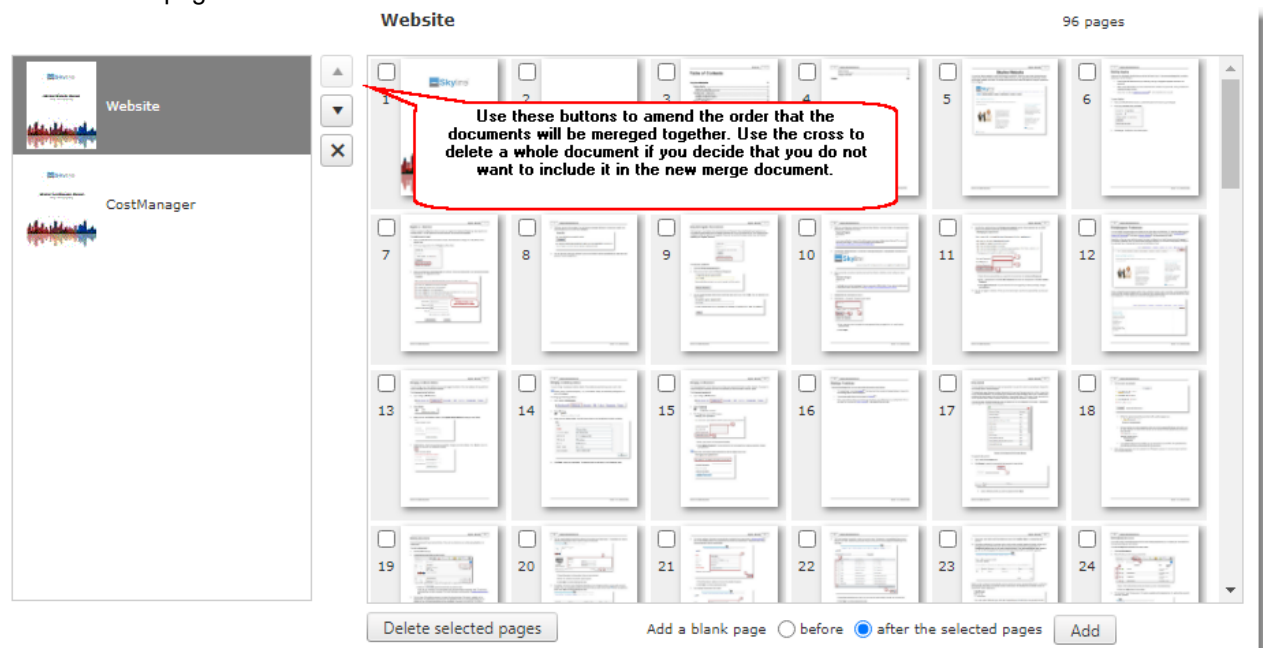
4.   Edit the documents⬚ 55 as required by adding blank pages or removing pages.

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.

Edit and merge documents

New merged document name | Website & CostManager Manual   Merge | Cancel

Preview of the merged documents. Use the arrow keys and dropdown page or docuemnt selectors to page through the merged document preview

Beginning of Book   1
Select Page

Skyline

Skyline Website Manual
Version: 7.0.3 [February 2020]

Reload Preview

Note:

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

Invalid PDF files

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

Adding a Personal Library

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

Click [icon] to view your personal libraries
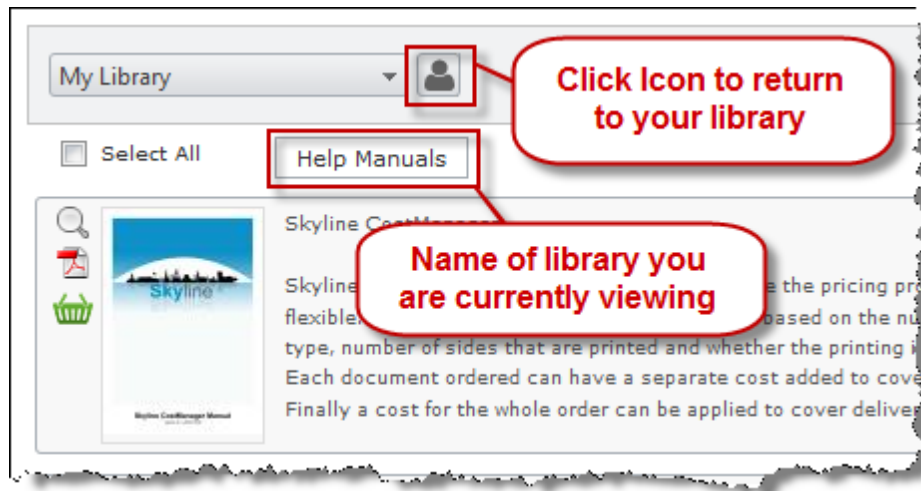
To add a new personal library:

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

2. Enter a name for your new library. In the example below we have entered the name 'Help Manuals'. Click **Add**.

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

Sharing Libraries

If you have been given access to a shared library, the shared library will be listed separately on the libraries web page. Click on any of the shared library names to view the documents that they contain.
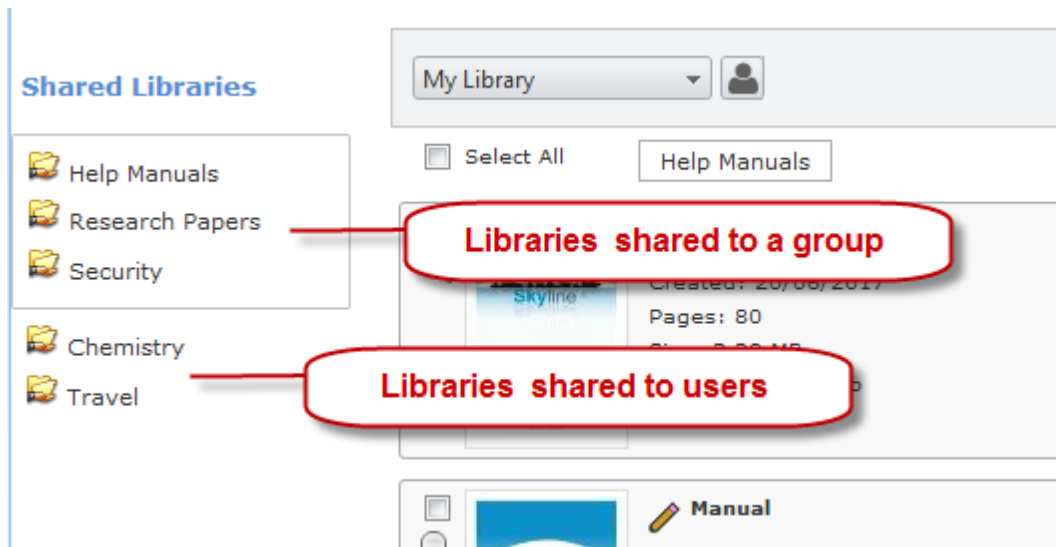
When the owner of a library chooses to share the library they can give users full access. Anyone given access is able to choose how to print the document but they are not able to delete any documents in the shared library. They will also be able to move or copy other documents into the shared library. If the product choices for the [document has been pre-defined] 68 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.
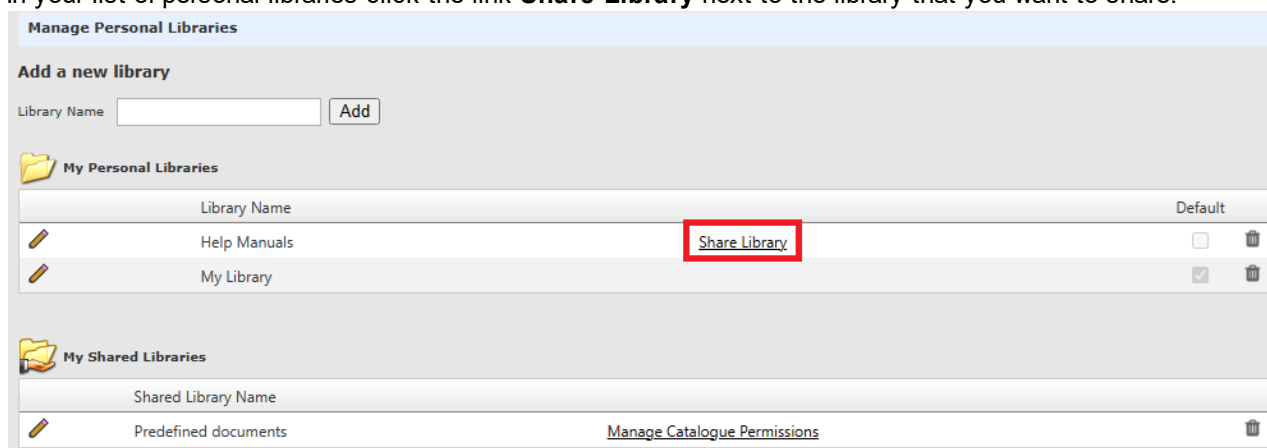
Creating a Shared Library

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⬜63.

To share a personal library:

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

2. In your list of personal libraries click the link **Share Library** next to the library that you want to share.
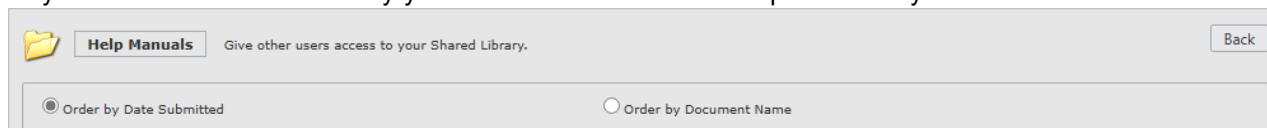
3. Select how you want your documents listed. You can choose to show the documents by the date that they were submitted. Alternatively you can order the documents alphabetical by the document name.

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

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

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

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

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

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

Adding Pre-defined Documents

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

To add documents with a pre-defined product:

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

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

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

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

    1. Change the view to "Catalog View".

    2. Click [icon] associated with the document.

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

    4. The updated details are shown in Catalog View
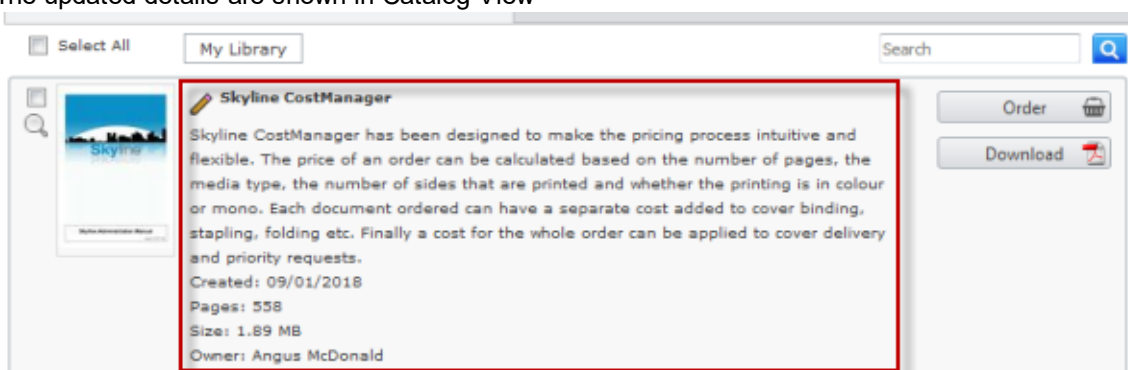
5.   The job ticket for the document needs to be defined.

1. Click 🛒 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 CostManager

Simple Printing
A4 A3 or A5 document printed in black/white or colour. No covers or finishing options available.

Proceed ▶
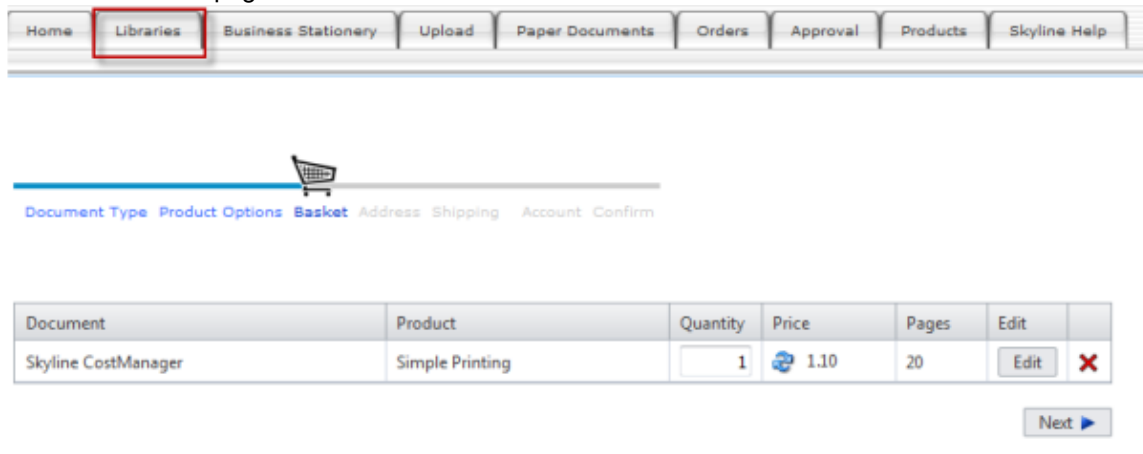
A4 Booklet
Printed on A3 in black and white or colour and folded to produce an A4 booklet double stapled. Please use Special

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.

Home Libraries Business Stationery Upload Paper Documents Orders Approval Products Skyline Help

Document Type Product Options **Basket** Address Shipping Account Confirm

Document	Product	Quantity	Price	Pages	Edit	
Skyline CostManager	Simple Printing	1	1.10	20	Edit	✖

Next ▶

6. You need to check that the document defined job ticket is available to the users.

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

    2. View the library. The basket associated with the amended document will be green.
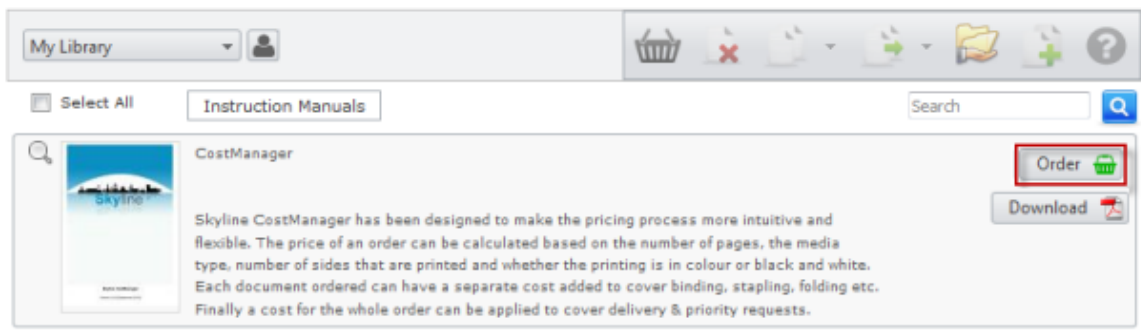
    3. Click 🧺 associated with the document that you have just updated. You just enter the quantity of documents to be ordered and add then to your basket.
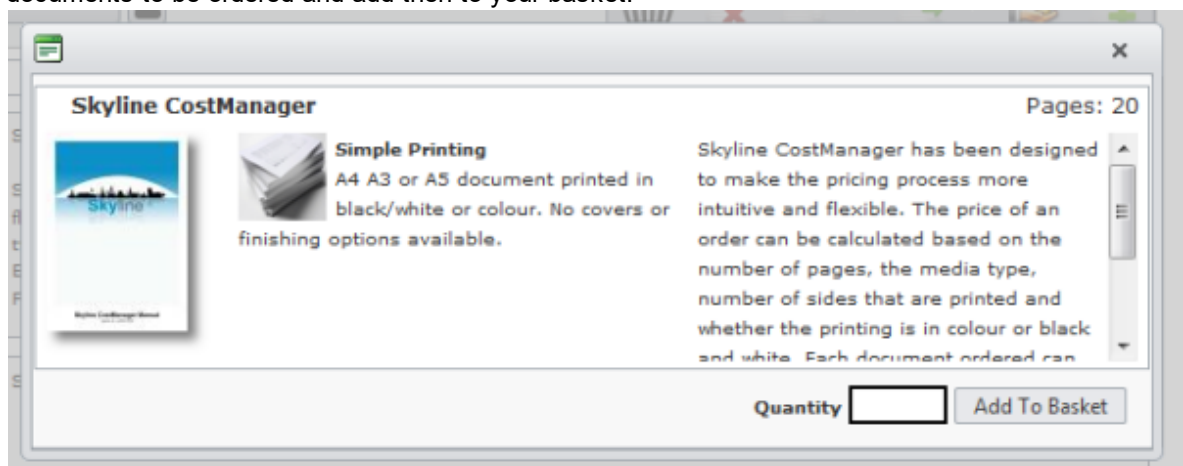
Shared Library Administration

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

To assign/remove users from a shared library:

1. Log in with administrator rights.

2. View your libraries page.

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

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

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

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

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

To transfer library ownership:

1. Log in with administrator rights.

2. View your libraries page.

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

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

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

   2. Click **Transfer**.

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

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

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

Approval

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

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

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

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

.

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

- Order details - 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- amend the account code, name or description.

- Recalculate prices- 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- contact details

- Additional Fields - 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.

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. For more information see the section on assigning users to approvers.
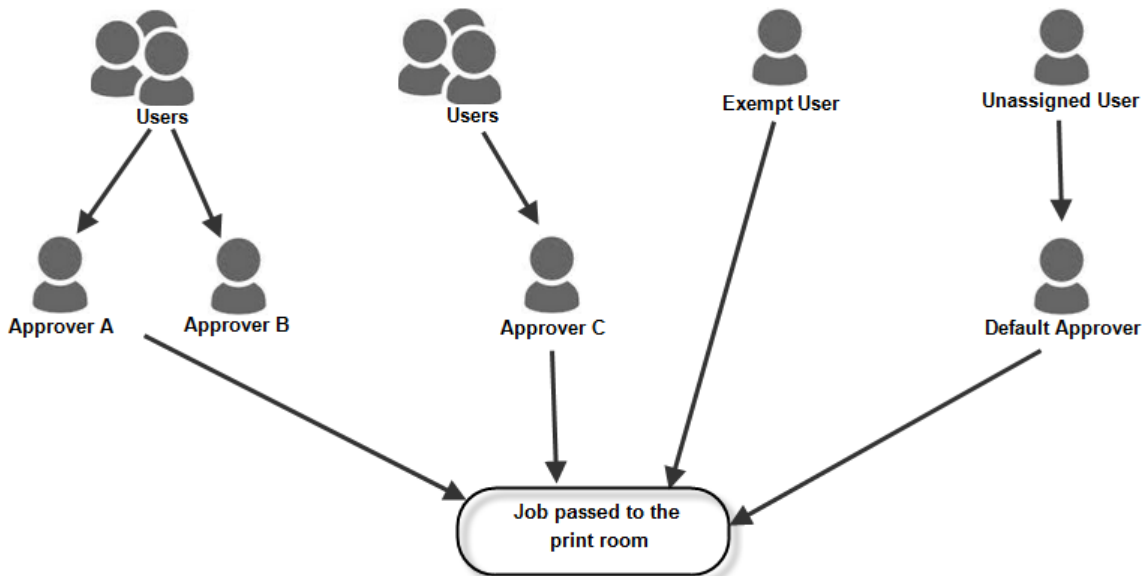
Approval is set and configured for each portal in your system.

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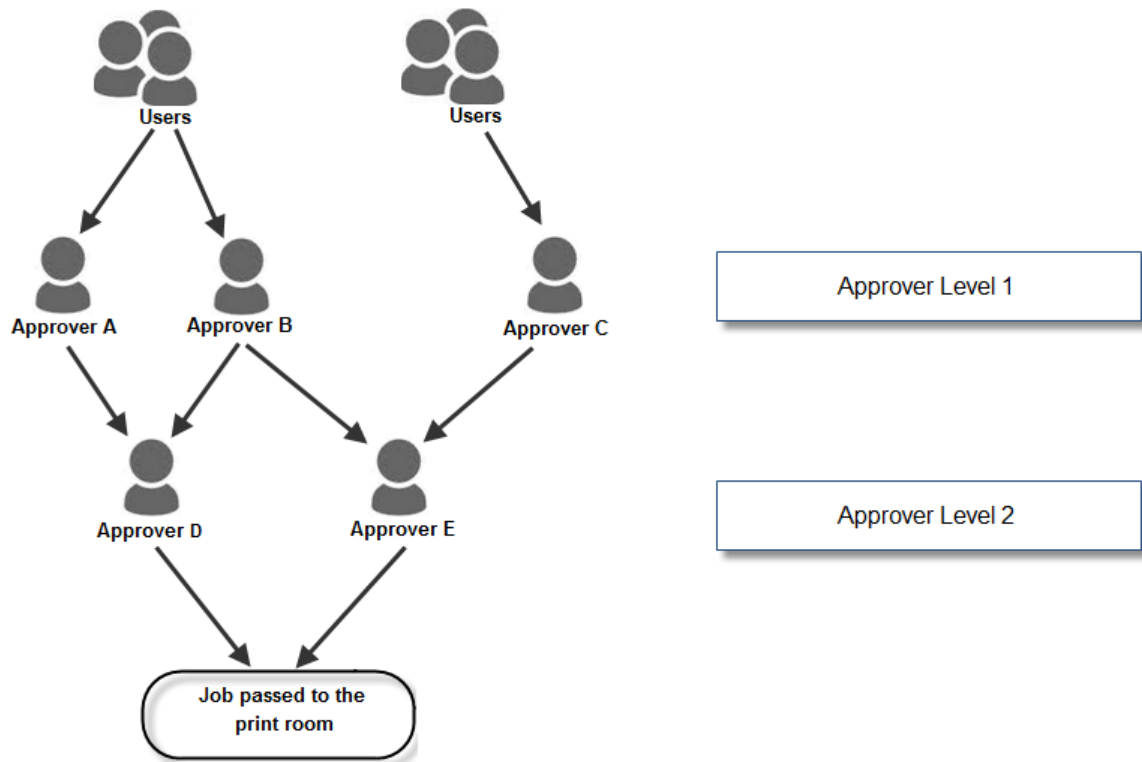
To help approvers decide whether an order should be passed to the PrintStation the system can be configured to allow them to download the associated PDF.

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

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

Your order was successful.

Order Number: 0005287
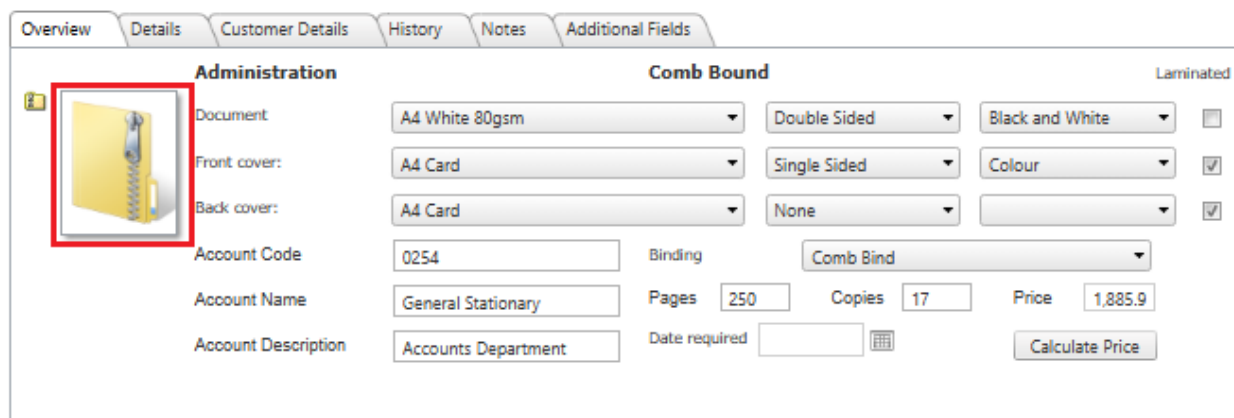
Documents will not be printed until they are approved.

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

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

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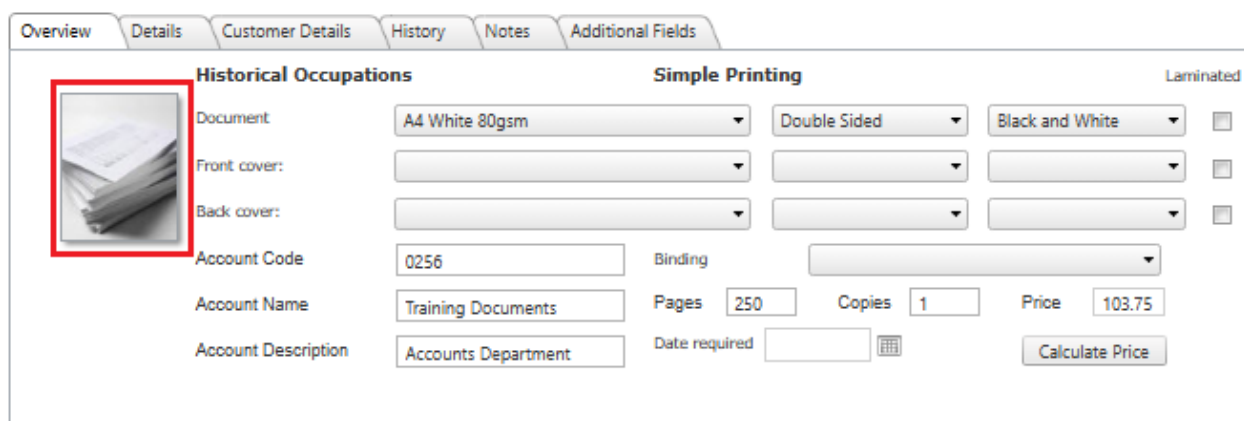
If an order is placed which contains a zip file you are able to open the zip file and view the document before approving or rejecting the order. To open the zip file double click 📁.

Example of an order placed for a Zip file

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

Example of an order placed for a paper original.

Using Approval

To approve or reject an order:

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

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

Overview Tab

Details

Customer Details

History

| Overview | Details | Customer Details | History | Notes | Additional Fields |

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

Notes

| Overview | Details | Customer Details | History | Notes | Additional Fields |

User Notes

Your Notes (Not visible to user)

Additional Fields

| Overview | Details | Customer Details | History | Notes | Additional Fields |

Further Information

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

Select an Additional Field to edit the Value
Course Subject

| Computing & Informatics ▼ |

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

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

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

Example with single level approval.

Example with 2 level approval.

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

Example of an email confirming that the order has been approved

Selecting Users

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

When an approver clicks [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.

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

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

Allocated users are hidden

To allocate a user to an approver:

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

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

3.   Click [Save].
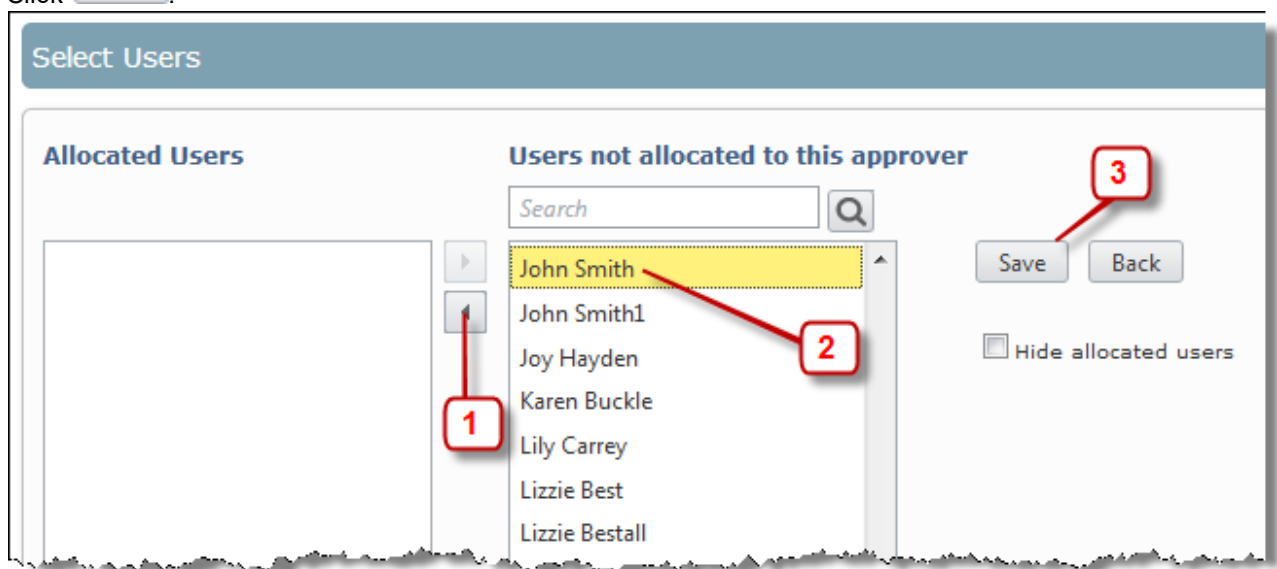
Viewing Approval Status

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

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

Example of the Approval Status Report.

To view the Approval Status Report:

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

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

   Approval Status

Management Facilities

The role of Manager provides access to the Management page.
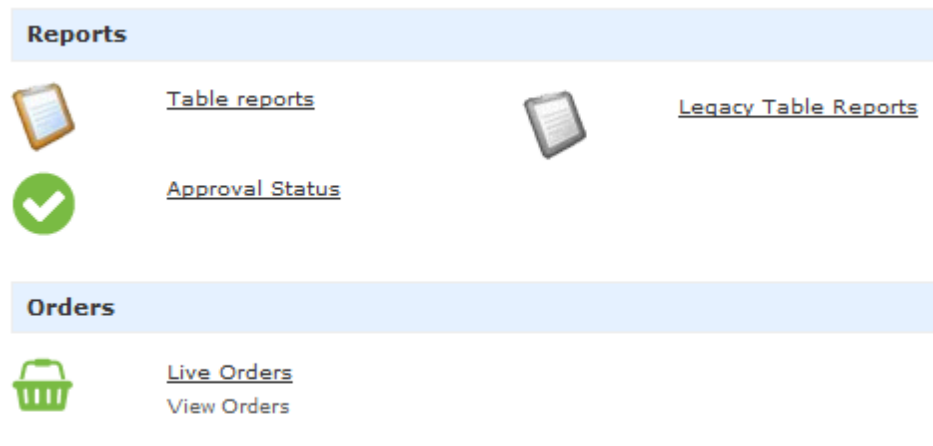
Example of the options available on the Management page.

Reports

Reports allow a manager to interrogate jobs that have been printed. When a report has been created the report data can be exported for further analysis in your own system or into Excel. For more information on presenting the exported data using Excel refer to the section Using Exported Data in Excel [92] .

The type of reports available are divided into 2 types.

- Table Reports [88] - 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.

- Approval Status [85] - A report that displays the number of orders awaiting approval and details about the order.

Using Table Reports

To run a report:

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

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

    Table reports

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

4. Select a date range for the report.

5. Click

6.   The report will be displayed at the bottom of the screen.The data created when you run a report can be exported so that it can be manipulated to produce any management reports required. When you have created a report you can export the report details as a comma separated file. You can then import the data into a program of your choice. You can export the data directly to Excel or as a CSV file that can be opened in other programs, including Excel. Refer to the section Using Exported Data in Excel[]92 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.
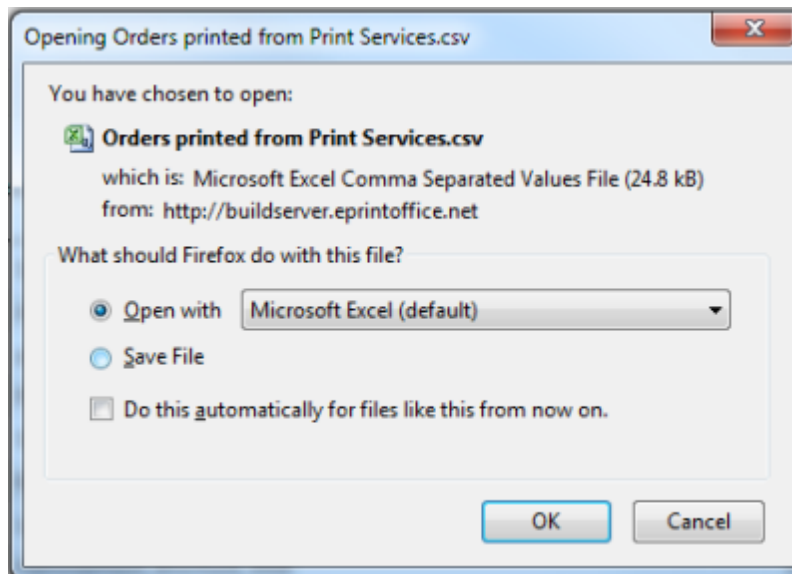
Creating a New Report

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

To create a new report:

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

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

Table reports

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

Variables can be added to the description.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Using Exported Data in Excel

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

To use Excel to present your data:

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

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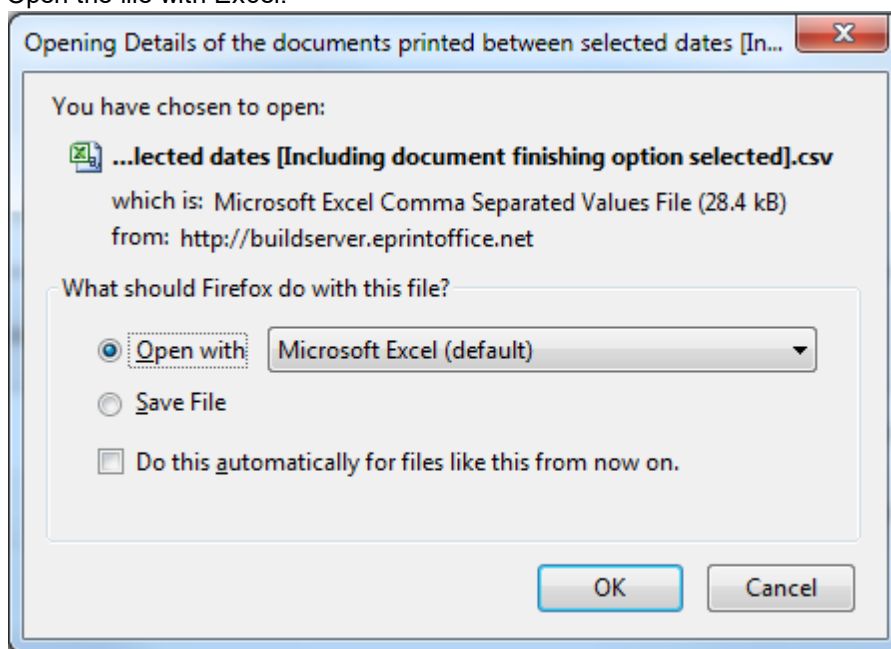
3. The exported data will be shown in Excel ready for you to apply formatting and present the data as required.

Sub-totals

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

1 2 3		A	B	C	D	E
	1	Product Name	OrderId	Document Pages	Account Code	Total Printed Pages
+	4	A4 Booklet Total				128
+	25	A4 Plastic Comb Binding Total				1715
+	34	Business Card Total				15
+	38	Printing Double Sided and Stapled Total				420
+	77	Simple Printing Total				19570
−	78	Grand Total				21848
	79					

Example showing the use of the Excel feature Sub-total

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

1 2 3		A	B	C	H
	1	OrderId	Account Code	Price	Username
+	122			1907.65	admin Total
·	123	3056	312	£0.15	AndyB
·	124	3058	312	£0.20	AndyB
·	125	3057	517	£0.09	AndyB
·	126	3054	517	£1.62	AndyB
·	127	3053	517	£1.20	AndyB
·	128	3055	517	£2.31	AndyB
−	129			£5.57	AndyB Total
+	327			£12,719.38	Anne Webb Total
+	351			£516.14	Shanda Leer Total
+	375			£534.76	Tester Total
+	397			£169.41	Theresa Green Total
+	403			£20.46	user Total
+	407			£120.84	Wanda Total
−	408			£15,994.21	Grand Total

Pivot Tables

Pivot tables can be used to summarize the exported data. Data can be sorted and grouped and the count of items or a sum can be shown. Before creating a pivot table you need to be clear on what you want to show. In the example below the total number of pages printed for all account codes is shown. Using the pivot table you could show just the pages printed for each of the account codes.

	A	B
1	Account Code	(All)
2		
3	**Product**	**Sum of Total Printed Pages**
4	A4 Booklet	128
5	A4 Plastic Comb Binding	1715
6	Business Card	15
7	Printing Double Sided and Stapled	420
8	Simple Printing	19570
9	**Grand Total**	**21848**

Pivot Table Example showing all the account codes

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

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

**Pivot Table example showing orders placed,
grouped by Account Code**

Pivot Table Chart - When you have created a pivot table you can easily display the data graphically.
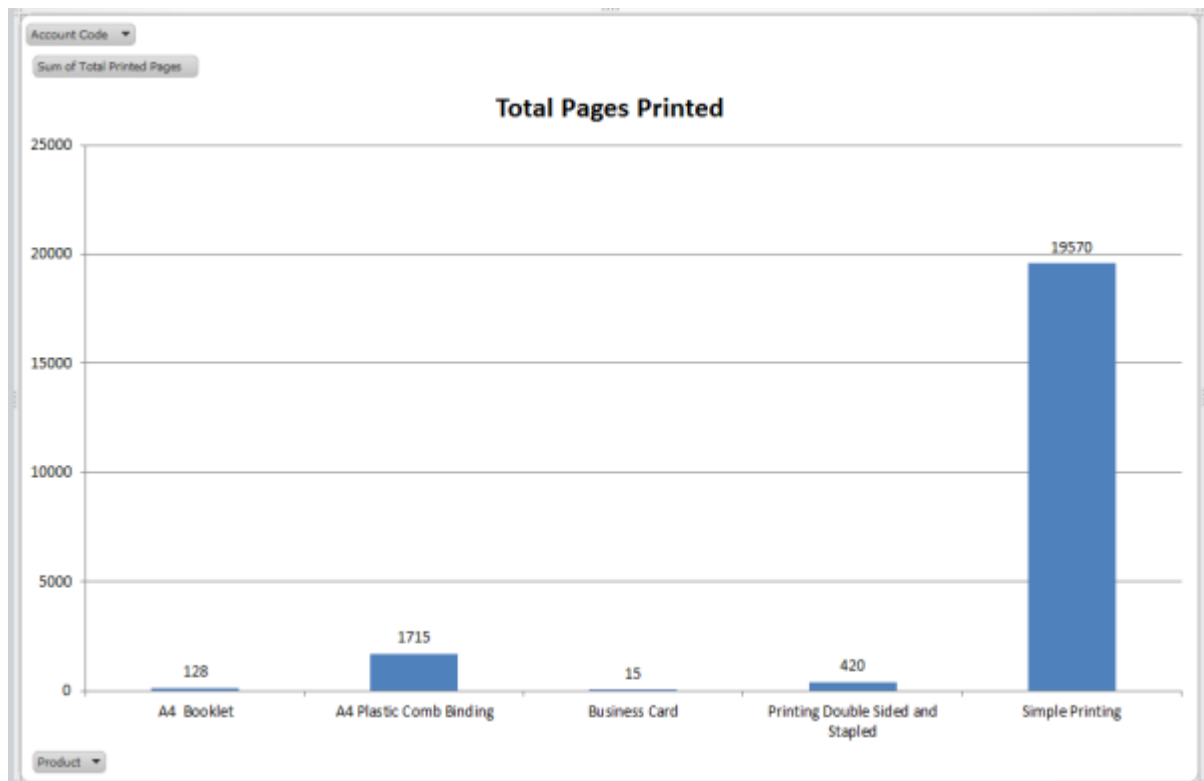
Example of a chart produced from the pivot table.

Using Reports - Further Information

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

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

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

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

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

Additional Cost
Not currently used

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

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

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

Notes

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

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

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

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

Live Orders

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

Note:

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

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

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

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

To enable Managers to edit live jobs:

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

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

    Portal Configuration
    Manage the configuration options for this portal

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

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

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

4. To amend this option click .

5. Click to save the setting.

To configure **Managers Can Edit Live Job Details** for all portals associated with Skyline use the default configuration option. These options are only available when you are logged in with Host privileges. Any changes to the default configuration will affect **ALL** portals associated with Skyline.go

Viewing Live Orders

To view live orders:

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

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

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

		User name	Order Id	Document name	Product	Account Code	Pages	Copies	Date Submitted	Date required
Status: Order placed										
		Anne Webb	0002936	Mail Merge with action	Simple	3	10	3	20/01/2020 09:25:00	
Status: Downloaded										
		Anne Webb	0002922	Austria	Simple	T369-C	10	5	13/01/2020 11:00:00	
		Anne Webb	0002921	PrintStation	Comb Bound	W587	100	3	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	
		Anne Webb	0002888	Administration	Portrait Staple	007	266	1	25/11/2019 14:20:00	26/11/2019 00:00:00
			0002885	WorldWide		852		50	12/11/2019	16/11/2019

Change page: |◀ ◀ ▶ ▶| Page **1** of **2**, items **1** to **100** of **184**.

Change the status of selected jobs to [Order placed ▼] [Change]

Example of the Live Orders web page

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

Example of the different statuses available

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

Example of a search result.

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

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

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

Example of the details of an order

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

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

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

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

[icon] Portal Configuration

Manage the configuration options for this portal

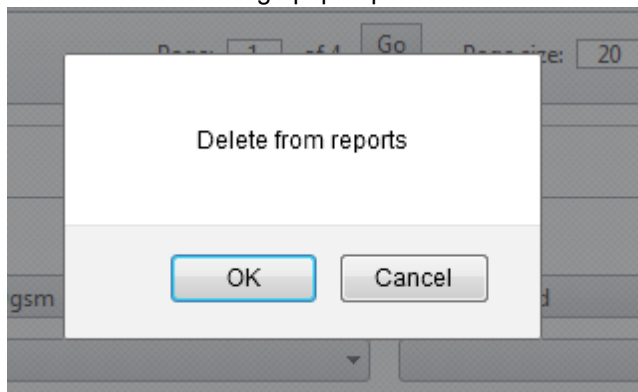3.   Find **Managers Can View Live Job PDFs** in the list.

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

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

4.   To amend this option click [icon].

5.   Click [icon] to save the setting.

To configure **Managers Can Edit Live Job Details** for all portals associated with Skyline use the default configuration option. These options are only available when you are logged in with Host privileges. Any changes to the default configuration will affect **ALL** portals associated with Skyline.go

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

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.

Example of the Customer Details tab information.

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

Example of the History tab information.

Printing details are shown in the Printing tab.

Example of the Printing tab information.

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

Example of the Notes tab information.

Changing the Status of Live Orders

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

To change the status of an order:

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

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

3. Select the required status then click Change .

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

4. The order will be updated to the new status. The change to the order is also shown in the PrintStation
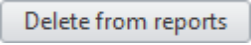
Removing a Printed job from Reports
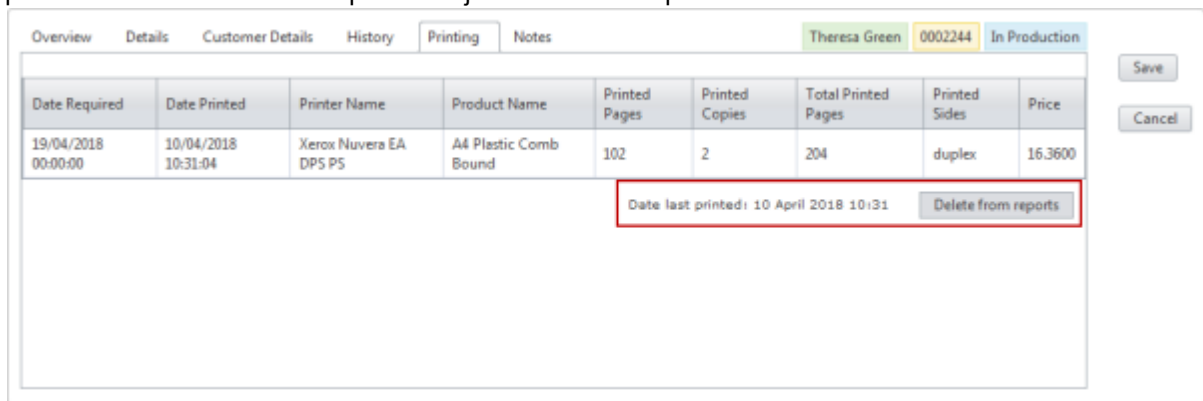
Managers can use the Live Orders page to remove a printed job from reports. Any amendments made will be shown in the PrintStation.
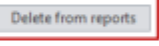
To remove a printed job from reports:

1. View the details of the order. A job that has been printed will have 🖨 associated with the order. If the print icon is red then the order has been printed more than once. Hover your mouse over the 🖨 and an indicator will show the number of times that the order had been printed.

2. View the Printing tab. Select the record that you want to delete and then click [Delete from reports] to remove the record of the job from the reports. This will not change the status of the job, just remove the printed information from the reports. If a job has not been printed then the button is not available.
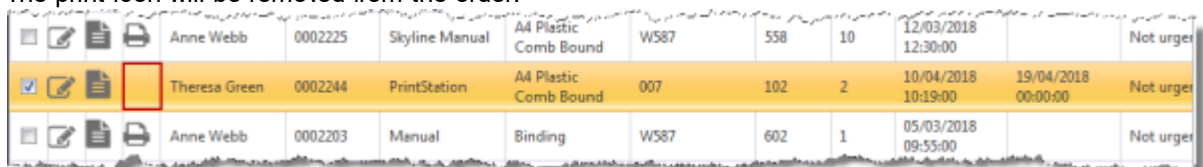
3. A confirmation message pops up. Click **OK** to delete the job from the reports.

4. The print icon will be removed from the order.
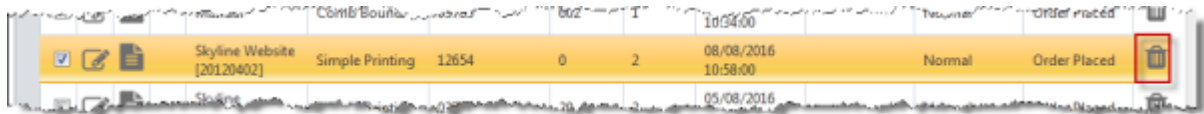
Deleting an Order

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

To delete an order:

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

1.   View the details of the order.

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

3.   Click **OK** when you are asked "Are you sure that you want to delete the selected record?"
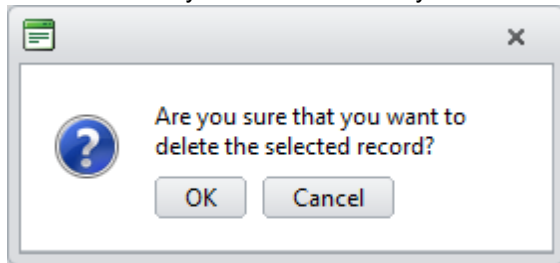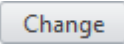
4.   The order will be deleted from both PrintStation and the user's order list.

Restoring a Deleted Order

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

To restore a deleted order:

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

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

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

Changing Order Details

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

To change the product options on an order:

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

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

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

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

To change the order information:

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

1.   Click [icon] to view the details of the order.

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

3.   If a change to the order will affect the price click [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.

To re-assign orders to the PrintStation:

1. Create a new custom status e.g. "Missing Jobs".

2. Change the status[104] 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

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