KONICA MINOLTA

Printgroove
POD Guide

User's Guide

Printgroove POD GUIDE

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1 Introduction

1.1 Welcome

This user's guide provides details about the use of Printgroove POD Guide, the PDF/JDF-based Workflow management module of the Printgroove suite of applications. The Printgroove POD Guide Workflow provides a comprehensive overview of a job's progress, an easy way to follow a job as it processes. With Printgroove POD Guide you can also place an order, upload files, edit job tickets and review proofs. It also handles customer account management, cost estimates and billing information.

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The actual dialog boxes that appear on the screen may be slightly different from the screen images used in this user's guide.

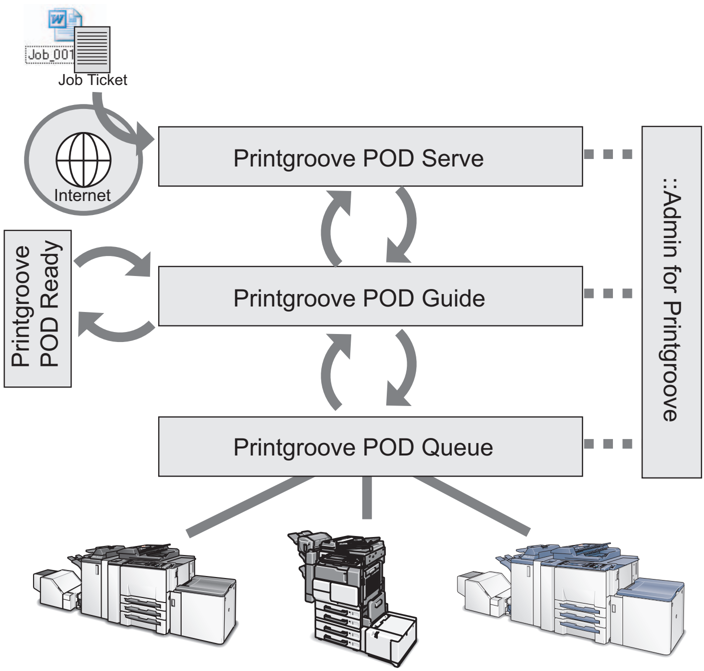
In order to incorporate improvements in the product, the contents of this user's guide are subject to change without notice.

1.2 Printgroove Suite Overview

The Printgroove POD Suite is a Digital Workflow Solution that helps CRD/reprographics departments meet the needs of increasingly demanding markets. Printgroove's modular design provides the flexibility to integrate all stages from job submission to fulfilment. Ideal for small to mid-size operations, Printgroove is an affordable solution for all your reproduction and publishing needs.

The Printgroove POD Suite is comprised of four modules.

- Printgroove POD Serve: a web service for print job submission by the external user. It also enables the external user to verify the status of the job in real-time.
- Printgroove POD Guide: a process control tool. It designs the Workflow, monitors job tracking, and also handles customer account management, cost estimates and billing information.
- Printgroove POD Ready: a Make Ready tool. Automatic and manual imposition, page layout and late-stage editing are all supported.
- Printgroove POD Queue: a print management tool. The status and workload of discovered printers are monitored. Incoming, processing and completed jobs are routed and tracked and last-minute job ticket editing is supported.



The Printgroove POD Suite improves the productivity of the entire Workflow and helps prevent print errors caused by users by providing the following functions:

- Printgroove POD Guide receives orders from Printgroove POD Serve through the Web. The customer creates a job ticket which is saved and submitted to the CRD/reprographics department. There the ticket can be reviewed and modified.
- A tracking number is issued and the user can trace the status of a print order using Printgroove POD Serve/Guide.
- Process management is handled in Printgroove POD Guide. POD Guides Workflow functions also enable comprehensive oversight of a job's progress.
- After Printgroove POD Guide sends the job data to Printgroove POD Queue, the Printgroove POD Queue selects the optimum output engine and automatically processes the job.
- Printgroove POD Queue supports the export/import of job tickets, allows the user to change a job ticket, and a simple method of reprinting, all of which improve the productivity of the print job process.

Printgroove POD Queue can function as a stand-alone application or in any combination with the other modules.

In addition to these modules, the Printgroove POD Suite provides the Printgroove POD Driver which enables you to convert native file jobs to JDF/PDF files and then send them directly to the selected Printgroove POD module for processing.

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Note

- *Printgroove POD Serve is one method used to submit jobs. It is primarily used by customers of your reprographics department to send you jobs.*
- *::Admin for Printgroove is a web utility that enables administration of the Printgroove POD system. For details, please refer to the user's guide of ::Admin for Printgroove.*

1.3 Printgroove POD Guide Overview

Printgroove POD Guide is an application installed on the Printgroove POD Server. Printgroove POD Guide is used by the internal (CRD/printshop) employee via an intranet connection.

Printgroove POD Guide provides Workflow functions that enable a comprehensive oversight of a job's progress. In addition, Printgroove POD Guide allows you to place an order, upload files, edit job tickets and review proofs. It also handles customer account management and business operations such as cost estimates and billing.

With Printgroove POD Guide running your print floor, work flow is streamlined.

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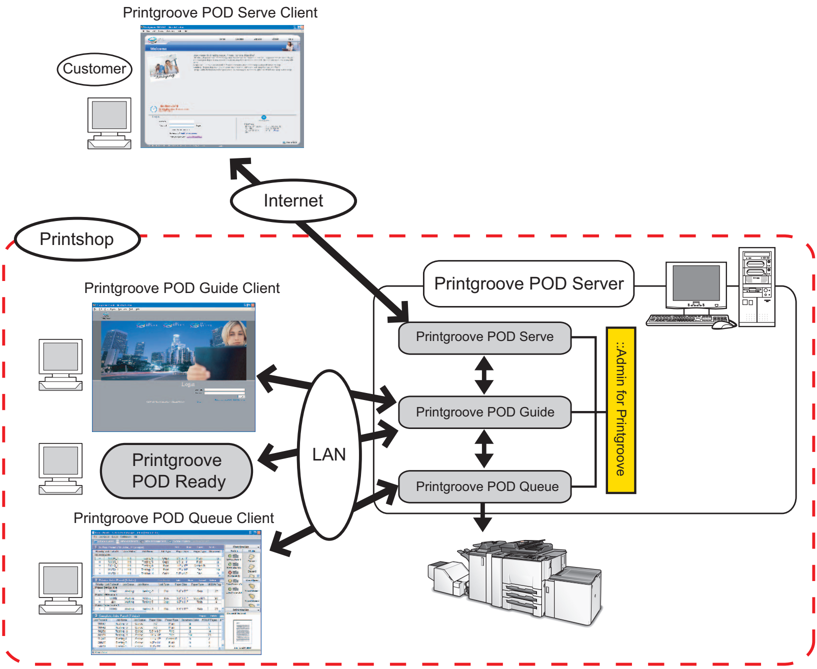
Note

Customers of a printshop are typically other companies. Customers of a CRD are typically other departments with the same company, such as Human Resources, Marketing, Engineering, etc.

An Internal employee can use Printgroove POD Serve on their intranet to place an order. While Printgroove POD Guide has the same functions as Printgroove POD Serve, POD Guide has more administrative functions. For this reason, it is recommended that internal employees use Printgroove POD Guide.

Printgroove POD Guide is the core of the Printgroove POD suite because it allows an internal employee to do the following:

- Place orders, upload files, review proofs on the web
- Check order status
- Workflow management
- Job Ticket/order tracking
- Operating status reporting
- Monitor to uncover bottlenecks
- Schedule management
- Customer management
- Order management and archiving
- Invoice creation
- Generate Quotes for off-line customers



Because Printgroove POD Guide communicates with Printgroove POD Serve, the external customer can submit/customize jobs, perform proof checks and track the status of orders, all over the Internet.

An internal employee can send e-mail notifications to the external customer via Printgroove POD Guide.

Printgroove POD Guide can communicate with Printgroove POD Queue, which allows an internal user to process incoming jobs and track output to printers.

If you install the Printgroove POD Driver on your PC, Printgroove POD Guide can use that Driver to convert a customer-submitted file to PDF. The latest Printgroove POD Driver can be downloaded via your Printgroove POD Serve Home page.

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Note

Printgroove POD Driver installation procedures are discussed in the 'Printgroove POD Driver User's Guide".

1.4 System Specifications

Printgroove POD Server

Operating System	Hardware (minimum specifications)
Ubuntu v8.04 (Hardy Heron)	Processor: Pentium 4, 2.8 GHz Memory: 512 MB HDD Capacity: 20GB free space NIC: 10/100/1000 Mbps Other Media: DVD-ROM Drive

RAID Support
RAID5

1.5 System Requirements

Client Computer

Web Browser for Windows
Internet Explorer 7.0 or 8.0
Firefox 2.0 or 3.0

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Note

When logging in as a user with appadmin-level permissions, that user must use Firefox as their browser since Internet Explorer will not support appadmin-level functionality.

Web Browser for Mac
Firefox 2.0 or 3.0

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Note

If you open Printgroove POD Guide in a different browser than those noted above, a pop-up message will open and request that you use a supported browser. Click the [OK] button if you wish to try running POD Guide on the non-supported browser. If you select the “Stop executing scripts on this page” checkbox on the pop-up message, JavaScript is disabled and Printgroove POD Guide will not run. The pop-up will appear prior to log in and any time you Refresh the browser.

Plugins
Flash Player 9 or later

Optional Plugins and Applications
Adobe Reader 8 or later

AntiVirus Software
Several application are supported by Ubuntu but ClamAV Antivirus is recommended. Please see: “https://help.ubuntu.com/community/ClamAV”.

1.6 Licensing Overview

Support for Printgroove POD Guide features is based on your license agreement. To upgrade, additional licensing is required. Please see your Konica Minolta Sales Representative for details.

Standard and upgrade levels of each feature are noted below:

Printgroove POD Guide Licensing	
Standard	Includes the following as standard: - 5 internal reprographics department user licenses (2 users defined as default users - psc and appadmin) - 1 Standard/Advanced Workflow
Additional	Internal 10 Users Internal 20 Users Internal 50 Users Standard/Advanced Workflow 5 packs Standard/Advanced Workflow 10 packs Standard/Advanced Workflow 25 packs Standard/Advanced Workflow 50 packs Standard/Advanced Workflow 100 packs

The following tables note the menus that display if you have a Standard License for Printgroove POD Serve and Printgroove POD Guide.

Menus		Printgroove POD Serve Standard License	Printgroove POD Guide Standard License
Main	Home	❍	❍
	Inbox	❍	❍
	Tracker	❍	❍
	Reports	❍	❍
	Statistics	❍	❍
	Send Alert	❍	❍

Menus			Printgroove POD Serve Standard License	Printgroove POD Guide Standard License
Jobs	New		-	❍
	Browse		❍	❍
	Archive		-	❍
	Quotes		-	❍
Users	Users		❍	❍
	Group		❍	❍
Configuration	PDF Profile	Upload	❍	❍
	Shipping	Methods	❍	❍
		Labels	❍	❍
	Payment	Methods	❍	❍
		Invoice Template	❍	❍
	Services	Printing	❍	❍
		Internal	-	❍
		Catalog	❍	❍
	Job Ticket	JT Numbering	❍	❍
		JT Builder	❍	❍
	Price List		❍	❍
	Inventory Management		❍	❍
	Workflow	Builder	-	❍
		Nodes	-	❍
	Site	Contacts	❍	-
		Pages	❍	-
		Advertising	❍	-
		Logo	❍	-
		Agreement	❍	-

❍: Available
- : Unavailable

Using the menus and the functions given below requires the PFP Package license of the Printgroove POD Serve.

- [Configuration] - [Shipping] - [Methods]: Tracking Link and Tracking Number for Shipping Options
- [Configuration] - [Payment] - [Methods]: PayPal option
- [Configuration] - [Payment] - [PayPal Support]
- Job Ticket Details screen: [Shipping Details] menu
- Inbox/Tracker/Browser screen: [Shipping Tracking] icon

1.7 Where to Go from Here

To help you quickly locate the information you require, an overview of each chapter follows:

Chapter 2: Basic Information

This chapter provides basic Information about Printgroove POD Guide. This includes information about default Users/Groups/Roles, default Workflow/Node, the primary screens of Printgroove POD Guide, and instructions for the Login/Logoff procedures. This chapter is useful for all users and will help you understand the basic terms and functionality of Printgroove POD Guide.

Chapter 3: Place and View an Order

This chapter describes how to place an order using Printgroove POD Guide and how to view the order once it has been placed. Printgroove POD Guide can generate a customer quote even if the customer does not use the Printgroove POD Suite. The procedure is also described in this chapter.

Chapter 4: [Details] Screen Operations

[Details] screen is important screen to process order, Complete procedures for processing order on [Details] screen are explained in this chapter.

Chapter 5: System Management

Printgroove POD Queue has several system management functions. This chapter explains how to use these functions.

Chapter 6: User Administration

This chapter describes Group management, Role management and User management, functions used only by the Application Administrator.

Chapter 7: Workflow Administration

This chapter describes Node management and Workflow management, functions used only by the Application Administrator.

Chapter 8: Job Ticket Administration

This chapter describes Job Ticket Numbering management and Job Ticket Format management, functions used only by the Application Administrator.

Chapter 9: Other Administrative Settings

This chapter describes several settings of options and templates, functions used only by the Application Administrator.

Chapter 10: WebSite Settings for Printgroove POD Serve

You may customize the text and graphics that appear on the web pages of Printgroove POD Serve. This chapter explains how to use Printgroove POD Guide to make these modifications.

Chapter 11: Appendix

A Glossary of Terms is provided in this chapter. This chapter is useful for all users.

2 Basic Information

Once the Printgroove POD server is live, the application can be launched and configured for general use.

Before using the Printgroove POD Guide, the Application Administrator should complete the following tasks.

- Price List
- Job Ticket settings for Group
- Role settings
- Group settings
- User settings
- Workflow settings

To make it easier to start using the Printgroove POD Guide, defaults for those settings are already set.

To estimate costs and generate invoices with the Printgroove POD Guide, the following settings should be set by the Application Administrator.

- Printing Service
- Internal Service
- Invoice Template

If you are an Application Administrator, see Chapters 6 through 9 for instructions for making all administrative settings.

For all users, the following browser-limitations should be noted:

- The [Refresh/Reload], [Back] and [Forward] buttons of the browser used to view Printgroove POD Guide should not be used.
- The Function Key shortcuts (F3, F5, etc.) of the browser used to view Printgroove POD Guide should not be used.

For all users, the following File Name character behavior should be noted:

- When uploading a file to a Printgroove POD Guide order, the following characters will be modified: [+], [=], [%] and [ ] (blank space). Printgroove POD Guide will replace these characters with an underscore (_).
- For example ***Chpt_Ind_File.pdf*** would be changed to ***Chpt_Ind_File.pdf***.

This chapter describes the Predefined Default settings and terms like “User”, “Group”, “Price List”, “Role” and “Workflow” used in the Printgroove POD Guide.

The descriptions of settings and terms are followed by an overview of the primary application screens as well as Login and Logout information.

2.1 Users, Group and Roles

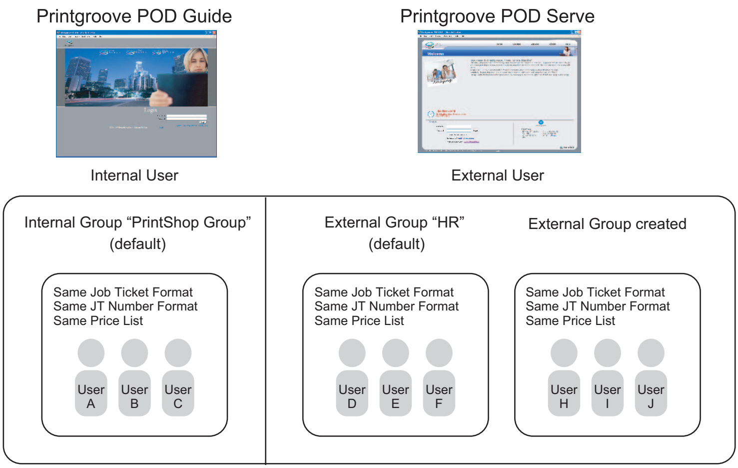
To use Printgroove POD Guide, user accounts are necessary.

The Application Administrator defines two types of users:
- Internal (the Printshop) who use Printgroove POD Guide
- External (the customer) who use Printgroove POD Serve

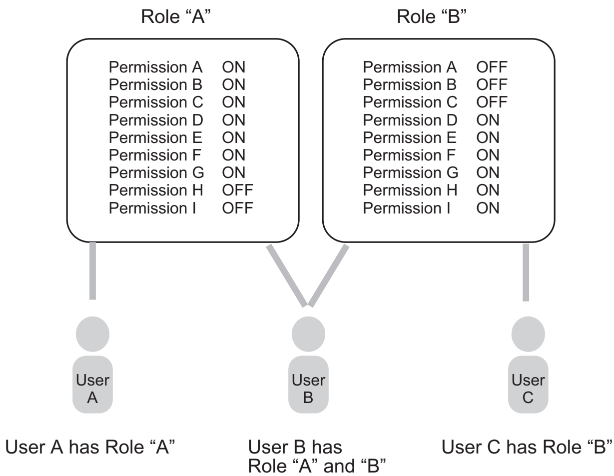
To make it easier to start using the Printgroove POD Guide, defaults have been predefined for both.

All users belong to a Group. A Group is a collection of users that use the same Job Ticket, the same Job Ticket Number Format, and the same Price List.

Internal users belong to the default Printshop group, named “Printshop Group.” External users belong to a customer Group based on company or department name, as defined by the Application Administrator.



The Application Administrator defines Roles.
- All users have permissions to perform certain actions.
- All users can be assigned multiple permissions.
- External user permissions are defined separately for each user.
- Internal user permissions are grouped as Roles.
- Internal users can have multiple Roles, meaning more than one set of permissions.



2.1.1 Predefined Users

To use the Printgroove POD Guide, user accounts are necessary. Default user accounts have been defined as follows:

User	Password	Description
appadmin	password	Application Administrator
psc	password	Printshop Coordinator

The Application Administrator can use the default account “appadmin” to start to use the Printgroove POD Guide.

The “appadmin” user can approve or create both external customer users as well as internal employee users.

If you are an Application Administrator and use “appadmin”, instead of creating a new account for the internal user, you may allow the default account “psc” to use Printgroove POD Guide.

If the default accounts are not suitable to your company, it is necessary to edit the default accounts or create new accounts as described in “User Administration” on page 6-1.

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Note

see "Roles and Permissions for Default Users" on page 2-6.

2.1.2 Predefined Groups

A Group is a collection of users that use the same Job Ticket, the same Job Ticket Number Format, and the same Price List.

All internal users belong to the group named, "Printshop Group."

The "Printshop Group" can be edited by the Application Administrator or others with the appropriate Role. This group cannot be deleted nor can another group for internal users be created.

The predefined group for external users is "HR". The Application Administrator or others with the appropriate Role can create, edit, and delete groups for external users.

Group	Description
Printshop Group	The group to which all internal users belong. This group can be edited but another group for internal users cannot be created. This group cannot be deleted.
HR	The predefined group for external users. This group can be edited but not deleted. Other groups for external users can be created, edited and deleted.

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Note

See "Group Settings" on page 6-11

2.1.3 Job Ticket Format, Job Ticket Number Format and Price Lists for Default Groups

Job Ticket Format is the form that users fill out to place an order. There are two basic types of Job Ticket Formats: Standard Order and Quick Order. The Standard Order contains all the available job ticket settings. Quick Orders provide the user with real time price quotes for a job but the job tickets have limited settings.

Job Ticket Number format is the combinations of letters, sequence numbers or date the order was placed, all these values used to identify the Job Ticket.

A Price List contains all the costing values for all supported job ticket settings as well as all Delivery, Internal Service and Special Pricing costs. The Application Administrator assigns the values to a Price List. A single price list is assigned to a group. Every job processed by that group will be costed based on the values set in the Price List.

The Application Administrator may designate different Job Ticket Formats, Job Ticket Number format options and Price Lists to different groups based on their needs.

Predefined settings of Job Ticket Format and Job Ticket Number format are as follows:

Setting	Predefined settings
Job Ticket Format	"Default Order-All fields" This format enables a user to fill out all available Printgroove POD Guide settings. This supports a Standard Order.
	"Default Order-Short Form" This format enables a user to fill out all available Printgroove POD Guide settings except the [Options] section which has limited accessibility. In the [Options] section, the user can only modify the [Copies], [Layout], [Paper], and [Sides] fields. This supports a Standard Order.
	"Default Order-Quick Order" This format enables a user to fill out limited fields but then get a real-time price quote for the print job.
Job Ticket Number format	"KM_%system-counter%"

The default settings of Job Ticket Format, Job Ticket Number format and Job Ticket Number format to the default groups are as follows:

Setting	Default setting
Job Ticket Format	"Default Order-All"
Job Ticket Number format	"KM_%system-counter%"

The Application Administrator can edit these default settings.

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Note

- *The Application Administrator can use "Job Ticket Builder" to create or change the Job Ticket Format to specify the requirements of print jobs. See "Job Ticket Format Settings" on page 8-9.*
- *The Application Administrator can create or change the Job Ticket Number Format. See "Job Ticket Number Settings" on page 8-2.*
- *The Application Administrator must create at least one Price List before jobs can be created. See "Create a Price List" on page 6-2.*

2.1.4 Roles and Permissions for Default Users

Roles and Permissions of the default users are as follows:

Category	Permissions	Role “app_admin”					Role “Printshop_coordinator”				
		Create	Edit	Delete	View	Activate	Create	Edit	Delete	View	Activate
Main	Inbox	-	-	-	OFF	-	-	-	-	ON	-
	View Tracker	-	-	-	ON	-	-	-	-	ON	-
	Queue	-	-	-	OFF	-	-	-	-	ON	-
	Alert	-	ON	-	-	-	-	ON	-	-	-
	Reports	-	-	-	ON	-	-	-	-	ON	-
	Statistics	-	-	-	ON	-	-	-	-	ON	-
Jobs	Jobs	OFF	OFF	OFF	ON	-	ON	ON	ON	ON	-
	Job Restore	-	OFF	-	-	-	-	ON	-	-	-
	All Jobs	-	OFF	-	ON	-	-	ON	-	ON	-
	Generate Invoice	-	-	-	ON	-	-	-	-	ON	-
	Ticket Printing	OFF	-	-	-	-	ON	-	-	-	-
	Costing	-	OFF	-	-	-	-	ON	-	-	-
	Notes	OFF	-	-	-	-	ON	-	-	-	-
	Files	OFF	-	OFF	-	-	ON	-	ON	-	-
	Proof Generation	OFF	-	-	-	-	ON	-	-	-	-
	Add To Tracker	ON	-	-	-	-	ON	-	-	-	-
	PDF Conversion	OFF	-	-	-	-	ON	-	-	-	-
	Internal Services	OFF	-	-	OFF	-	ON	-	-	ON	-
	Quote	OFF	-	OFF	OFF	OFF	ON	-	ON	ON	ON
	Archive	OFF	-	-	OFF	-	ON	-	-	ON	-
	Subscribe To Job	ON	-	-	-	-	ON	-	-	-	-
	Status Change	-	OFF	-	-	-	-	ON	-	-	-

Category	Permissions	Role “app_admin”					Role “Printshop_coordinator”				
		Create	Edit	Delete	View	Activate	Create	Edit	Delete	View	Activate
User Admin	Customer Group	ON	ON	ON	ON	ON	OFF	OFF	OFF	OFF	OFF
	Customer Users	ON	ON	ON	ON	ON	OFF	OFF	OFF	ON	OFF
	Printshop Groups	-	ON	-	ON	-	-	OFF	-	OFF	-
	Printshop Roles	ON	ON	ON	ON	-	OFF	OFF	OFF	OFF	-
	Printshop Users	ON	ON	ON	ON	ON	OFF	OFF	OFF	ON	OFF

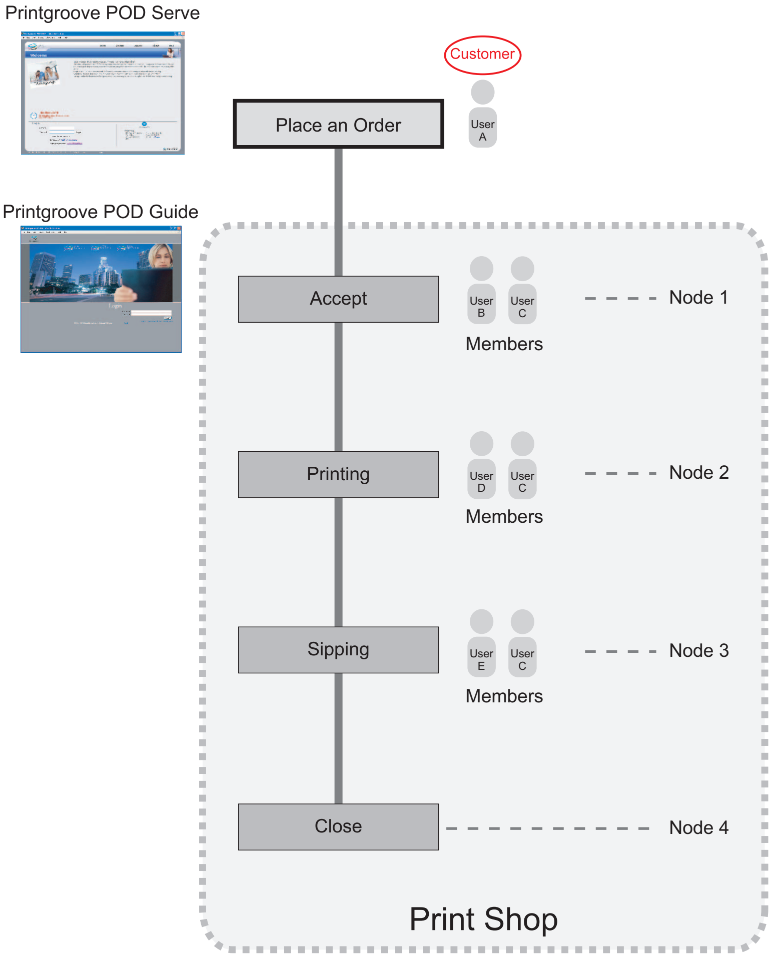
Category	Permissions	Role “app_admin”					Role “Printshop_coordinator”				
		Create	Edit	Delete	View	Activate	Create	Edit	Delete	View	Activate
Configuration	Admin Application	-	OFF	-	-	-	-	OFF	-	-	-
	Shipping Methods	ON	ON	ON	ON	ON	OFF	OFF	OFF	OFF	OFF
	Shipping Labels	-	ON	-	-	-	-	ON	-	-	-
	Payment Methods	-	-	-	-	ON	-	-	-	-	OFF
	Invoice Templates	-	ON	-	-	-	-	OFF	-	-	-
	Printing Services	ON	ON	ON	ON	-	OFF	OFF	OFF	OFF	-
	Internal Services	ON	ON	ON	ON	-	OFF	OFF	OFF	OFF	-
	Catalog Services	ON	ON	ON	ON	-	OFF	OFF	OFF	OFF	-
	Price List	ON	ON	ON	ON	-	OFF	OFF	OFF	OFF	-
	Contact Details	-	ON	-	-	-	-	OFF	-	-	-
	Site Pages	-	ON	-	-	-	-	OFF	-	-	-
	Advertisement	-	ON	-	-	-	-	OFF	-	-	-
	Logo	-	ON	-	-	-	-	OFF	-	-	-
	Ticket Number Formats	ON	ON	ON	ON	-	OFF	OFF	OFF	OFF	-
	Ticket Builder	ON	ON	ON	ON	-	OFF	OFF	OFF	OFF	-
	Workflow Basic	ON	ON	ON	ON	ON	OFF	OFF	OFF	OFF	OFF
	Workflow Advanced	ON	ON	ON	ON	ON	OFF	OFF	OFF	OFF	OFF
	Workflow Nodes	ON	ON	ON	ON	-	OFF	OFF	OFF	OFF	-
	Inventory Management	OFF	OFF	OFF	OFF	-	ON	ON	ON	ON	-
	PayPal Support	ON	ON	ON	ON	ON	OFF	OFF	OFF	OFF	OFF
	Site Agreement	-	ON	-	-	-	-	OFF	-	-	-

2.2 Workflow

Printgroove POD Guide contains a workflow function which allows you to define the way a job is routed through the Printshop Group.

The various locations where work is performed on print jobs are called nodes. A Node represents an internal Printshop Team, an individual, or even an automated process. Printshop Users within Nodes are called Members.

An example of a basic workflow is as follows:



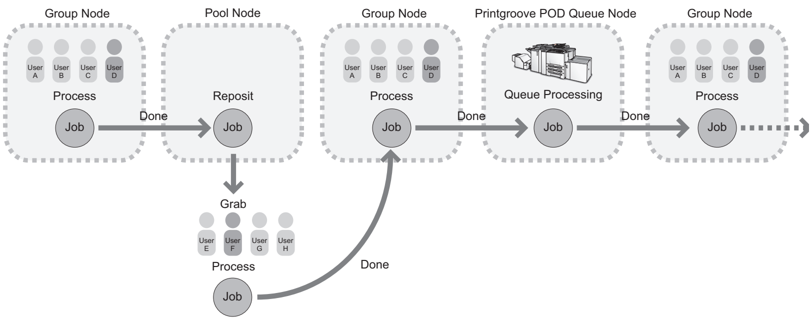
A complete definition of a Workflow consists of Nodes, Members assigned to each Node, valid paths or Transitions a Job may take and Node Triggers.

There are three types of nodes:
- Group Node
- Pool Node
- Queue Node

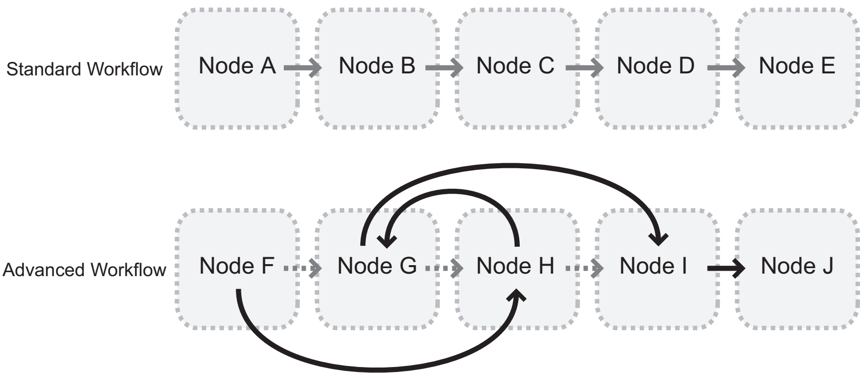
The Group Node is made up of Printshop Users, usually performing similar tasks.

The **Pool Node** is a place to send jobs that need to go to a specific node only when users in that node are ready to perform the job. Jobs do not move from a pool node – they are grabbed by users in the next node in a workflow by use of the [Grab] menu of [Job Ticket Menu]. For details about the [Grab] menu, see “Grab an Order” on page 4-59.

The **Queue Node** is included in the workflow to send the job to Printgroove POD Queue for printing. When POD Queue has finished with the document, the document will come back to the next node defined in the workflow.



There are two types of Workflow paths:
- **Standard**: Jobs are kept to a predetermined workflow path.
- **Advanced**: Jobs are allowed to move to other nodes without restriction.



Node Triggers are preplanned events that occur when a job has been sitting at a node for a specified period of time without a change in status.

You can use the Printgroove POD Guide without using the Workflow function, but this function enables you to automate all stages from job submission to fulfilment.

2.2.1 Predefined Workflows and Nodes

Two nodes are predefined. No workflow is predefined.

Default node names are “Printshop Node” and “Closed”. The “Printshop Node” is used to open the workflow and “Closed” is to close the workflow. These nodes cannot be deleted.

The “Printshop Node” can be edited except for the node name and node type. “Closed” nodes cannot be edited.

You can create workflows and nodes according to the procedures described in “Workflow Administration” on page 7-1.

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Note
To create a workflow, create nodes to add to the default workflow.

2.3 Screens

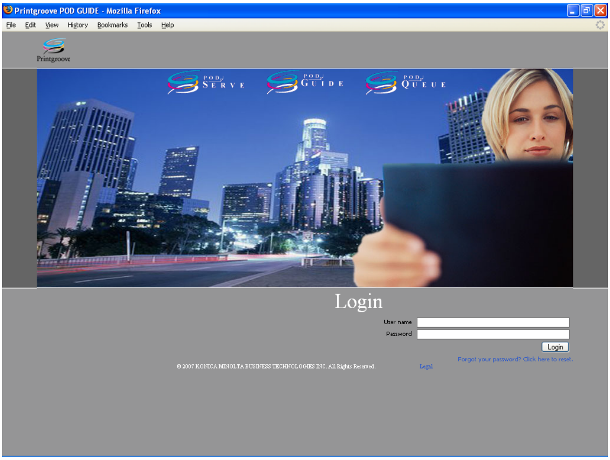
You can process orders or view orders via specific Printgroove POD Guide screens.

This section provides an outline of the screens and helps you to understand the functions of Printgroove POD Guide.

Note
For details about each screen, see Chapter 3 forward.

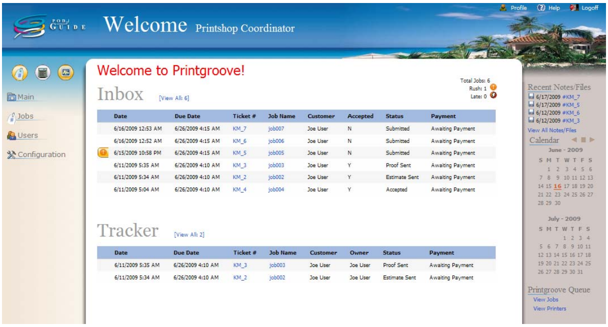
2.3.1 [Login] screen

When you launch Printgroove POD Guide, the [Login] screen opens.



2.3.2 Home Page

When you login to Printgroove POD Guide, your Home page opens. The quick link button icons ([New Job], [New Quote], and [Statistics]) above the menu on your Home page, allow you to access various functions, depending on your Role.



All screens display menus to the left of the screen and quick link buttons above the menu. From these menus and buttons, you can access various functions of the Printgroove POD Guide.

A [Recent Notes/Files] list and two calendars appear to the right of the screen. Click a date on the calendar to see all jobs submitted that day.

Administrators can access the Printgroove POD Queue Web client by clicking “View Jobs” or “View Printers” below the calendars.

You can access the [Help] page via the quick link at the top-right.

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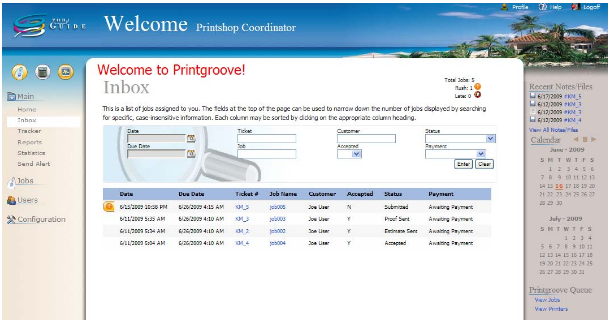
Note

For details about the Printgroove POD Queue Web client, see the ::Admin for Printgroove User’s Guide.

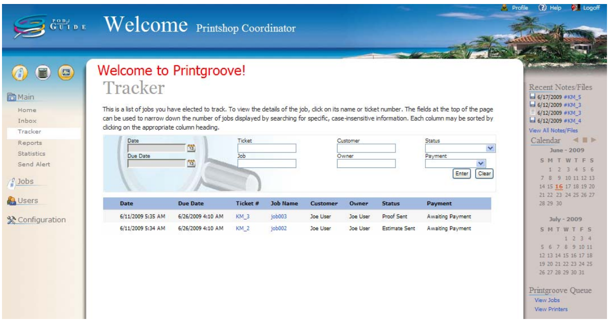
2.3.3 [Inbox] Screen

When you click [Main] - [Inbox] on your Home page, the [Inbox] screen opens. This screen lists your active jobs.



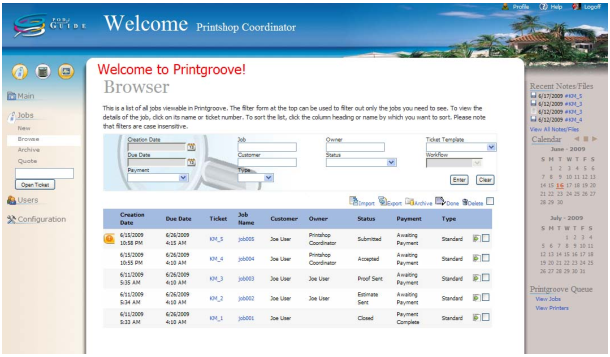
2.3.4 [Tracker] Screen

When you click [Main] - [Tracker] on your Home page, the [Tracker] screen opens. This screen lists jobs you are tracking.



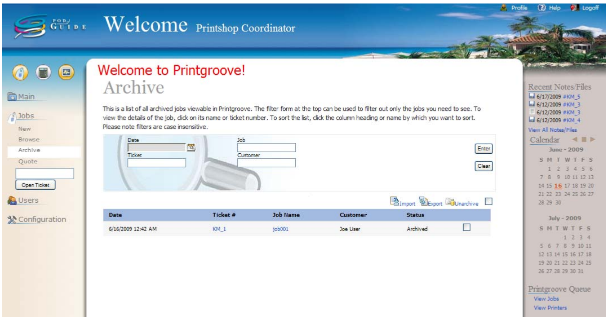
2.3.5 [Browser] Screen

When you click [Jobs] - [Browse] on your Home page, the [Browser] screen opens. This screen lists all jobs.



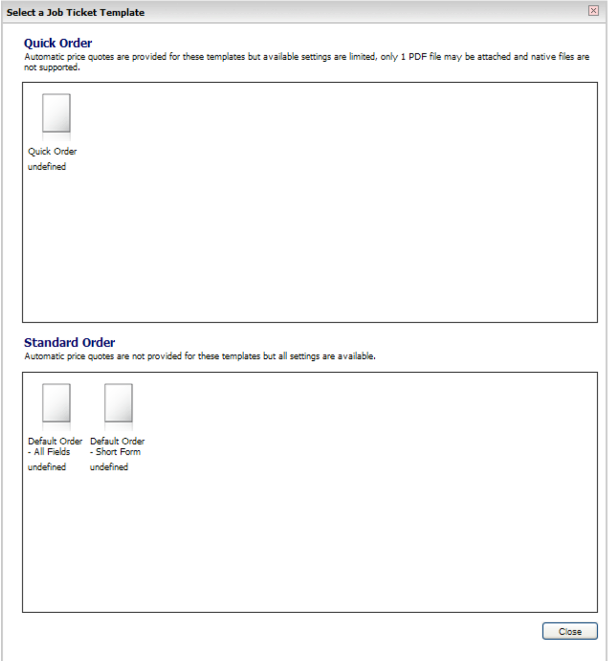
2.3.6 [Archive] Screen

When you click [Jobs] - [Archive] on your Home page, the [Archive] screen opens. This screen lists all archived jobs.



2.3.7 [New] Screen

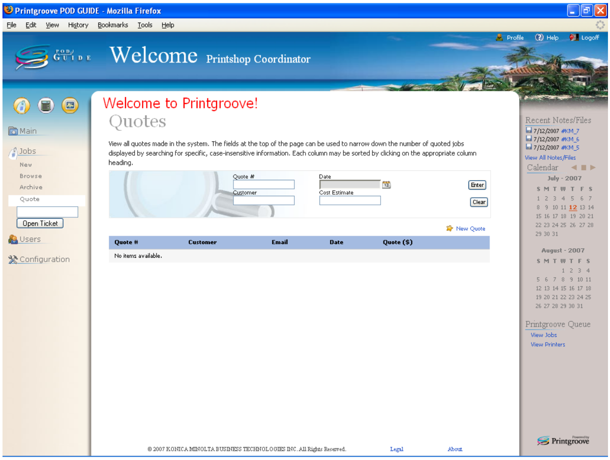
When you click [Jobs] - [New] on your Home page, the [Select a Job Ticket Template] screen opens.



Select either a Quick Order or a Standard Order by clicking on an icon. The [New] screen opens. You can place an order on this screen. The contents of this screen will vary based upon the type of Job Ticket Template you selected.

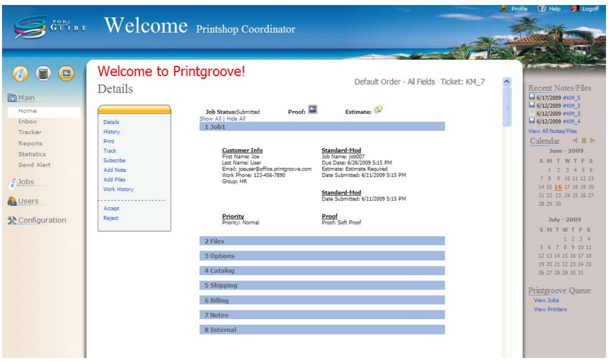
2.3.8 [Quote] Screen

When you click [Jobs] - [Quote] on your Home page, the [Quote] screen opens. You can generate a quote for a customer who does not use Printgroove POD Suite on this screen.



2.3.9 [Details] Screen

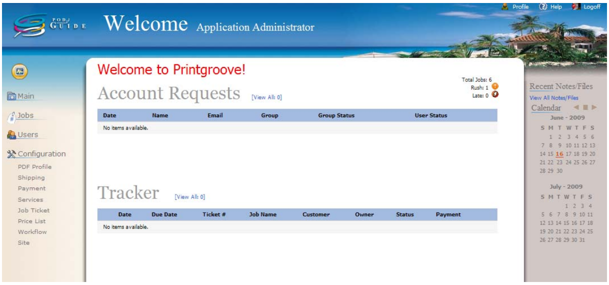
When you select a Job Ticket from the [Inbox] screen, [Browser] screen, or other screen, the [Details] screen opens. The [Details] screen displays the details of the Job Ticket. You can process the Job Ticket from this screen. The contents of this screen will vary based upon the type of Job Ticket Template you selected.



2.3.10 Application Administrator Screens

Some users will be given more permissions than others. These permissions are given by the Application Administrator--to managers, for example--so they can administrate all orders and this application.

For information about using these screens, see Chapter 6 forward.



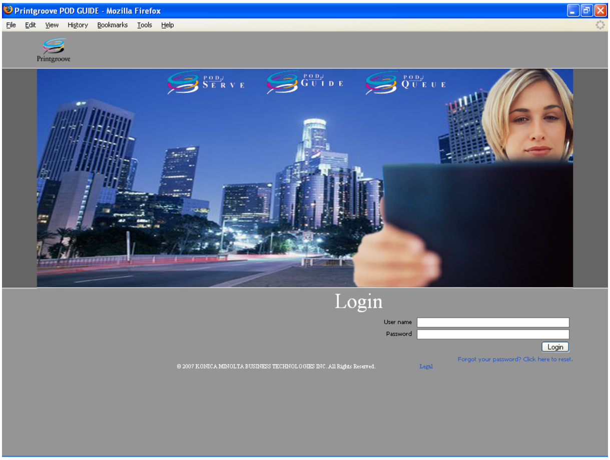
2.4 Login and Accept License

When you first login, you must accept the License Agreement.

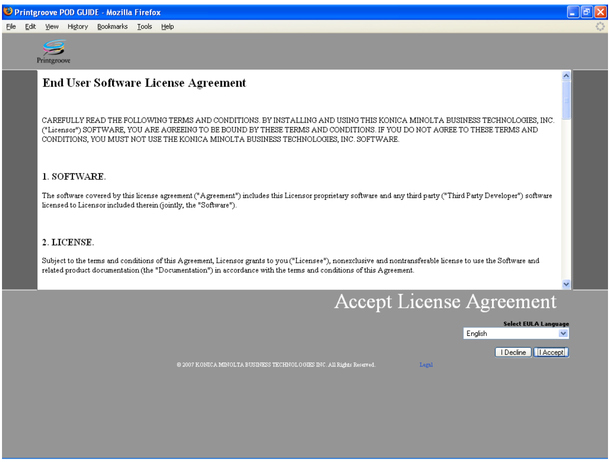
To login and accept the license agreement:

1. Start your web browser, enter the IP address of the Printgroove server/sg/, and press [Enter]. For example, if the IP address for the Printgroove server is 192.168.1.20, enter “http://192.168.1.20/sg/”.

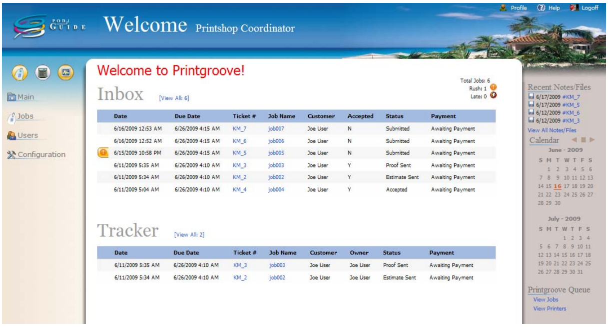
2. Enter your username and password in the corresponding fields located at the bottom-right of the [Login] screen.



3. Click [Login]. The License Agreement opens.



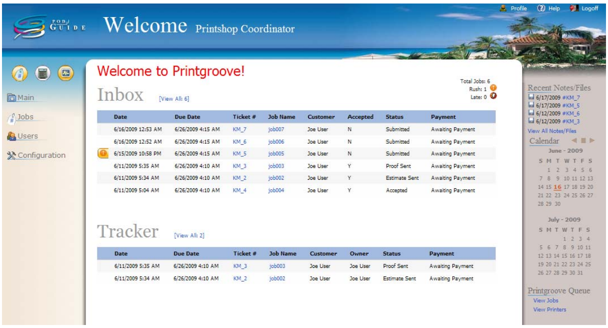
4 Read through the License Agreement and click [I accept]. The Home page will appear.



– The look of the Home page will vary slightly depending on the user-level of the person logged-in.

2.5 Logoff

When you want to logoff from Printgroove POD Guide, click [Logoff] at the top-right of your Home page.



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Note

If your session remains inactive beyond the time limit defined by your Application Administrator, you are automatically logged off.

3 Place and View an Order

Orders placed by the customer via Printgroove POD Serve are received and processed by internal users on Printgroove POD Guide. Additionally, orders can also originate from the Printgroove POD Guide.

This chapter describes how an internal; user with the appropriate Role can place an order with Printgroove POD Guide. Instructions for viewing the order are also provided.

Printgroove POD Guide can also provide a price to customers who do not use the Printgroove POD Suite. That quote process is also described in this chapter.

✎...

Note

If you have questions about your user Role, please see your Application Administrator.

3.1 Placing an Order

If you have the appropriate Role, you can place an order on Printgroove POD Guide by selecting [Jobs] - [New] from the menu. There are two types of orders that may be placed: Quick Order and Standard Order.

When creating a Print order, the Job Ticket must be filled in. The Job Ticket contains six sections: [Job], [Files], [Options], [Catalog], [Shipping] and [Billing].

The format of a Job Ticket can be edited by an appadmin user. In this section, however, the default Job Ticket format “Default Order-All fields” is used when describing the order-placing procedure. This is the default template for Standard-type orders. When there are differences between creating a new Standard Order and a new Quick Order, they are noted in the discussion.

The “Default-Order -All fields” available setting options are as follows:

Section	Category	Items	Description
Job	Customer Info	First Name	enter in text box
		Last Name	enter in text box
		Email	enter in text box
	Standard	Job Name	enter in text box
		Due Date	select from calendar
		Estimate	mark check box
	Priority	Priority	select a radio button
	Proof	Proof	select a radio button
Files	Submission	File Upload	select file(s) on dialog box
		Delete Files	mark check box
		Delivery	mark check box

Section	Category	Items	Description
Options	Copies	Copies	enter in text box
	Color	Print Color	select a radio button
		Color Quality - High Chroma	mark check box
	Media	Media Type	select a radio button
		Media Type Details	select from drop down menu
		Grade	select from drop down menu
		Coating	select from drop down menu
	Layout	Orientation	select from drop down menu
		Size Policy	select from drop down menu
		Combination	select from drop down menu
	Paper	Size	select from drop down menu
		Weight	select from drop down menu
		Color	select from drop down menu
		Use Perforated Paper	select from drop down menu
		Paper Name	enter in text box
	Sides	Sides	select from drop down menu
	Collation	Collation	mark check box
	Punching	Punching Edge	select from drop down menu
		Punching Number	select from drop down menu
	Folding	Folding	select from drop down menu
	Front Cover	Page	select from drop down menu
		Weight	select from drop down menu
		Color	select from drop down menu
		Grade	select from drop down menu
		Coating	select from drop down menu
	Back Cover	Page	select from drop down menu
		Weight	select from drop down menu
		Color	select from drop down menu
		Grade	select from drop down menu
		Coating	select from drop down menu
	Binding	Type	select from drop down menu
		Location	select from drop down menu
		Binding Color	select from drop down menu

Section	Category	Items	Description
Options	Offset	Offset	select from drop down menu
	Trim	Trim	select from drop down menu
Catalog	Paper	Letter White 20lb	enter in text box
		Legal White 20lb	enter in text box
	Pencils	Pencils	enter in text box
Shipping	Address Book		drag and drop the selected shipping address
	Ship to		select option of the selected shipping address
Billing	Billing Method		select a billing method

The “Default-Order -Quick Order” available setting options are as follows:

Section	Category	Items	Description
Job	Customer Info	First Name	enter in text box
		Last Name	enter in text box
		Email	enter in text box
	Standard	Job Name	enter in text box
		Due Date	select from calendar
	Priority	Priority	select a radio button
	Proof	Proof	select a radio button
Files	Submission	File Upload	select file(s) on dialog box
		Delete Files	mark check box
		Delivery	mark check box

Section	Category	Items	Description
Options	Copies	Copies	enter in text box
	Color	Print Color	select a radio button (Mixed is not available)
		Color Quality - High Chroma	mark check box
	Media	Media Type Details	select from drop down menu
		Grade	select from drop down menu
		Coating	select from drop down menu
	Layout	Orientation	select from drop down menu
		Size Policy	select from drop down menu
		Combination	select from drop down menu
	Paper	Size	select from drop down menu
		Weight	select from drop down menu
		Color	select from drop down menu
		Use Perforated Paper	select from drop down menu
		Paper Name	enter in text box
	Sides	Sides	select from drop down menu
	Collation	Collation	mark check box
	Punching	Punching Edge	select from drop down menu
		Punching Number	select from drop down menu
	Folding	Folding	select from drop down menu
	Front Cover	Page	select from drop down menu
		Weight	select from drop down menu
		Color	select from drop down menu
		Grade	select from drop down menu
		Coating	select from drop down menu
	Back Cover	Page	select from drop down menu
		Weight	select from drop down menu
		Color	select from drop down menu
		Grade	select from drop down menu
		Coating	select from drop down menu
	Binding	Type	select from drop down menu
		Location	select from drop down menu
		Binding Color	select from drop down menu
	Offset	Offset	select from drop down menu
	Trim	Trim	select from drop down menu

Section	Category	Items	Description
Catalog	Paper	Letter White 20lb	enter in text box
		Legal White 20lb	enter in text box
	Pencils	Pencils	enter in text box
Shipping	Address Book		drag and drop the selected shipping address
	Ship to		select option of the selected shipping address
Billing	Billing Method		select a billing method

...

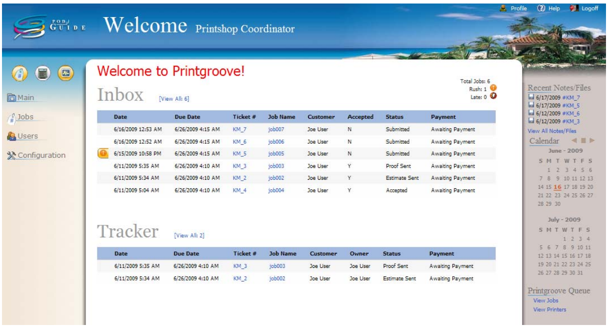
Note

By default, users who sign in using the "psc" login have permission to create jobs.

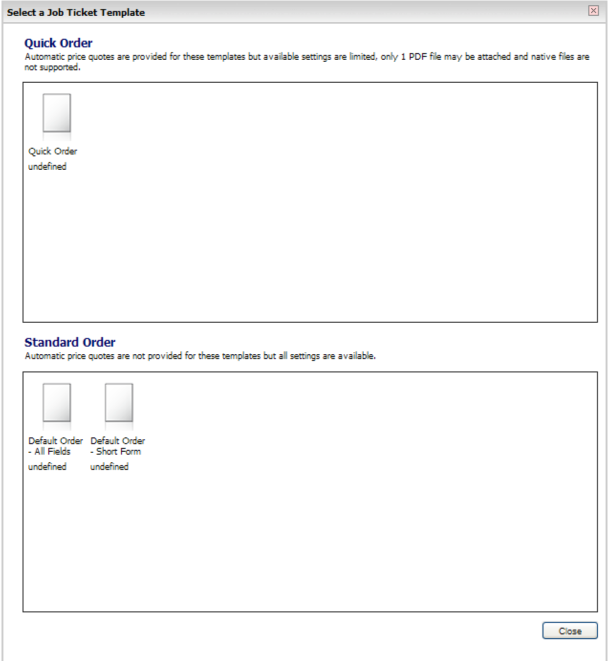
To place an order:

1 Launch a Browser and open Printgroove POD Guide.

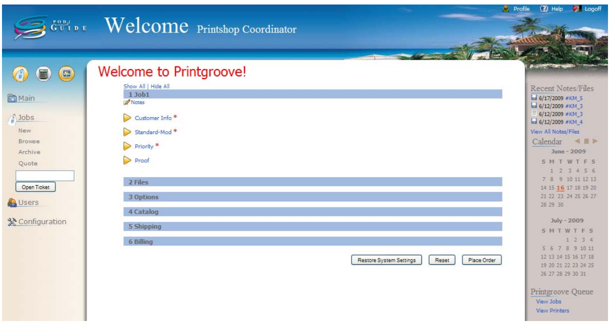
2 Login to the Home Page.



3 Click [Jobs] - [New]. The [Select a Job Ticket Template] screen opens:



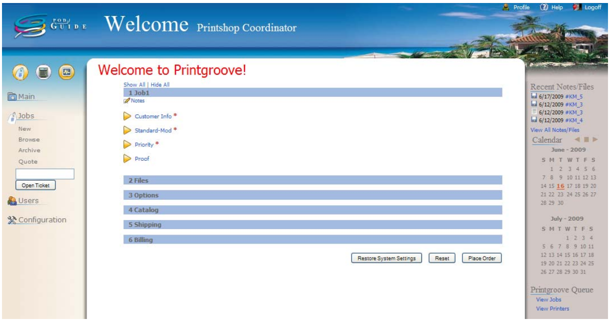
4 Select either a Quick Order or a Standard Order by clicking on an icon. The [New] screen opens. The contents of this screen will vary based upon the type of Job Ticket Template you selected.



5 The settings for a new job may be entered on this page.

– NOTE: Throughout this process, all mandatory text fields are noted on the GUI with a red asterisk. These fields must have values in order to complete the Job Ticket.

6 If the ticket type is Quick Order, an Estimated Cost of the job will display in the far left menu, near the bottom of the screen. This is a real-time quote and will continue to update as the job ticket is filled out. This feature is not supported for Standard-type orders.
The first section of the Job Ticket is [Job]. In this section, you can specify the order name, the date you would like the order completed, and indicate whether or not a proof is required before the job is printed. The setting categories of the [Job] section are [Customer Info], [Standard], [Priority] and [Proof]. Information about each setting category follows:



- Click the triangle icon at the left of the category name to expand the category and display the settings.

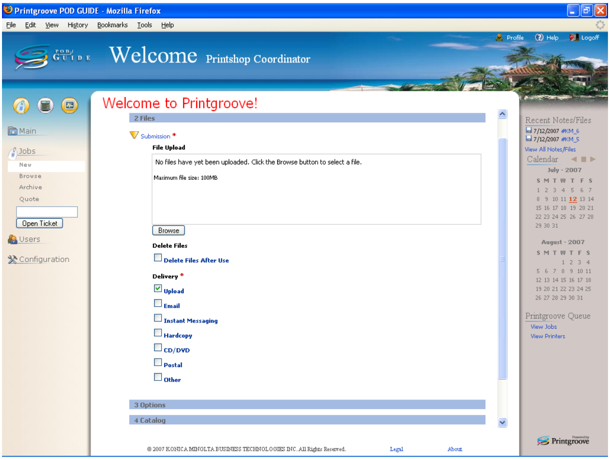
- [Customer Info]
- First Name: Enter the customer's first name
- Last Name: Enter the customer's last name
- Email: Enter the customer's Email address

- [Standard]
- Job Name: Enter a name for the job being created.
- Due Date: To the right of the field is a Calendar icon that opens the current month's calendar. Click on a day of the month to select that day. To return to the current date, click [Today] (near the top of the calendar). To change months/years, use the arrows on either side of the link.
- Estimate: Indicate whether or not an Estimate is required. This option is not available for Quick Orders.

- [Priority]
- Indicate whether the order is Normal or Rush.

- [Proof]
- Indicate whether or not a Proof is required. The Soft Proof option is not available for Quick Orders.

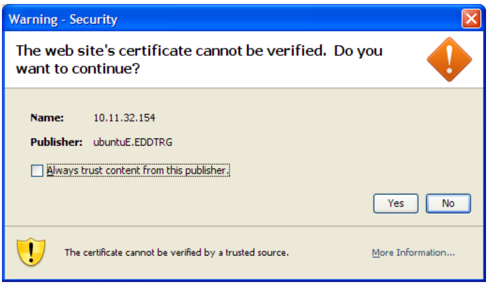
7 The next section of the Job Ticket is [Files]. Click the blue heading bar to open it. The [Files] section expands.



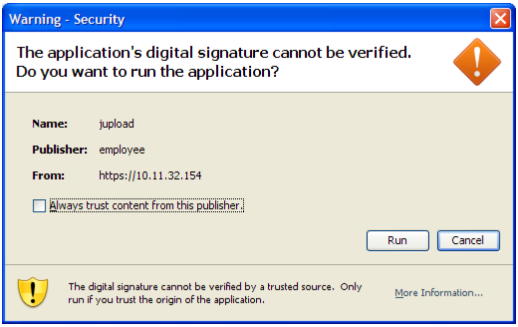
– NOTE: While it is not necessary to close one section before opening another, leaving multiple sections open may increase the amount of scrolling required to view relevant information.

8 Standard Order Section. See 9 below for information about this section for Quick Orders. The [Files] section of the job ticket allows you to locate then submit the files for the print job via the web. The selected files are copied from your local computer and transferred to Printgroove POD Guide. The Delivery method for the original job documents is also specified in this section.

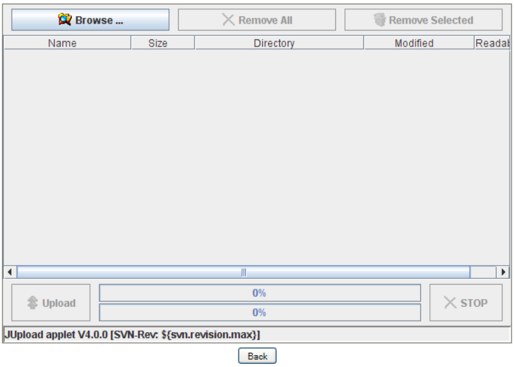
– [Submit Files]
– To submit files, click the [Upload] button. The [Warning - Security] popup opens:



– If you want to avoid this step in future uploads, select the [Always trust content from this publisher] checkbox then click the [Yes] button. A second [Warning - Security] pop-up opens:



– If you want to avoid this step in future uploads, select the [Always trust content from this publisher] checkbox then click the [Run] button. The [Upload Files] screen opens:



– Click the [Browse] button, navigate to the file(s) you want to upload, select them then click the [Open] button. The files appear in the [Upload Files] screen main panel. You may upload up to ten files. The maximum file size is 2 GB. If multiple files are added and all are larger files, performance may be significantly reduced. A combine file size of 5 GB or less is recommended for optimal performance.
– Once the files are selected, click the [Upload] button. A progress bar will track the upload process (in the case of larger files, it may take a little longer for the progress bar to appear). If you click the [Stop] button, the upload is stopped and you return to the previous step above.
– When the files are uploaded, the progress bar will inform you that the task is complete. Click the [Back] button to close the [Upload Files] pop-up.
– The uploaded files will appear on the Printgroove POD Guide screen.

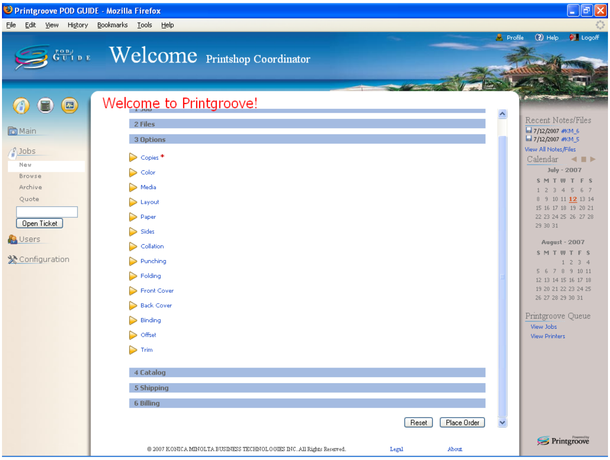
– [Delete Files]
– Select the [Delete Files After Use] checkbox if you want the uploaded files deleted after the print order is complete.

– [Delivery]
– If the Delivery section is required (if it has a red asterisk), you must select how you will deliver the job originals. The choices are: CD/DVD, Email, Instant Messaging, Upload, Postal, Hardcopy and Other.

9 Quick Order Section. If the job ticket type was Quick Order, the [Files] section will be identical to the Standard Order section. The only difference is that you are limited to uploading a single PDF file. (You may also remove and replace the PDF file.)

– The Upload Files process noted in step 8 is identical for Standard Orders.

10 The next section of the Job Ticket is [Options]. Click the blue heading bar. The [Options] section expands.

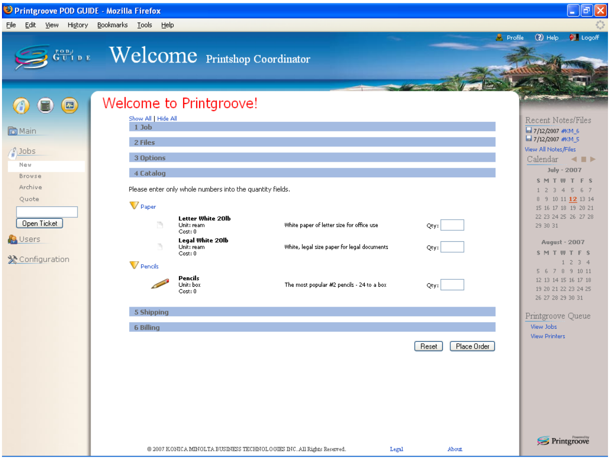


11 The [Options] section allows you to specify many of the material values of the job ticket as well as finishing and layout settings. Except for the Copies fields, these values may be left blank and can be determined in another phase of the print job processing (e.g., Printgroove POD Ready or Printgroove POD Queue). Click the triangle icon at the left of the category name to expand the category and display the settings.

– NOTE: The Options shown are the defaults delivered with the application. An appadmin user may add new or edit existing values.

- Copies: This is the only required setting for this section. Enter a numerical value for the number of copies of the original document you want printed.
- Color: Select either the color, black and white or mixed radio button. If the job ticket type is Quick Order, mixed is not available. And also, a selection can be made to decide whether the High Chroma is set or not. Use the option if you want your color job to print on a device that supports High Chroma color.
- Media (Media Type, Media Type Details, Grade, Coating): any of these values may be selected but none are required. If the job ticket type is Quick Order, Media Type is not available.
- Layout (Orientation, Size Policy, Combination): any of these values may be selected but none are required.
- Paper: (Size, Weight, Color, Use Perforated Paper, Paper Name): any of these values may be selected but none are required.
- Sides (Front, Back, Two sided head-to-head, Two sided head-to-foot): any of these values may be selected but none are required.
- Collation (Collate, Not Collate): any of these values may be selected but none are required.
- Punching (Punching Edge, Punching Number): any of these values may be selected but none are required.
- Folding (Folding method): any of these values may be selected but none are required.
- Front Cover (Page, Weight, Color, Grade, Coating): any of these values may be selected but none are required.
- Back Cover (Page, Weight, Color, Grade, Coating): any of these values may be selected but none are required.
- Binding (Type, Location, Binding Color): any of these values may be selected but none are required.
- Offset: A value may be selected but is not required.
- Trim: A value may be selected but is not required.

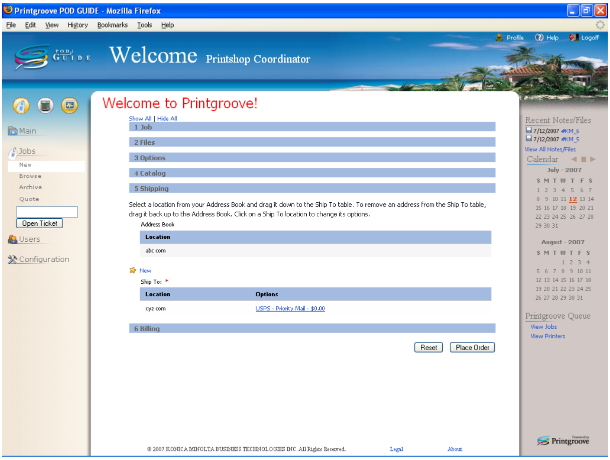
12 The next section of the Job Ticket is [Catalog]. Click the blue heading bar. The [Catalog] section expands.



13 The [Catalog] section is not required for a print job order. This section is provided primarily as a support for Printgroove POD Serve. If, while placing a print order, a customer wishes to order additional items from your graphics department, these values will appear here when the order is sent to Printgroove POD Guide. If you are creating a new job ticket internally, you may ignore this section. If a job is received externally, review these values for any customer-requested items.

– An appadmin user may add or edit these options.

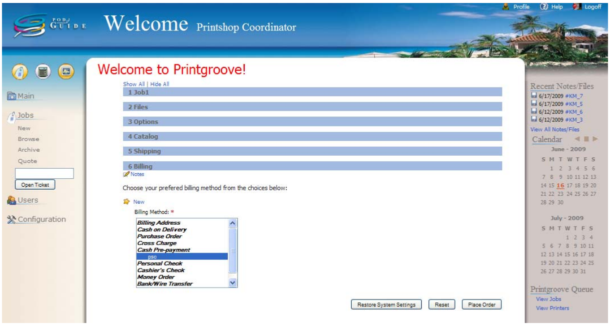
14 The next section of the Job Ticket is [Shipping]. Click the blue heading bar. The [Shipping] section expands.



15 When placing an order, at least one [Shipping Address] is mandatory. If a default Shipping address is in a user's Profile, it will automatically be placed in the [Ship To] field when an order is placed. If you do not use the default Shipping address, select a location from your Address Book and drag it down to [Ship To]. To remove a selected address, drag it back into the Address Book. Click on [New] to enter a new or different shipping address. Click in the space under the "Options" column in the [Ship To] address list to change the Options information.

– The list of Shipping Options shown is the default. Additional options can be added by an appadmin user via the Configuration menus, Shipping Methods and JT Builder.
– When you click [New] to enter a new shipping address, the [Create Shipping Address] pop-up window opens. Fill in all of the required fields and select [Set as default] and/or [Add to profile] to save this Shipping information in your Profile (Setting the address as default will cause any new job tickets to use that address so you do not need to enter it each time you place an order). When you have filled out all of the data, click [Save Shipping Address] to save the information.

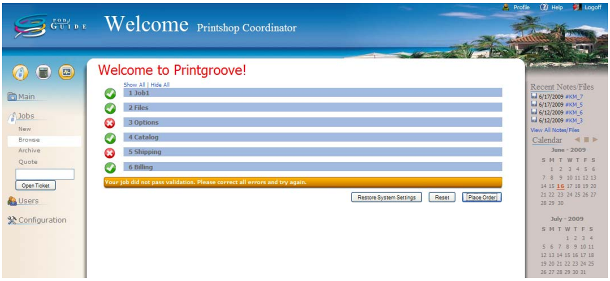
16 The next section of the Job Ticket is [Billing]. Click the blue heading bar. The [Billing] section expands.



17 The [Billing] section allows you to choose and design a specific billing method from a pre-populated list of billing options. The default billing methods are shown below, but they can be customized. Clicking on [New] allows entry of a new or different billing method.

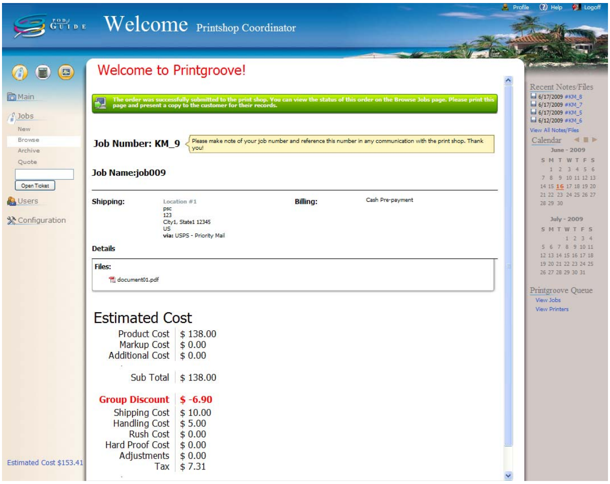
- A new Billing Method can be entered either through [My Profile] on your Home page or when placing an order. When you click [New] to enter a new billing address, the [Create Billing Address] popup window opens. Enter data in all of the required fields and mark both [Save to profile] and [Set as default] if you want this option to be used whenever you place an order. When you have filled out all of the data, click [Save Billing Option] to save the new billing address information.
- If you wish to use the same billing address you entered in Step 15 above, click [New] to open the [Create Billing Address] pop-up window. Click [Same as Shipping Address]. All texts fields are automatically populated with the information entered in the current Shipping Address field. Click [Save Billing Option] to save the new billing address information.

18 The final section of the Job Ticket is [Place Order]. After completing all of the sections that are pertinent to your job, click the blue heading bar. The [Place Order] section expands.

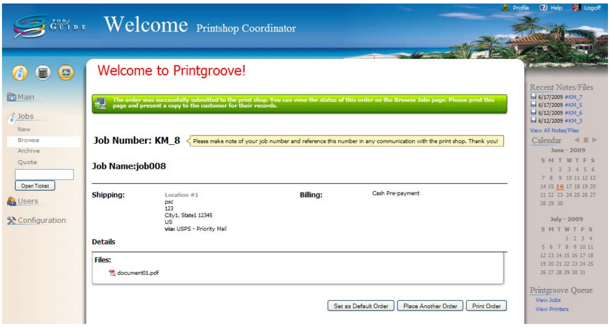


– Click [Place Order]. If all the necessary data has been entered properly, a green-check-mark-in-a-circle icon will appear to the left of each section and a confirmation page will appear.
– If there is an error or omission in the job ticket, a red-X-in-a-circle icon will appear to the left of the section that requires modification. The job is rejected and a “Your job did not pass validation. Please correct all errors and try again.” message will be displayed in an orange bar below the sections. Once errors or omissions have been corrected, the job can be resubmitted by clicking [Place Order] again.
– Once the job has been successfully saved and submitted, a confirmation page will appear with basic information about your order. The ticket number, job name, file(s) uploaded, and shipping/billing information will be displayed.
– If the job is a Quick Order, all values of the order -- including Pricing -- are fixed and cannot be modified. A Payment Request email will be sent to the customer as soon as the [Place Order] button is clicked. A job ticket summary appears at the bottom of the order

screen. This provides the details of the order. If you must cancel this order see “To cancel an order:” on page 4-56 for details.



– You will be reminded to print the screen and asked to make a note of the information for future use.



– After an internal user accepts your order, you will receive a email informing you of the situation.
– In the case of the Quick Order, placing an order with the print shop issues a mail requesting the orderer for payment.

19 For Standard Orders only: If you wish to store the Job Ticket values as your default setting for all new Job Tickets, click [Set as Default Order]. The Job Ticket parameters are stored on a per User basis and remain in effect until changed by the user.

✎...

Note

Once you have clicked [Set as Default Order], Printgroove POD Guide will retain all the values and display them each time you place a new order. To clear these values, click [Restore System Settings]. A prompt will verify your request.

If you select [Yes], all default values are removed and will need to be entered each time you create a new print job.

Before an order is placed, any of the sections described above can be opened and edited. To cancel or delete the entire order, click [Reset] in the lower right of the screen.

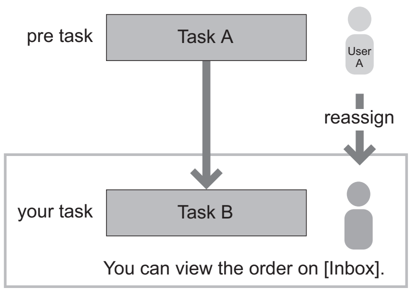
For Standard Orders only: If you click "Place Another Order" you will be returned to the Standard Order type job ticket.

For Quick Orders only: If you click "Place Another Order" you will be returned to the Quick Order type job ticket.

3.2 View Assigned Order ([Inbox] Screen)

If you have the appropriate Role, you can view jobs that have been assigned to you via your Home page ([Inbox] list) or on the [Inbox] screen.

When an order is assigned to you, it means that you are responsible for processing the job. If your user level is "psc", you are the first person responsible for processing an order. If your user level is anything other than "psc", you must be assigned the responsibility of processing an order by someone else, after the pre-processing phase is completed. Even if you place an order yourself, you cannot view it on your Home page ([Inbox] list) or on [Inbox] screen, until someone assigns it to you.



There are two types of assignments: optional reassignment and Workflow-based assignment.

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Note

– *If you have the appropriate Role, you can view all jobs on the [Browser] screen. See "View All Orders ([Browser] Screen)" on page 3-23.*
– *You can also view the details of all orders. See "Viewing Order Details" on page 3-29.*

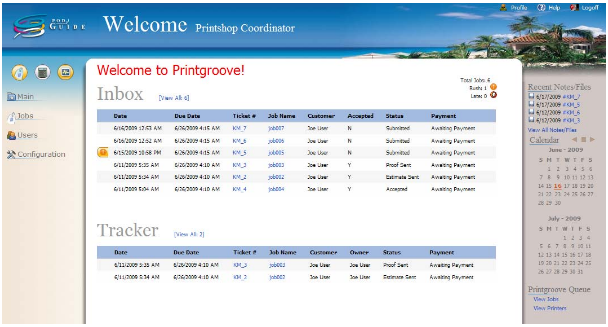
3.2.1 View [Inbox] List on Your Home Page

To display your Home page, click [Home] and then [Inbox]. The [Inbox] lists all jobs assigned to you. It also has rows that display [Date], [Due Date], [Ticket #], [Job Name], [Customer], [Accepted], [Status] and [Payment].

...

Note

You can sort columns alphabetically by clicking on a column heading. The sort affects all assigned jobs in the list, not just those that you can see on the screen. You can switch ascending order and descending order by clicking the column again



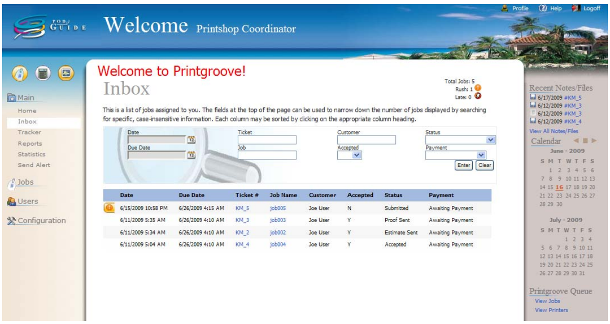
The [Status] row displays the values noted below in the left column. The right column explains those values:

The status of orders	Description
Submitted	A job just after the original is accepted.
Accepted	A job accepted has been received.
In Process	A job is processing.
Make Ready	A job is being modified to prepare it for printing.
Proofing	A job is being proofed.
Waiting for Customer	A job is awaiting customer approval.
Printing	A job is printing.
Finishing	A job is in the post-printing, finishing phase.
Packaging	A job is being packaged for shipping.
Shipping	A job is being processed for shipping.
Delivered	A job is being delivered or has been delivered.
Rejected	A job has been rejected by reprographics department user.

The status of orders	Description
Sent to Queue	A job has been sent to Printgroove POD Queue.
Return from Queue	A job has been returned from Printgroove POD Queue.
Disapproved	A job has been disapproved by approver.
Open	A job is on hold.
Estimate Sent	A estimate has been sent by the print shop user.
Estimate Accepted	A estimate is accepted by the customer.
Estimate Rejected	A estimate is rejected by the customer.
Proof Sent	A proof has been sent by the print shop user.
Proof Accepted	A proof is accepted by the customer.
Proof Rejected	A proof is rejected by the customer.

3.2.2 View [Inbox] List on [Inbox] Screen

On your Home page, click [Main] - [Inbox] or the [View All] link to display the complete list of orders assigned to you.



3.2.3 Search Assigned Orders

You can search for a specific job assigned to you or narrow the [Inbox] list down to jobs containing common characteristics.

To search assigned orders:

1 On your Home page, click [Main] - [Inbox] to display the complete list of orders assigned to you.

2 Enter data in one or more search fields at the top of the page.

- Date: Click the Calendar icon to the right of [Date] to open a calendar for the current month. Click on a day of the month to select that day as the search criteria. To return to the current date, click [Today] and use the directional arrows to change months or years.
- Ticket: To search for one specific Job Ticket number, type that number into this field.
- Job: To search for one or more specific Job(s) by name, type the name of the job in this field. Adding a wildcard (*) to this field will broaden the search within the job name field.
- Customer: To search for one or more specific job(s) by Customer name, type the name of the customer in this field. A wildcard character (*) may be used in this field also.
- Accepted: Use the [Yes] or [No] indicator to filter by accepted or not accepted jobs.
- Status: This filter confines a search to the Status definition selected from an extensive drop-down menu.
- Payment: To search for jobs that have a particular Payment Status, select a value from the drop-down menu.
- Leaving all fields blank will not restrict the search. As a result, all assigned jobs will be displayed.

3 Click [Enter]. All jobs that meet the specified criteria are displayed.

✎...

Note

Clicking [Clear] eliminates all values specified in search fields.

3.3 View All Orders ([Browser] Screen)

If you have the appropriate Role you can view jobs that have been assigned to you via the [Browser] screen.

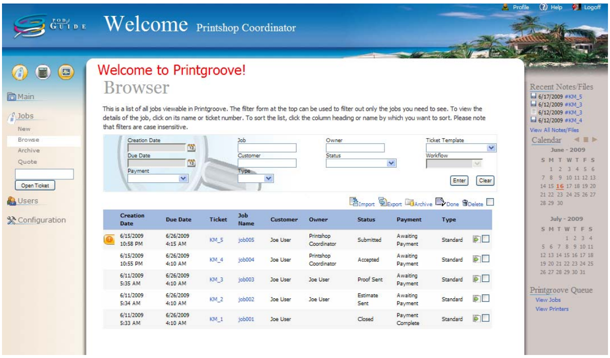
✎...

Note

- *By default, "psc"- and "appadmin"-level users can view all jobs.*
- *You can also view the details of all orders. See "Viewing Order Details" on page 3-29.*
- *Archived jobs are only available on the [Archive] screen. See "View Archived Order ([Archive] Screen)" on page 3-27.*

3.3.1 View [Browser] List

On your Home page, click [Jobs] - [Browse] to display the complete list of all orders including closed and cancelled orders.



The [Status] row displays the values noted below in the left column. The right column explains those values:

The status of orders	Description
Submitted	A job just after the original is accepted.
Accepted	A job accepted has been received.
In Process	A job is processing.
Make Ready	A job is being modified to prepare it for printing.
Proofing	A job is being proofed.
Waiting for Customer	A job is awaiting customer approval.
Printing	A job is printing.
Finishing	A job is in the post-printing, finishing phase.

The status of orders	Description
Packaging	A job is being packaged for shipping.
Shipping	A job is being processed for shipping.
Delivered	A job is being delivered or has been delivered.
Rejected	A job has been rejected by reprographics department user.
Sent to Queue	A job has been sent to Printgroove POD Queue.
Return from Queue	A job has been returned from Printgroove POD Queue.
Disapproved	A job has been disapproved by approver.
Open	A job is being held.
Closed	A job is closed.
Cancelled	A job is cancelled.
Estimate Sent	A estimate has been sent by the print shop user.
Estimate Accepted	A estimate is accepted by the customer.
Estimate Rejected	A estimate is rejected by the customer.
Proof Sent	A proof has been sent by the print shop user.
Proof Accepted	A proof is accepted by the customer.
Proof Rejected	A proof is rejected by the customer.

✎...

Note
You can sort columns alphabetically by clicking on a column heading. The sort affects all assigned jobs in the list, not just those that you can see on the screen. You can switch ascending order and descending order by clicking the column again.

3.3.2 Search All Orders

If you have the appropriate Role, you can search for a specific job or narrow the [Browser] list down to jobs containing common characteristics.

To search all orders:

1. On your Home page, click [Jobs] - [Browse] to display the complete list of all orders.
2. Enter data in one or more of the search fields at the top of the page.
   – Creation Date: Click the Calendar icon to the right of [Date] to open a calendar for the current month. Click on a day of the month to select that day as the search criteria. To return to the current date, click [Today] and use the directional arrows to change months or years.

- Due Date: Click the Calendar icon to the right of [Date] to open a calendar for the current month. Click on a day of the month to select that day as the search criteria. To return to the current date, click [Today] and use the directional arrows to change months or years.
- Payment: To search for jobs that have a particular Payment Status, select a value from the drop-down menu.
- Job: To search for one or more specific Job(s) by name, type the name of the job in this field. Adding a wildcard (*) to this field will broaden the search within the job name field.
- Customer: To search for one or more specific job(s) by Customer name, type the name of the customer in this field. A wildcard character (*) may be used in this field also.
- Type: To search for jobs that were created using a particular template (Standard Order or Quick Order), select a value from the drop-down menu.
- Owner: To search for one or more specific job(s) by Owner name, type the name of the owner in this field. A wildcard character (*) may be used in this field also. For a job the Status of which is [Closed], however, no search can be made with the Owner.
- Status: This filter confines a search to the Status definition selected from an extensive drop-down menu.
- Ticket Template: This filter confines a search to the Ticket Template selected from the drop-down.
- Workflow: To search for one or more specific Job(s) under the selected Workflow from an extensive drop-down menu.
- Leaving all fields blank will not restrict the search. As a result, all assigned jobs will be displayed.

3 Click [Enter]. All jobs that meet the specified criteria are displayed.

✎...

Note

Clicking [Clear] eliminates all values specified in search fields.

3.3.3 Archive, Set as Done or Delete Functions

If you have the appropriate Role, you can archive the job (store the Job Ticket and the attached files in Printgroove POD Guide), mark the job as [Done] or [Delete] one or more jobs.

...

Note

Note that if jobs are assigned to other modules, you may not be able to [Delete] them until they are returned to Printgroove POD Guide.

To [Archive], mark as [Done] or [Delete] a job:

1. On your Home page, click [Jobs] - [Browse] to display the complete list of all orders.
2. Select the check box at the right of the job.
3. Select the checkbox of the action to apply [Archive], [Done] or [Delete].
4. Click [Enter] and [OK]. A message will inform you if the action cannot be completed.

3.4 View Archived Order ([Archive] Screen)

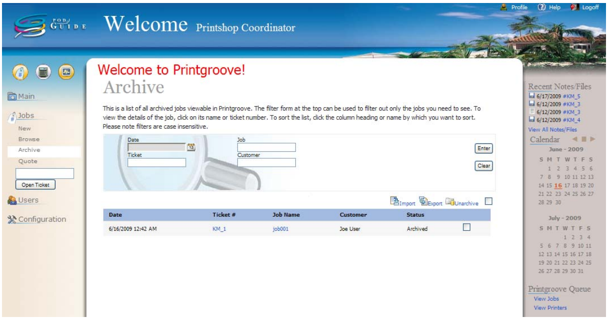
If you have the appropriate Role, you can access the [Archive] screen.

Note

- *By default, “psc”- and “appadmin”-level users can view archived jobs.*
- *You can also view the details of all orders. See “Viewing Order Details” on page 3-29.*

3.4.1 View [Archive] List

On your Home page, click [Jobs] - [Archive] to display the complete list of all archived orders.



The [Status] row displays the value noted below in the left column. The right column explains that value:

The status of orders	Description
Archived	Job is archived.

Note

You can sort columns alphabetically by clicking on a column heading. The sort affects all assigned jobs in the list, not just those that you can see on the screen. You can switch ascending order and descending order by clicking the column again.

3.4.2 Search Archived Orders

If you have the appropriate Role, you can search for a specific job or narrow the [Archive] list down to jobs containing common characteristics.

To search archived orders:

1 On your Home page, click [Jobs] - [Archive] to display the complete list of all archived orders.

2 Enter data in one or more of the search fields at the top of the page.

- Date: Click the Calendar icon to the right of [Date] to open a calendar for the current month. Click on a day of the month to select that day as the search criteria. To return to the current date, click [Today] and use the directional arrows to change months or years.
- Ticket: To search for one specific Job Ticket number, type that number into this field.
- Job: To search for one or more specific Job(s) by name, type the name of the job in this field. Adding a wildcard (*) to this field will broaden the search within the job name field.
- Customer: To search for one or more specific job(s) by Customer name, type the name of the customer in this field. A wildcard character (*) may be used in this field also.
- Leaving all fields blank will not restrict the search. As a result, all archived jobs will be displayed.

3 Click [Enter]. All jobs that meet the specified criteria are displayed.

✎...

Note

Clicking [Clear] eliminates all values specified in search fields.

3.4.3 Import/Export Archived Orders

If you have the appropriate Role, you can Import and Export orders that appear on the [Archive] page. For details, please see “Export and Import Job Tickets” on page 3-44.

3.5 Viewing Order Details

You can view the details of orders on the [Details] screen.

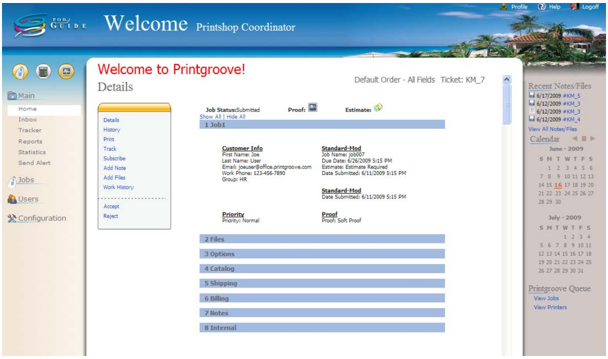
- By default, “psc”- and “appadmin”-level users can view jobs.
- For additional information, see “[Details] Screen Operations” on page 4-1.

3.5.1 View the Details of an Order

You can access the details of active orders from the following lists:

- [Inbox] list
- [Browser] list
- [Archive] list
- [Tracker] list (Please refer to “Track an Order” on page 4-12)
- The list of retrieval results

1 Click any order you want to review. The [Details] screen opens. The contents of this screen will vary based upon the type of Job Ticket Template you selected. If Proofs or Estimates have been requested by the customer, these icons blink until the proofs or estimates are done.



2 Click the blue heading bar of section you want to view. Details of the selected section of the job ticket appear.

To display [Details] screen using [Open Ticket]:

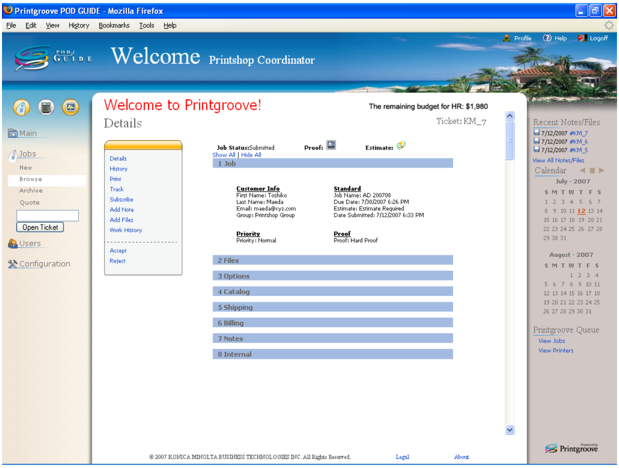
1 On your Home page, click [Jobs] and enter the Job Ticket number in the text field directly above the [Open Ticket] button.

2 Click [Open Ticket]. The [Details] screen opens. Order you want to check. The [Details] screen opens.

3.5.2 View Remaining Budget

If the print job is assigned to Group and that Group has a budget value assigned to it, you can view that value before processing a job. (For details about setting budget values, see “Set Group Budget” on page 6-18.) To view the budget, follow these steps:

1 On your Home page, click [Main] - [Jobs] then the order you want to check. The [Details] screen opens.



2 The remaining budget opens as a dollar value at the upper right of the screen. If the remaining budget is less than $0.00, the dollar value is in red.

3 If the budget value is red, the job may still be processed.

3.6 Job Quotes

Printgroove POD Guide can generate a price quote for a job for customers who do not use the Printgroove POD Suite.

Quotes can be created, copied, sent directly to a customer, activated (via submission) or deleted.

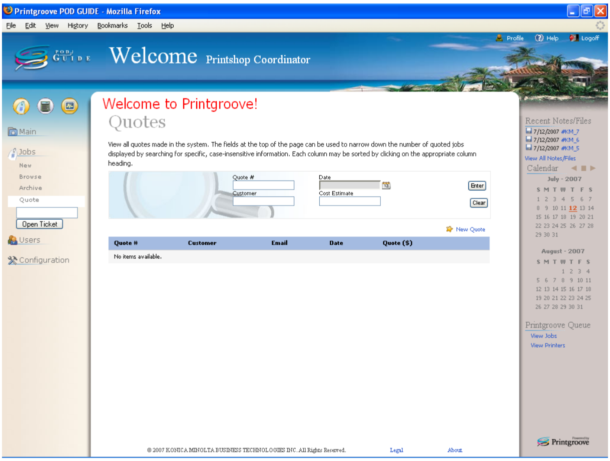
Quotes are generate by filling out the Quote Job Ticket, a [Job] option made up of five sections the internal Printgroove POD Guide user must complete: [Job], [Files], [Options], [Catalog] and [Internal].

3.6.1 Generate a Quote

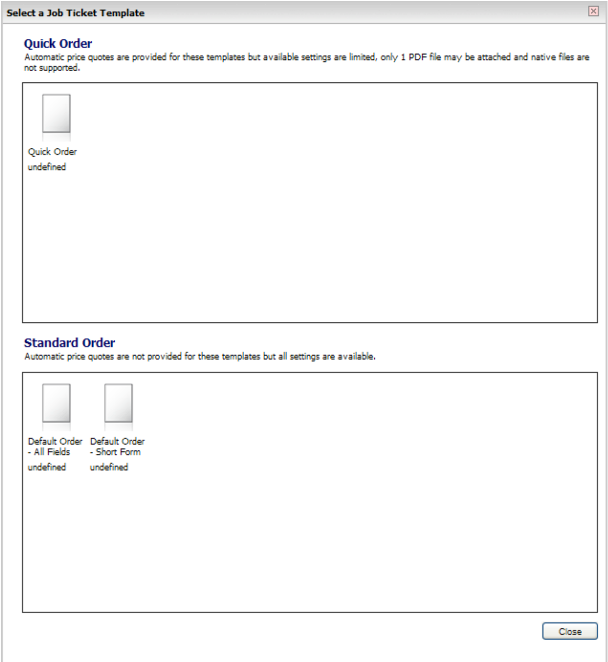
If you have the appropriate Role, you can use the [Jobs] - [Quote] menu on your Home page to generate a new Quote.

To generate a Quote:

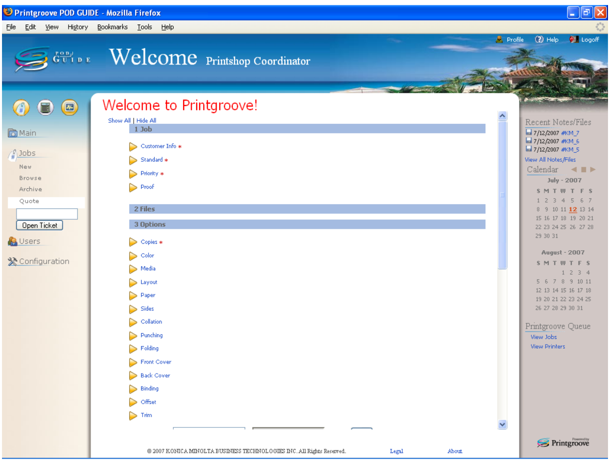
1 On your Home page, click [Jobs] - [Quote]. The [Quote] screen opens.



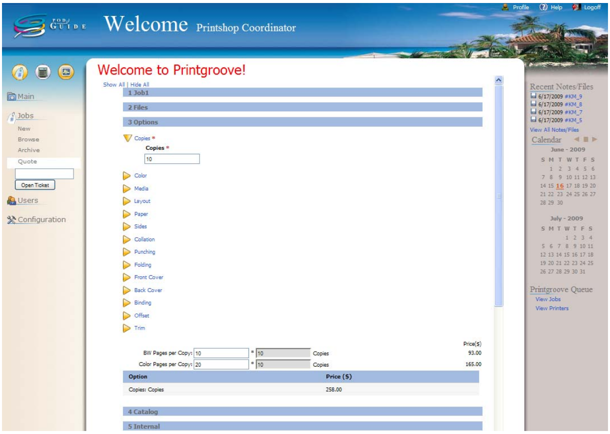
2 Click the [New Quote] icon. The [Select a Job Ticket Template] screen opens:



3 Select either a Quick Order or a Standard Order by clicking on an icon. The [New] screen opens. The contents of this screen will vary based upon the type of Job Ticket Template you selected.



4 Fill in the field of the [Job], [Files] and [Options] section with values relevant to the job for which you are generating the quote (use the same procedures described in Steps 4 - 7 of “Placing an Order” on page 3-2 and note the limitations for the [Files] section when the job is a Quick Order Template. The [Options] section contains the Copy and the page color copy fields:



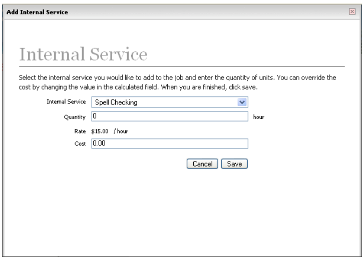
5 Enter a value in the [Copies] field. In the [BW Pages Per Copy] text box, enter the number of BW pages in the original PDF file. In the [Color Pages Per Copy] text box, enter the number of Color pages in the original PDF file. Once values are entered the cost is updated automatically.

6 If the customer is requesting additional supplies beyond the print job, fill out those values in the [Catalog] section using the same procedures described in Steps 9 - 10 of “Placing an Order” on page 3-2.

7 The next section of the Job Ticket is [Internal]. After completing all of the sections that are pertinent to your job, click the blue heading bar to open it. The [Internal] section expands.

8 Click [Add Services]. The [Add Internal Service] screen opens.

9 Select the Internal Service you want to add from [Internal Service] drop-down menu.



10 Enter a value in the [Quantity] text box. The [Cost] will be calculated automatically.

11 Click [Save]. The [Add Internal Service] screen closes and the Internal Service is added to the table.

12 If you need to adjust the cost of the order, the values in any of the live fields may be modified. Fields that are grayed out are automatically calculated by Printgroove POD Guide.

13 Click [Save] to generate a Quote for the job.

- If all the necessary data has been entered properly in each section, click [Save]. A green-check-mark-in-a-circle icon will appear before each section and a Quote Saved message will appear.
- If you discard this Quote, click [Discard].

14 Click [Send Email] to e-mail the Quote to your customer.

15 Click [View All Quotes] to return to the [Quote] screen.

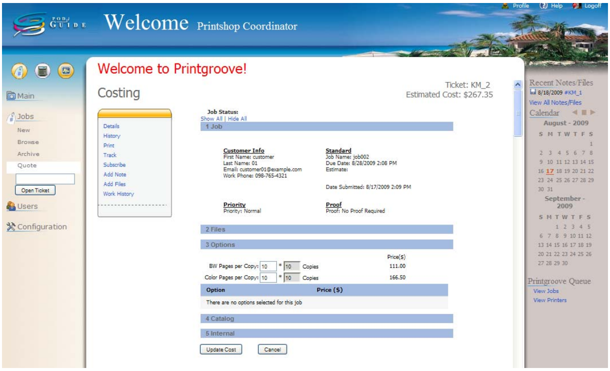
3.6.2 Update a Quote

If you have the appropriate Role, you can use the [Jobs] - [Quote] menu on your Home page to edit values of an existing Quote and generate an updated Quote.

To update a Quote:

1 On your Home page, click [Jobs] - [Quote]. The [Quote] screen displays.

2 Click the Quote you want to update. The [Costing] screen opens.



3 If you need to change the number of [BW Pages per Copy] or the number of [Color Pages per Copy], click the [Options] header to expand it then change the values as required. Once values are entered the cost is updated automatically.

4 If you need to adjust the pricing used for the quote, click the [Internal] header to expand it. Values in any of the live fields may be modified. Fields that are grayed out are automatically calculated by Printgroove POD Guide.

5 When your modifications are complete, click the [Update Cost] link. The cost is updated and the [Quotes] screen opens again.

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Note

The [Job Ticket Menu] displayed on the [Costing] screen is used to process the order. These menus have the same functions as the [Job Ticket Menu] on the [Details] screen. For details about each menu, see "View Order History" on page 4-16, "Print a Job Ticket" on page 4-11, "Track an Order" on page 4-12, "Subscribe/Unsubscribe to Orders" on page 4-15, "Add a Note" on page 4-17, "Add/Remove a File" on page 4-19, and "View Order History" on page 4-16.

3.6.3 Duplicate a Quote

If you have the appropriate Role, you can use the [Jobs] - [Quote] menu on your Home page to duplicate an existing Quote.

To duplicate a Quote:

1. On your Home page, click [Jobs] - [Quote]. The [Quote] screen is displayed.
2. Click the [Copy quote] icon (green arrow icon) to the right of the Quote you want to duplicate. Duplicated Quotes are added to the list.

3.6.4 Delete a Quote

If you have the appropriate Role, you can use the [Jobs] - [Quote] menu on your Home page to delete an existing Quote.

To delete a Quote:

1. On your Home page, click [Jobs] - [Quote]. The [Quotes] screen opens.
2. Click the [Delete] icon (trash box icon) to the right of the Quote you want to delete.

3. A confirmation message opens. Click [OK] to delete the Quote. Click [Cancel] to cancel the request.

3.6.5 Activate a Quote and Submit the Order

If you have the appropriate Role, you can use the [Jobs] - [Quote] menu on your Home page to activate an existing Quote and submit it to Printgroove POD Guide as a new order.

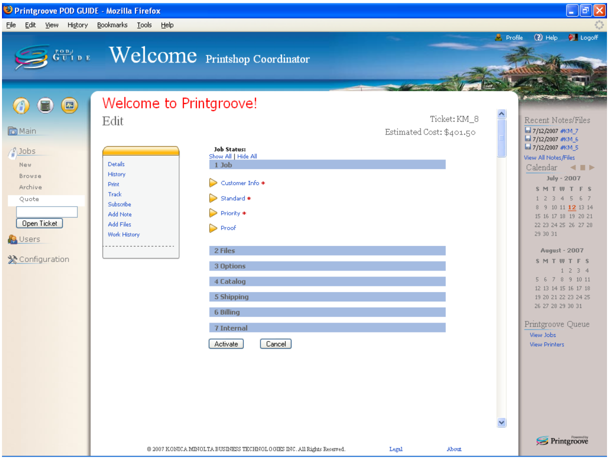
Note
All Quotes can be activated.

To activate a Quote and submit the order:

1. On your Home page, click [Jobs] - [Quote]. The [Quotes] screen opens.

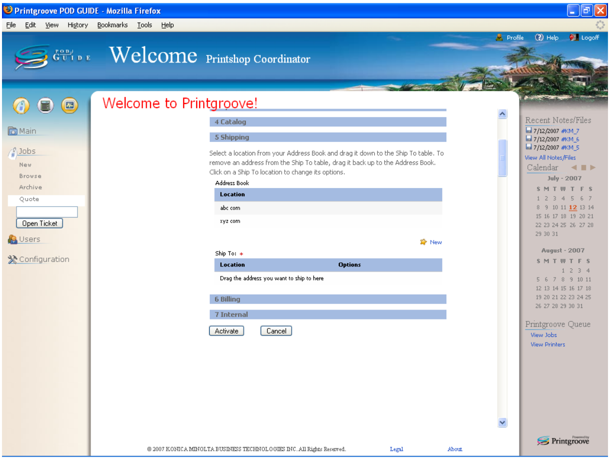
2 Click the activate icon to the right of the Quote you want to submit as a new order. The job ticket will open in the [Edit] screen.

3 If you want to change any of the [Job], [Files], [Options], [Catalog] or [Internal] section settings, follow the same procedures described in Steps 3 - Step 13 of “Generate a Quote” on page 3-31.



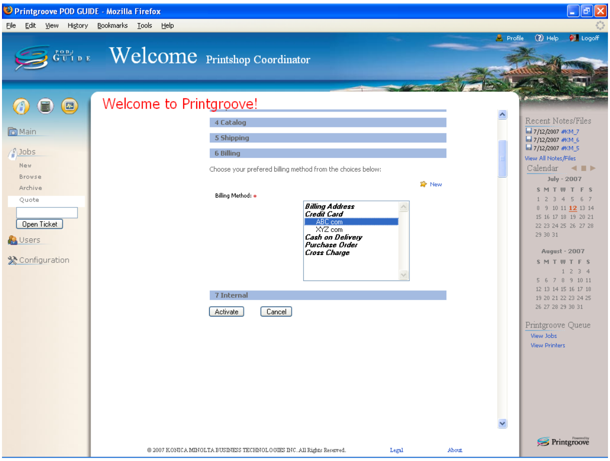
4 When you complete modifying the other sections noted in Step 3, click the blue heading bar of the [Shipping] section to expand the [Shipping] section.

5 Fill in the [Shipping] section using the same procedures described in Step 12 of "Placing an Order" on page 3-2.

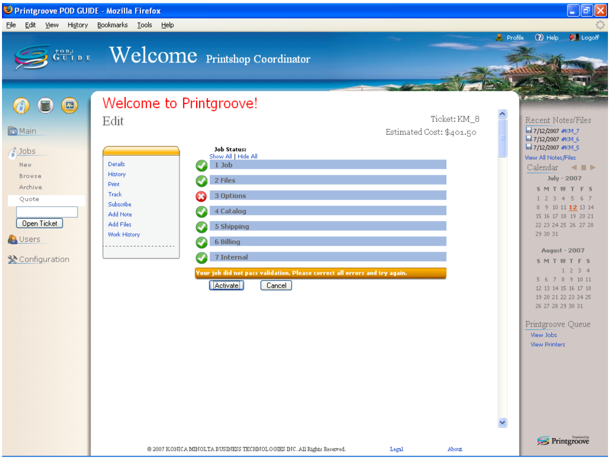


6 Click the blue heading bar of the [Billing] section to expand the [Billing] section.

7 Fill in the [Billing] section using the same procedures described in Step 14 of "Placing an Order" on page 3-2.



8 After completing all of the pertinent sections, click [Activate] to submit the job.



– Click [Place Order]. If all the necessary data has been entered properly, a green-check-mark-in-a-circle icon will appear to the left of each section and a confirmation page will appear.
– If there is an error or omission in the job ticket, a red-X-in-a-circle icon will appear to the left of the section that requires modification. The job is rejected and a “Your job did not pass validation. Please correct all errors and try again.” message will be displayed in an orange bar below the sections. Once errors or omissions have been corrected, the job can be resubmitted by clicking [Place Order] again.
– Once the job has been successfully saved and submitted, a confirmation page will appear with basic information about your order. The ticket number, job name, file(s) uploaded, and shipping/billing information will be displayed.
– If the job is a Quick Order, the ticket summary will also contain a detailed Estimated Cost section at the bottom of the screen. This provides details about the cost of the job.
– You will be reminded to print the screen and asked to make a note of the information for future use.
– For Standard Orders only: After an internal user accepts your order, you will receive a email informing you of the situation.

9 For Standard Orders only: If you wish to store the Job Ticket values as your default setting for all new Job Tickets, click [Set as Default Order]. The Job Ticket parameters are stored on a per User basis and remain in effect until changed by the user.

✎...

Note

Once you have clicked [Set as Default Order], Printgroove POD Guide will retain all the values and display them each time you place a new order. To clear these values, click [Restore System Settings]. A prompt will verify your request.

If you select [Yes], all default values are removed and will need to be entered each time you create a new print job.

✎...

Note

Before an order is placed, any of the sections described above can be opened and edited. To cancel or delete the entire order, click [Reset] in the lower right of the screen.

- *For Standard Orders only: If you click “Place Another Order” you will be returned to the Standard Order type job ticket.*
- *For Quick Orders only: If you click “Place Another Order” you will be returned to the Quick Order type job ticket.*
- *The [Job Ticket Menu] displayed on the [Edit] screen is used to process the order. These menus have the same functions as the [Job Ticket Menu] on the [Details] screen. For details about each menu, see “View Order History” on page 4-16, “Print a Job Ticket” on page 4-11, “Track an Order” on page 4-12, “Subscribe/Unsubscribe to Orders” on page 4-15, “Add a Note” on page 4-17, “Add/Remove a File” on page 4-19, and “View Order History” on page 4-16.*

3.6.6 Search for a Quote

If you have the appropriate Role, you can use the [Jobs] - [Quote] menu on your Home page to search for an existing Quote.

You can search for a specific Quote, or narrow the list down to multiple Quotes that contain common characteristics.

To search for a Quote:

1 On your Home page, click [Jobs] - [Quote]. The [Quotes] screen opens.

2 Search fields appear at the top of the page. Enter keywords for the search in one or more of the search fields using these guidelines:

- Quote #: To search for one specific Quote number, type that number into this field.
- Date: Click the Calendar icon to the right of [Date] to open a calendar for the current month. Click on a day of the month to select that day as the search criteria. To return to the current date, click [Today] and use the directional arrows to change months or years.
- Customer: To search for one or more specific Quote(s) by Customer name, type the name of the customer in this field. A wildcard character (*) may be used in this field also.
- Cost Estimate: To search for one or more specific Quote(s) by Estimated Total amount, type the value of total estimate in this field.
- Leaving all fields blank will not restrict the search. As a result, all archived jobs will be displayed.

3 Click [Enter]. All jobs that meet the specified criteria are displayed.

...

Note

Clicking [Clear] eliminates all values specified in search fields.

3.7 Resubmit an Order

New print orders may share many characteristics of previously submitted orders. You may find it saves time to locate one of these older orders stored on Printgroove POD Guide, create a copy, modify it and submit it as a new print order. This section provides instructions regarding this procedure.

Not all previously submitted orders stored in Printgroove POD Guide can be copied. However, if the order can be located in either of the following locations, it can be copied and then resubmitted as a new order:

- The [Browser] list
- The list of Search results displayed on the [Browser] screen

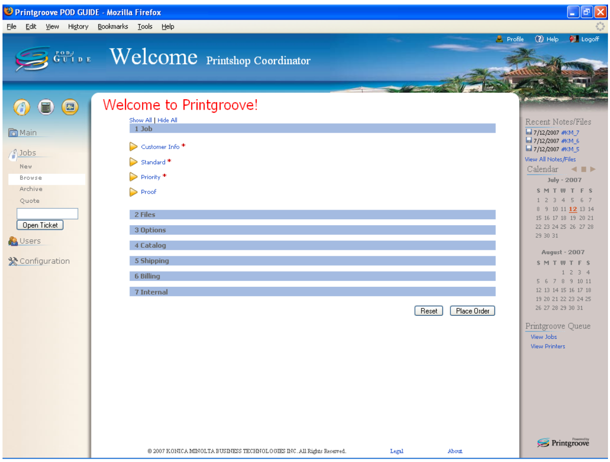
...

Note

Once a closed job has been archived by the reprographics department, it can no longer be accessed. For this reason, archived jobs cannot be copied.

When you locate the order you wish to copy, click the [Copy] icon (green arrow icon) to the right of the order you want to resubmit. The screen that opens is nearly identical to the New screen but contains the files and values of the copied order.

Configure the sections of the order using the same procedures used to create a New order. When complete, click [Place Order] to submit the new job.



3.8 Export and Import Job Tickets

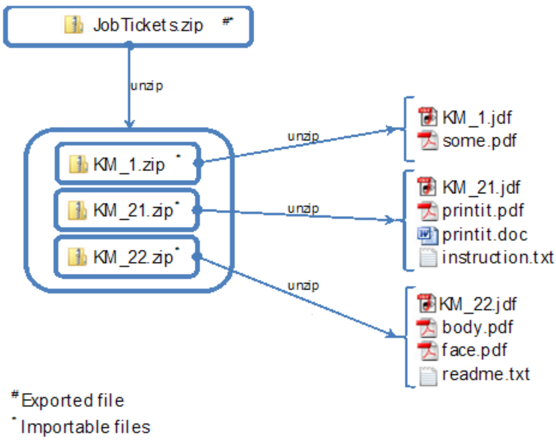
You can export Printgroove POD Guide orders (job tickets and attached files) and store them locally. Once exported, you may later import those same orders back into Printgroove POD Guide. In certain cases, exported jobs can be imported into Printgroove POD Queue; however, only orders exported from Printgroove POD Guide can be imported back into POD Guide.

✎...

Note

An exported .CSV file can only be imported back into the same version of Printgroove POD Guide that was used to create the original, exported file. For example, if a .CSV file is exported from a 1.3.2 version of Guide it cannot be imported back into a 1.5 version of Guide; however, it can be imported back into a 1.3.2 version of Guide.

The following diagram explains the Import and Export functionality:



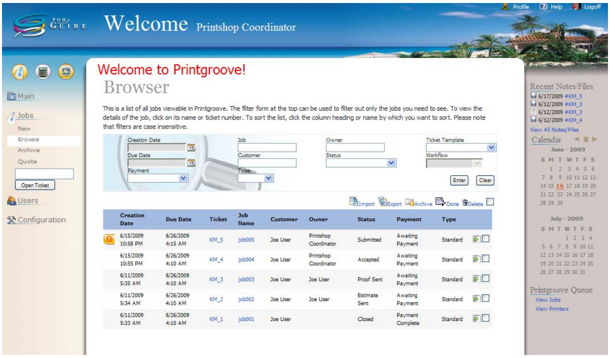
In this model, three jobs from within POD Guide are selected for exporting. For each order, POD Guide does the following:

1. Takes all job ticket settings and creates a JDF file to store these values.
2. Locates all files attached to the order (PDF, .doc, .txt, etc.)
3. Takes the JDF and the attached files and zips them together in one zip file. If multiple jobs are selected for exporting, Steps 1-3 are completed for each order. In the example above, KM_1.zip, KM_21.zip and KM_22.zip are the zipped files of three different orders.
4. All individual order files are zipped together into one master file named Job Tickets.zip. This is the file that is exported to your local pc desktop.

5. On your desktop, you may unzip any of the files to extract the original files. The JDF-type file can be read by any application that understands JDF.
6. When importing back into Printgroove POD Guide, the Job Tickets.zip file may be selected. When selected, all individual jobs in the file will be imported back.
7. Should you wish to import a single file in the Job Ticket.zip folder, navigate to the individual file then select it during the import process.
8. POD Queue will only accept jobs that contain one JDF file and one PDF file. Of the three types of orders noted in the example above, only KM_1.zip can be imported into Printgroove POD Queue.

To select and export orders from the [Browse] screen:

1 On your Home page, click [Jobs] - [Browse]. The [Browse] screen opens:



2 Select an order to export by clicking the check box on the right.

3 Click [Export]. A popup dialog opens.

4 Click [Save to Disk] and [OK]. The zip file (Job Tickets.zip) is saved to your local pc desktop.

To import orders from the [Browse] screen:

1 On your Home page, click [Jobs] - [Browse].

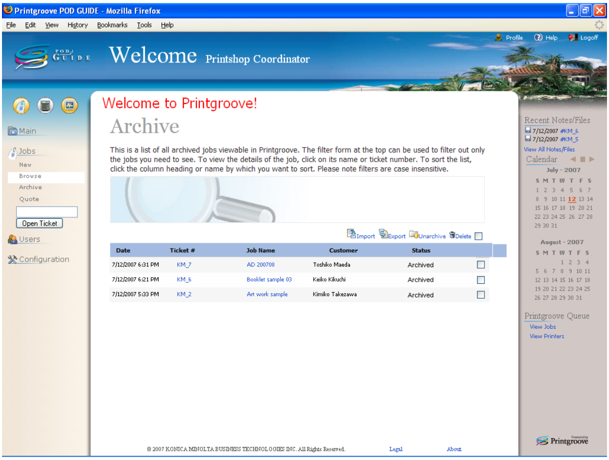
2 Click [Import]. The Import Jobs dialog box opens.

3 Browse to your desktop folder, select the JobTickets.zip file, and click [Open].

4 The files are imported into your POD Guide system.

To select and export orders from the [Archive] screen:

1 On your Home page, click [Jobs] - [Archive]. The [Archive] screen opens:



2 Select an order to export by clicking the check box on the right.

3 Click [Export]. A popup dialog opens.

4 Click [Save to Disk] and [OK]. The zip file (Archived.zip) is saved to your local pc desktop.

To import orders from the [Archive] screen:

1 On your Home page, click [Jobs] - [Archive].

2 Click [Import]. The Import Jobs dialog box opens.

3 Browse to your desktop folder, select the JobTickets.zip file, and click [Open].

4 The files are imported into your POD Guide system.

5 If you wish to Unarchive these jobs, click [Unarchive]. The job the moved to the [Browser] screen and the job status is Closed.

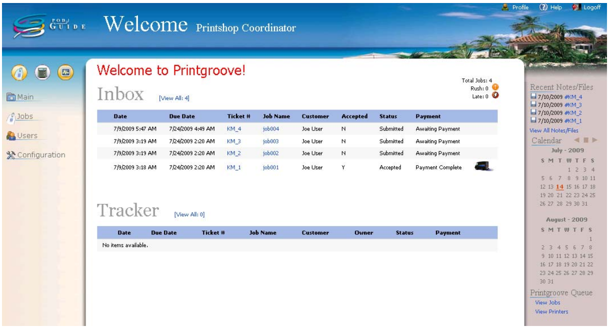
3.9 View Shipping Tracking Information

If Shipping Tracking Information is provided for a job, it can be viewed. When available, this information can be accessed on the Home screen, the Inbox screen, the Tracker screen, the Browse screen and the Archive screen. The instructions below reference the Browse screen but are the same for any of the noted screens. See “Shipping Details” on page 4-43 for details about adding tracking information.

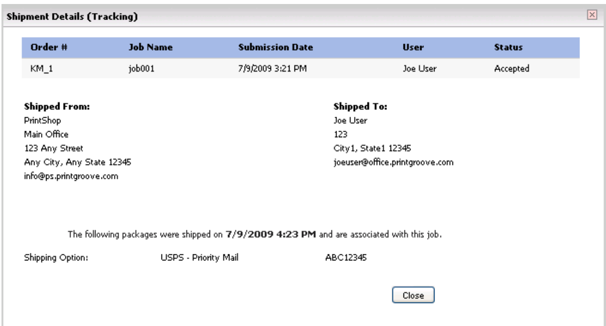
To view Shipping Tracking information from the [Home] screen:

1. On your Home page, click [Jobs] - [Browse].

2. Locate the job and click the [Shipping Tracking] icon. (If no link/icon is displayed, no tracking information has been added to the job.)



3. Click the Shipping Tracking icon. The Shipping Details (Tracking) pop-up screen opens:



4 The Shipping Option and the tracking number(s) are noted at the bottom of the screen. If a job is split into multiple shipments, a tracking number is provided for each shipment. If the Shipping Method has a Tracking Link defined, hyperlinks are displayed.

5 Click a hyperlink for more precise details about the selected shipment.

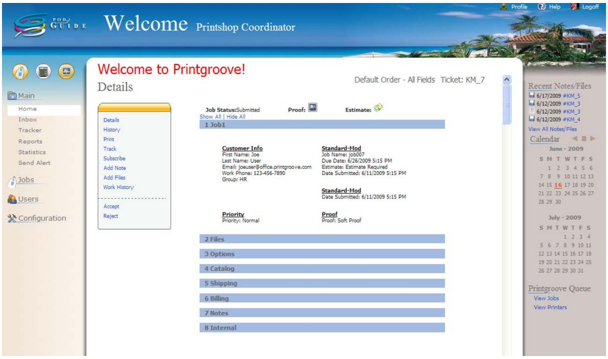
6 When finished, click [Close] to close the pop-up screen.

4 [Details] Screen Operations

This chapter describes the [Details] screen operations.

Once a job is placed it must first be accepted by Printgroove POD Guide before it can be processed. If information is missing on the job ticket or you determine there is something wrong with the order as submitted, you can reject the ticket and send an e-mail to the creator of the job informing them of the situation.

The [Details] screen displays the [Job Ticket Menu] and all the various job processing options including [Accept] and [Reject]. The [Job Ticket Menu] will vary depending on the type of job submitted, the job status, the permission level of the user viewing the screen and whether the order is a Quick Order or Standard Order.



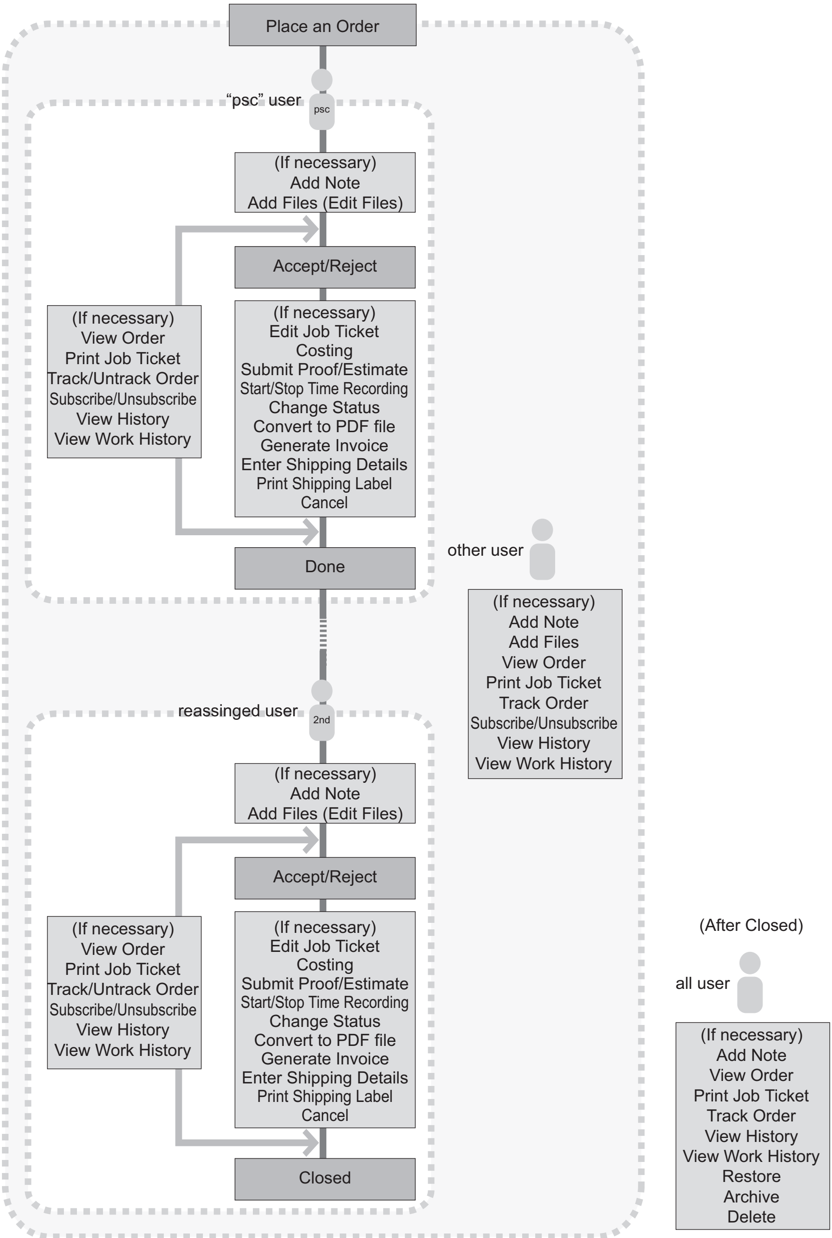
The following table notes the various displayed values of the Job Ticket Menu:

Job Ticket Menu	Not Assigned (Role: "printshop coordinator)"	User Assigned (Role: "printshop coordinator")		All Users
	Before Closed	Before Acceptance	After Acceptance	After closed
Details	available	available	available	available
History	available	available	available	available
Print	available	available	available	available
Track/Untrack	available	available	available	available
Subscribe/Unsubscribe	available	available	available	not available

Job Ticket Menu	Not Assigned (Role: “printshop coordinator)”	User Assigned (Role: “printshop coordinator”)		All Users
	Before Closed	Before Accept-ance	After Accept-ance	After closed
Add Note	available	available	available	available
Add Files (Standard type Orders only)	available	available	available	not available
Edit Files (Quick type Orders only)	available	available	available	not availa-ble
Work History	available	available	available	available
Accept	available	available	not available	not available
Reject	available	available	not available	not available
Edit	not available	not available	available	not available
Costing	not available	not available	available	not available
Shipping Details	not available	not availa-ble	available	not availa-ble
Submit Proof	not available	not available	available	not available
Submit Estimate	not available	not available	available	not available
Start/Stop	not available	not available	available	not available
Status	not available	not available	available	not available
Cancel	not available	not available	available	not available
Restore	not available	not available	not available	available/
Done	not available	not available	available	not available
Archive/Unarchive	not available	not available	not available	available
Delete	not available	not available	not available	available

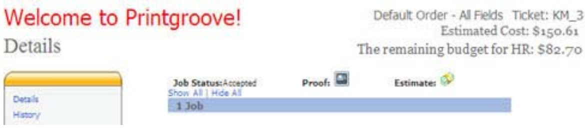
In addition to the items mention in the menu above, the [Details] screen provides other functions including buttons to generate an invoice, convert the native files that have been uploaded to PDF, etc.

This chapter describes all the functions of the [Details] screen.


Place an Order
"psc" user
psc
(If necessary)
Add Note
Add Files (Edit Files)
Accept/Reject
(If necessary)
View Order
Print Job Ticket
Track/Untrack Order
Subscribe/Unsubscribe
View History
View Work History
(If necessary)
Edit Job Ticket
Costing
Submit Proof/Estimate
Start/Stop Time Recording
Change Status
Convert to PDF file
Generate Invoice
Enter Shipping Details
Print Shipping Label
Cancel
Done
other user
(If necessary)
Add Note
Add Files
View Order
Print Job Ticket
Track Order
Subscribe/Unsubscribe
View History
View Work History
reassinged user
2nd
(If necessary)
Add Note
Add Files (Edit Files)
Accept/Reject
(If necessary)
View Order
Print Job Ticket
Track/Untrack Order
Subscribe/Unsubscribe
View History
View Work History
(If necessary)
Edit Job Ticket
Costing
Submit Proof/Estimate
Start/Stop Time Recording
Change Status
Convert to PDF file
Generate Invoice
Enter Shipping Details
Print Shipping Label
Cancel
Closed
(After Closed)
all user
(If necessary)
Add Note
View Order
Print Job Ticket
Track Order
View History
View Work History
Restore
Archive
Delete

4.1 Header Details

When the Details screen opens, the upper-right corner of the screen will contain some or all of the following items:



- Job Ticket Template Name: the name of the template used to create the job appears in the top row for all jobs.
- Job Ticket Number: the number assigned to the job ticket always appears in the top row after the template name.
- Estimated Cost: the estimated cost of the job always appears in the second row.
- Remaining Budget: if the Group is set up to include a Budget, the remaining budget appears as a dollar value in the third row. If the budget has been exceeded, the overage value will appear in red. The job may still be processed when the budget has been exceeded.
- Proof and Estimate icons: if a Proof or an Estimate are required, animated icons will display above the [Job] section.

4.2 Accept /Reject an Order

If everything is correct on the Job Ticket you can accept the order. If there are errors on the Job Ticket, you may reject the order.

By default, "any operator" can accept or reject an order.

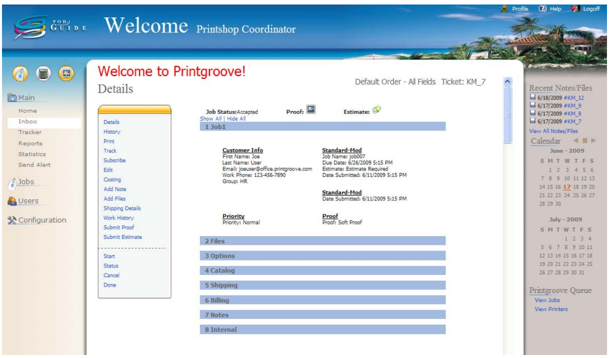
To accept /reject an order:

1 From the [Inbox] list or the [Browser] list, click the job you want to accept /reject. The [Details] screen opens.

2 View and check the Job Ticket. As required, perform the following tasks:

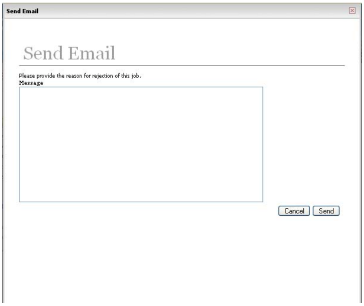
– Print Job Ticket: See "Print a Job Ticket" on page 4-11.
– Track Order: See "Track an Order" on page 4-12.
– Subscribe Order: See "Subscribe/Unsubscribe to Orders" on page 4-15.
– View Order History: See "View Order History" on page 4-16.
– Add Note: See "Add a Note" on page 4-17.
– Add Files (Standard Order only): See "Add/Remove a File" on page 4-19.
– Edit Files (Quick Order only): See "Edit a File" on page 4-22.
– Convert Files: See "Convert a Native File to PDF" on page 4-25.
– Download Files: See "Download Files" on page 4-27.
– View Work History: See "View Order History" on page 4-16.

3 If everything is correct on the Job Ticket, click [Accept]. The order is accepted and a message is shown in a green bar, confirming that the job was successfully accepted.



– When the order is accepted, an e-mail is sent to the user who placed the order.

4 If there are any problems with the Job Ticket, click [Reject]. The [Send E-mail] screen opens. Enter a message and click [Send].



– When the order is rejected, an e-mail will be sent to the user who placed the order.

4.3 Done

Once the job has been accepted, it needs to be moved to the next processing phase. If you have the appropriate Role, you may continue processing the job.

✎...

Note

By default, a "psc"-level user has the permission to continue processing the job.

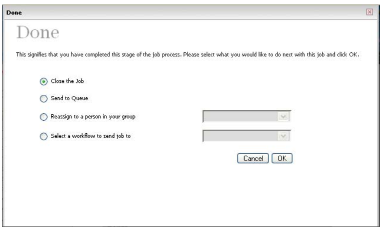
To continue processing the job:

1. From the [Inbox] list or the [Browser] list, click the job you want to continue processing. The [Details] screen opens.

2. View and check the Job Ticket. As required, perform the following tasks:

   – Print Job Ticket: See "Print a Job Ticket" on page 4-11.
   – Track Order: See "Track an Order" on page 4-12.
   – Subscribe Order: See "Subscribe/Unsubscribe to Orders" on page 4-15.
   – View Order History: See "View Order History" on page 4-16.
   – Add Note: See "Add a Note" on page 4-17.
   – Add Files (Standard Order only): See "Add/Remove a File" on page 4-19.
   – Edit Files (Quick Order only): See "Edit a File" on page 4-22.
   – Convert Files: See "Convert a Native File to PDF" on page 4-25.
   – Download Files: See "Download Files" on page 4-27.
   – View Work History: See "View Order History" on page 4-16.
   – Edit: See "Edit a Job Ticket" on page 4-29.
   – Costing: See "Costing" on page 4-33.
   – Submit Proof: See "Submit a Proof" on page 4-48.
   – Submit Estimate: See "Submit an Estimate" on page 4-50.
   – Start: See "Time Recording" on page 4-51.

3. When you are finished, click [Done]. The [Done] screen opens.



– If the order has been entered into a Workflow, the [Done] screen is different from the image above. If the job was entered into a Work-flow, see “To assign the order to a Workflow:” on page 4-9.

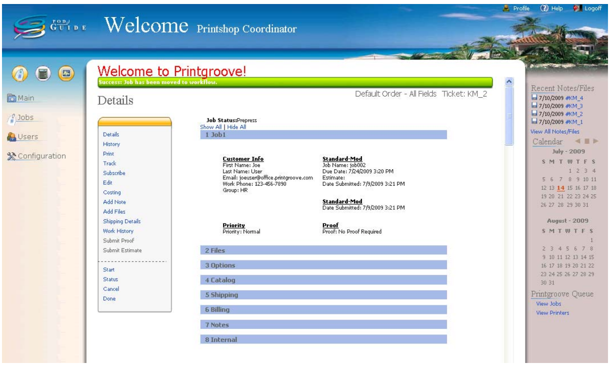
4 Select one of the on-screen options. The options are:

– Close the Job: Changes the status of the job to “Closed”. No further changes can be made to the job (including costing or invoicing) but the job can be archived, copied, or resubmitted as a new job.
– Send to Queue: Sends the job to Printgroove POD Queue for printing (if you select this option you must have the Printgroove POD Queue product and the user accounts between both applications must be synchronized).
– Reassign to a person in your group: Allows you to reassign the ticket to another user in your Group.
– Select a workflow to send job to: Allows you to choose one of the available Printgroove POD Guide Workflow options.

5 If you select [Reassign to a person in your group], select the person from the drop-down list.

6 If you select [Select a workflow to send job to], select a Workflow from the drop-down list.

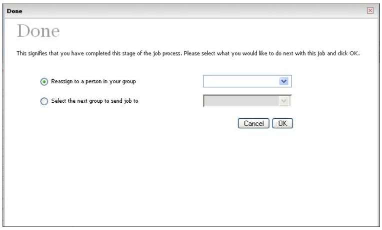
7 Click [OK]. The [Details] screen returns and a message is shown in a green bar to confirm that the request was successfully completed.



To assign the order to a Workflow:

1 Complete steps 1 and 2 described in “To continue processing the job:” on page 4-7.

2 When you finish entering your order into a Standard Workflow, click [Done]. The [Done] screen opens.

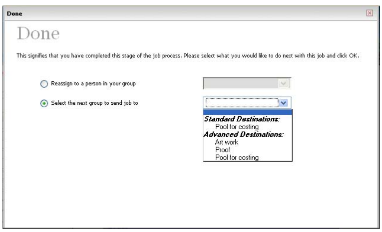


3 Select one of the on-screen options. The options are:

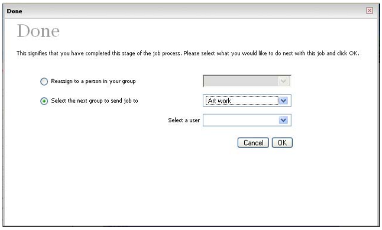
- Close the Job: Changes the status of the job to “Closed”. No further changes can be made to the job (including costing or invoicing) but the job can be archived, copied, or resubmitted as a new job.
- Send to Queue: Sends the job to Printgroove POD Queue for printing (if you select this option you must have the Printgroove POD Queue product and the user accounts between both applications must be synchronized).
- Reassign to a person in your group: Allows you to reassign the ticket to another user who is assigned to the same Node.
- Select the next group to send job to: Allows you to choose the next Node.

4 When you select [Reassign to a person in your group], select the person from the drop-down list.

5 When you select [Select a workflow to send job to], select the next Node from drop-down list.



6 When you select a Node to which multiple users are assigned, select the user you want to reassign the job to from the [Select a user] drop-down list.



7 Click [OK]. The [Details] screen returns and a message is shown in a green bar to confirm that the request was successfully completed.

4.4 Print a Job Ticket

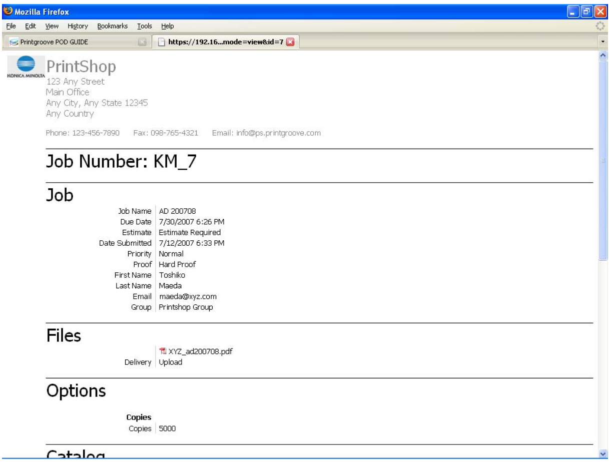
If you have the appropriate Role, you can print a Job Ticket. A printed copy of the job ticket is useful as a tangible confirmation of the print job and its settings.

Note
By default, "psc"- and "appadmin"-level users can print Job Tickets.

To print a Job Ticket:

1 From the [Inbox] list or the [Browser] list, click the job for which you want to print a hard copy. The [Details] screen opens.

2 Click [Print] to open a printable view of the job ticket.



3 Select [File] - [Print] to print a hard copy of the job.

4.5 Track an Order

If you have the appropriate Role, you can track jobs as they are processed.

When you add to Tracker, the [Tracker] list on your Home page displays the first ten jobs that are being tracked. Each can be viewed separately. You can track the order status of these jobs from processing to completion by looking at the Home page.

✎...

Note

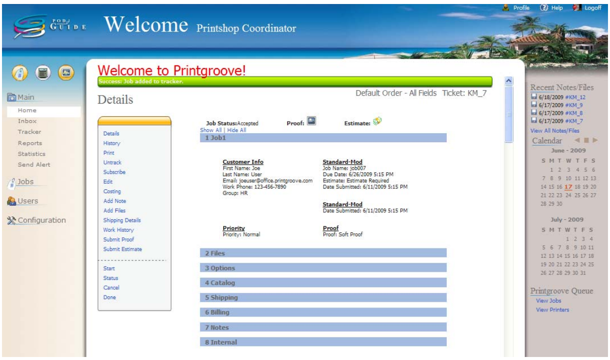
- *By default, "psc"- and "appadmin"-level users can track orders.*
- *You can also receive automatic notification when a job's status changes. See "Subscribe/Unsubscribe to Orders" on page 4-15.*
- *You can view order history. See "View Order History" on page 4-16.*
- *You can view the working history of a processing order. See "Time Recording" on page 4-51*

4.5.1 Track/Untrack Order

To track/untrack an order:

1 From the [Inbox] list or the [Browser] list, click the job you want to add to Tracker. The [Details] screen opens.

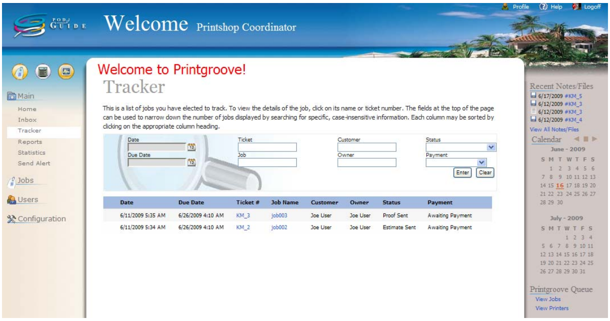
2 Click [Track]. A message is shown in a green bar to confirm that the request was successfully completed.



- Once a job is added to Tracker, the menu option will change to [Untrack] to allow you to stop tracking the job, as required.
- Once a job is deleted from Tracker, the menu option will change to [Track] to allow you to start tracking the job, as required.

4.5.2 View the [Tracker] List

Display your Home page by clicking [Home]. Click [Tracker] to display all tracked jobs. For each job the [Date], [Due Date], [Ticket #], [Job Name], [Customer], [Owner], [Status] and [Payment] values are displayed.



4.5.3 Search Tracked Orders

When [Tracker] is displayed, you can search for a specific job or narrow the list down to jobs containing common characteristics.

To search tracked orders:

1 On your Home page, click [Main] - [Tracker] to display the complete list of all orders being tracked.

2 Enter data in one or more search fields at the top of the page.

- Date & Due Date: Clicking the Calendar icon to the right of [Date] opens a calendar of the current month. Clicking on a day of the month will select that day as the search criteria. To return to the current date, click [Today] and use the directional arrows to change months or years.
- Ticket: To search for one specific Job Ticket number, type that number into this field.
- Job: To search for one or more specific Job(s) by name, type the name of the job in this field. Adding a wildcard (*) to this field will broaden the search within the job name field.
- Customer: To search for one or more specific job(s) by Customer name, type the name of the customer in this field. A wildcard character (*) may be used in this field also.
- Owner: To search for one or more specific job(s) by Owner name, type the name of the owner in this field. A wildcard character (*) may be used in this field also. For a job the Status of which is [Closed], however, no search can be made with the Owner.

– Status: This filter confines a search to the Status definition selected from a drop-down menu.
– Payment: To search for jobs that have a particular Payment Status, select a value from the drop-down menu.
– Leaving all fields blank will not restrict the search. As a result, all assigned jobs will be displayed.

3 Click [Enter]. All jobs that meet the specified criteria are displayed.

...

Note

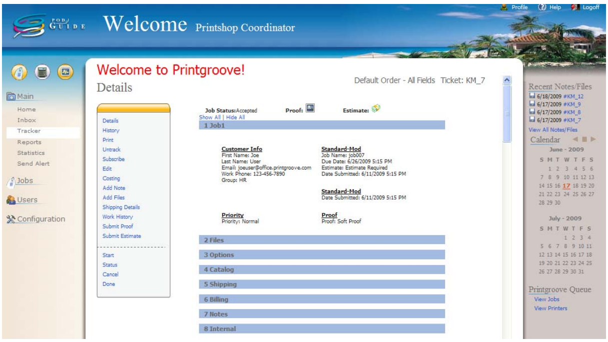
Clicking [Clear] eliminates all values specified in search fields.

4.5.4 View Details of Tracked Orders

You can access the details of orders being tracked via the following lists:

- The [Tracking] list on your Home page
- The [Tracking] list on the [Tracking] screen
- The list of retrieval results on the [Tracking] screen

Click any order you want to review. The [Details] screen opens.



Click the blue heading bar of section you want to view to expand the section and view the setting details.

4.6 Subscribe/Unsubscribe to Orders

If you have the appropriate Role, you can subscribe to a job. When you subscribe to a job, Printgroove POD Guide will automatically send you a notification e-mail message whenever the status of the job ticket to which you have subscribed changes.

Once you have subscribed to a job, the menu option will change to [Unsubscribe] to allow you to unsubscribe and stop receiving e-mails about the job.

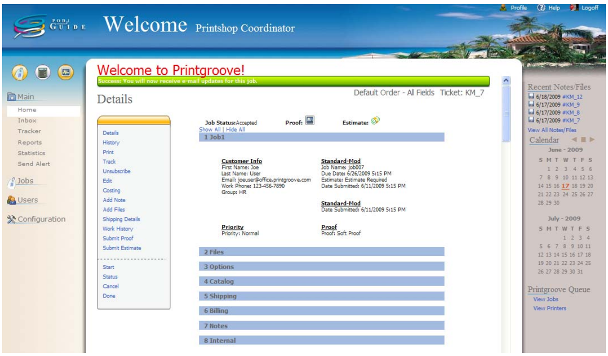
Note

- *By default, "psc"- and "appadmin"-level users can set auto-notify.*
- *You can track a processing order. See "Track an Order" on page 4-12.*
- *You can view order history. See "View Order History" on page 4-16.*
- *You can view the working history of a processing order. See "Time Recording" on page 4-51.*

To subscribe/unsubscribe to orders:

1 From the [Inbox] list or the [Browser] list, click the job to which you want to subscribe. The [Details] screen opens.

2 Click [Subscribe]. A message is shown in a green bar to confirm that it will start successfully.



- Once you have subscribed, to a job the menu will change to [Unsubscribe] to allow you to unsubscribe and stop receiving notification e-mails about the job.
- Once unsubscribed, the menu will change to [Subscribe] to allow you to start receiving notification e-mails about the job.

4.7 View Order History

If you have the appropriate Role, you can view the history of an order. Job history notes all the steps of the job that are completed including the current step, and includes time stamps, status values and other relevant information about these steps.

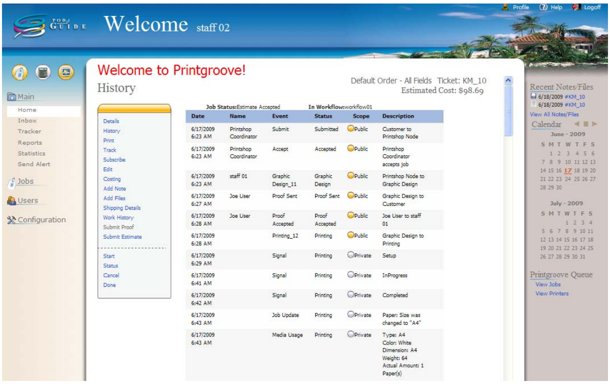
Note

- *By default, "psc"- and "appadmin"-level users can view order history.*
- *You can track the placed order. See "Track an Order" on page 4-12.*
- *You can subscribe to a job and receive information about the job each time its status changes. See "Subscribe/Unsubscribe to Orders" on page 4-15.*
- *You can view the working history of an order. See "Time Recording" on page 4-51.*

To view an order's history:

1 From the [Inbox] list or the [Browser] list, click the job whose history you want to view. The [Details] screen opens.

2 Click [History]. The [History] screen opens. It lists the [Date], [Name], [Event], [Status], [Scope] and [Description] for each listed process.



3 To return to the [Details] screen, click [Details].

4.8 Add a Note

If you have the appropriate Role, you can add a note to the job ticket. The note will be added to the Notes section of the job.

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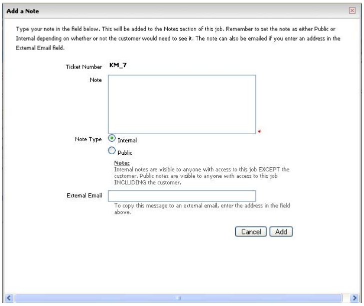
Note

By default, "psc"-level users can create notes.

To add a note:

1. From the [Inbox] list or the [Browser] list, click the job to which you want to add a note. The [Details] screen opens.

2. Click [Add Note]. The [Add a Note] screen opens.



3. Enter text in the [Note] field.

4. Select a [Note Type] radio button:
   - Internal: Internal notes are visible to anyone with access to this job except the customer.
   - Public: Public notes are visible to anyone with access to this job including the customer. As an internal reprographics department user, you also have the option to send a Note to an external user address via e-mail.

5. If you select [Internal] and want to send a copy of this message to an external user via e-mail, enter the e-mail address in the [External E-mail] field.

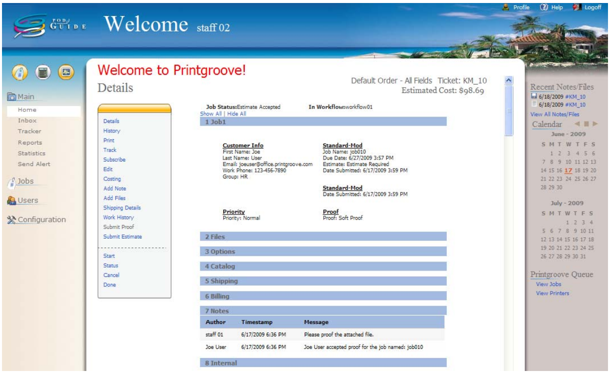
6. Click [Add]. The [Add a Note] screen closes.

4.8.1 View a Note

To view a note:

1 From the [Inbox] list or the [Browser] list, click the job ticket whose Note you want to view. The [Details] screen opens.

2 Click the blue heading bar for the [Note] section.



4.9 Add/Remove a File

The [Add Files] menu option is only available when the job ticket type is Standard Order. This function is not available for Quick Orders. See “Edit a File” on page 4-22 for details about modifying a PDF file attached to a Quick Order. If you have the appropriate Role, you can upload additional files to a job ticket and remove any uploaded files from a job ticket.

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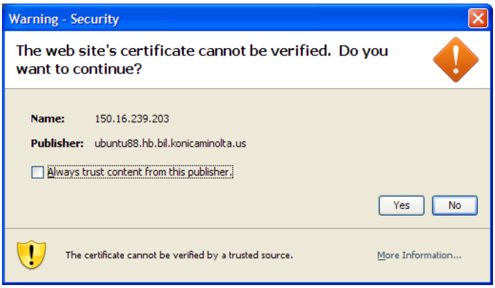
Note

– *By default, “psc”-level users can add /remove files.*
– *If native files are uploaded to the job, you can convert them to PDF. See “Convert a Native File to PDF” on page 4-25.*
– *You can view and download all uploaded files. See “Download Files” on page 4-27.*

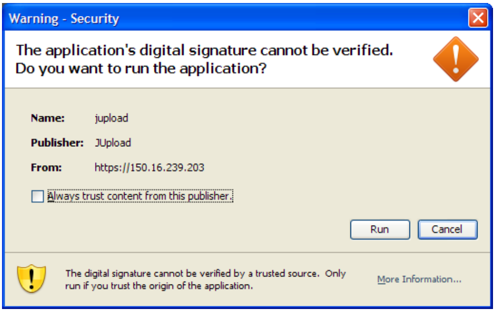
To add a file:

1 From the [Inbox] list or the [Browser] list, click the job to which you want to add files. The [Details] screen opens.

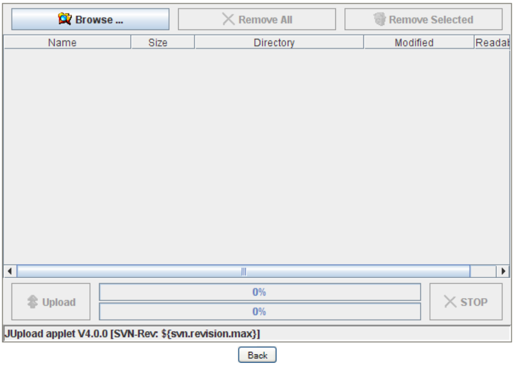
– Click [Add Files]. The [Warning - Security] pop-up opens:



- If you want to avoid this step in future uploads, select the [Always trust content from this publisher] checkbox then click the [Yes] button. A second [Warning - Security] pop-up opens:



- If you want to avoid this step in future uploads, select the [Always trust content from this publisher] checkbox then click the [Run] button. The [Upload Files] screen opens:

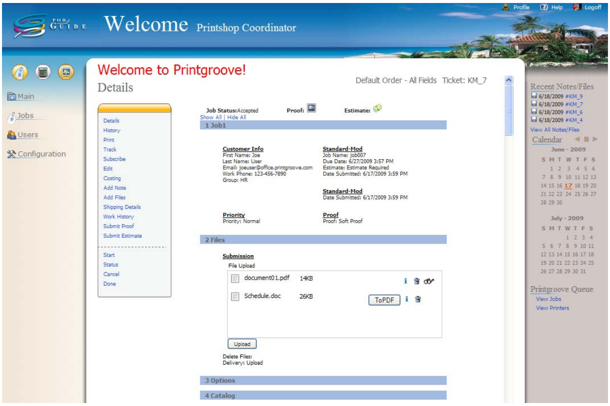


- Click the [Browse] button, navigate to the file(s) you want to upload, select them then click the [Open] button. The files appear in the [Upload Files] screen main panel. You may upload up to ten files. The maximum file size is 2 GB. If multiple files are added and all are larger files, performance may be significantly reduced. A combine file size of 5 GB or less is recommended for optimal performance.
- Once the files are selected, click the [Upload] button. A progress bar will track the upload process (in the case of larger files, it may take a little longer for the progress bar to appear). If you click the [Stop] button, the upload is stopped and you return to the previous step above.
- When the files are uploaded, the progress bar will inform you that the task is complete. Click the [Back] button to close the [Upload Files] pop-up.
- The uploaded files will appear on the Printgroove POD Guide screen.

To remove a file:

1 From the [Inbox] list or the [Browser] list, click the job from which you want to remove files. The [Details] screen opens.

2 Click the blue heading bar of the [Files] section to view the details.



3 Click the [Preview] icon to see the first page of the selected document. This icon only appears for PDF files. If you want to view the full PDF file or any other type of file, see Steps 4-9 of “To view or download the files:” on page 4-27. If the PDF file is password protected, Printgroove POD Guide cannot open the file. A pop-up message will inform you if this situation occurs.

4 Click the [Delete] icon to the right of the uploaded file you want to delete. A confirmation message opens.

5 Click [OK] to delete the order. A confirmation message opens.

6 Click [OK].

4.10 Edit a File

The [Edit Files] menu option is only available when the job ticket type is Quick Order. This function is not available for Standard Orders. See “Add/Remove a File” on page 4-19 for details about modifying files attached to a Standard Order.

If you have the appropriate Role, you can delete the PDF file attached to a Quick Order then Upload a new PDF file to the job ticket.

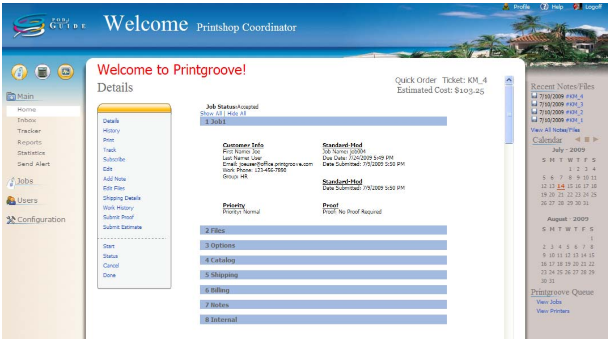
Note

By default, “psc”-level users can add /remove a PDF file to a Quick Order.

To remove a PDF file:

1 From the [Inbox] list or the [Browser] list, click the job to which you want to remove the PDF file. The [Details] screen opens.

2 Click [Edit Files]. The [Select file(s) to upload] screen opens.



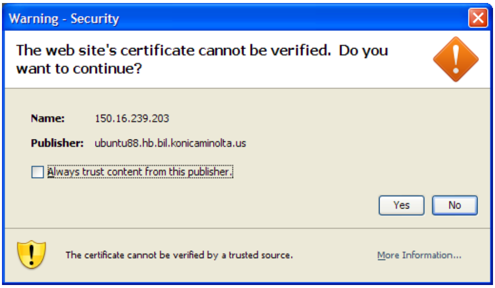
3 Click the [Delete] icon to the right of the PDF file. A confirmation message opens.

4 Click [OK] to delete the file.

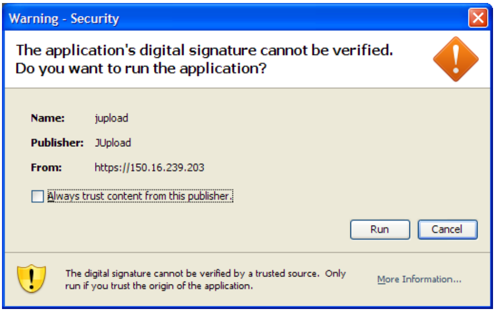
To add a PDF file:

1 From the [Inbox] list or the [Browser] list, click the job from which you want to add files. The [Details] screen opens.

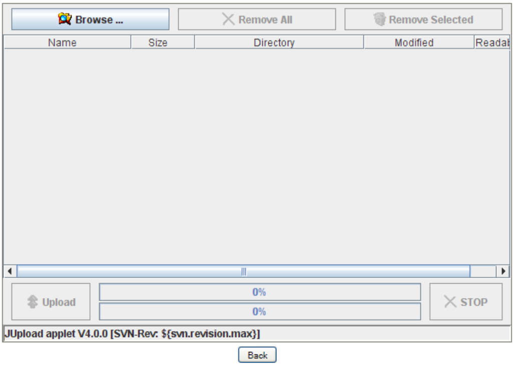
– Click [Edit Files], then click [Upload]. The [Warning - Security] pop-up opens:



– If you want to avoid this step in future uploads, select the [Always trust content from this publisher] checkbox then click the [Yes] button. A second [Warning - Security] pop-up opens:



– If you want to avoid this step in future uploads, select the [Always trust content from this publisher] checkbox then click the [Run] button. The [Upload Files] screen opens:



– Click the [Browse] button, navigate to the PDF file you want to upload, select it then click the [Open] button. The file appears in the [Upload Files] screen main panel. You may only upload a single PDF file. The maximum file size is 2 GB.
– Once the file is selected, click the [Upload] button. A progress bar will track the upload process (in the case of larger files, it may take a little longer for the progress bar to appear). If you click the [Stop] button, the upload is stopped and you return to the previous step above.
– When the file is uploaded, the progress bar will inform you that the task is complete. Click the [Back] button to close the [Upload Files] pop-up.
– The uploaded file will appear on the Printgroove POD Guide screen.

4.11 Convert a Native File to PDF

This function is not available if the order is a Quick Order. If you have the appropriate Role, you can convert native files uploaded to a job ticket into PDF files. You must also have the Printgroove POD Driver installed on your PC for this function to work. (See the Printgroove POD Driver User's Guide for details.)

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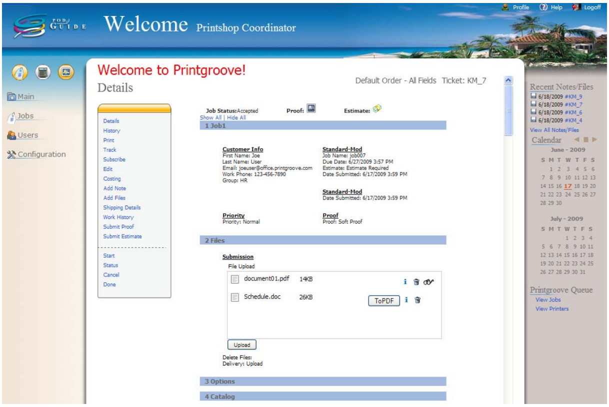
Note

- *By default, "psc"-level users can convert native files to PDF files.*
- *You can preview uploaded PDF files and download all uploaded files. See "Download Files" on page 4-27.*

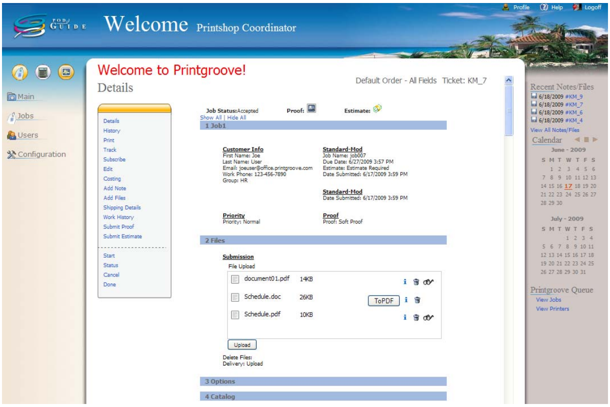
To convert a file:

1 From the [Inbox] list or the [Browser] list, click the job that contains the file(s) you want to convert to PDF. The [Details] screen opens.

2 Click the blue heading bar of the [Files] section to view the details.



3 Click [To PDF] to convert the native file to a PDF file. A pop-up window displays the progress. After conversion completes, the PDF file is added to Printgroove POD Guide.



4.12 Download Files

If you have the appropriate Role, you can view uploaded files and download all uploaded files.

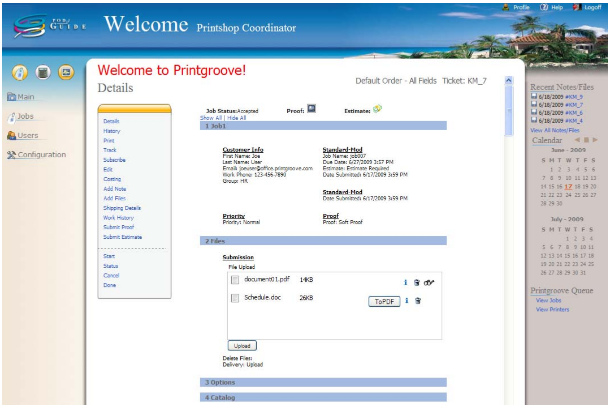
Note

- *By default, “psc”-level users can download files.*
- *If native files are uploaded to the job, you can convert them to PDF. See “Convert a Native File to PDF” on page 4-25.*

To view or download the files:

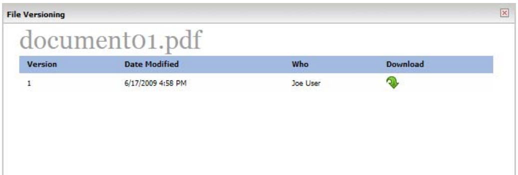
1 From the [Inbox] list or the [Browser] list, click the job that contains the file(s) you want to view or download. The [Details] screen opens.

2 Click the blue heading bar of the [Files] section to view the details.

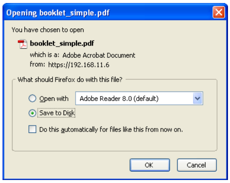


3 Click the [Preview] icon to see the first page of the selected document. This icon only appears for PDF files. If the PDF file is password protected, Printgroove POD Guide cannot open the file. A pop-up message will inform you if this situation occurs. If you want to view the full PDF file or any other type of file, continue to Step 4.

4 Click the [i] icon to the right of the file you want to view or download.
The [File Versioning] pop-up window opens.



5 To download, click the green download arrow icon. The [Opening] pop-up window opens.



6 Select [Open with] or [Save to disk].

7 If you select [Open with], specify the application you want to use to open the file from the drop-down menu.

8 If you want set this application as the default for this function, check [Do this automatically for files like this from now on].

9 Click [OK]. After a few moments, the browser will attempt to download the selected file. The [Opening] pop-up windows closes and the [File Versioning] pop-up window reappears.

– In some cases, additional pop-up windows appear for downloads.

10 Click the close icon to return to the [Details] screen.

4.13 Edit a Job Ticket

If you have the appropriate Role, you can edit Job Tickets.

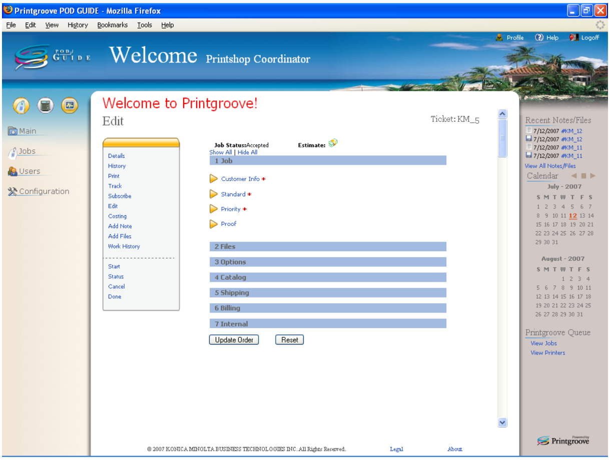
Note

- *By default, "psc"-level users can edit a Job Ticket.*
- *You cannot edit a Job Ticket until after it is accepted.*
- *In the case of the job ticket type being the quick order, [Edit Files] is used to delete the PDF file for uploading.*

To edit a Job Ticket:

1 From the [Inbox] list or the [Browser] list, click the job you want to edit. The [Details] screen opens.

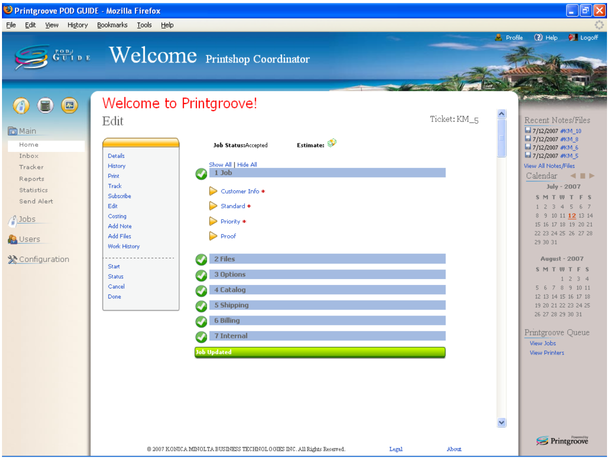
2 Click [Edit]. The [Edit] screen opens.



3 Edit the sections that should be changed according to the procedures described in "Placing an Order" on page 3-2.

4 If a native file is uploaded in [Files] section and needs to be converted to PDF, See "Convert a Native File to PDF" on page 4-25.

5 After completing all of the sections that are pertinent to your job, click [Update Order] to update the job.



– If all the necessary data has been entered properly, a green-check-mark-in-a-circle icon will appear to the left of each section and a Job Saved message will appear.
– If there is an error or omission in the job ticket, a red-X-in-a-circle icon will appear to the left of the section that requires modification. The job is rejected and a “Your job did not pass validation. Please correct all errors and try again.” message will be displayed in an orange bar below the sections. Once errors or omissions have been corrected, the job can be resubmitted by clicking [Place Order] again.

6 To return to the [Details] screen, click [Details].

4.14 Add an Internal Service

If you have the appropriate Role, you can add Internal Services to an order.

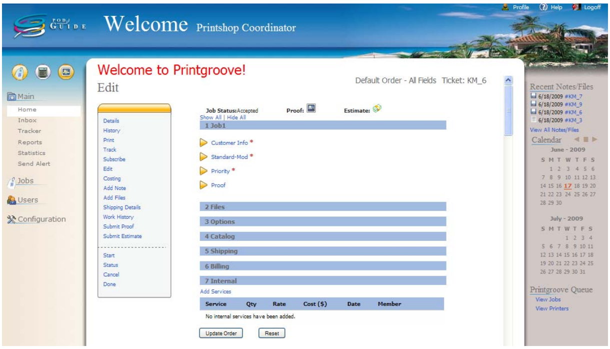
Note

- *By default, "psc"-level users can add Internal Services to an order.*
- *Internal Services are defined by the Application Administrator. See "Internal Service" on page 9-27.*

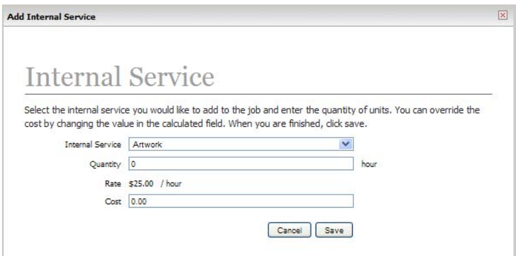
To add an Internal Service:

1 From the [Inbox] list or the [Browser] list, click the job to which to want to add an Internal Service. The [Details] screen opens.

2 Click [Edit] or [Costing]. Then click the blue heading bar of the [Internal] section to view the details.



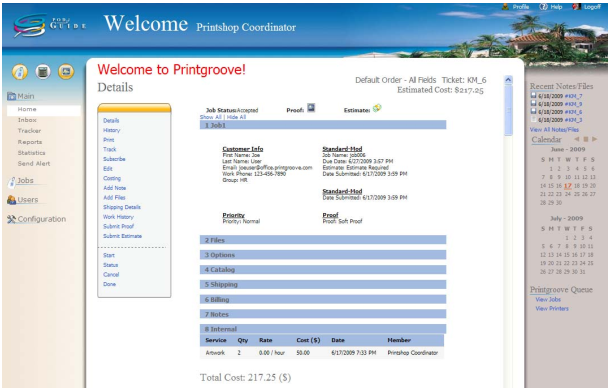
3 Click [Add Service]. The [Add Internal Service] screen opens.



4 Select the Internal Service you want to add from the [Internal Service] drop-down menu.

5 Enter a value in the [Quantity] field. The [Cost] value will be calculated automatically.

6 Click [Save]. The [Add Internal Service] screen closes. The Internal Service is added to the table and a confirmation message is shown in a green bar, confirming that the service was saved.



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Note

To change the cost of an Internal Service you've added, follow the same procedures mentioned above but just modify the [Quantity] value on the [Add Internal Service] screen.

4.15 Costing

This option is only available if the order is a Standard Order. If you have the appropriate Role, you can calculate the cost of an order.

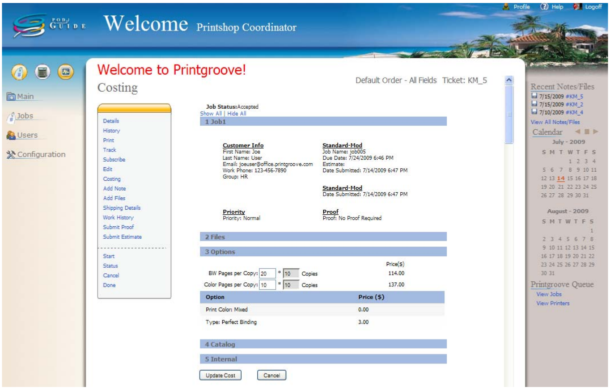
Note

- *By default, "psc"-level users can calculate the cost of an order.*
- *The cost of individual options is set by the Application Administrator. See "Printing Service" on page 9-19.*
- *You cannot calculate the cost of an order until after the order is accepted.*

To calculate the cost:

1 From the [Inbox] list or the [Browser] list, click the job for which you want to calculate the cost. The [Details] screen opens.

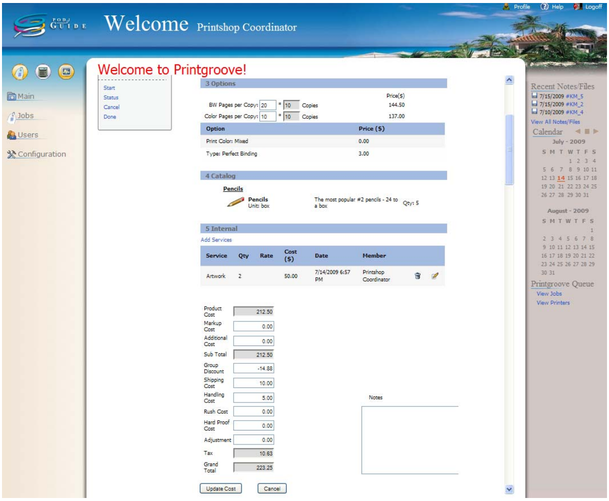
2 Click [Costing]. The [Costing] screen opens.



3 In the [BW Pages Per Copy] text box, enter the number of BW pages in the original PDF file. In the [Color Pages Per Copy] text box, enter the number of Color pages in the original PDF file. Once values are entered the cost is updated automatically.

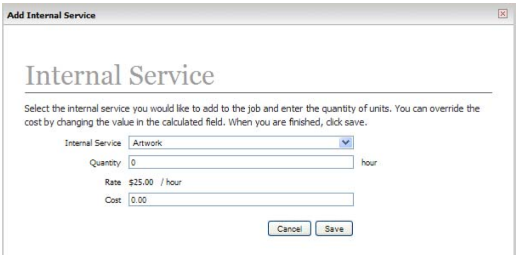
- The cost is obtained by using the expression given below that employs the one-time cost, the price per copy and the price per page set in the Price List.
- (One-time cost) + (Number of copies x Price per copy) + (Total number of pages (Number of pages for one copy x Number of copies) x Price per page)

4 Additional costing fields are in the [Internal] section. Click the blue heading bar to open it. The [Internal] section expands.



5 If you want to add a service click [Add Services]. The [Add Internal Service] screen opens.

6 Select the Internal Service you want to add from [Internal Service] drop-down menu.



7 Enter a value in the [Quantity] text box. The [Cost] will be calculated automatically.

8 Click [Save]. The [Add Internal Service] screen closes and the Internal Service is added to the table.

9 If you need to adjust the cost of the order, the values in any of the live fields may be modified. Fields that are grayed out are automatically calculated by Printgroove POD Guide.

10 When complete, click [Update Cost]. The cost is updated and the [Details] screen reappears.

4.16 Generate an Invoice

If you have the appropriate Role, you can generate invoice.

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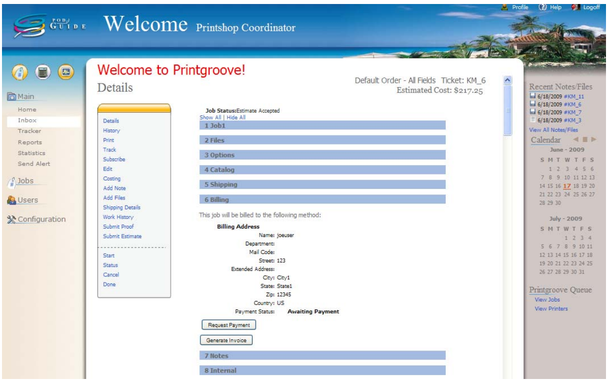
Note

- *By default, "psc"- and "appadmin"-level users can generate an invoice.*
- *The Invoice Templates are created by the Application Administrator. See "Predefined Invoice Template" on page 9-12.*
- *You cannot generate an invoice until costing is complete.*

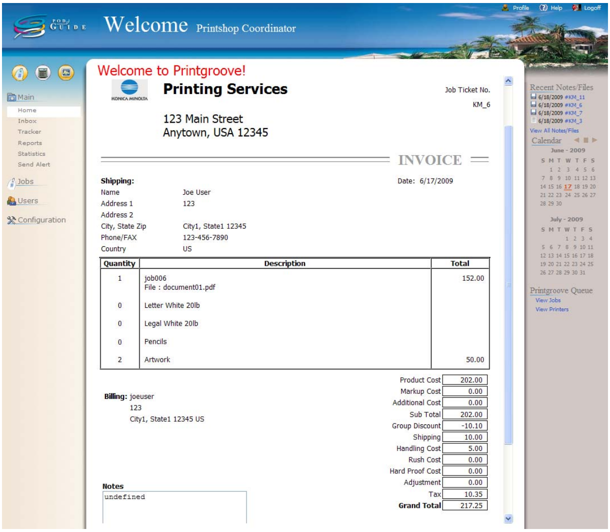
To generate an invoice:

1 From the [Inbox] list or the [Browser] list, click the job for which you want to generate an invoice. The [Details] screen opens.

2 Click the blue heading bar of the [Billing] section to view the details.



3 Click [Generate Invoice]. The Invoice preview opens.



4 To print the invoice, click [Print Invoice] in the upper-right of the screen. The [Print] screen opens.

5 To return to the [Details] screen, click [Return to the previous page] in the upper-right of the screen. The [Details] screen reappears.

4.17 Printgroove POD Guide Payment Procedures

If you have the appropriate Role, you can request and enter payment information.

Note

By default, "psc"-level users can request and enter payment information.

To request and enter payments for non-PayPal Standard orders

This applies to all Standard- type orders that do not have PayPal as the Billing Method.

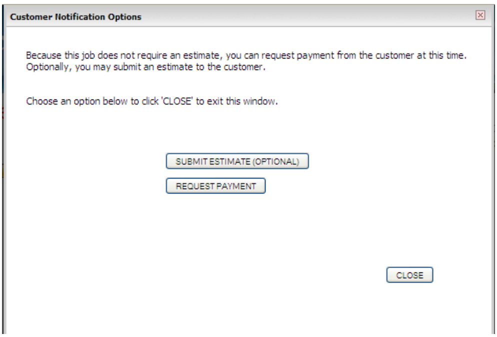
Before you can request payment from the customer, you must first Create and Accept an order. If the [Estimate Required] check box was selected when the job was created, that step must also be completed.

1 Go to the Brows screen, locate the job and click it to open the job Details screen.

2 Click Costing to open the costing menu.

3 In the [Options] section, enter values for the [BW Pages per Copy] and [Color Pages per Copy] fields.

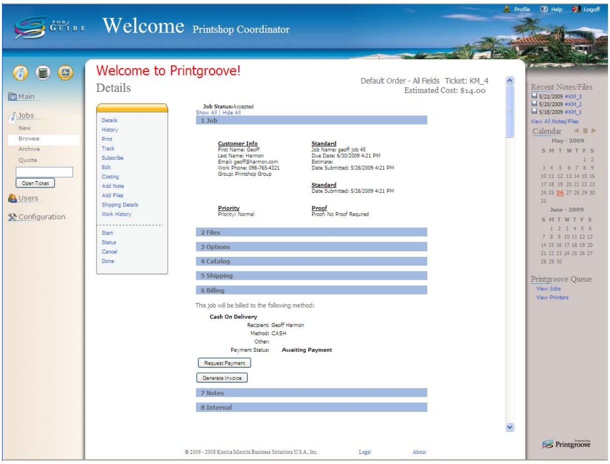
4 Modify any additional costs, as required, then click [Update Cost]. The [Customer Notification] pop-up screen opens:



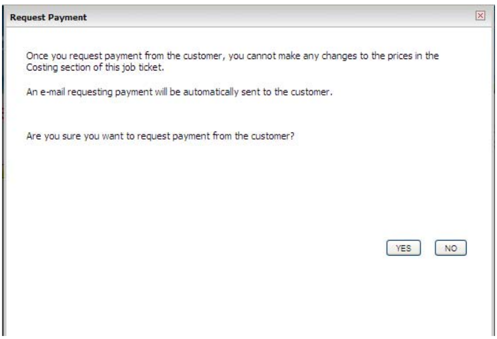
5 If the customer did not request an Estimate, you may choose to send one at this time by click the [Submit Estimate (Options)] button. Note that this is not mandatory.

6 If you select the option, the pop-up closes and an Estimate is sent to the customer. If you do not select the option and click [Request Payment] see Step 8 below.

7 Once you receive the customer's approval, return to the Browser screen, locate the job and open the Details screen. Click the Billing row to open it.



8 Click the [Request Payment] button. If this is the first time that a request is made, the Request Payment pop-up screen opens:



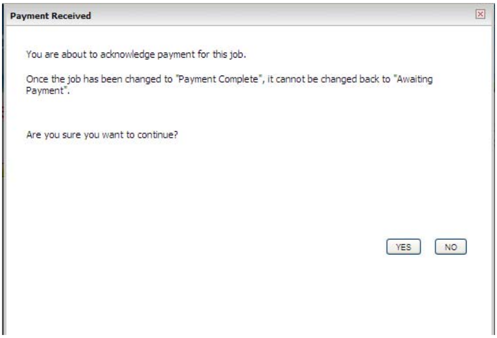
9 As noted on the screen, if you continue with the request, the job ticket pricing will be fixed and cannot be altered. If you agree to these conditions, click [Yes]. An email is sent to the customer, requesting that they pay for their order.

– Once you click [Yes] you cannot make changes to the [Costing] section of the job.

– The [Request Payment] button may be clicked as many times as required. Any clicks after the initial click will generate an email request but till not open the pop-up screen. The timestamp will update to reflect the latest request date.

10 A [Payment Received] button is added to the Billing section of the Details screen. The [Payment Status] changes to [Awaiting Payment].

11 When payment has been received, reopen the Details screen for the job, expand the Billing section and click the [Payment Received] button. The Payment Received pop-up screen opens:



12 If you want to change the status of the job to [Payment Complete], click [Yes]. Once this is done the status cannot be reverted back.

13 The pop-up screen closes, The job Details no longer displays and payment buttons in the Billing section. The Status is noted as [Payment Complete] and includes a date and time stamp.

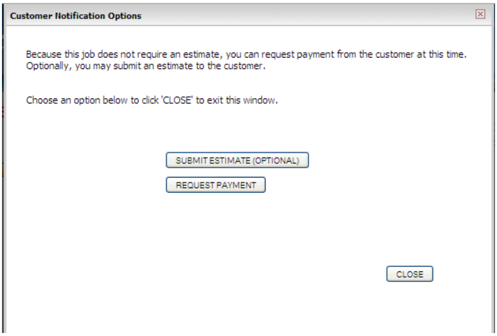
To request payments for PayPal Standard orders

1 Go to the Brows screen, locate the job and click it to open the job Details screen.

2 Click Costing to open the costing menu.

3 In the [Options] section, enter values for the [BW Pages per Copy] and [Color Pages per Copy] fields.

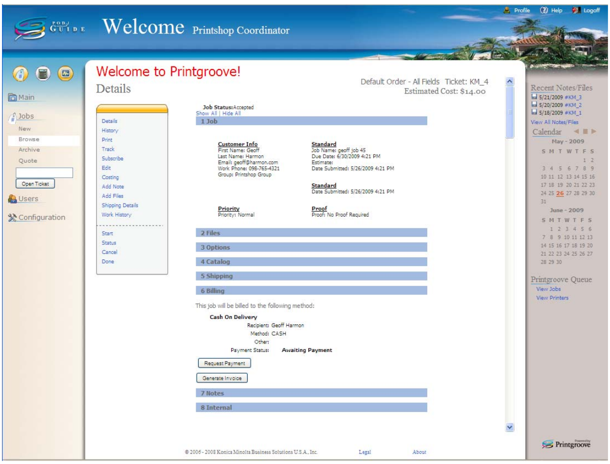
4 Modify any additional costs, as required, then click [Update Cost]. The [Customer Notification] pop-up screen opens:



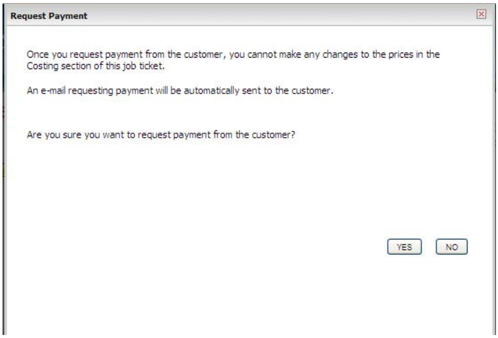
5 If the customer did not request an Estimate, you may choose to send one at this time by click the [Submit Estimate (Options)] button. Note that this is not mandatory.

6 If you select the option, the pop-up closes and an Estimate is sent to the customer. If you do not select the option and click [Request Payment] see Step 8 below.

7 Once you receive the customer's approval, return to the Browser screen, locate the job and open the Details screen. Click the Billing row to open it.



8 Click the [Request Payment] button. The Request Payment pop-up screen opens:



9 As noted on the screen, if you continue with the request, the job ticket pricing will be fixed and cannot be altered. If you agree to these conditions, click [Yes]. An email is sent to the customer, requesting that they pay for their order.

10 The [Payment Status] changes to [Awaiting Payment]. Once the user submits their payment to PayPal, the [Payment Status] will change to [Verifying Payment]. This indicates that PayPal is processing the order.

11 When payment has been received, PayPal will inform Printgroove POD Guide of this situation and [Payment Status] will change to [Payment Complete] and will include a date and time stamp.

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Note

Note that Quick Orders paid via PayPal do not require any intervention from the Printgroove POD Guide operator. It is up to the customer to initiate the payment process via Printgroove POD Serve. POD Guide will simply note the Payment Status of the job.

To request and enter payments for non-PayPal Quick orders

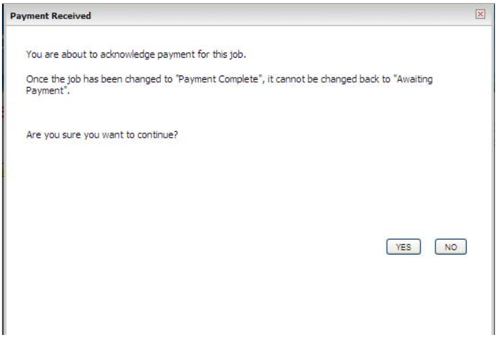
This applies to all Quick- type orders that do not have PayPal as the Billing Method.

1 Since Quick orders provide real-time price quotes for a job, Estimate and Costing phases are not required. And also, a mail requesting for payment is automatically issued after an order is placed.

2 Locate the job and open the Details screen. Click the Billing row to open it.

3 When [Request Payment] is clicked, a mail is issued once again requesting the customer for payment for the order. And the date and hour of [Last Payment Requested On] is also updated.

4 When payment has been received, reopen the Details screen for the job, expand the Billing section and click the [Payment Received] button. The Payment Received pop-up screen opens:



5 If you want to change the status of the job to [Payment Complete}, click [Yes]. Once this is done the status cannot be reverted back.

6 The pop-up screen closes, The job Details no longer displays and payment buttons in the Billing section. The Status is noted as [Payment Complete] and includes a date and time stamp.

Limitations to Payment Status

There are two limitations to the Payment Status function. Descriptions of each follow as well as suggestions for resolving these issues.

- If the [Payment Status] is accidentally changed to [Payment Complete] for a non-PayPal job and you wish to return the job to [Awaiting Payment], duplicate the job then cancel the original. The copied job’s [Payment Status] will be [Awaiting Payment] and the copy can be processed normally.
- If a PayPal job with [Payment Complete] status is refunded back to the customer, their is no [Payment Status] option to track this. To resolve this issue, open the detailed view of the job and select [Add Note] from the menu. On the screen that opens, enter information about the transaction then click [Save]. You may then click [Done] and close the job. As an alternative to the preceding option you may instead cancel the order.

4.18 Shipping Details

If you have the appropriate Role, you can add and edit Shipping Details. When Shipping Details are added, the can be accessed by the Printgroove POD Serve and Guide users so that they may view the shipping providers up-to-date shipping information.

For this feature to function properly, the sysadmin must set up the Shipping Courier account to include the courier's Tracking Link URL. Please see "Shipping Option" on page 9-2 for details.

✎...

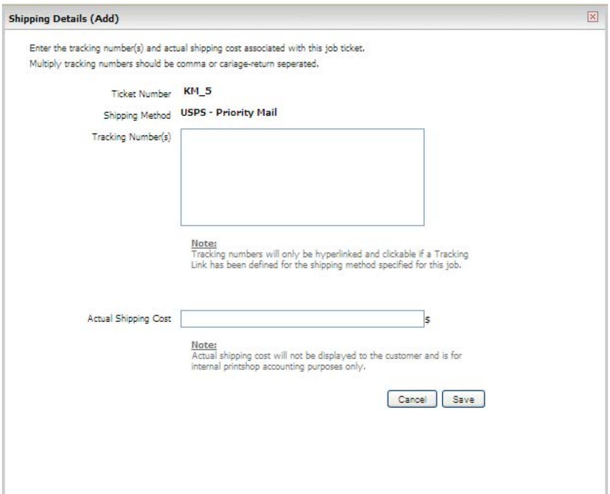
Note

By default, "psc"-level users can add and edit Shipping Details.

To add shipping details:

1 From the [Inbox] list or the [Browser] list, click the job for which you want to add shipping details. The [Details] screen opens.

2 Click [Shipping Details]. If no details are currently associated with the job the Shipping Details (Add) screen opens:



3 In the [Tracking Number(s)] field, enter the tracking numbers associated with the job. If a tracking link URL has been entered for the service, the tracking numbers will display as hyper-links that connect directly to the courier's tracking site. (See "Shipping Option" on page 9-2 for details about adding the link.) If there is not a tracking link, the values en-

tered will still display for the Printgroove POD Serve/Guide users but they will not be hyperlinked to the courier's tracking site.

4 In the [Actual Shipping Cost] field, enter the exact shipping cost of the job.

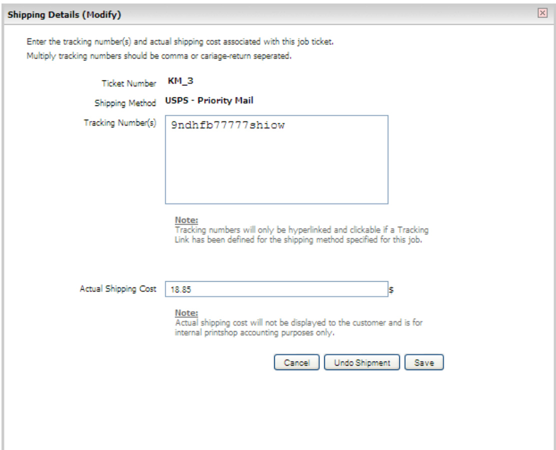
– NOTE:
The data in the [Actual Shipping Cost] field is for administrative use only and is not displayed to the end-user/customer. This data is provided so that the printshop can track the actual price of shipping for each order. This data can be exported and accounting may then compare the actual versus the charged shipping prices and modify their standard pricing model, as required.

5 Click [Save]. When saved, the Shipping section of the job ticket will display a Shipping Tracking icon. This icon will also appear on the Home, Browser, Archive, Inbox and Tracker screens. See "View Shipping Tracking Information" on page 3-48 for details about using this icon.

To edit shipping details:

1 From the [Inbox] list or the [Browser] list, click the job for which you want to edit the shipping details. The [Details] screen opens.

2 Click [Shipping Details]. If details are currently associated with the job the Shipping Details (Modify) screen opens:



3 As required, modify the [Tracking Number(s)] and the [Actual Shipping Cost] value.

4 Click [Save] to save the changes.

To cancel a shipment:

1. From the [Inbox] list or the [Browser] list, click the job for which you want to remove the shipping details. The [Details] screen opens.

2. Click [Shipping Details]. If details are currently associated with the job the Shipping Details (Modify) screen opens.

3. If you wish to revert the Shipping Status of the job back to [Not Shipped], click the [Undo Shipment] button.

4. A pop-up will open and ask if you wish to continue. If you click [Yes], all [Tracking Number(s)] and [Actual Shipping Cost] values will be removed.

5. Click [Save] to close the screen. All shipment information is cancelled and an email is sent to the customer, informing them that the shipment was cancelled.

4.19 Print a Label

If you have the appropriate Role, you can print a shipping label.

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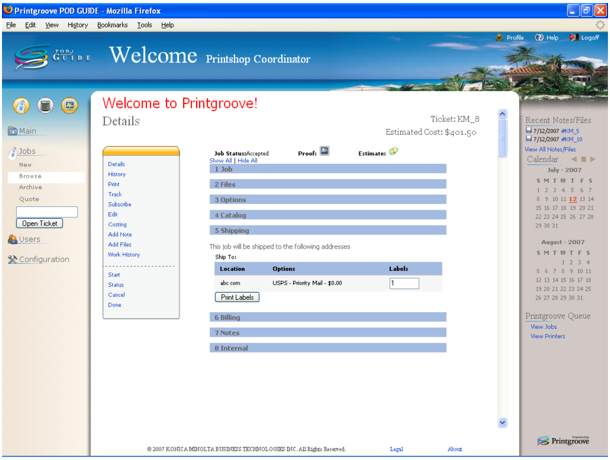
Note

By default, "psc"- and "appadmin"-level users can print shipping labels.

To print a shipping label:

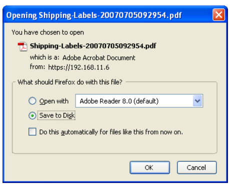
1 From the [Inbox] list or the [Browser] list, click the job for which you want to print a shipping label. The [Details] screen opens.

2 Click the blue heading bar of the [Shipping] section to view the details.



3 In the [Label] field, enter the number of labels required.

4 Click [Print Labels]. The [Shipping Labels] screen opens.



5 Select [Open with] or [Save to disk].

6 If you select [Open with], specify the application you want to use to open the file from the drop-down menu.

7 If you want set this application as the default for this function, check [Do this automatically for files like this from now on].

8 Click [OK]. After a few moments, the browser will download a printable PDF file that contains the labels.

9 Open the file in Adobe Acrobat Reader and print the labels.

4.20 Submit a Proof

If an external user has requested a proof in the [Job] section, you need to either upload a proof file or provide them with a hard-copy. If you have the appropriate Role, you can submit an electronic proof to the user who placed the order.

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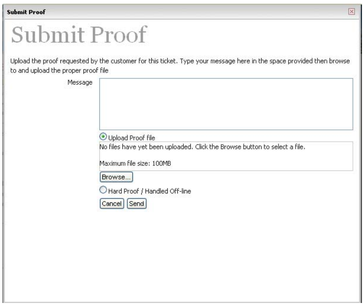
Note

– *By default, "psc"-level users can submit a proof.*
– *You cannot submit a Proof until the order is accepted.*

To submit a proof:

1 From the [Inbox] list or the [Browser] list, click the job for which you want to submit a proof. The [Details] screen opens.

2 Click [Submit Proof]. The [Submit Proof] pop-up window opens.



3 If required, enter a note to the user who placed the order in the [Message] field.

4 Select [Upload Proof file] then click [Browse] to display the [Select file(s) to upload] screen. Select the proof file then click [Open].

– If you select a file that does not currently appear in the [File] section of the job ticket, it is added. If you select a file that has the same name and extension as a file that currently appears in the [File] section, the file is added as a new version. You can check for multiple versions of a file by clicking the [i] icon the right of the job ticket in the [File] section. If you need to verify if the selected file is the correct version, click on [the i] icon, then click on the green download arrow on the [File Versioning] pop-up window. This will open the selected file.

– If more than one version of a file is attached, be sure to ask the customer which version they want printed.

5 If a Hard Proof is required, select [Hard Proof / Handled Off-line].

6 Click [Send]. The [Details] screen reappears.

– Once the proof is submitted, the [Submit Proof] menu will be not displayed on the [Details] screen.

Note

You cannot select [Submit Estimate], [Done], [Start/Stop] or [Status] until you receive a reply from the customer.

4.21 Submit an Estimate

If an external user has requested an estimate in the [Job] section and you have the appropriate Role, you can send the estimate directly to the customer via e-mail or include the estimate as part of the job ticket.

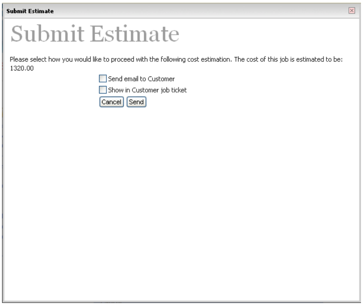
Note

– *By default, "psc"-level users can submit an estimate.*
– *You cannot submit an estimate until the order is accepted.*

To submit an estimate:

1 From the [Inbox] list or the [Browser] list, click the job for which you want to submit an estimate. The [Details] screen opens.

2 Click [Submit Estimate]. The [Submit Estimate] pop-up window opens.



3 Select [Send e-mail to Customer] to send them the estimate via e-mail. Select [Show in Customer job ticket] to include the estimate as part of the job ticket.

4 Click [Send]. The [Details] screen reappears.

– Once the estimate is submitted, the [Submit Estimate] menu will be not displayed in the [Details] screen.

Note

You cannot select [Submit Estimate], [Done], [Start/Stop] or [Status] until you receive a reply from the customer.

4.22 Time Recording

Once an order is accepted, Printgroove POD Guide can be set to track the amount of time it takes to process the job. If you have the appropriate Role, you can activate time recording. Once activated, you can view the amount of time spent on each task as well as the percentage of total time each task required.

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Note

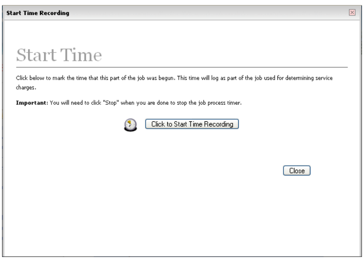
- *By default, "psc"- and "appadmin"-level users can activate time recording and view the tracking results.*
- *You cannot activate time recording until the order is accepted.*
- *In order to make use of the Time Recording function, jobs are necessary to be allocated to the work flow.*
- *You can track the placed order. See "Track an Order" on page 4-12.*
- *You can subscribe to a job and receive automatic e-mail notifications whenever the job's status changes. See "Subscribe/Unsubscribe to Orders" on page 4-15*
- *You can view an order's history. See "View Order History" on page 4-16.*

4.22.1 Start and Stop Time Recording

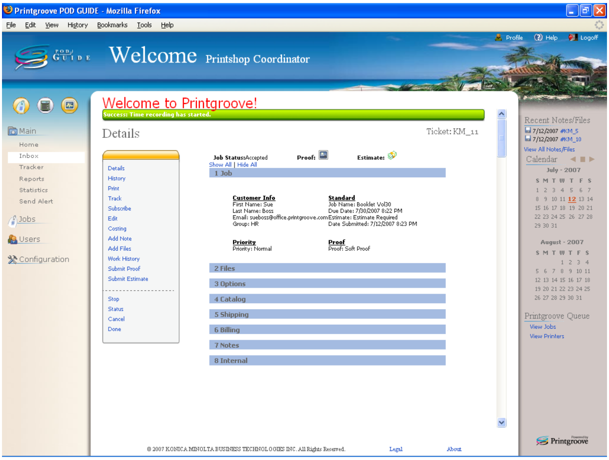
To start/stop time recording:

1. From the [Inbox] list or the [Browser] list, click the job for which you want to start time recording. The [Details] screen opens.

2. Click [Start]. The [Start Time Recording] screen opens.



3 Click [Click to Start Time Recording] button. Time recording is activated and the [Details] screen reappears. A message appears in a green bar to confirm that time recording started successfully.



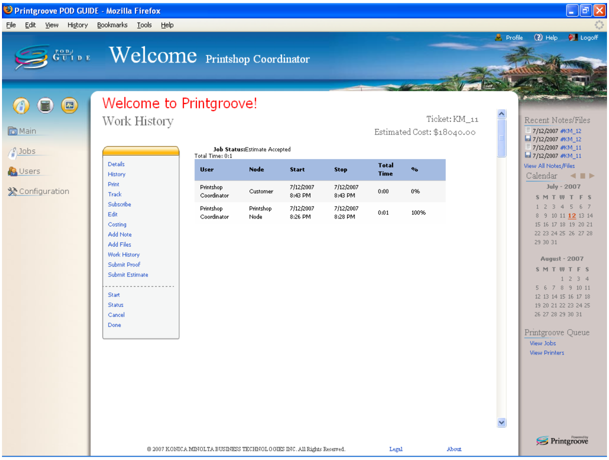
– Once time recording starts, the menu changes to [Stop] to allow you to stop the recording time.
– Once recording is stopped, the menu changes to [Start] to allow you to start time recording.

4.22.2 View Work History

To view work history:

1 From the [Inbox] list or the [Browser] list, click the job whose work history you want to view. The [Details] screen opens.

2 Click [Work History] to view the details.



3 To return to the [Details] screen, click [Details].

4.23 Change Status

Once an order has been accepted, you may manually modify the status of a job if you have the appropriate Role. You may also modify who can view the status, making it either Public (viewable by all users) or Private (viewable by the reprographics department users only).

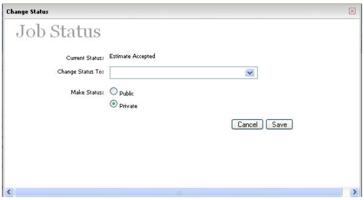
Note

– *By default, "psc"-level users can edit a job's status.*
– *The [Status] options are, initially, default values provided by Printgroove POD Guide. These values may be modified if the Application Administrator adds workflows and nodes for which new status events are defined.*

To change a job's status:

1 From the [Inbox] list or the [Browser] list, click the job for which you want to change its status. The [Details] screen opens.

2 Click [Status]. The [Change Status] pop-up window opens.



3 From the [Change Status To] drop-down, select the new status you wish to apply.

4 Select a [Make Status] radio button: Public (viewable by all users) or Private (viewable by the reprographics department users only).

5 Click [Save]. The new status is displayed in the [Job Status] field.

4.24 Archive/Unarchive an Order

If you have the appropriate Role, you can archive or unarchive an order. However, this can only be done after the order is closed.

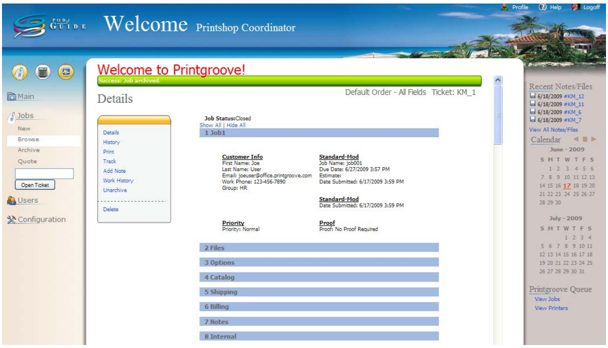
Note

- *By default, "psc"-level users can archive/unarchive an order.*
- *You can also archive an order by changing the job's status. See "Change Status" on page 4-54.*
- *You cannot archive an order until the order is closed.*
- *TAn Archived order can be viewed on the [Archive] screen. See "View Archived Order ([Archive] Screen)" on page 3-27.*

To archive/unarchive an order:

1 From the [Inbox] list or the [Browser] list, click the job you want to Archive. The [Details] screen opens.

2 Click [Archive]. The order is archived and a message is shown in a green bar to confirm that it was archived successfully.



- Once [Archive] is selected, the menu changes to [Unarchive] to allow you to unarchive the job.
- Once [Unarchive] is selected, the menu changes to [Archive] to allow you to archive the job.

4.25 Cancel an Order

If you have the appropriate Role, you can cancel an order. However, this can only be done after the order is closed. Once a job is cancelled, it is automatically deleted two days later. After that time, it cannot be restored.

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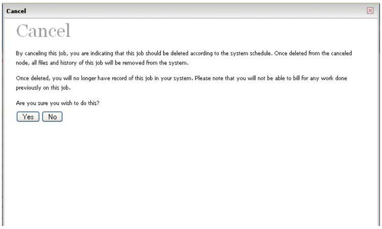
Note

– *By default, "psc"-level users can cancel/restore an order.*
– *You cannot cancel an order until it is accepted.*
– *The cancelled order can be viewed on the [Browse] screen. See "View All Orders ([Browser] Screen)" on page 3-23.*

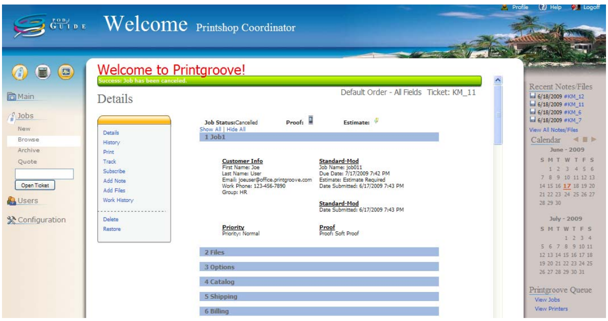
To cancel an order:

1 From the [Inbox] list or the [Browser] list, click the job you want to cancel. The [Details] screen opens.

2 Click [Cancel]. The [Cancel] pop-up window opens.



3 Click [Yes]. The order is canceled and a message is shown in a green bar to confirm that it was successfully canceled.



– All files including the history of the selected job will be removed from Printgroove POD Guide according to the system schedule.

4.26 Restore a Canceled Order

If you have the appropriate Role, you can restore an order. However, the amount of time a cancelled order remains available for restoration is determined according to the system schedule. If the job has been permanently removed, it cannot be restored.

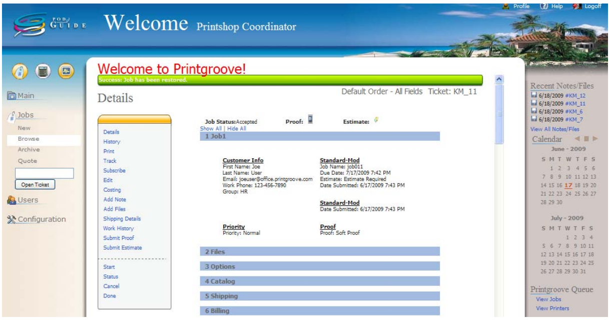
Note

- *By default, "psc"-level users can restore a canceled order.*
- *A cancelled order can be viewed on the [Browse] screen. See "View All Orders ([Browser] Screen)" on page 3-23.*

To restore a canceled order:

1 From the [Inbox] list or the [Browser] list, click the job you want to restore. The [Details] screen opens.

2 Click [Restore]. The order is restored and a message is shown in a green bar to confirm that it was successfully restored.



4.27 Delete an Order

If you have the appropriate Role, you can delete an order. However, this can only be done after the order is closed. Once a job is deleted, it is automatically deleted, you no longer have a record of the job in your system. If you delete a job that contains billable expenses, you will need to find a different way to track those expenses, if required.

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Note

- *By default, "psc"-level users can delete an order.*
- *You cannot delete an order until it is closed.*
- *A deleted order can no longer be viewed in Printgroove POD Guide.*

To delete an order:

1. From the [Inbox] list or the [Browser] list, click the job you want to delete (it must be Closed). The [Details] screen opens.
2. Click [Delete]. A confirmation message opens.
3. Click [OK] to delete the order. The order is deleted and your Home page reappears.

4.28 Grab an Order

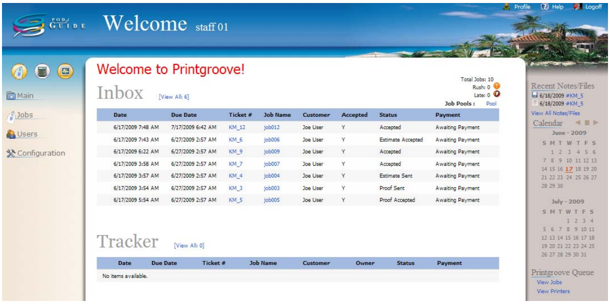
When a job has enters the Pool Node of a workflow and you are ready to process the job, you can bring it to the next Node using [Grab].

Note

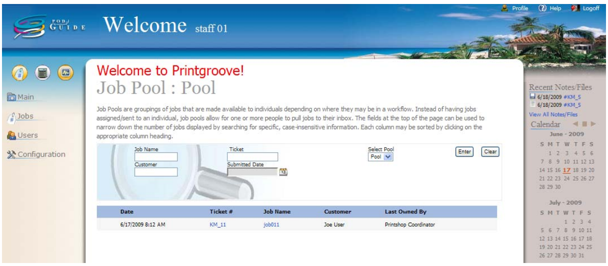
- *All internal users can grab a job in Pool Node.*
- *For details about Pool Node, please refer to "Workflow" on page 2-9 and "Node Settings" on page 7-2.*

To grab the order:

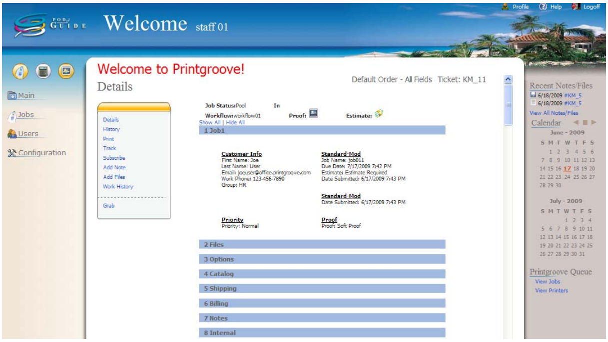
1 Locate [Job Pool] at the upper-right of your Home Page.



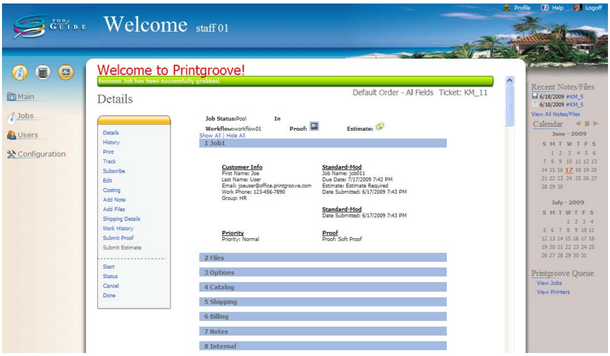
2 Once you locate [Job Pool], click the name of [Job Pool], where the job you want to grab for process is located. The selected [Job Pool] screen opens.



3 From the [Job Pool] list, click the job name or ticket number you want to process. The [Details] screen opens.



4 Click [Grab]. A confirmation message opens. The job is moved to its own Inbox. You may not work on the job. When finished, click [Done], and the job is automatically moved to the next node.



5 System Management

Printgroove POD Guide can report all jobs currently being processed and provide a graphical representation of the current system. If necessary, Printgroove POD Guide can send system-wide alerts. These functions can be performed using the [Main] - [Reports], [Main] - [Statistics], or [Main] - [Send Alert] menu on your Home page.

This chapter describes how to use these menus.

5.1 Reports

Use the [Main] - [Reports] menu on your Home page to generate a report of jobs based on specified criteria. Both “psc”- and Application Administrator-level Users can generate reports.

The [Reports] function can generate the following job reports and charts. These will appear in the bottom portion of the screen (except where noted) and may also be exported:

- All Jobs Report--a report of all the jobs in process

The All Jobs Report shows:

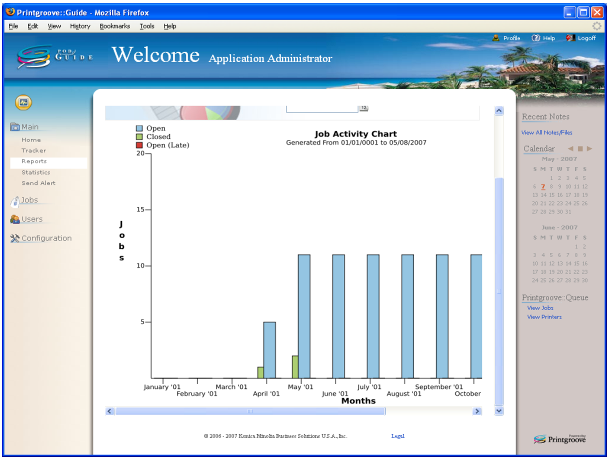
- Job Number
- Group/Dept
- Job Name
- Submitted Date
- History
- Priority
- Status
- Owner

Other report labels are self explanatory. The information provided in each of these report varies:

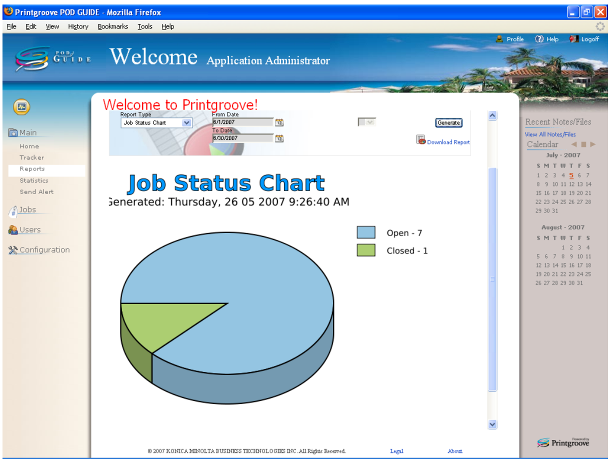
- Open Jobs Report
- Closed Jobs Report
- Late Jobs Report
- Rush Jobs Report
- Archived Jobs Report
- Job Activity Chart
- Job Status Chart
- Invoices - All - a comma separated values (.CSV) file of all invoices in the system that meet the filtering criteria. (No on-screen display - must export the .CSV file to view)
- Invoices - Group - a comma separated values (.CSV) file of all invoices in the system that meet the filtering criteria. (No on-screen display - must export the .CSV file to view)

- Job Work Flow Report - a .CSV file of all jobs data in the system that meet the filtering criteria. (no on-screen display - must export the .CSV file to view)
- Customized Report - a .CSV file of all jobs data in the system that meet the filtering criteria. (no on-screen display - must export the .CSV file to view)
- Catalog Items - all Catalog transactions in the system that meet the filtering criteria.

The [Job Activity Chart] provides the following information:

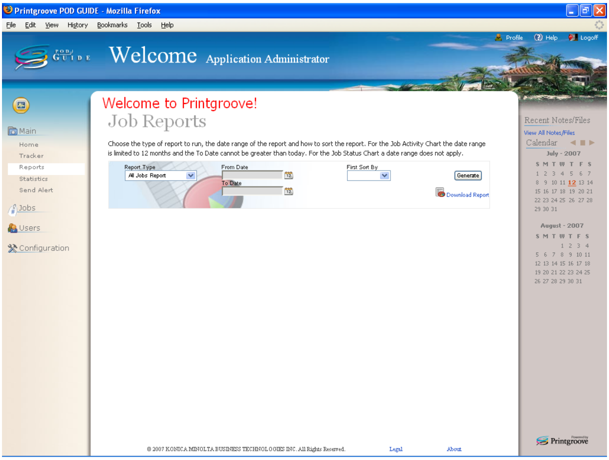


The [Job Status Chart] provides the following information:



To generate Reports:

1 On the Home page, click [Main] - [Reports]. The [Job Reports] screen opens.



2 From the [Report Type] drop down, select a Report Type.

3 If the [Invoice - Group] option is selected, a Primary User has to specified for at least one of the existing Groups. For information about this setting, see “Create a Customer Group” on page 6-11.

4 To fill [From Date] and [To Date], click the calendar to the right of the field and select the dates.

- For [Job Activity Chart], the date range is limited to 12 months.
- [To Date] cannot be greater than today.
- For [Job Status Chart], a date range does not apply.

5 When you sort the report by options, select the option from [First Sort By]. The option you selected will be the primary sort for the report.

- [Second Sort By] is only available if [First Sort By] is chosen. The secondary sort is useful when the primary sort does not adequately sort all of the jobs in the report. Jobs having the same date will not be in any logical order.
  Jobs having the same date can be sorted by [Job Name], [Priority], [Status], or [Owner].

6 When “Customized Reports” is selected, the following options replace the [Sort By] options: [Archived Jobs] check box, [Status] drop-down

and [Priority] drop-down. The following functionality applies to these options:

- The radio buttons “OR” and “AND” apply to the fields “STATUS”, and “PRIORITY”.
- If Status is set to “Late” and Priority is set to “Rush”, and “OR” is selected, then all Late jobs and all Rush jobs will be selected.
- If “Archived Jobs” is selected, then only archived data will be selected and Status will be unselectable.

7 Click [Generate]. The report will appear in the lower portion of the screen (except as noted above).

8 If necessary, click [Download Report] to download. The Job Reports screen opens.

9 Select [Open with] or [Save to disk].

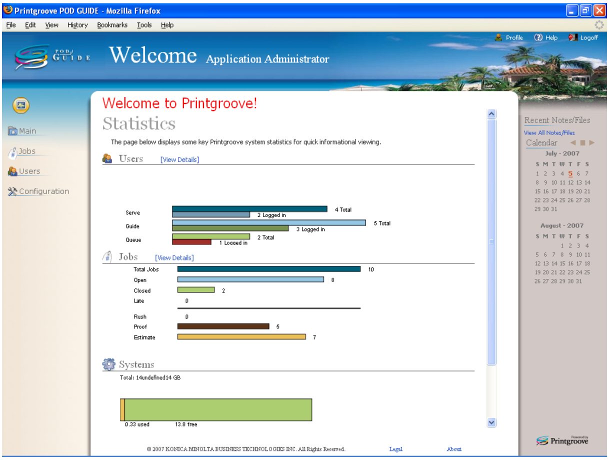
10 When you select [Open with], select the application from the drop-down menu.

11 If you want do this automatically from now on, check [Do this automatically for files like this from now on].

12 Click [OK]. After a few moments, the browser will download a printable PDF file or CSV file that contains the Report.

5.2 Statistics

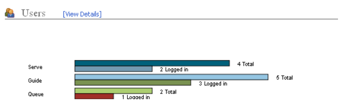
Click [Main] - [Statistics] on your Home page to view the Statistics screen. The Statistics screen includes the number of users, the status of jobs, the amount of HDD space used, and the status of the current system. By default, both “psc”- and Application Administrator-level Users can use this feature.



5.2.1 Users

The Users section displays bar charts as follows:

- Serve: Printgroove POD Serve users
- Guide: Printgroove POD Guide users
- Queue: Printgroove POD Queue users in the system.



The top bar represents the total number of users.

The bottom bar represents the number of users logged on.

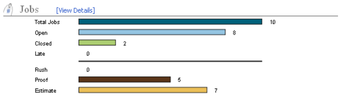
Click [View Details] to show the Users screen.

5.2.2 Jobs

The Jobs section displays bar charts as follows:

- Total Jobs: Total number of jobs in the system
- Open: Total number of open jobs
- Closed: Total number of closed jobs
- Late: Total number of late jobs which were past their due date
- Rush: Total number of jobs submitted as Rush priority
- Proof: Total number of open jobs that requested Proofs
- Estimate: Total number of open jobs that requested Estimates

The Rush bar represents all open jobs submitted as rush priority.

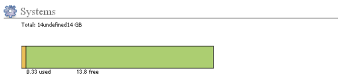


Detail

Click [View Details] to show the Browser screen.

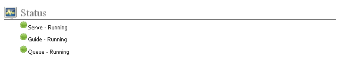
5.2.3 Systems

The Systems section shows how much HDD space has been used, and how much is remaining.



5.2.4 Status

The Status section shows which modules of the application are running. When Printgroove POD Printgroove POD Serve, Printgroove POD Guide, and Printgroove POD Queue are running, a green light will be shown next to the label. If any of these parts are not functioning, a red light will display. This display may help prevent, fix, or identify problems within the application.



5.3 Send Alerts

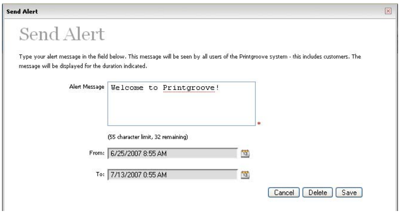
Use the [Main] - [Send Alert] menu on your Home page to send system-wide alerts.

By default, both “psc”- and Application Administrator-level Users can use this feature.

Alerts are messages that are displayed at the top of every page in Printgroove POD Guide and Printgroove POD Serve.

To send an alert:

1 Click [Main] - [Send Alert]. The [Send Alert] pop-up screen opens.



2 To send an Alert Message, type the message.

3 Click the calendar to the right of the [From] and [To] fields and select the dates.

4 Click [Save]. The alert will appear on all screens.

To cancel the alert, click [Delete].

6 User Administration

This chapter describes User Administration functions. When logging in as a user with appadmin-level permissions, that user must use Firefox as their browser since Internet Explorer will not support appadmin-level functionality.

By default, only the Application Administrator can perform the following:

- Price List management
- Group management
- Role management
- User management

The Application Administrator can assign these administrator Roles to other Users.

This table shows the default Roles and Permissions for Price Lists, Groups, Roles, and Users.

Category	Permissions	Role “app_admin”					Role “Printshop_coordinator”				
		Create	Edit	Delete	View	Activate	Create	Edit	Delete	View	Activate
User Admin	Customer Group	ON	ON	ON	ON	ON	OFF	OFF	OFF	OFF	OFF
	Customer Users	ON	ON	ON	ON	-	OFF	OFF	OFF	ON	OFF
	Printshop Groups	-	ON	-	ON	-	-	OFF	-	OFF	-
	Printshop Roles	ON	ON	ON	ON	-	OFF	OFF	OFF	OFF	-
	Printshop Users	ON	ON	ON	ON	ON	OFF	OFF	OFF	ON	OFF
Configuration	Price List	ON	ON	ON	ON	-	OFF	OFF	OFF	OFF	-

...

Note

For an overview of Groups, Roles and Users, see “Users, Group and Roles” on page 2-2.

6.1 Price Lists

A Price List is the location where the Application Administrator enters pricing information. Once a Price List is created, it can then be assigned to a Group. The Costing values applied to a print job, then, are determined by the Group to which the submitting user belongs and the Price List assigned to that Group. The assigned Price List is applied consistently to a job in both Printgroove POD Serve and Printgroove POD Guide so that a job created in Serve will have the same Price List applied to it when a Guide user accesses the job (For Costing or Editing).

By default, only the Application Administrator can:

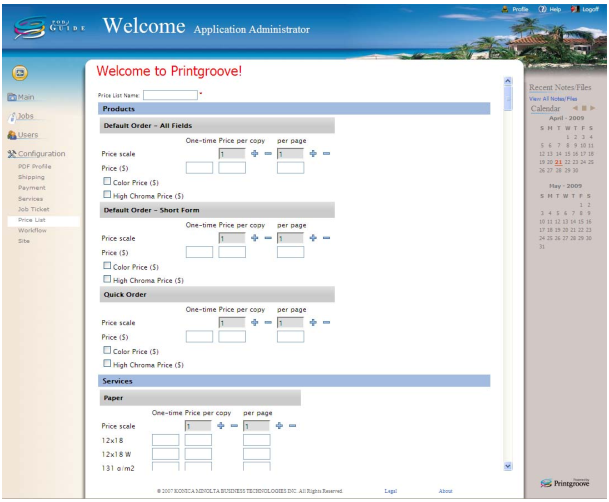
- Create a Price List
- Edit a Price List
- Duplicate a Price List
- Delete a Price List
- Search Price Lists

6.1.1 Create a Price List

Use [Configuration] - [Price List] on your Home page to create a new Price List.

To create a Price List:

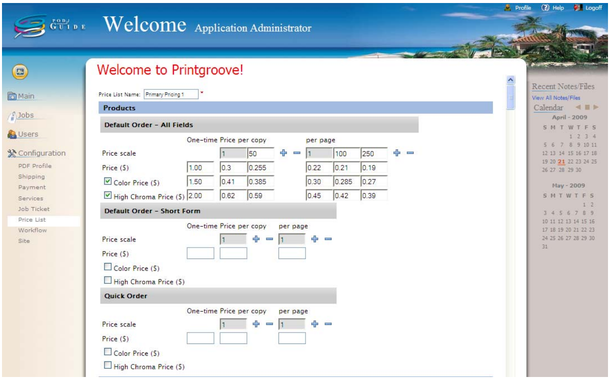
1 On your Home page, click [Configuration] - [Price List] and [New Price List]. The [New Price List] screen opens:



2 There are six sections to the Price List: [Products], [Services], [Delivery Types], [Internal Services], [Catalog Items] and [Special Pricing]. Before

entering values in these sections, enter a name for the Price List in the [Price List name] field.

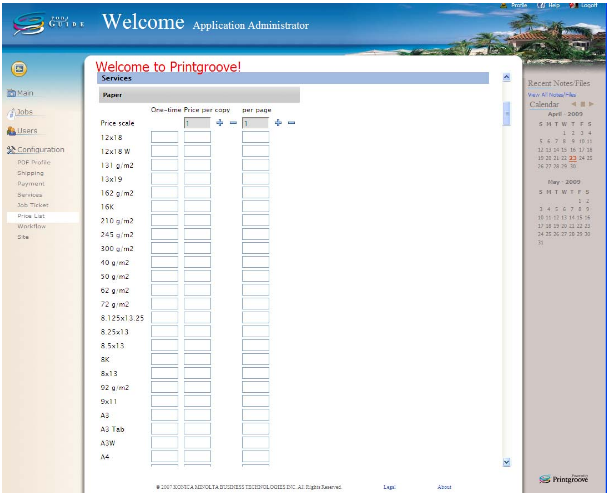
– Once the name is saved it cannot be edited. If the name must be changed, a new Price List must be created using the correct name (see “Duplicate a Price List” on page 6-8).



3 The [Products] section of the screen lists all the Job Tickets stored in Printgroove POD Guide. These are the Job Tickets created in the JT Builder and used as the basic templates for orders processed through Serve and Guide. Use the Products section to assign Copy and Color pricing for each of these templates.

– The [One-time] column allows you to enter a one-time cost that is applied to all jobs that use the Job Ticket. A value can be entered in the [Price ($)] row. This will be applied to all BW jobs. If the [Color Price ($)] and/or the [High Chroma Price ($)] check boxes are selected, a [One-time] cost field is displayed and a value may be entered there.
– The [Price per copy] and [Price per page] columns allow you to enter a per copy and per page charge for BW, Color and High Chroma jobs. Click the [+] sign to add pricing box columns. This is useful if you provide discounted prices for higher numbers of copies. The added boxes indicate the range values for discounts. When the correct number of columns are added, enter range values in the [Price Scale] row. The default value of the first box is [1]. If you add a second box and enter a value of 50, all jobs with 1 - 49 copies will be costed based on the value entered under the [1]. Jobs with 50 or more copies will be priced based on the value entered under the 50. You may add up to 9 additional boxes.
– The [Price ($)], [Color Price ($)] and [High Chroma Price ($)] rows allow you to enter costing values for the page ranges. Select the

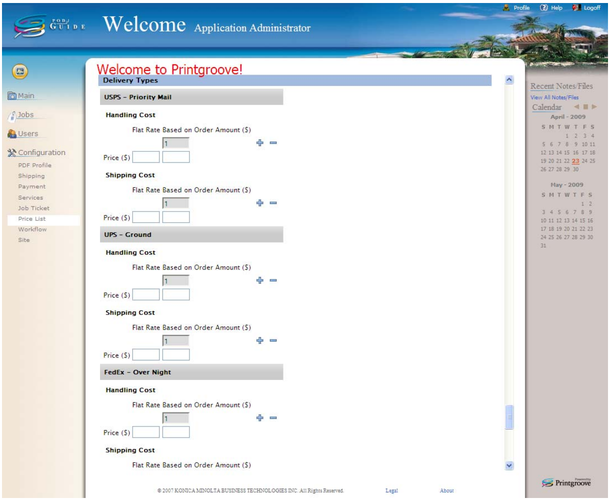
[Color Price ($)] and [High Chroma Price ($)] check boxes to activate and set these options.



4 The [Services] section of the screen allows you to enter costing values for all the print-related settings (Paper Type, Cover Paper settings, Layout, Binding, Punching, Trim, etc.). These values come from the Job Tickets created in the JT Builder and used as the basic templates for orders processed through Serve and Guide. These are the same Job Tickets noted in the Products section.

– The [One-time] column allows you to enter a one-time cost that is applied to all jobs that use the Job Ticket and the selected Service.
– The [Price per copy] and [Price per page] columns allow you to enter a per copy and per page charge for selected services. Click the [+] sign to add pricing box columns. This is useful if you provide discounted prices for higher service volumes. The added boxes indicate the range values for discounts. When the correct number of columns are added, enter range values in the [Price Scale] row. The default value of the first box is [1]. If you add a second box and enter a value of 50, all jobs with 1 - 49 copies will be costed based on the value entered under the [1]. Jobs with 50 or more copies will be

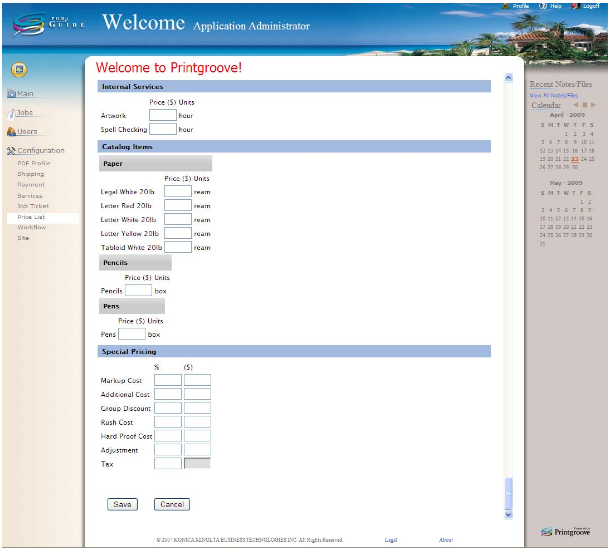
priced based on the value entered under the 50. You may add up to 9 additional boxes.



5 The [Delivery Types] section of the screen lists all the Shipping Methods stored in POD Guide (all those created using Configuration --> Shipping --> Methods). For each method, enter a Handling and a Shipping cost policy.

– ***Handling*** Cost: There are two costing options, both of which may be used.
– To charge a flat rate for all orders, enter a numeric value in the [Flat Rate] column in the [Price ($)] row.
– To charge based on the order amount, click the [+] sign to add pricing box columns. When the correct number of columns are added, enter range values. The default value of the first box is [1]. If you add a second box and enter a value of 50, all jobs with an order amount of 1 - 49 will be costed based on the value entered under the [1]. Jobs with an order amount of 50 or more will be priced based on the value entered under the 50. You may add up to 9 additional boxes.
– Enter the cost for each range in the [Price ($)] row.
– ***Shipping*** Cost: There are two shipping options, both of which may be used.
– To charge a flat rate for all orders, enter a numeric value in the [Flat Rate] column in the [Price ($)] row.
– To charge based on the order amount, click the [+] sign to add pricing box columns. When the correct number of columns are added, enter range values. The default value of the first box is [1]. If you add a second box and enter a value of 50, all jobs with an order amount

of 1 - 49 will be costed based on the value entered under the [1]. Jobs with an order amount of 50 or more will be priced based on the value entered under the 50. You may add up to 9 additional boxes.
– Enter the cost for each range in the [Price ($)] row.



6 The [Internal Services] section of the screen lists all the special services stored in POD Guide (all those created using Configuration --> Services --> Internal). For each method, enter a [Price ($)] for the noted [Units]. The Unit value is specified when the service is created.

7 The [Catalog Items] section of the screen lists all the catalog items stored in POD Guide (all those created using Configuration --> Services --> Catalog). For each catalog item, enter a [Price ($)] for the noted [Units]. The Unit value is specified when the catalog item is created.

8 The [Special Pricing] section of the screen provides a location where you may enter pricing components not included in the other sections. Here you may enter a [Markup Cost], an [Additional Cost], a [Group Discount], a [Rush Cost], a [Hard Proof Cost], an [Adjustment] value and a [Tax] value. In all cases but [Tax] a percentage value and a flat numeric value may be applied. Only a percentage value may be entered for the [Tax] field.

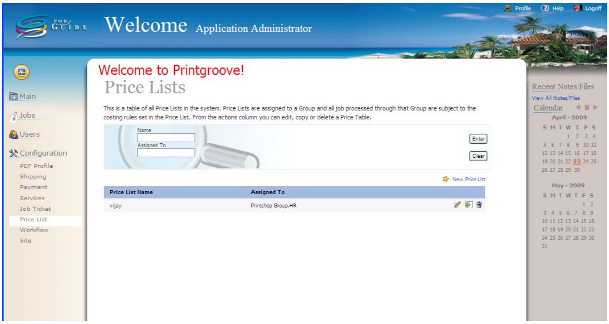
9 When all the values are entered, click [Save]. The Price List is stored on the [Price Lists] screen and can be assigned to any Group.

6.1.2 Edit a Price List

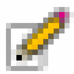
Use [Configuration] - [Price List] on your Home page to edit a Price List.

To edit a Price List:

1 On your Home page, click [Configuration] - [Price List]. The [Price List] screen opens:



2 Click the [Edit] icon to the right of the Price List you want to edit.



3 You may edit any values except the [Price List Name]. If this is required, use the “Duplicate a Price List” on page 6-8.

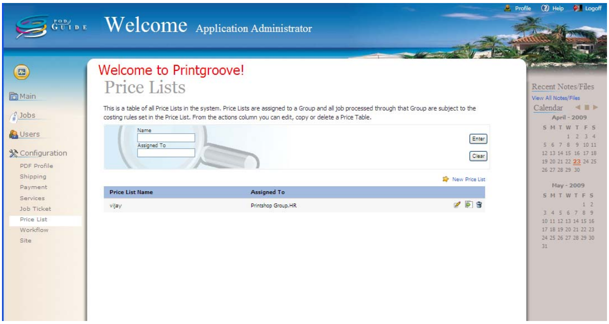
4 When complete, click [Save].

6.1.3 Duplicate a Price List

Use [Configuration] - [Price List] on your Home page to duplicate a Price List.

To duplicate a Price List:

1 On your Home page, click [Configuration] - [Price List]. The [Price List] screen opens:



2 Click the [Duplicate] icon to the right of the Price List you want to copy.

3 An exact duplicate of the [Price List] opens. The [Price List Name] field is blank.

4 Enter a name and modify the values, as required.

5 When complete, click [Save].

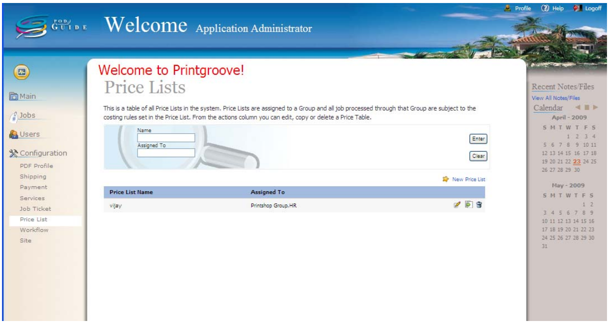
6.1.4 Delete a Price List

If you have the appropriate Role, you can delete a Price List.

You cannot delete a Price List that is assigned to a Group.

To delete a Price List:

1 On your Home page, click [Configuration] - [Price List]. The [Price List] screen opens:



2 Click the [Delete] icon (trash box icon) to the right of the Price List.

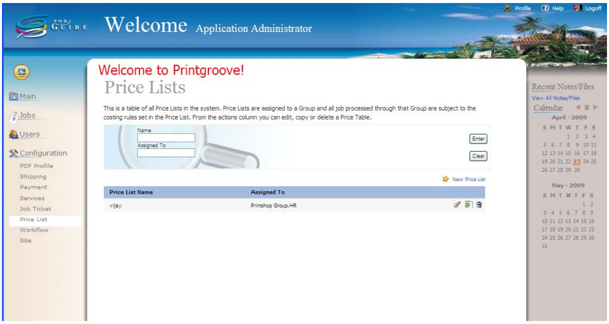
3 Click [OK].

6.1.5 Search the Price Lists

If you have the appropriate Role, you can search the Price Lists.

To search the Price Lists:

1 On your Home page, click [Configuration] - [Price List]. The [Price List] screen opens:



2 Enter search string in one or both of the search fields at the top of the page.

3 Click [Enter]. All Price Lists that match your search criteria are displayed in the main screen.

– Click [Clear], to clear the data entered in the search fields.

6.2 Group Settings

A Group is a collection of Users who use the same Job Ticket Format, Ticket Number format and Price List.

By default, only the Application Administrator can:

- Create Customer Groups
- Edit Groups
- Delete Customer Groups
- Activate Groups
- Search Groups

6.2.1 Create a Customer Group

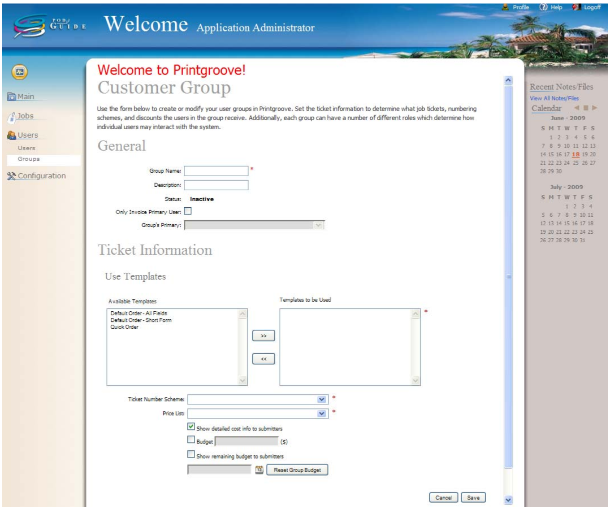
Use [Users] - [Groups] on your Home page to create a new Customer Group.

You can add only Customer Groups.

The Printshop Group can be edited but cannot be created.

To create a Customer Group:

1 On your Home page, click [Users] - [Groups] and [New]. The [Customer Group] screen opens:



2 Enter the name of Group in the [Group Name] field.

3 Enter the description of the Group in the [Description] field.

– If you want invoices for this group sent only to the Group's Primary User instead of each individual submitter, put a check in the check-box [Only Invoice Primary User] and select the name of the Group's

Primary User from the drop-down list. The name and address of the Primary User will appear in the billing address section on any invoice generated for this Group.

– The Primary User setting must be selected for at least one Group in order to generate an [Invoice - Groups] report. See “To generate Reports:” on page 5-3 for details.

4 All the Job Ticket Templates that are stored in POD Guide appear in the [Available Templates] box. Select a template and click the [>>] button to move it to the [Templates to be Used] box. All Job Ticket Templates that are moved to the [Templates to be Used] box will be available for use by the members of the Group.

5 Select the Ticket Number format for the Group from [Ticket Number Scheme].

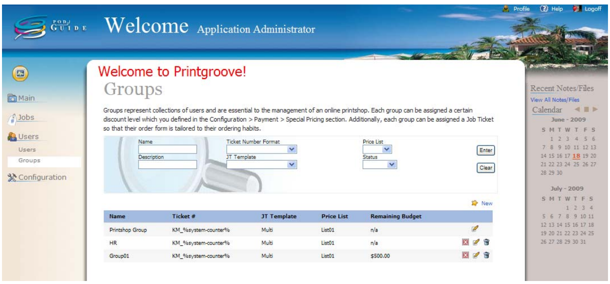
6 Select the Price List to be used by this Group from [Price List].

7 If you want POD Serve users in this Group to see a detailed cost breakdown of their Quick Orders, select the [Show detailed cost info to submitters] check box.

8 If you wish to assign a budget to this Group, click the [Budget] checkbox and enter the budget amount.

9 Click the checkbox [Show remaining budget amount to submitters]. When selected, the remaining budget appears as a dollar value at the upper right of the [Details] screen of any selected job to which the budget applies. If the remaining budget is less than $0.00, the dollar value is in red.

10 Click [Save]. The new group is created.



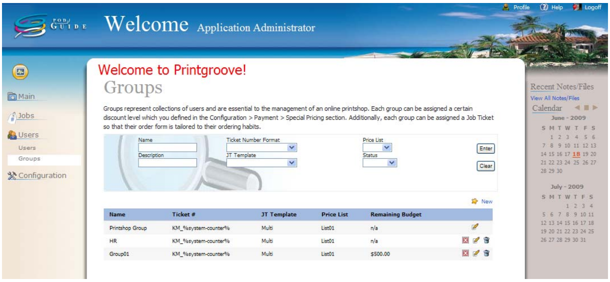
6.2.2 Edit a Group

If you have the appropriate Role, you can edit Groups.

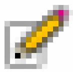
You can edit Customer Groups and the Printshop Group.

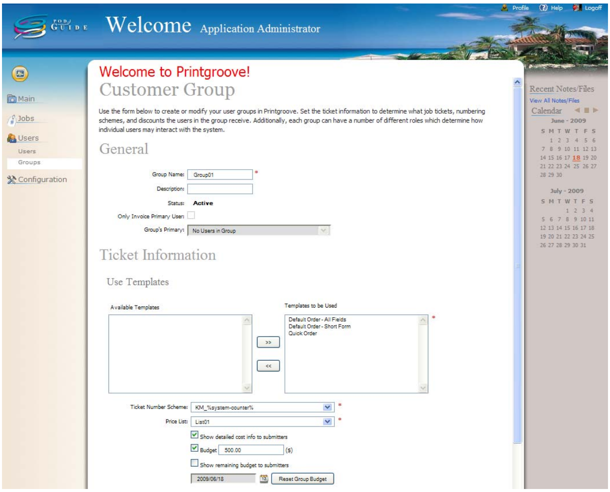
To edit a Group:

1 On your Home page, click [Users] - [Groups]. The [Groups] screen opens.



2 Click the [Edit] icon to the right of the Group you want to edit.





3 You may change a Customer Group Name or the Printshop's Group name.

4 You may change Description, Ticket Number Scheme and Price List. You may select or deselect the [Only Invoice Primary User] checkbox

and, if selected, change the [Group's Primary] option. You may also select or deselect the [Detailed Cost Display] and [Budget] check boxes, modify budget values and reset the Group Budget. (See “Enable Detailed Cost Display” on page 6-20 and “Reset the Group Budget” on page 6-19 for details about these features.)

5 When you edit the Printshop Group, you can create and/or edit Roles and Users all at once, as described below. When you are finished editing Roles and Users, this screen will reappear so you can continue editing the group.

- To create Roles, click [New] - [Roles] section and follow the procedures described in “Create a Role” on page 6-21.
- To edit Roles, click the Role to edit from the Role list of [Roles] section and follow the procedures described in “Edit a Role” on page 6-28.
- To create Users, click [New printshop User] of [Users] section and follow the procedures described in “Create Printshop Users” on page 6-32.
- To edit Users, click the User to edit and follow the procedures described in “Edit Users” on page 6-45.

6 When you edit a Customer Group, you can create and/or edit Users all at once. When you are finished editing Roles and Users, this screen will reappear so you can continue editing the group.

- To create Users, click [New Customer] and follow the procedures described in “Create Printshop Users” on page 6-32.
- To edit Users, click the User to edit and follow the procedures described in “Edit Users” on page 6-45.

7 Click [Save].

6.2.3 Delete a Customer Group

If you have the appropriate Role, you can delete a Customer Group.

All Users and jobs belonging to the group are deleted.

You cannot delete a Group that has any open jobs.

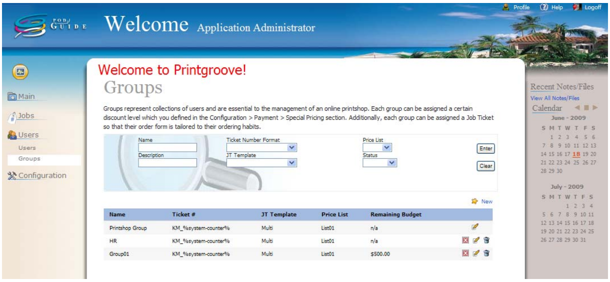
✎...

Note

– *You can deactivate a Group, instead of deleting it. See “Deactivate or Activate a Group” on page 6-16.*

To delete a Customer Group:

1 On your Home page, click [Users] - [Groups]. The [Groups] screen opens.



2 Click the [Delete] icon (trash box icon) to the right of the Group.

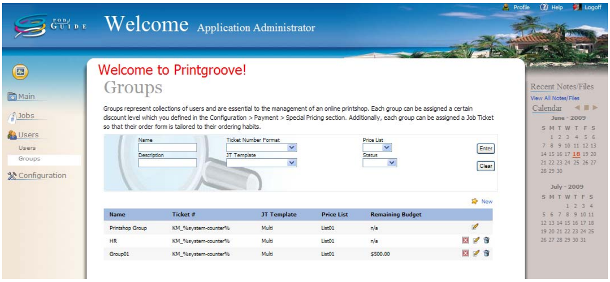
3 Click [OK].

6.2.4 Deactivate or Activate a Group

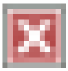
If you have the appropriate Role, you can deactivate and/or activate Customer Groups. Users belonging to the deactivated Group cannot use Printgroove POD Serve until the Group is activated. You can only deactivate or activate Customer Groups.

To deactivate or activate a Group:

1 On your Home page, click [Users] - [Groups]. The [Groups] screen opens.



2 To deactivate, click the deactivate icon to the right of the Group.



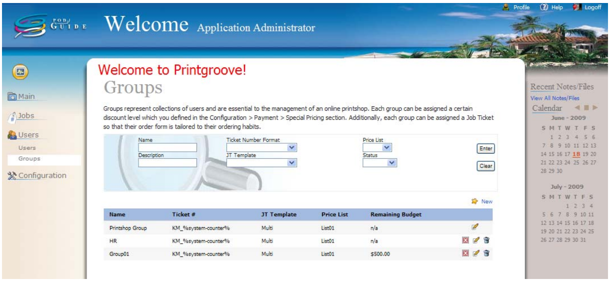
3 To activate, click the activate icon to the right of the Group.

6.2.5 Search Group

If you have the appropriate Role, you can search for Groups.

To search for Groups:

1 On your Home page, click [Users] - [Groups]. The [Groups] screen opens.



2 Enter search string in one or more search fields at the top of the page.

3 Click [Enter]. A list of groups matching your search criteria appears.

– Click [Clear], to clear the data entered in the search fields.

Note

– *You can sort the column alphabetically by clicking on a column heading. The sort affects all Groups in the list, not just those that you can see on the screen. You can switch ascending order and descending order by clicking the column again.*

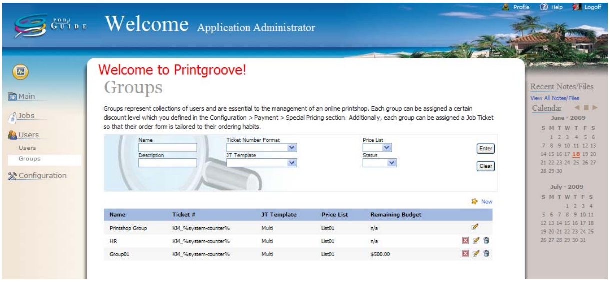
6.2.6 Set Group Budget

If you have the appropriate Role, you can set budget amounts for Groups.

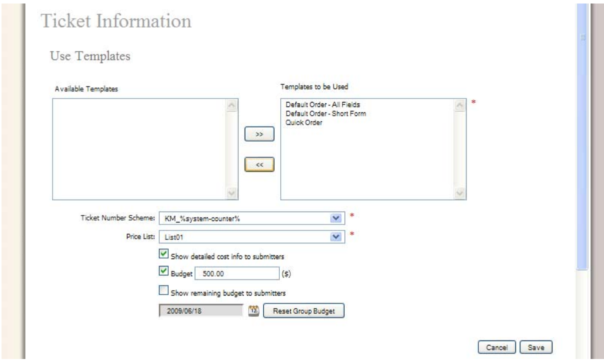
You can edit both Customer and Printshop Groups.

To set a group budget value:

1 On your home page, click [Users] - [Groups]. The [Groups] screen opens.



2 Select a group and click the [Edit] icon. The [Ticket Information] page opens.



3 Click the [Budget] checkbox and enter the budget amount.

4 Click the checkbox [Show remaining budget amount to submitters]. When selected, the remaining budget appears as a dollar value at the upper right of the [Details] screen of any selected job to which the budget applies. If the remaining budget is less than $0.00, the dollar value is in red.

5 Click [Save].

6.2.7 Reset the Group Budget

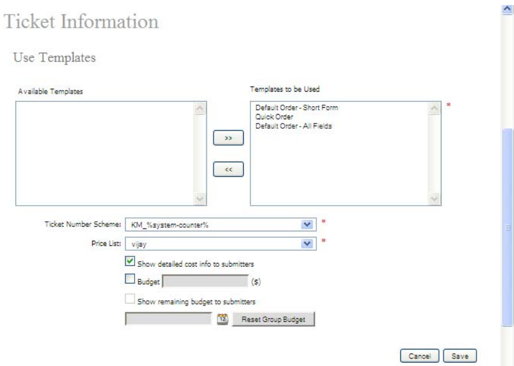
If you have the appropriate Role, you can reset budget amounts for Groups.

You can edit both Customer and Printshop Groups.

To reset a group budget value:

1 On your home page, click [Users] - [Groups]. The [Groups] screen opens.

2 Select a group and click the [Edit] icon. The [Ticket Information] page opens.



3 Click the calendar icon then select the date on which you wish to reset the Group's Budget.

4 Click [Reset Group Budget]. The reset date is saved. The Budget amount will be automatically reset when that date is reached.

6.2.8 Enable Detailed Cost Display

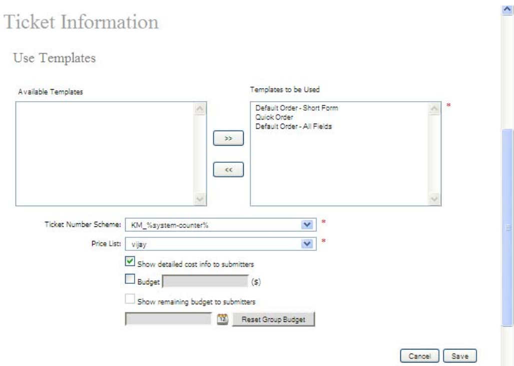
If a POD Serve user orders a Quick Order type job, an [Estimated Cost] value is provided. If the print shop prefers, it can make that cost a hyperlink. When the user clicks the hyperlink, a detailed breakdown of the Quick Order job is displayed.

If you have the appropriate Role, you can enable the display of this detailed cost information.

To enable detailed cost display:

1 On your home page, click [Users] - [Groups]. The [Groups] screen opens.

2 Select a group and click the [Edit] icon. The [Ticket Information] page opens.



3 Click the [Show detailed cost info to submitters] checkbox.

4 Click [Save].

6.3 Role Settings

Internal User Permissions are grouped as Roles, although the external User Permissions are defined separately for each User.

A Role is set of Permissions that can be assigned to Printshop Users.

By default, only the Application Administrator can administrate Roles as follows:

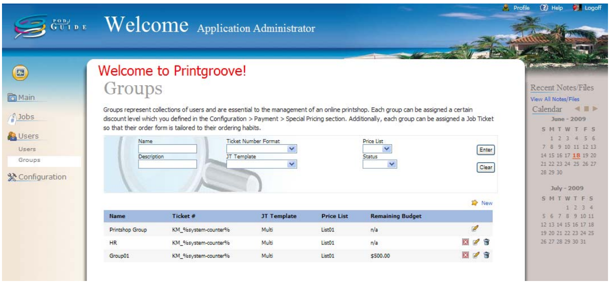
- Create Role
- Edit Role
- Delete Role
- View details of Role

6.3.1 Create a Role

If you have the appropriate Role, you can create a new Printshop Role as follows:

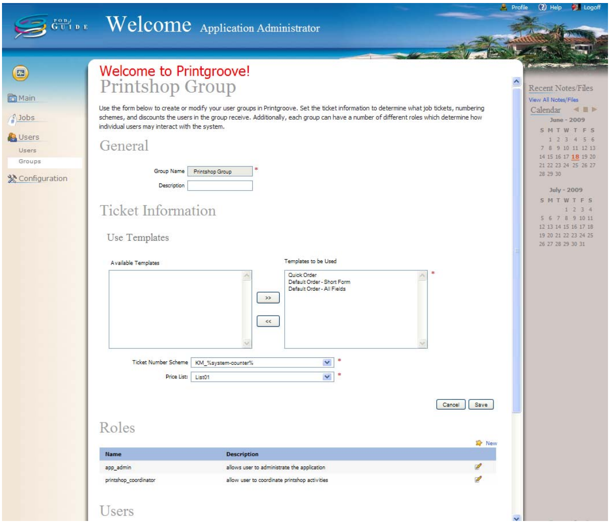
To create a new Printshop Role:

1 On your Home page, click [Users] - [Groups]. The [Groups] screen opens.



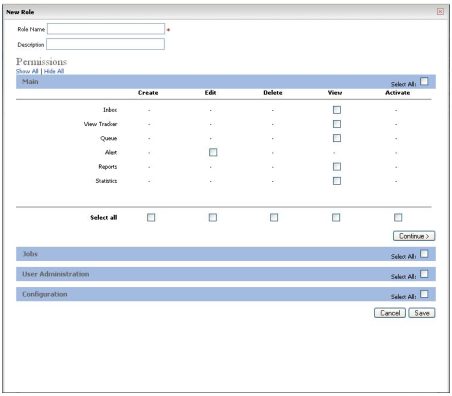
2 Click the [Edit] icon to the right of the printshop Group. The [Printshop Group] screen appears.

3 Click [New] to open the [New Role] pop-up.



– The New Role pop-up window consists of four sections: Main, Jobs, User Administration and Configuration.

4 Enter the Role Name and Description.



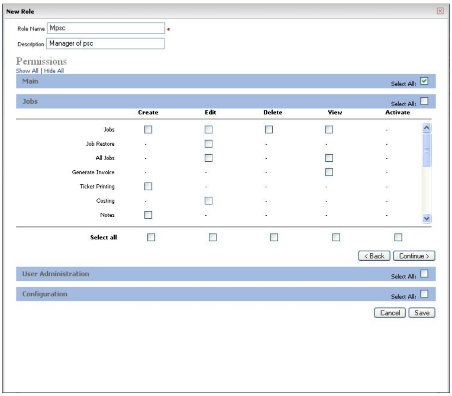
5 In Main section, check the Permissions the new Role should have.

– **Inbox**: allows the User to view Inbox where incoming jobs arrive on the User's home page. If checked, [Main] - [Inbox] menu will be available.
– **View Tracker**: allows the User to view Tracker where jobs can be followed and watched on the User's home page. If checked, [Main] - [Tracker] menu will be available.

– **Queue**: allows the User to view the printing part of the Printgroove software from the link displayed on the right side of page.
– **Alert**: allows the User to create and/or delete alert message displayed at the top of the screens of all Users. If checked, [Main] - [Send Alert] menu will be available.
– **Reports**: allows the User to view graphical interpretations as well as lists of jobs and general information about those jobs. If checked, [Main] - [Reports] menu will be available.
– **Statistics**: allows the User to create, edit, delete and/or view Printgroove status about Users, system usage, and jobs. If checked, [Main] - [Statistics] menu will be available.
– At the blue heading bar of the section, there is a check box labelled [**Select All**]. Checking it causes all of the boxes in the section to be selected.
– At the bottom of the section, there is a row labelled [**Select All**]. Checking one of the boxes in this row causes all of the boxes directly above it to be selected.

6 Click [Continue].

7 In the Jobs section, check the Permissions the new Role should include.

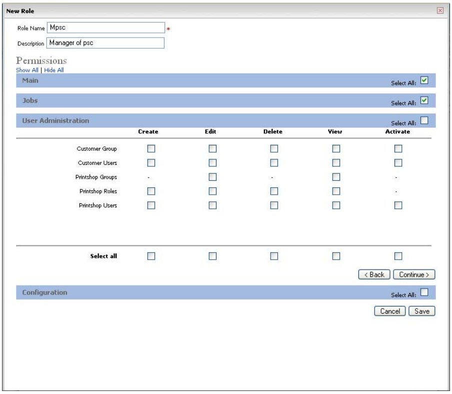


– **Jobs**: allows the User to create, edit, delete and/or view orders to be sent to the Printshop Department. If checked, [Jobs] - [New] (create), [Browse] (edit, delete, and/or view) menus will be available.
– **Job Restore**: allows the User to restore jobs that have been cancelled but that have not yet been deleted from the system.
– **All Jobs**: allows the User to edit and/or view list of all jobs on [Browser] screen.
– **Generate Invoice**: allows the User to preview Invoices. If checked, [Generate Invoice] button on the Details screen will be available.

- **Ticket Printing**: allows the User to print the ticket information filled out when a job is submitted. If checked, [Print] (create) menu will be available on the Details screen.
- **Costing**: allows the User to determine the cost for special printing services. If checked, [Costing] (edit) menu will be available on the Details screen.
- **Notes**: allows the User to append notes to a job. If checked, [Add Note] (create) menu will be available on the Details screen.
- **Files**: gives the User permission to upload (create) and/or delete the file uploaded for jobs. If checked, [Add Files] (create) menu and /or [Edit] (create, edit, delete, and/or view) menu will be available on the Details screen.
- **Proof Generation**: allows the User to create view a proof to show User what final product will look like. If checked, [Submit Proof] menu will be available on the Details screen.
- **Add To Tracker**: allows the User to track to follow and watch a particular job that will be included in the tracker. If checked, [Track] menu will be available on the Details screen.
- **PDF Conversion**: allows the User to convert files from and to PDF. If checked, [To PDF] button will be available on [Edit] screen.
- **Internal Services**: allows the User to create and/or view extra services done by the reprographics department. If checked, [Add Services] will be available on [Edit] screen.
- **Quote**: allows the User to create and/or view Quote to sent job to a Customer before being submitted and accepted. If checked, [Jobs] - [Quote] menu will be available.
- **Archive**: allows the User to create and/or view list of jobs that have been closed and are no longer visible by anyone but those who have Archive Permissions. If checked, [Jobs] - [Archive] menu will be available.
- **Subscribe To Job**: allows the User to send an e-mail to the User whenever the job ticket status changes. If checked, [Subscribe] menu will be available on the Details screen.
- **Status Change**: allows the User to manually edit (change) the state a job in, such as printing, shipping, graphics, proofing, etc. If checked, [Status] menu will be available on the Details screen.
- At the blue heading bar of the section, there is a check box labelled [**Select All**]. Checking it causes all of the boxes in the section to be selected.
- At the bottom of the section, there is a row labelled [**Select All**]. Checking one of the boxes in this row causes all of the boxes directly above it to be selected.

8 Click [Continue].

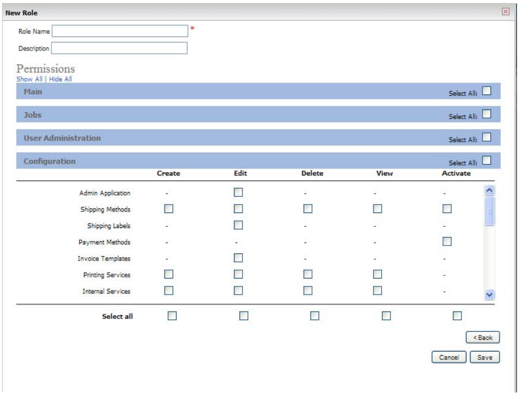
9 In the User Administration section, check the Permissions the new Role should include.



- **Customer Group**: allows the User to create, edit, delete, view and/or deactivate/activate Group comprised solely of Customers.
- **Customer Users**: allows the User to create, edit, delete, view and/or deactivate/activate Customer Users that will be able to login to the system.
- **Printshop Groups**: allows the User to edit and/or view Printshop Department Group comprised of Printshop Department Users.
- **Printshop Roles**: allows the User to create, edit, delete and/or view Roles assigned to internal Users with permission and options.
- **Printshop Users**: allows the User to create, edit, delete and/or view Printshop Department Users that will be able to login to the system.
- At the blue heading bar of the section, there is a check box labelled [**Select All**]. Checking it causes all of the boxes in the section to be selected.
- At the bottom of the section, there is a row labelled [**Select All**]. Checking one of the boxes in this row causes all of the boxes directly above it to be selected.

10 Click [Continue].

11 In the Configuration section, check Permissions the new Role should include.



- **Admin Application**: allows the User to edit the ability to log-in to and edit the system administrator’s page.
- **Shipping Methods**: allows the User to create, edit, delete, view and/or activate methods (e.g. Overnight, 2-Day, Regular, etc.) of shipment.
- **Shipping Labels**: allows the User to edit labels to be used when job is ready to be shipped.
- **Payment Methods**: allows the User to deactivate/activate methods by which the Customer can pay for the job (Cash, Purchase Order, etc.).
- **Invoice Templates**: allows the User to edit the logo and address of company to be used on each invoice.
- **Printing Services**: allows the User to create, edit, delete and/or view different services for printing provided by the reprographics department (binding, stapling, folding, coloring, etc.).
- **Internal Services**: allows the User to create, edit, delete and/or view additional services provided by reprographics department (spell check, etc.).
- **Catalog Services**: allows the User to create, edit, delete and/or view items Customer can order from reprographics department separate from a job.
- **Price List**: allows the User to create, edit, delete and/or view price lists.
- **Contact Details**: allows the User to edit contact information for billing, sales, support, and reprographics department.
- **Site Pages**: allows the User to edit images and text for many pages in the system.
- **Advertisement**: allows the User to edit advertisement seen on the Customer’s login page.

– **Logo**: allows the User to edit and/or view image displayed in top left corner of all pages in the system.
– **Ticket Number Formats**: allows the User to create, edit, delete and/or view number assigned to each job ticket.
– **Ticket Builder**: allows the User to create, edit, delete and/or view Job Ticket that is used by all members of a group.
– **Workflow Basic**: allows the User to create, edit, delete, view and/or deactivate/activate Workflow restricting the order processing path.
– **Workflow Advanced** allows the User to create, edit, delete, view and/or deactivate/activate Workflow allowing nodes to send jobs to other nodes within the Workflow without restriction.
– **Workflow Nodes**: allows the User to create, edit, delete and/or view locations where work is performed on jobs in a Workflow.
– **Inventory Management**: allows the User to track and modify inventory values for all Catalog items.
– **PayPal Support**: allows the User to pay for a job using a credit card through PayPal.
– **Site Agreement**: allows the User to edit website terms and conditions.
– At the blue heading bar of the section, there is a check box labelled [**Select All**]. Checking it causes all of the boxes in the section to be selected.
– At the bottom of the section, there is a row labelled [**Select All**]. Checking one of the boxes in this row causes all of the boxes directly above it to be selected.

12 Click [Save].

✎...

Note
Click [Cancel], to cancel creating the Role.

6.3.2 Edit a Role

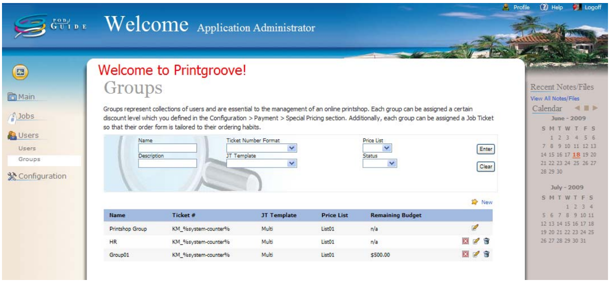
If you have the appropriate Role, you can edit Printshop Group Roles.

Note

You can edit all Roles.

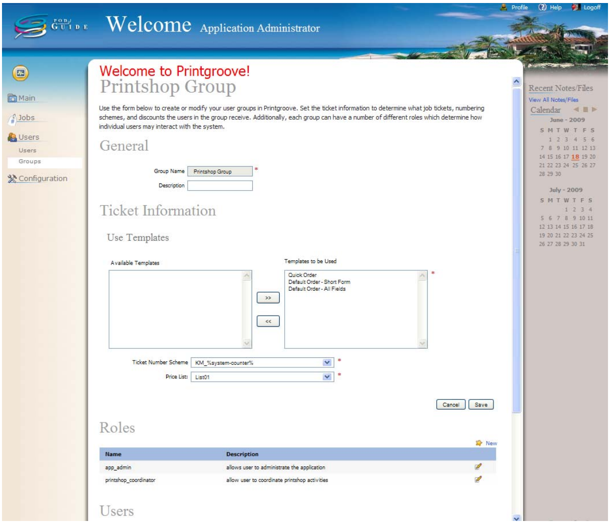
To edit a Role:

1 On your Home page, click [Users] - [Groups]. The [Groups] screen opens.



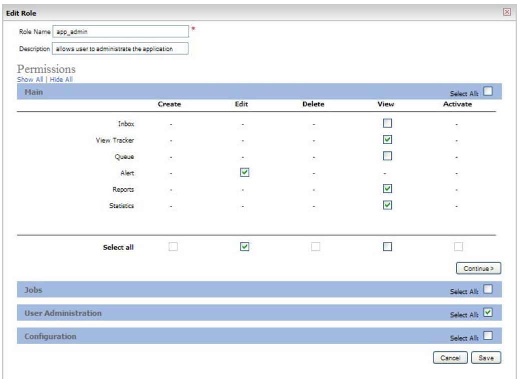
2 Click the [Edit] icon to the right of the printshop department Group.

3 Click the [Edit] icon to the right of the Role to edit.



– [Edit Role] pop-up window opens with four sections: Main, Jobs, User Administration and Configuration.

4 Edit the Role Name and Description.



5 In the [Main] section, mark the Permissions the Role should include or remove any marked values the Role should not include and click [Continue].

6 In the [Jobs] section, mark the Permissions the Role should include or remove any marked values the Role should not include and click [Continue].

7 In the [User Administration] section, mark the Permissions the Role should include or remove any marked values the Role should not include and click [Continue].

8 In the [Configuration] section, mark the Permissions the Role should include or remove any marked values the Role should not include and click [Continue].

9 When the selections are complete for the new Role, click [Save]. The changed Role is saved.

– Click [Cancel], to cancel editing the Role.
– Click [Back] to return to the previous field.

6.3.3 Delete a Role

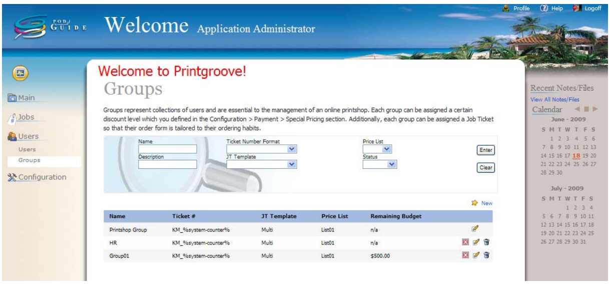
If you have the appropriate Role you can delete Roles.

Note

– *You cannot delete default Roles.*
– *If an active job is owned by a Role, it cannot be deleted.*

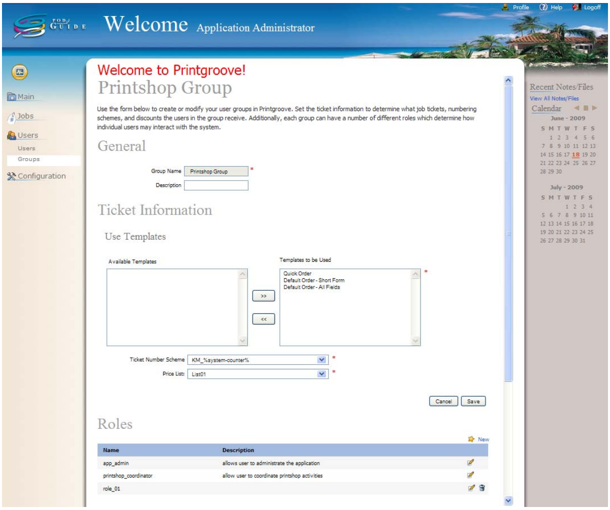
To delete a Role:

1 On your Home page, click [Users] - [Groups]. The [Groups] screen opens.



2 Click the [Edit] icon to the right of the Printshop Group.

3 Click the [Delete] icon (trash box icon) to the right of the Role you want to delete.



4 Click [OK].

6.4 User Settings

To use Printgroove POD Guide, User accounts are necessary.

The Application Administrator defines both types of Users of the Printgroove application: Internal (to the printshop) who uses the Printgroove POD Guide or External (the Customer) who uses the Printgroove POD Serve.

By default, only the Application Administrator can administrate Users as follows:

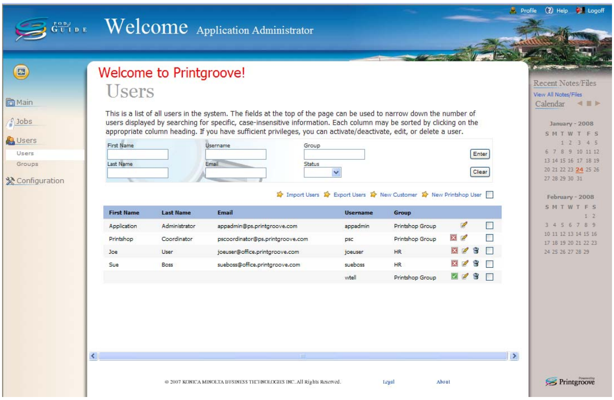
- Create Users
- Duplicate Users
- Edit Users
- Delete Users
- View details of Users
- Activate Users
- Export and Import Users

6.4.1 Create Printshop Users

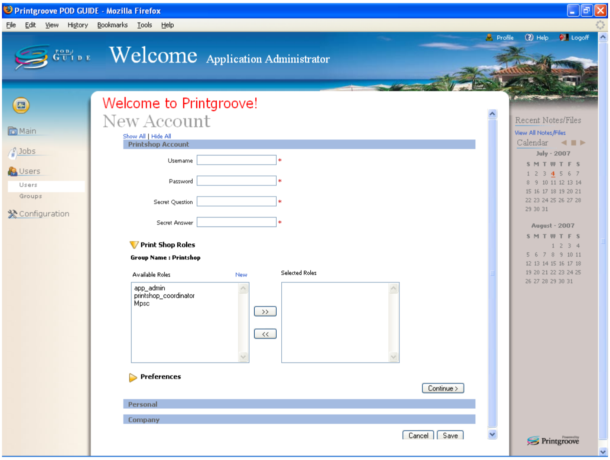
If you have the appropriate Role, you can create additional Printshop Users.

To create a Printshop User:

1 On your Home page, click [Users] - [Users]. The [Users] screen opens.



2 Click [New Printshop User]. The [New Account] screen opens.



3 Enter the Username, Password, Secret Question and Secret answer.
The password has the following limitations:

- The password must be a minimum of 7 characters
- Numbers and symbols are allowed
- The value is case-sensitive
- Spaces are not allowed

4 Click the appropriate Role under [Available Roles] and click the double-arrow [>>] move button to move the Role to the [Selected Roles] section. To deselect one of the Roles, click the Role under [Selected Roles] and click the other double-arrow [<<] move button.

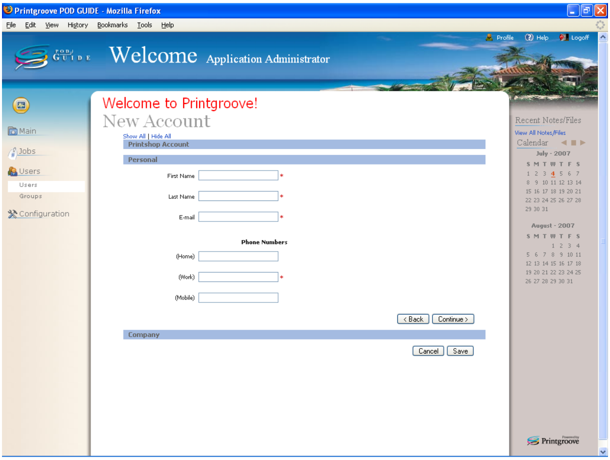
- Instead of clicking the double-arrow [>>] move button, you can drag the Role from one side to the other to select/deselect Roles.

5 Click [Preferences] to expand the display.

6 From [Preferences] - [Language], select the preferred language.

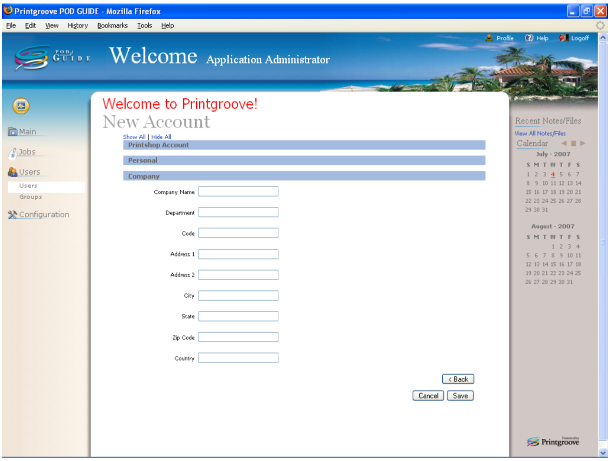
7 Click [Continue].

8 Enter [First Name], [Last Name], [E-mail] and [Work] phone number of the new User. [Home] and [Mobile] phone numbers are optional.

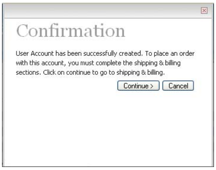


9 Click [Continue].

10 The Company section is optional. You can enter this information at any time.



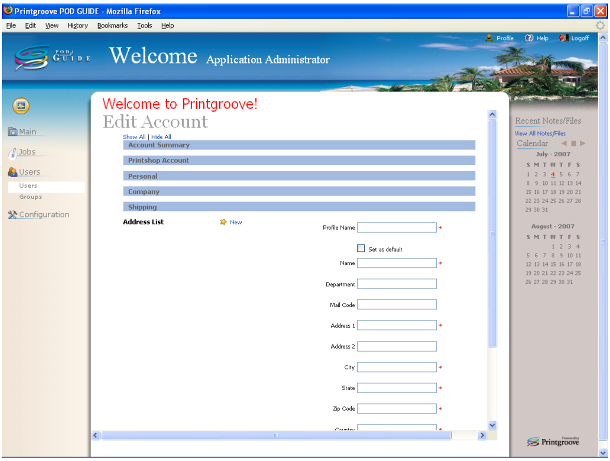
11 When you have finished entering the account information, click [Save]. If you give the new User the Role to place an order, a [Confirmation] pop-up window opens.



12 Click [Continue] to set the shipping address and billing method.
—Or—
Click [Cancel] to end the process. The account cannot be used to create orders until the shipping address and billing method are completed.

13 If you click [Continue], enter the required information, indicated by a red asterisk.

14 To use this Shipping Address as a default, check [Set as default].

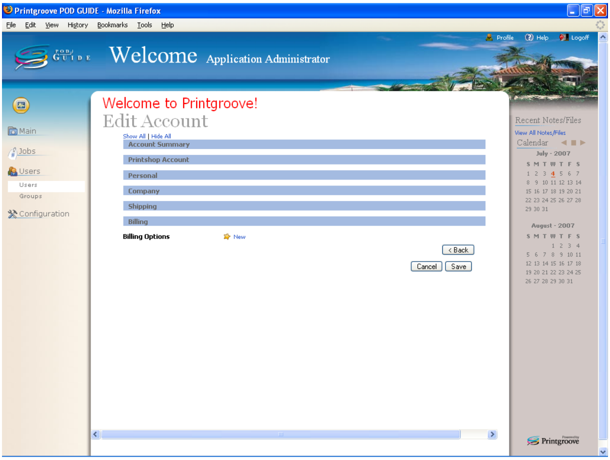


15 Click [Save Shipping Address].

– To edit the Shipping Address, follow the procedures in “To edit the Shipping Address:” on page 6-42.
– To delete the Shipping Address, follow the procedures of “To delete the Shipping Address:” on page 6-42.

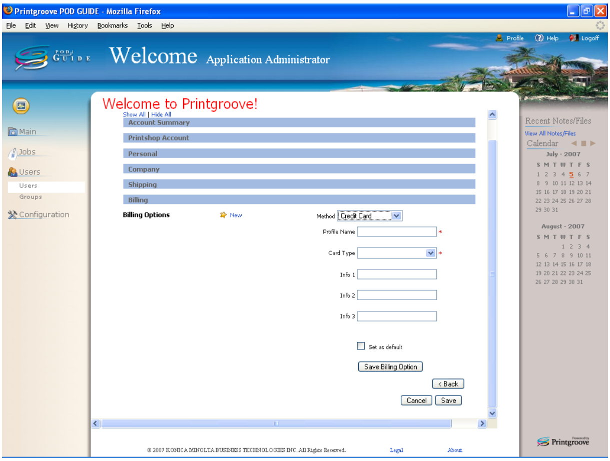
16 Click [Continue].

17 Click [New]. The [Method] pull-down opens.



18 Select a billing method.

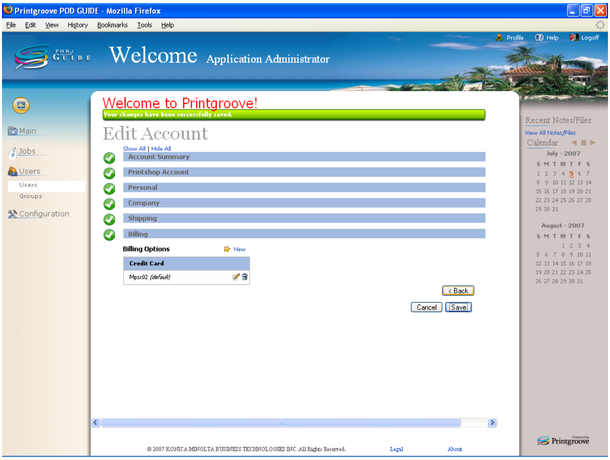
19 Enter the required information, indicated by a red asterisk. The fields required will vary depending on the billing method.



– To edit the Billing method, follow the procedures in “To edit the Billing Method:” on page 6-43.
– To delete the Billing method, follow the procedures in “To delete the Billing Method:” on page 6-43.

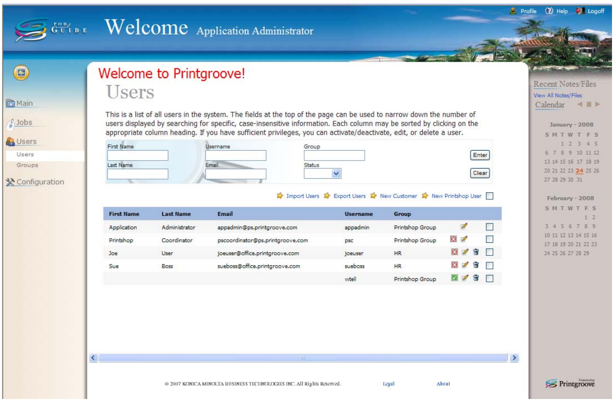
20 Click [Save Billing Option].

21 Click [Save]. A new User is created.

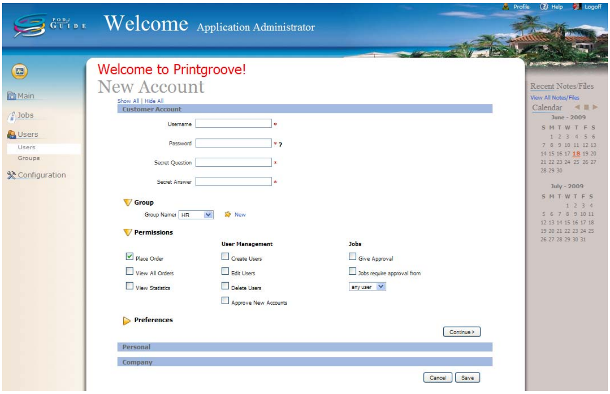


To create a Customer User:

1 On your Home page, click [Users] - [Users]. The [Users] screen opens.



2 Click [New Customer]. The [New Account] screen opens.



3 Enter the Username, Password, Secret Question and Secret Answer. The password has the following limitations:

- The password must be a minimum of 7 characters
- Numbers and symbols are allowed
- The value is case-sensitive
- Spaces are not allowed

4 Check the Permissions the new User should have. If you mark [Jobs Require Approval from], select an Approver from the drop down list.

- If you select [any User], any user can approve an order.

5 Click [Preferences] to expand the display.

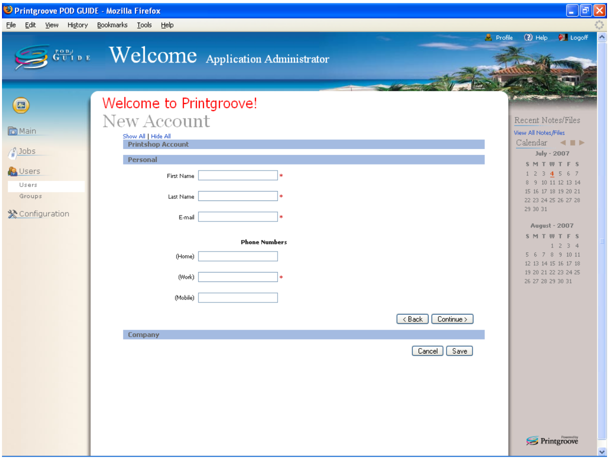
6 From [Preferences] - [Language], select the preferred language.

7 From [Preferences] - [Closed Orders] enter the number of days required before an order is closed.

8 From [Preferences] - [Color Scheme], select a color scheme.

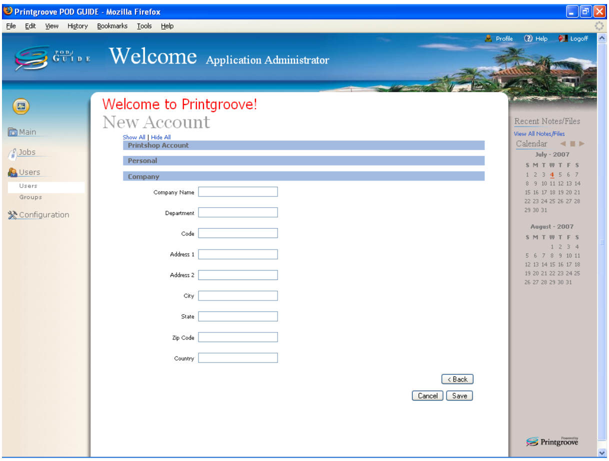
9 Click [Continue].

10 Enter [First Name], [Last Name], [E-mail] and [Work] phone number of the new User. [Home] and [Mobile] phone numbers are optional.

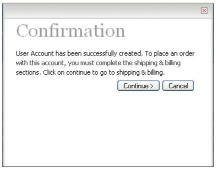


11 Click [Continue].

12 The Company section is optional. You can enter this information at any time.



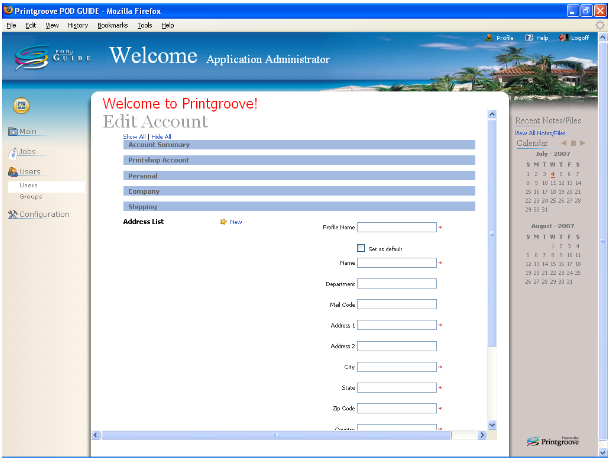
13 When you have finished entering the account information, click [Save]. If you give the new User the Role to place an order, a [Confirmation] pop-up window opens.



14 Click [Continue] to set the shipping address and billing method.
—Or—
Click [Cancel] to not continue and finish this procedure. The account cannot be used to create orders until the shipping address and billing method are completed.

15 Enter the required information, indicated by a red asterisk.

16 To use this Shipping Address as a default, check [Set as default].

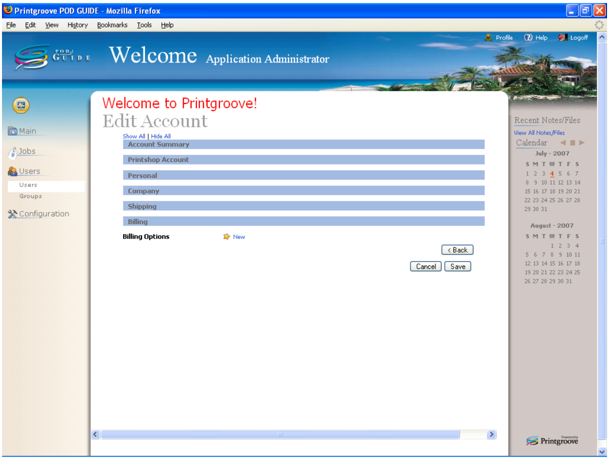


17 Click [Save Shipping Address].

– To edit the Shipping Address, follow the procedures in “To edit the Shipping Address:” on page 6-42.
– To delete the Shipping Address, follow the procedures of “To delete the Shipping Address:” on page 6-42.

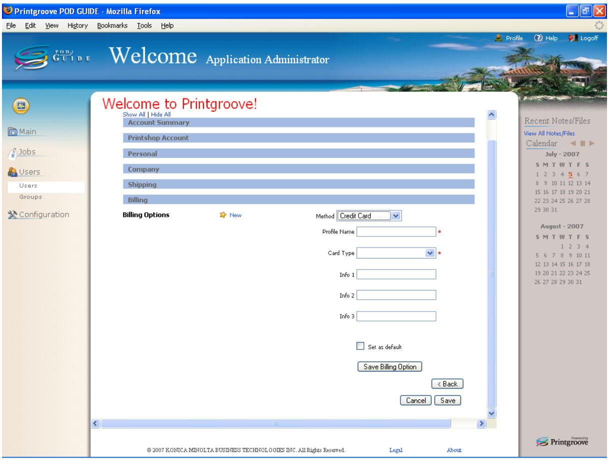
18 Click [Continue].

19 Click [New]. The [Method] pull-down appears.



20 Select a billing method.

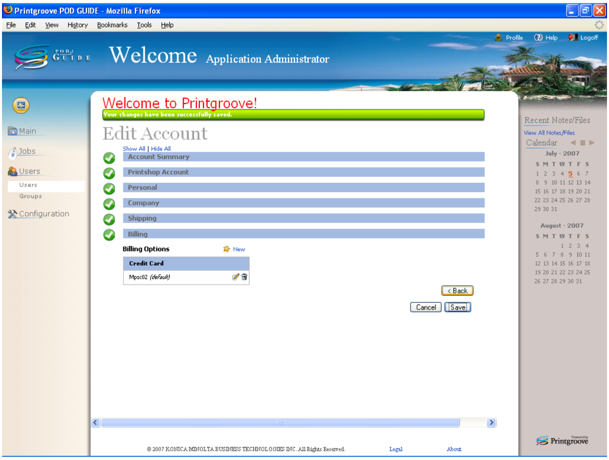
21 Enter the required information, indicated by a red asterisk. The fields required will vary depending on the billing method selected.



– To edit the Billing method, follow the procedures in “To edit the Billing Method:” on page 6-43.
– To delete the Billing method, follow the procedures in “To delete the Billing Method:” on page 6-43.

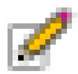
22 Click [Save Billing Option].

23 Click [Save]. The new User is created.



To edit the Shipping Address:

1 From the Address List, click the [Edit] icon near the Shipping Address. All fields of the selected Shipping Address appear.

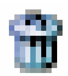


2 Edit the fields.

3 Click [Save Shipping Address].

To delete the Shipping Address:

1 From Address List, click the [Delete] icon (trash box icon) to the right of the Shipping Address.



2 A confirmation message opens.

3 Click [OK].

To edit the Billing Method:

1 From [Billing Options], click the [Edit] icon to the right of the Billing method to edit. All the fields of the selected Billing method appear.

2 Change the fields.

3 Click [Save Billing Option].

To delete the Billing Method:

1 From [Billing Options], click the [Delete] icon (trash box icon) to the right of the Billing Method.

2 Click [OK].

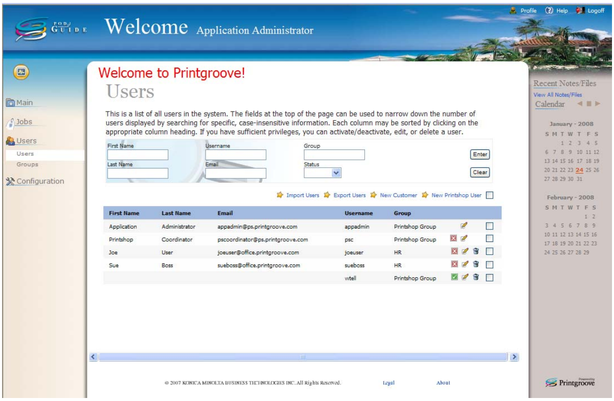
6.4.2 Duplicate a User

If you have the appropriate Role, you can create new Users from existing Users by duplication.

You can duplicate both Customer Users and Internal Users.

To duplicate a User:

1 On your Home page, click [Users] - [Users] menu. The [Users] screen opens.



2 Click the Duplicate icon near the User profile.

3 Populate the empty fields.

4 Modify other fields as necessary.

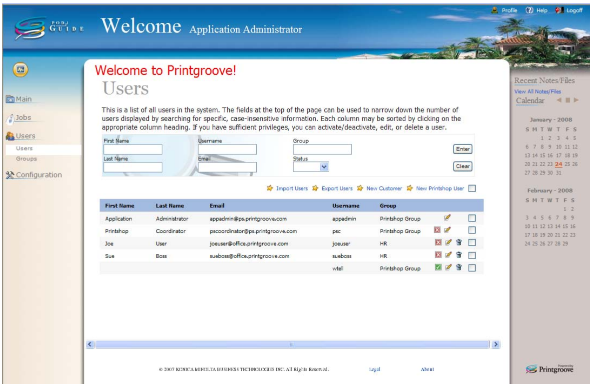
5 Click [Save].

6.4.3 Edit Users

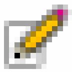
If you have the appropriate Role, you can edit Users. You can edit both Customer Users and internal Users.

To edit a User:

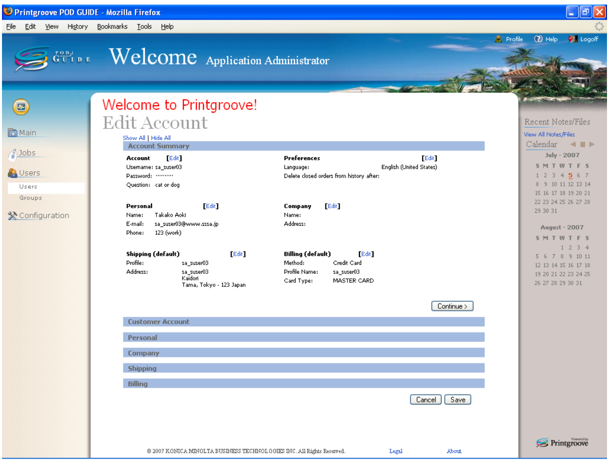
1 On your Home page, click [Users] - [Users]. The [Users] screen opens.



2 Click the [Edit] icon to the right of the User.



3 Click [Account] - [Edit], to edit the basic information.



4 Check the Permissions the User should have or remove marked values the User should not have. If you mark [Jobs Require Approval from], select the approver from the drop down list.

5 When you edit a Printshop User, click the appropriate Role under Available Roles, and click the double-arrow [>>] move button to move the Role to the Selected Roles section.

To deselect one of the Roles, click the Role under Selected Roles and click the other double-arrow [<<] move button.

– Instead of clicking a move button, you can drag the Role from one side to the other to select/deselect Roles.

6 Change Language, Closed Orders, and Color Scheme in the Preferences category and click [Continue].

7 Change the information In the [Personal] section and click [Continue]. [Home] and [Mobile] are optional.

8 Change the information In the [Company] section and click [Continue]. The [Company] section is optional.

9 Create, change, or delete the shipping address In the [Shipping] section and click [Continue]. At least one shipping address must be selected.

10 Create, change, or delete the billing option in the [Billing] section. One billing option must be selected.

11 Click [Save].

6.4.4 Delete Users

If you have the appropriate Role, you can delete Users.

You cannot delete “appadmin” or “psc” Users.

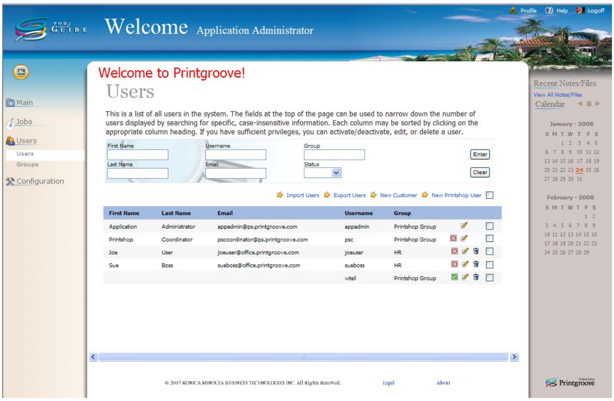
✎...

Note

– *You can deactivate all Users (including “psc” Users) except the Application Administrator User. See “To deactivate or activate a User:” on page 6-48.*

To delete a User:

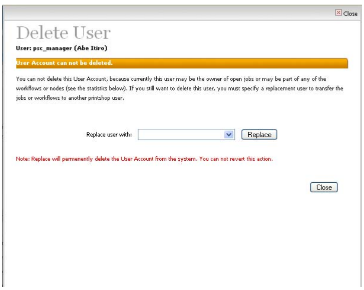
1 On your Home page, click [Users] - [Users]. The [Users] screen opens.



2 Click the [Delete] icon (trash box icon) to the right of the User.

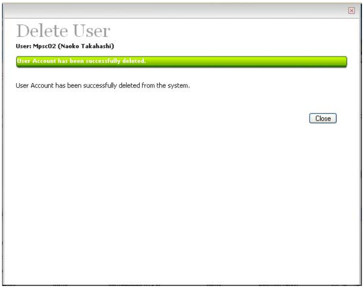
3 Click [OK].

4 When the User you want to delete is the owner of open jobs or part of any of the Workflows or nodes, a warning message opens. In this case, select a replacement User to transfer the jobs to, and click [Replace].



– If this windows does not appear, go to step 5.
– To cancel the delete, click [Close].

5 Click [OK]. The [Delete User] pop-up window opens.



6 Click [Close].

6.4.5 Deactivate or Activate Users

If you have the appropriate Role you can deactivate and activate Users.

Deactivated Users cannot use Printgroove POD Guide or Printgroove POD Serve.

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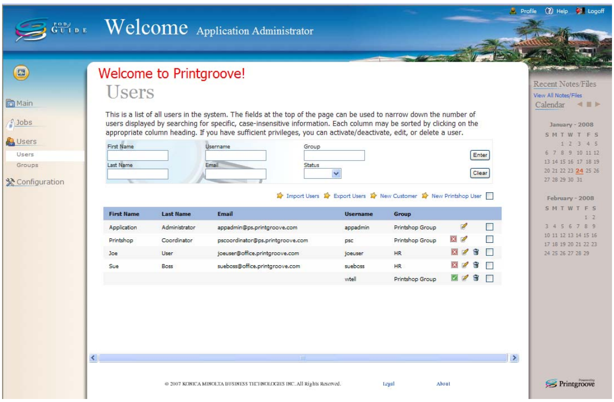
Note

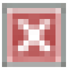
The Application Administrator cannot be deactivated.

To deactivate or activate a User:

1 On your Home page, click [Users] - [Users]. The [Users] screen opens.



2 Click the [Deactivate] icon the right of the User to deactivate.



—Or—

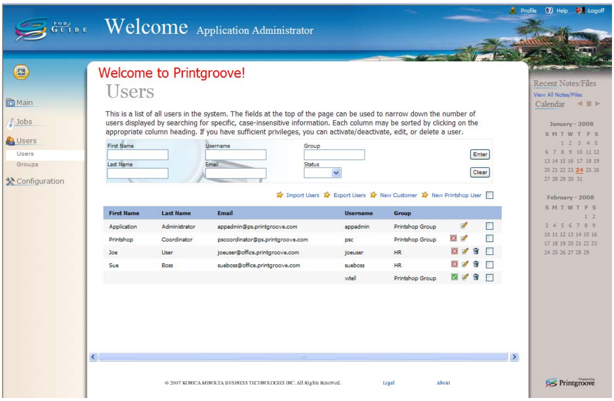
Click the [Activate] icon to the right of the User to activate.

6.4.6 Search for Users

If you have the appropriate Role, you can search for Users.

To search for Users:

1 On your Home page, click [Users] - [Users]. The [Users] screen opens.



2 Enter search terms in one or more search fields at the top of the page.

- Leave all fields blank to list all Users.
- Click [Clear], to clear the search fields.
- You can sort by clicking on column headings. The sort affects all Users in the list, not just those that you can see on the screen. You can switch ascending order and descending order by clicking the column again.

3 Click [Enter].

6.4.7 Export and Import Users

If you would like to enter user account information without having to individually enter each value, use Printgroove POD Guide to export selected users to a .CSV file stored locally on your pc. Open the .CSV file and add new users. Import the file back into Printgroove POD Guide and the new users are added. If you have the appropriate Role, you can complete this procedure.

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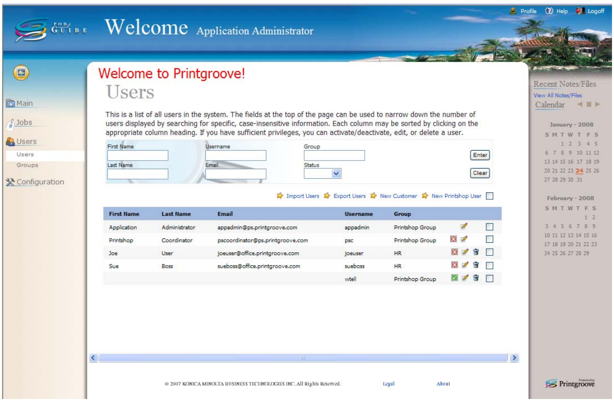
Note

An exported .CSV file can only be imported back into the same version of Printgroove POD Guide that was used to create the original, exported file. For example, if a .CSV file is exported from a 1.3.2 version of Guide it cannot be imported back into a 1.5 version of Guide; however, it can be imported back into a 1.3.2 version of Guide.

To export User account information:

1 On your Home page, click [Users] - [Users]. The [Users] screen opens.



2 Select the Users to export by using the checkbox to the right, and click [Export]. The Save As dialog opens.

3 Select the destination folder, and click [Save]. Account information of the selected Users is exported into the specified CSV file in the specified folder. The default name of the file is Users.csv.

✎...

Note

If any of the exported values are encrypted (Passwords, Secret Answers, etc.), you will not be able to modify these values when you edit the .CSV file.

To import User account information:

When you export a Users.csv from Printgroove POD Guide, you may modify the contents of that file locally. These modifications will remain when you import the file back into Printgroove POD Guide. However, you cannot modify the format of the Users.csv file. If the format is modified, Printgroove POD Guide cannot read the file or import the values.

When a Users.csv file is imported, Printgroove POD Guide looks for matches in the Username field. If a match is found, the value is overwritten by the new file's value.

1 On your Home page, click [Users] - [Users] - [Browse]. The Open dialog screen opens.

2 Select the User file and click [Open]. The file path appears in the Edit-Box next to the [Browse] button.

3 Click [Upload] and [Continue]. User account information in the CSV file is imported into the system.

7 Workflow Administration

This chapter describes Workflow Administration.

By default, only the Application Administrator can manage the following:

- Nodes
- Workflows

The Application Administrator can assign permission to other Roles, so those Roles can also manage nodes and workflows.

The following table shows the default Roles and Permissions for Nodes, Workflows, and Advanced Workflows.

Category	Permissions	Role "AppAdmin"					Role "Printshop_coordinator"				
		Create	Edit	Delete	View	Activate	Create	Edit	Delete	View	Activate
Configuration	Workflow Basic	ON	ON	ON	ON	ON	OFF	OFF	OFF	OFF	OFF
	Workflow Advanced	ON	ON	ON	ON	ON	OFF	OFF	OFF	OFF	OFF
	Workflow Nodes	ON	ON	ON	ON	-	OFF	OFF	OFF	OFF	-

✎...

Note

For an outline of Node, Workflow, and Advanced Workflow see "Workflow" on page 2-9.

7.1 Node Settings

The first step in building a Workflow is to add internal Printshop Users.

The second step is adding Nodes.

A Node represents an internal Printshop team, individual or automated process.

Printshop Users within Nodes are called Members.

By default, only the Application Administrator can perform the following tasks:

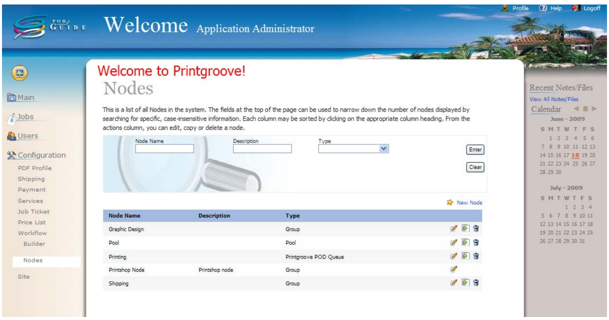
- Create a Node
- Edit a Node
- Duplicate a Node
- Delete a Node
- Search for Nodes

7.1.1 Create a Node

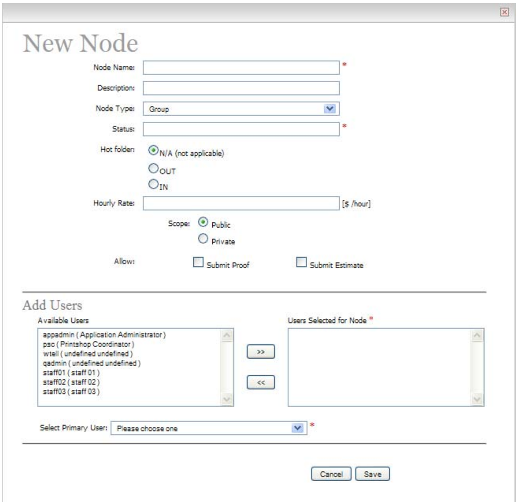
If you have the appropriate Role, you can create new Nodes.

To create a Node:

1 Click [Configuration] - [Workflow] - [Nodes]. The [Nodes] screen opens.



2 Click [New Node]. The [New Node] pop-up screen opens.



3 Enter the Node Name.

4 Enter a Description of the process.

5 Select a Node Type:

- **Group**: a group made up of Printshop Users, all users usually performing similar tasks.
- **Pool**: a repository of jobs (not users) that need to go to a specific node when the Users in that node are ready to perform the job. Jobs do not move from a pool node – they must be “grabbed” by users in the next node in a Workflow. See [Job Ticket Menu] - [Grab].
- **Printgroove POD Queue**: a process Node included in a Workflow that automatically sends the job to Printgroove POD Queue for printing.
- **Printgroove POD Ready**: a node for Printgroove POD Ready user. Only one user can be assigned.
- **Printgroove POD Ready (Pool)**: a pool node for Printgroove POD Ready user.
  When Printgroove POD Queue finishes with the job, it will send it to the next Node defined in the Workflow.
  The Printgroove POD Queue process Node can only be used if your printshop has a licensed version of Printgroove POD Queue and that version is installed.

6 Enter a Status description to help identify which phase of processing the job is in. By default Status field value is the Node Name.

7 If required, select a type of Hot Folder for this Node. If this is not required, select N/A.

If you want to do more complex processing of job tickets outside of the Printgroove POD suite, you may wish to use Hot Folders. Hot Folders make this possible since they are accessible to external systems.

To use this function, you must create two types of Hot Folder nodes: outbound and inbound. An external system agent monitors the outbound Hot Folder. As soon as new files appear, it moves them to the external processor, deletes them from the outbound Hot Folder, and puts the resulting JDF and associated files into the inbound Hot Folder.

An internal Printgroove POD Guide agent monitors the inbound Hot Folder. As soon as files appear, they are moved to the next node in the Workflow, and the files are deleted from the inbound Hot Folder.

See “Hot File Folder Location Data” on page 9-37, for detailed information about Hot Folder locations.

8 Fill out an Hourly Rate. This is the per hour charge for the work that is done in the node. This value is used for Time Recording function.

9 Select [Public] or [Private] to define who can see the Node.

- **Public**: the Node can be seen by all users.
- **Private**: the Node can only be seen by internal users.

10 Check [Submit Proof] and/or [Submit Estimate] to make these options available on Job Tickets.

11 If the Node type is [Group], you can add Members to the Node:

- Click the User in the Available Users section and click the Move Right [>>] button to move the user to the Users Selected for Node section.
- To de-select one of the Users, click the User in Users Selected for Node and click the Move Left [<<] button.

12 From [Select Primary User], select a primary user for each Group. This is the person who receives jobs when they are not assigned to a specific user.

13 Click [Save].

7.1.2 Edit a Node

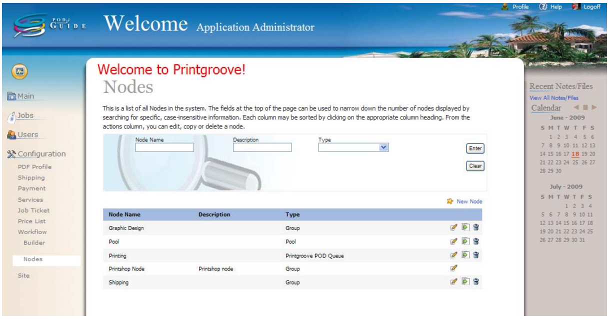
If you have the appropriate Role, you can edit Nodes.

You can edit all Nodes. All Printshop Nodes can be edited except the Node name and Node type.

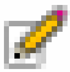
Closed Nodes cannot be edited.

To edit a Node:

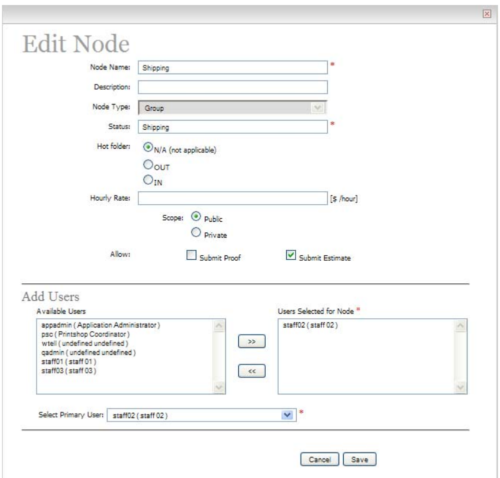
1 Click [Configuration] - [Workflow] - [Nodes]. The [Nodes] screen opens.



2 Click the [Edit] icon to the right of the Node.



3 Edit the Node Name, Description, Status, Hourly Rate, Scope, and the required Allow options.



– You cannot change the name of the “Printshop Node”.
– You cannot change the node Type of any Node.
– Click the User in the Available Users section and click the Move Right [>>] button to move the user to the Users Selected for Node section.
– To de-select one of the Users, click the User in Users Selected for Node and click the Move Left [<<] button.

4 You may select a different Primary User.

5 Click [Save].

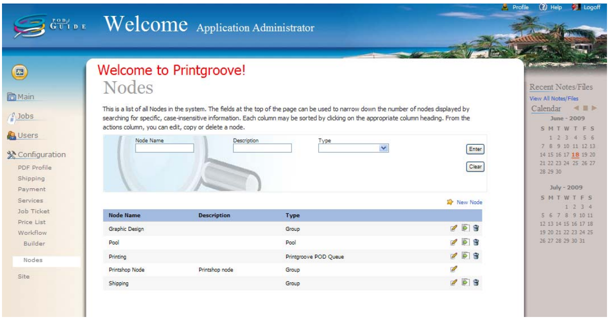
7.1.3 Duplicate a Node

If you have the appropriate Role, you can duplicate Nodes.

Note
You cannot duplicate the “Printshop Node”.

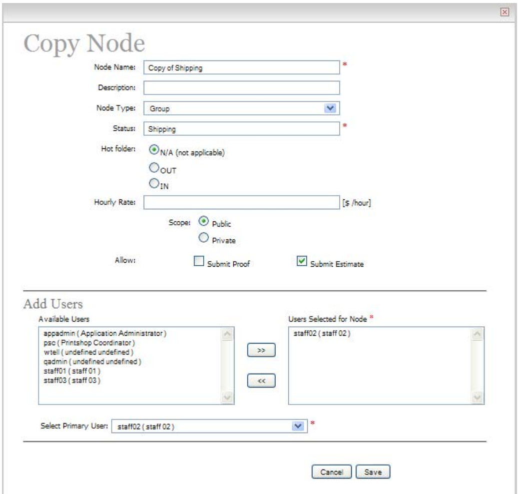
To duplicate a Node:

1 Click [Configuration] - [Workflow] - [Nodes]. The [Nodes] screen opens.



2 Click the [Copy] icon to the right of the Node.

3 Change the Node Name, Description, Node Type, Status, Hourly Rate, and Scope.



4 Modify [Submit Proof] and/or [Submit Estimate] as required.

5 You may select or deselect a User for this node as follows:

Select a name in Available Users and click the Move Right [>>] button to move the User to the Users Selected for Node section.

—Or—

Select a User in Users Selected for Node and click the Move Left [<<] button to deselect the User.

6 You may change the Primary User.

7 Click [Save].

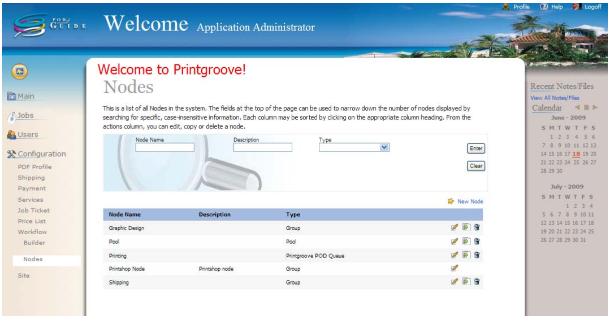
7.1.4 Delete a Node

If you have the appropriate Role, you can delete Nodes.

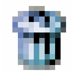
You cannot delete the Printshop Node or any Closed Node.

To delete a Node:

1 Click [Configuration] - [Workflow] - [Nodes]. The [Nodes] screen opens.



2 Click the [Delete] icon (trash box icon) to the right of the Node.



3 Click [OK].

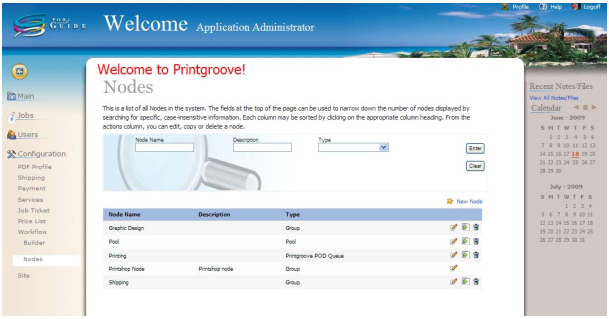
7.1.5 Search for Nodes

If you have the appropriate Role, you can search for Nodes.

You can search for a specific Node or for Nodes containing specific characteristics.

To search Nodes:

1 Click [Configuration] - [Workflow] - [Nodes]. The [Nodes] screen opens.



2 Enter search strings in one or more fields at the top of the page.

– Leave all fields blank to list all Nodes.

3 Click [Enter].

– Click [Clear] to clear the search fields.

7.2 Workflow Settings

After adding Nodes, you can build Workflows.

A Workflow consists of Nodes, Members assigned to each Node, Transitions, and Node Triggers—preplanned events that occur when a Job has been sitting at a Node for a specified period of time without a change in status.

By default, only the Application Administrator can do the following tasks:
- Create a Workflow
- Edit a Workflow
- Duplicate a Workflow
- Delete a Workflow
- Activate/Deactivate Workflows
- Search Workflows

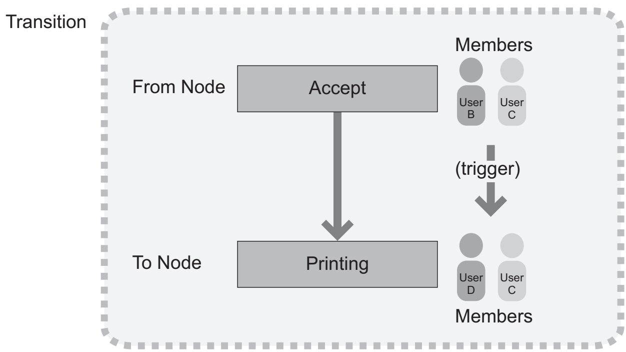
7.2.1 Create a Workflow

If you have the appropriate Role, you can create new Workflows.

Before creating a new Workflow, make sure that Nodes and Members for each Node have been defined.

Transitions define the sequence of Nodes in Workflows.

The basic Transition looks like this:

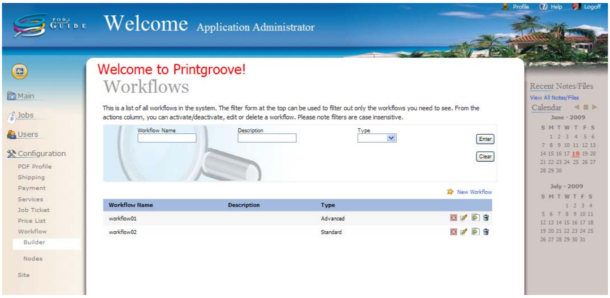


The predefined Workflow supplied with Printgroove POD Guide, contains the permanent Nodes “Printshop Node,” and “Closed,” and the Transition they define. You cannot delete these Nodes or their Transitions. You can, however, edit the Transitions.

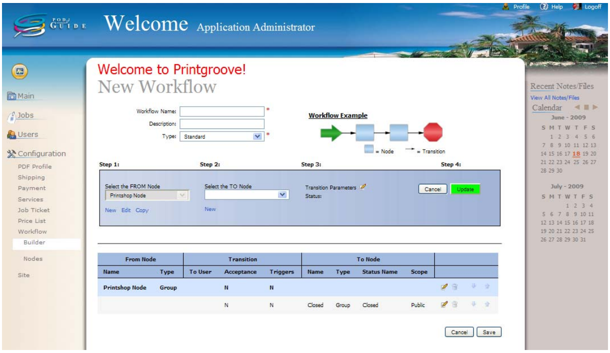
You can also add, edit, delete, move, and copy other Nodes and Transitions to customize the Workflow.

To create a Workflow:

1 Click [Configuration] - [Workflow] - [Builder].



2 Click [New Workflow]. The [New Workflow] screen opens.



This screen is divided into two sections: Top Section and Bottom Section. Nodes are selected in the Top Section of the screen, by selecting values in the [Select the FROM Node] (Step 1 on the GUI) and [Select the TO Node] (Step 2 on the GUI) drop-downs. Transition Parameters can be viewed and modified by clicking the Edit link (Step 3 on the GUI). When you click the Update button (Step 4 on the GUI), the Node and its Transition are added as the next step in the Workflow. The New Node and its Transition appear in the Bottom Section. To modify the Node and/or its Transition, select the Node in the Bottom Section. Its values will appear in the Top Section. Click [Cancel] or [Apply], as required.

3 Enter a name and a description for the Workflow

4 Select a type of Workflow.

– **Standard**: maintains a predetermined Workflow path.
– **Advanced**: allows a job to move to any Node within the Workflow.

5 Specify the Nodes and Transitions, as required.

- NOTE: Beneath the [Select the FROM Node] and the [Select the TO Node] drop-downs are three menu items: New, Edit and Copy. When you click on a menu items a pop-up window opens that allows you to create, edit, or duplicate Nodes. After saving the Node, the pop-up closes and you can then select the Node from [Select the FROM Node] or [Select the TO Node]. See “Create a Node” on page 7-2, “Edit a Node” on page 7-5 or “Duplicate a Node” on page 7-6.
- When work is completed in one Node, the Node is considered Done, and the job is moved to the next Node in the Workflow. The Transition is the step in the Workflow where you specify how a job moves from Node to Node, what happens to that job once it arrives at a new Node, and what event happens if the job remains in the Node past an acceptable length of time (a time also specified in the Transition).
- **Transition options are as follows:**
- To edit the first step in a Workflow, see “To edit the first step in a Workflow:” on page 7-13.
- To add/edit a transition, see “To add/edit a Transition:” on page 7-14.
- To delete a step from a Workflow, see “To delete a step from a Workflow:” on page 7-16.
- To change the position of a step in a Workflow, see “To change the position of a step in a Workflow:” on page 7-16.
- To edit the last step of a Workflow, see “To edit the last step of a Workflow:” on page 7-16.

6 Click [Save].

To edit the first step in a Workflow:

1 By default, the [Select the FROM Node] value is set as [Printshop Mode]. Make sure you have selected a value in the [Select the TO Node] drop-down.

- If you select something other than “Pool Node”, you must continue to Step 2. If “Pool Node” is selected, continue to Step 4.

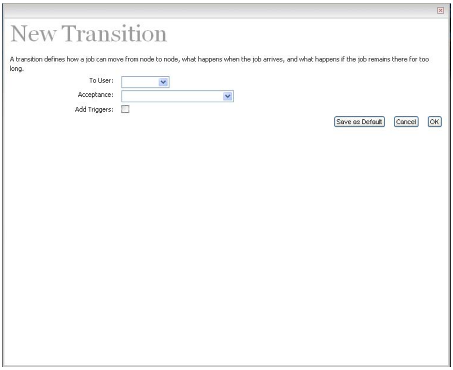
2 Click the [Edit] icon that appears to the right of [Transition Parameters] (Step 3 in the GUI):.

3 Follow the procedure noted in “To add/edit a Transition:” on page 7-14.

4 When you return to the New Workflow screen, click [Update].

To add/edit a Transition:

1 Click the [Edit] icon to the right of Transition Parameters. The [New Transition] screen opens. In the [To Users] field, select a User to whom each job should go.

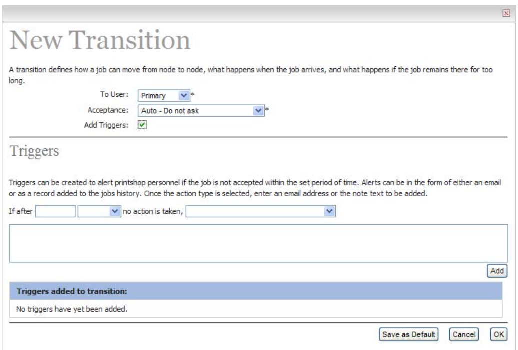


- **Primary**: the Primary User in the Node
- **Specific**: pick a Specific User for this Node.
- **Selectable**: the User assigning the job can select any User.
- When you select a Pool Node or Process Node that has no members, [None] is selected and the value cannot be changed.

2 In the [Acceptance] field, select a job acceptance method.

- **Auto**: The job is accepted and placed in the Node automatically.
- **Manual**: Forces Users to accept or reject incoming jobs.

3 Check [Add Trigger] to add an action trigger such as, “send e-mail”, in case no action has been taken on a job within a set period of time. When you select the checkbox, the [Triggers] menu opens.



- Fill out as noted:

- **If after**: Enter a number in the text box and select a unit from the drop down list (days, hours, or minutes).
- **no action is taken, send an**: Select “add the following note to the job history:” or “e-mail the following users:”.
- **Please add note/email addresses**: Enter message text or e-mail address of the recipient to be notified if a trigger event has occurred.

4 Click Add.

5 If you want to save the settings as the default values, click [Save as default].

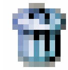
6 If everything is complete, click [OK]. Click [Cancel] to cancel this setting.

To delete a step from a Workflow:

When you use this procedure, you are removing the Node and its Transition from the Workflow. To delete a Node from Printgroove POD Guide, see “To delete a Node:” on page 7-8.

1 In the Bottom Section of the screen, locate and select the Node and Transition you want to remove.

2 Click the [Delete] icon (trash icon) (at the far right of the selected row).



3 A verification pop-up opens. Click [OK].

To change the position of a step in a Workflow:

Use this procedure to move a step to a different position in the Workflow.

1 In the Bottom Section of the screen, locate and select the Node and Transition you want to move.

2 Click the [Up] or [Down] icon. The row moves accordingly.


To edit the last step of a Workflow:

1 In the Bottom Section of the screen, locate and select the last Node and Transition. The values appear in the Top Section.

2 In the [Select the FROM Node] drop down menu, select the final Node processing jobs are sent from when all work is complete. Once sent from this Node, Printgroove POD Guide will mark them Closed when they are processed through this Workflow.

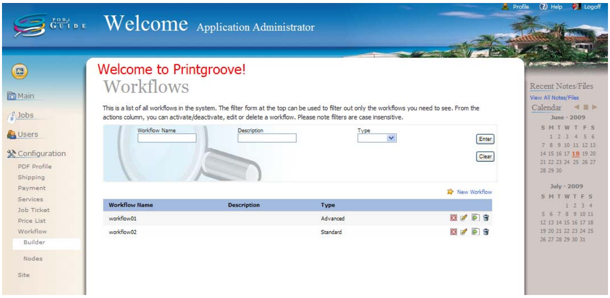
3 Click [Update].

7.2.2 Edit a Workflow

If you have the appropriate Role, you can edit Workflows.

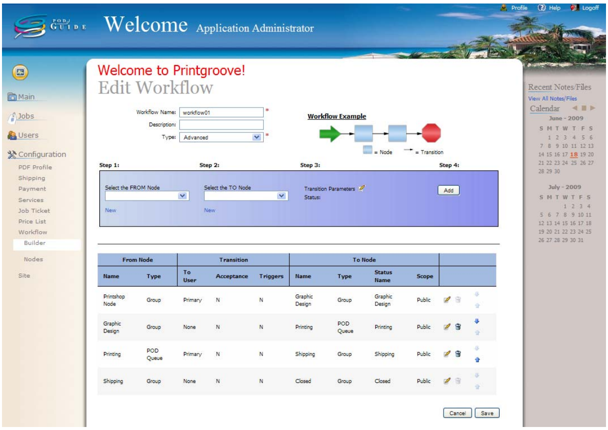
To edit a Workflow:

1 Click [Configuration] - [Workflow] - [Builder]. The [Workflows] screen opens.



2 Click the [Edit] icon to the right of the Workflow you want to edit. The [Edit Workflows] screen opens.

3 If necessary, change [Workflow Name], [Description] and [Type].



4 If you want to edit the first step in a Workflow, see “To edit the first step in a Workflow:” on page 7-13.

5 If you want to add/edit a transition, see “To add/edit a Transition:” on page 7-14.

6 If you want to delete a step from a Workflow, see “To delete a step from a Workflow:” on page 7-16.

7 If you want to change the position of a step in a Workflow, see “To change the position of a step in a Workflow:” on page 7-16.

8 If you want to edit the last step of a Workflow, see “To edit the last step of a Workflow:” on page 7-16.

9 When you finish editing, click [Save]. The modified Workflow is saved.

✎...

Note

Beneath the [Select the FROM Node] and the [Select the TO Node] drop-downs are three menu items: New, Edit and Copy. When you click on a menu items a pop-up window opens that allows you to create, edit, or duplicate Nodes. After saving the Node, the pop-up closes and you can then select the Node from [Select the FROM Node] or [Select the TO Node].

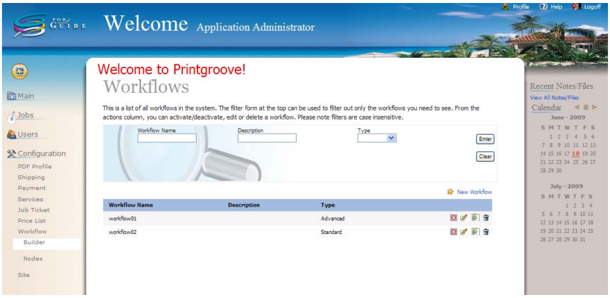
See “Create a Node” on page 7-2, “Edit a Node” on page 7-5 or “Duplicate a Node” on page 7-6.

7.2.3 Duplicate a Workflow

If you have the appropriate Role, you can duplicate a Workflow.

To duplicate a Workflow:

1 Click [Configuration] - [Workflow] - [Builder]. The [Workflows] screen opens.



2 Click the [Copy] icon (green arrow icon) to the right of the Workflow you want to duplicate. The [Copy Workflow] pop-up screen opens.

3 If necessary, change [Workflow Name], [Description] and [Type].

4 If you want to edit the first step in a Workflow, see "To edit the first step in a Workflow:" on page 7-13.

5 If you want to add/edit a transition, see “To add/edit a Transition:” on page 7-14.

6 If you want to delete a step from a Workflow, see “To delete a step from a Workflow:” on page 7-16.

7 If you want to change the position of a step in a Workflow, see “To change the position of a step in a Workflow:” on page 7-16.

8 If you want to edit the last step of a Workflow, see “To edit the last step of a Workflow:” on page 7-16.

9 When you finish editing, click [Save]. The Duplicated Workflow is saved.

✎...

Note

Beneath the [Select the FROM Node] and the [Select the TO Node] drop-downs are three menu items: New, Edit and Copy. When you click on a menu items a pop-up window opens that allows you to create, edit, or duplicate Nodes. After saving the Node, the pop-up closes and you can then select the Node from [Select the FROM Node] or [Select the TO Node].

See “Create a Node” on page 7-2, “Edit a Node” on page 7-5 or “Duplicate a Node” on page 7-6.

7.2.4 Delete a Workflow

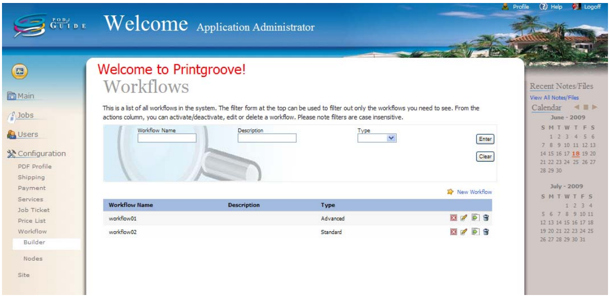
If you have the appropriate Role, you can delete a Workflow.

Note

- *You cannot delete a Workflow if it contains jobs.*
- *Instead of Deleting, you can Deactivate a Workflow. See “Activate or Deactivate Workflows” on page 7-22.*

To delete a Workflow:

1 Click [Configuration] - [Workflow] - [Builder]. The [Workflows] screen opens.



2 Click the [Delete] icon to the right of the Workflow you want to delete.

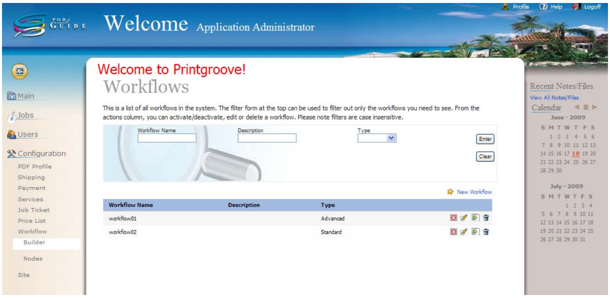
3 Click [OK].

7.2.5 Activate or Deactivate Workflows

If you have the appropriate Role, you can activate and deactivate any Workflow.

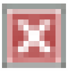
To activate or deactivate a Workflow:

1 Click [Configuration] - [Workflow] - [Builder]. The [Workflows] screen opens.



2 To activate a Workflow, click the [Activate] icon to the right of the Workflow. This icon is only selectable if the Workflow was previously deactivated.

3 To deactivate a Workflow, click the [Deactivate] icon to the right of the Workflow.



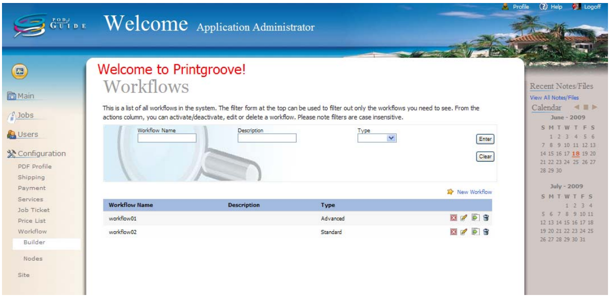
7.2.6 Search Workflows

If you have the appropriate Role, you can search all Workflows.

You can search for a specific Workflow or for Workflows that contain common characteristics.

To search Workflows:

1 Click [Configuration] - [Workflow] - [Builder]. The [Workflows] screen opens.



2 Enter a search string in one or more of the search fields.

– Leaving all fields blank will not restrict the search. As a result, all Workflows will be displayed.

3 Click [Enter].

Note

Clicking [Clear] eliminates all values specified in search fields.

8 Job Ticket Administration

This chapter describes Job Ticket Administration.

By default, only the Application Administrator can do the following:
- Job Ticket Number Format management
- Job Ticket Format management

If you use an account other than “appadmin”, you must have administrative Permissions for Job Ticket Number Format and/or Job Ticket Format.

The following table shows the default Roles and Permissions for Job Ticket Number Format and Job Ticket Format.

Category	Permissions	Role “AppAdmin”					Role “Printshop_coordinator”				
		Create	Edit	Delete	View	Activate	Create	Edit	Delete	View	Activate
Configuration	Ticket Number Formats	ON	ON	ON	ON	-	OFF	OFF	OFF	OFF	-
	Ticket Builder	ON	ON	ON	ON	-	OFF	OFF	OFF	OFF	-

8.1 Job Ticket Number Settings

A Job Ticket Number is a combination of letters, numbers, or date the order was placed.

A typical Job Ticket Number might look like this: ABC_02/05/2007_501—The initials of the company (ABC), the date of submission (2/5/07), and a counter (501).

A Job Ticket Number Format has 4 Section types:
- **Text**: alphanumeric characters including underscores or spaces
- **Date**: Adds the current date to the ticket number
- **Group Counter**: Increments orders by group. You can specify the start number for the Group Counter.
- **System Counter**: Increments all jobs regardless of Group.

Any combination of section types may be used to define a Job Ticket Number Format. Each number format may be used across multiple Groups.

By default, only the Application Administrator can do the following:
- Create Job Ticket Number Format
- Edit Job Ticket Number Format
- Delete Job Ticket Number Format

✎...

Note
Create Job Ticket Number Formats before creating Job Ticket Formats.

8.1.1 Create a Job Ticket Number Format

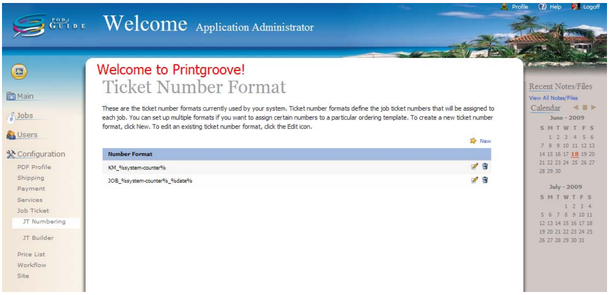
If you have the appropriate Role and Permissions, you can create a new Job Ticket Number Format.

✎...

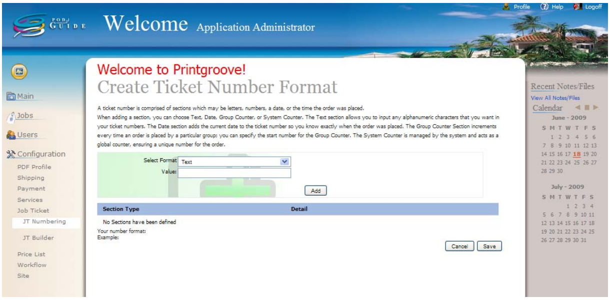
Note
One Ticket Number Format may be used on multiple Tickets.

To create a Job Ticket Number Format:

1 Click [Configuration] - [Job Ticket] - [JT Numbering]. The [Ticket Number Format] screen opens.



2 Click [New]. The [Create Ticket Number Format] screen opens.



- To add text to the Job Ticket Number, see “To add text to the Job Ticket Number:” on page 8-4.
- To add date information to the Job Ticket Number, see “To add date information to the Job Ticket Number:” on page 8-4.
- To add a Group Counter to the Job Ticket Number, see “To add a Group Counter to the Job Ticket Number:” on page 8-4.
- To add a System Counter to the Job Ticket Number, see “To add a System Counter to the Job Ticket Number:” on page 8-5.
- To delete added values, see “To delete an added value:” on page 8-5.
- To move the position of added values, see “To move the position of an added value:” on page 8-5.

3 Click [Save]. The new format is saved.

✎...

Note

Each section type can be used multiple times for one Job Ticket Number Format.

To add text to the Job Ticket Number:

1 From [Select Format], select [Text].

2 Enter alphanumeric characters in [Value].

3 Click [Add]. The new [Text] section appears at the bottom of the table.

To add date information to the Job Ticket Number:

1 From [Select Format], select [Date] to add the date when the order is placed to the job ticket number format.

2 Click [Add]. The new [Date] section appears at the bottom of the table.

To add a Group Counter to the Job Ticket Number:

1 From [Select Format], select [Group Counter] to increment the sequence number every time an order is placed by a particular group.

2 Enter the start number for the Group Counter in [Starts with].

3 Click [Add]. The new [Group Counter] section appears at the bottom of the table.

To add a System Counter to the Job Ticket Number:

1 From [Select Format], select [System Counter] to increment a sequence number every time an order is placed by the entire system.

2 Click [Add]. The new [System Counter] section appears at the bottom of the table.

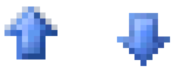
To delete an added value:

1 Locate the section you want to delete then click the [Delete] icon.

2 Click [OK].

To move the position of an added value:

1 Locate the section you want to move then click the [Up] or [Down] icon to move the section to the correct location.

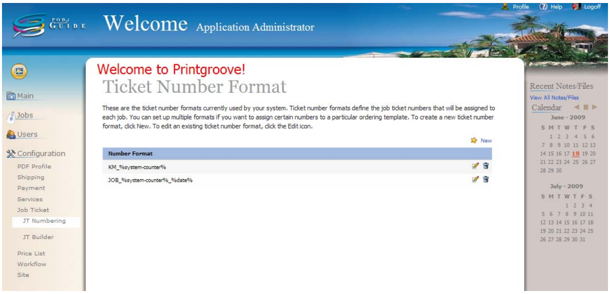


8.1.2 Edit a Job Ticket Number Format

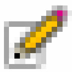
If you have the appropriate Role and Permissions, you can edit the Job Ticket Number Format.

To edit a Job Ticket Number Format:

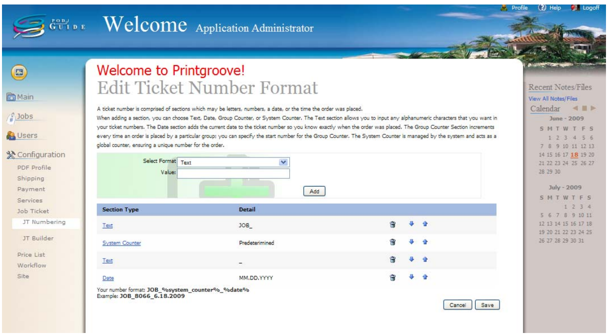
1 Click [Configuration] - [Job Ticket] - [JT Numbering]. The [Ticket Number Format] screen opens.



2 Click the [Edit] icon to the right of the format you want to modify.



3 Click [Section type]. If you change the type to [Text], or [Group Counter], click [Detail] and enter the value. or [Group Counter], click the [Detail] of the same line and enter the value.



– To add text to the Job Ticket Number, see “To add text to the Job Ticket Number:” on page 8-4.
– To add the date to Job Ticket Number, see “To add date information to the Job Ticket Number:” on page 8-4.

- To add a Group Counter to Job Ticket Number, see "To add a Group Counter to the Job Ticket Number:" on page 8-4.
- To add a System Counter to Job Ticket Number, see "To add a System Counter to the Job Ticket Number:" on page 8-5.
- To delete the added section, see "To delete an added value:" on page 8-5.
- To move the added section, see "To move the position of an added value:" on page 8-5.

4 Click [Save].

8.1.3 Delete a Job Ticket Number Format

If you have the appropriate Role and Permissions, you can delete a Job Ticket Number Format.

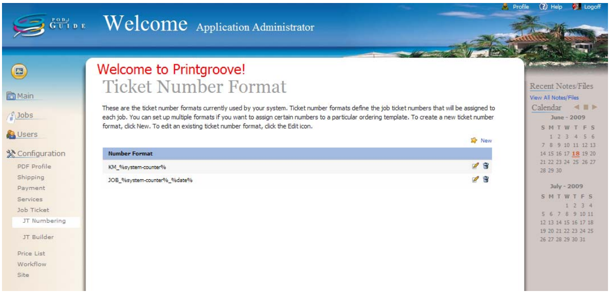
...

Note

You cannot delete a Job Ticket Number Format if it is assigned to a Group.

To delete a Job Ticket Number Format:

1 Click [Configuration] - [Job Ticket] - [JT Numbering]. The [Job Ticket Number Format] screen opens.



2 Click the [Delete] icon to the right of the format you want to delete.

8.2 Job Ticket Format Settings

A Job Ticket is the form that users will fill out when they come to your site to place an order. Default tickets are described in "Place and View an Order" on page 3-1.

A Job Ticket Format can be customized to permit users to specify the requirements of their print jobs. Different Job Ticket Formats can be defined for different Groups based on their needs.

By default, only the Application Administrator can do the following:
- Create a Job Ticket Format
- Edit a Job Ticket Format
- Duplicate a Job Ticket Format
- Delete a Job Ticket Format
- Search for Job Ticket Formats

8.2.1 Create a Job Ticket Format

✎...

Note
You must Create Job Ticket Number Formats before creating Job Ticket Formats.

If you have the appropriate Role and Permissions, you can create a new Job Ticket Format. There are two types of Job Ticket Formats that can be created: Quick Order and Standard Order.

Quick Order Job Tickets have limited functionality (you may only upload a single PDF file to the job) but they do support real-time pricing.

Standard Orders Job Tickets support full functionality but require print shop interaction for pricing.

Both Standard Order and Quick Order Job Ticket Formats have six sections: Job, Files, Options, Shipping, Billing, and Catalog. Differences between the two options are noted in the discussion below, as required.

Four of the six sections (Job, Files, Options, and Catalog) have subsections or categories. There are 21 default categories, each associated with one of the job ticket sections.

Categories contain Items.

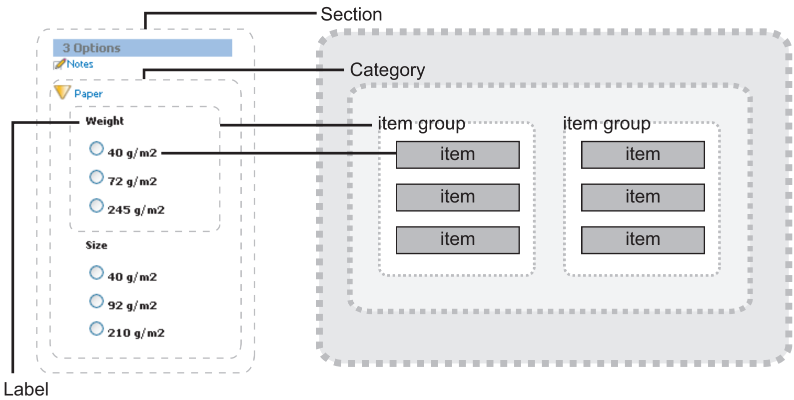
Items represent user selectable options on a job ticket.

Items can be grouped into "Item Groups."

An Item Group is a logical grouping of Items under a Category.

An Item Group may have a "Label" defined for the group.

Items are defined by the Application Administrator under [Configuration] - [Services] - [Printing]. See “Printing Service” on page 9-19).



The Catalog section of a Job Ticket offers “items” for sale by the Printshop but they are not printing-related options. “Items” under the Catalog section are defined by the Application Administrator under [Configuration] - [Services] - [Catalog]. See “Catalog” on page 9-31)

The Shipping and Billing sections of a job ticket do not use either the item concept or the category level of organization, but have their own format.

Here are the built-in categories and items of the Job section:

Category	Items	Description
Standard	Job Name	enables users to enter a meaningful name
	Date/Time Needed	enables users to specify a Due Date from the calendar
	Estimate Required	enables users to require estimate (not recommended for Quick Orders)
Priority	Normal, Rush	enables users to select the priority
Proof	No Proof Required, Soft Proof, Hard Proof	enables users to select the method of proof (Soft Proof not recommended for Quick Orders)

Here are the built-in categories and items of the Files section:

Category	Items	Description
Submis-sion	File Upload	enables users to upload files. it is possible to use Upload Control (lim-ited to 1 PDF file for Quick Orders).
	Delete Files After Use	enables users to select to delete files after use automatically
	Postal, Email, Instant Messaging, Upload, CD/DVD, Hardcopy, Other	enables users to select the method of sending files

Here are the built-in categories and items of the Options section:

Category	Items	Description
Copies	Copies	enables users to enter the number of copies to print.
Color	Color, Black & White, Mixed	enables users to select the color scheme (Mixed not recommended for Quick Orders).
Color Quality	High Chroma	enables user to select a device that supports High Chroma printing.
Layout	Reduce to Fit	enables users to reduce the size of original to fit the paper size.
	Fit to Page	enables users to enlarge the size of original to fit the paper size.
	Clip to Max	enables users to reduce or enlarge the size of original to fit the paper size.
	Tile	enables users to print large size original with resizing and tiling to fit the paper size.
	Portrait, Landscape	enables users to select orientation.
	1 in 1, 2 in 1	enables users to select the page numbers to print per one sheet of paper.
	Booklet	enables users to set booklet print-ing.
Media Type	CD/DVD, Paper	enables the user to indicate the me-dia to print (not recommended for Quick Orders).
	Media Type Details	enables users to select the details of the media to print.
	Grade	enables users to select the details of the media grade.
	Coating	enables users to select the details of the media coating.

Category	Items	Description
Paper	Tabloid, 12x18, 16K, Half Letter, Letter, Legal, 8K,A3, A4, A5,A6, B4, B5, B6, 8x13, 8.5x13, 8.25x13, 8.125x13.25, A3W, A4W, A5W, B4W, B5W, Half Letter W, Letter W, Tabloid W, 12x18W, Postcard, Letter Tab, A3 Tab, A4 Tab, A5 Tab, B4 Tab, B5 Tab, Half Letter Tab, Tabloid Tab, 13x19, SRA3, SRA4, ISOB4, ISOB5	enables users to select the paper size.
	40g/m2, 50g/m2, 62g/m2, 72 g/m2, 92g/m2, 131g/m2, 162g/m2, 210g/m2, 245g/m2, 300g/m2	enables users to select the paper weight.
	Cyan, Magenta, Yellow, Black, White, Clear, Pink, Blue, Green, Gray, Red, Turquoise, Violet, Orange, Brown, Gold, Silver, Buff, Ivory, Goldenrod, Other	enables users to select the paper color.
	Off, On	enables users to select whether to use paper settings.
	Paper Name	enables users to set the name of paper.
Sides	Front, Back, Two Sided head-to-head, Two Sided head-to-foot	enables users to select the method of one side printing and two sided printing.
Collation	Collate	enables users to collate
Binding	Channel Binding, Coil Binding, Single Staple, Adhesive Binding, Hard Cover, Plastic Comb, Ring, Saddle Stitch, Sewn, Side Sewn, Double Staple, Perfect Binding, Strip Bind, Tape, Thread Sealing, Wire Comb, Auto	enables users to select the binding type.
	Top, Bottom, Left, Right	enables users to select the binding location.
	Cyan, Magenta, Yellow, Black, White, Clear, Pink, Blue, Red, Green, Brown, Gray, Turquoise, Violet, Orange, Gold, Silver, Buff, Ivory, Goldenrod, Other	enables users to select the binding color.
Front Cover	No Cover, Blank Page, Printed	enables users to select the method of Front Cover.
	40g/m2, 50g/m2, 62g/m2,72 g/m2, 92g/m2, 131g/m2, 162g/m2, 210g/m2, 245g/m2, 300g/m2	enables users to select the weight of paper for Front Cover.
	Cyan, Magenta, Yellow, Black, White, Clear, Pink, Blue, Green, Gray, Red, Turquoise, Violet, Orange, Brown, Gold, Silver, Buff, Ivory, Goldenrod, Other	enables users to select the color of paper for Front Cover.
	Gloss, Matte, White Paper, Yellowish Paper, None, Glossy, High Gloss, Coated	enables users to select the grade of paper for Front Cover.

Category	Items	Description
Back Cover	No Cover, Blank Page, Printed	enables users to select the method of Back Cover.
	40g/m2, 50g/m2, 62g/m2,72 g/m2, 92g/m2, 131g/m2, 162g/m2, 210g/m2, 245g/m2, 300g/m2	enables users to select the weight of paper for Back Cover.
	Cyan, Magenta, Yellow, Black, White, Clear, Pink, Blue, Green, Gray, Red, Turquoise, Violet, Orange, Brown, Gold, Silver, Buff, Ivory, Goldenrod, Other	enables users to select the color of paper for Back Cover.
	Gloss, Matte, White Paper, Yellowish Paper, None, Glossy, High Gloss, Coated	enables users to select the grade of paper for Back Cover.
Punching	Left, Right, Top, Bottom	enables users to select the punching edge.
	2, 3, 4	enables users to select the punching number.
Folding	Z-fold(A3, B4, 11x17, 8k), Z-fold(8.5x14), Center Fold, Center Fold Out, Letter Fold, Letter Fold Out, Zig Zag, Zig Zag Out, Double Parallel, Double Parallel Out, Gate Fold, Gate Fold Out, Multi Letter Fold, Multi Letter Fold Out, Multi Center Fold	enables users to select the method of folding.
Offset	Offset	enables users to set offset printing
Trim	Trim	enables users to set trim printing
Business Card	Company Name, Department, Code, Work Phone, Mobile Phone, Home Phone, Country, Zip Code, State, City, Address 1, Address 2, First Name, Last Name, Email	The setting of the Business Card template is available.

“Items” of [Shipping] section are as follows:

	Items	Description
Shipping Methods	USPS - Priority Mail, UPS - Ground, FedEx - Over Night	enables users to select the method of shipping

Here are the Items of the Billing section:

	Items	Description
Billing Method	Billing Address, Cash on Delivery, Purchase Order, Cross Charge, Cash Pre-payment, Personal Check, Cahier’s Check, Money Order, Bank/Wire Transfer, PayPal	enables users to select the method of billing

Here are the built-in Categories and Items of the Catalog section:

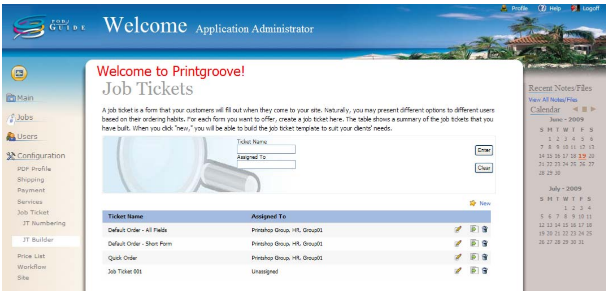
Category	Items	Description
Paper	Letter White 20lb, Legal White 20lb, Tabloid White 20lb, Letter Yellow 20lb, Letter Red 20lb	enables users to order paper.
Pencils	Pencils	enables users to order pencils.
Pens	Pens	enables users to order pens.

Note

- *When you need more items, you can create them using [Configuration] - [Services] - [Printing] menu as long as the items have a standard JDF (Job Definition Format). For recommends regarding new Quick Orders, please see "To create a Quick Order Job Ticket Format:" on page 8-27.*
- *An Item Group can also function as a Filter Group.*
- *A Filter Group has a name, screen control type and required flag like an ordinary Item Group but also has a parent (or original) Item Group.*
- *Filter Groups reuse the Items of their parent Item Group.*

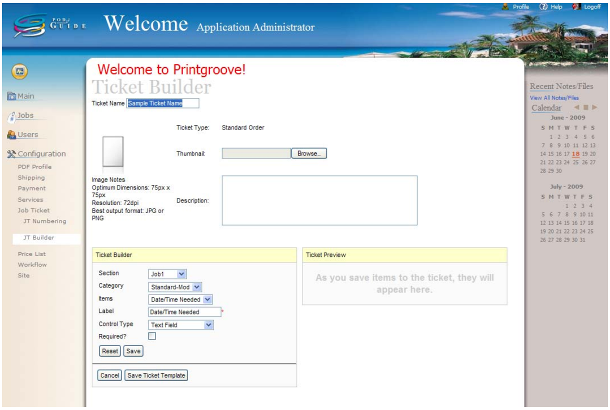
To create a Standard Order Job Ticket Format:

1 Click [Configuration] - [Job Ticket] - [JT Builder]. The [JT Builder] screen opens.



2 Click [New]. The [Job Ticket Type] screen opens.

3 Select [Standard Order] then click [OK]. The [Ticket Builder] screen opens.



4 Enter a name for the Job Ticket Format

5 To add a thumbnail for the ticket, click [Browse...]. Navigate to the file you wish to use. Select the file and click [OK]. An image of the icon appears in the Ticket Builder.

6 Enter a Description.

– Note
  The thumbnail image and the description are displayed on the [Select a Job Ticket] screen. This screen opens every time a user creates a new print job.

7 Select a Section.

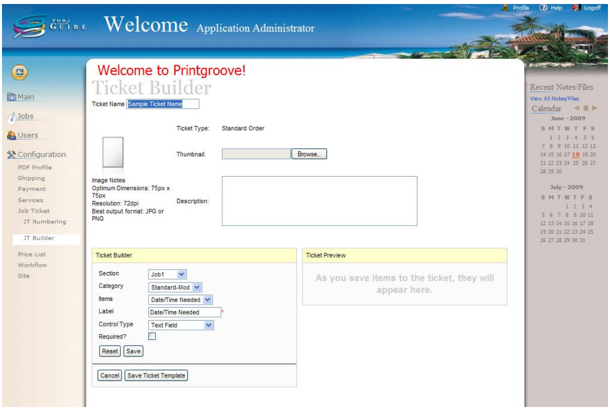
- For the Job section, see “To set the [Job] section of the Job Ticket Format:” on page 8-16.
- For the [Files] section, see “To set the [Files] section of the Job Ticket Format:” on page 8-18.
- For the [Options] section, see “To set the [Options] section of the Job Ticket Format:” on page 8-20.
- For the [Shipping] section, see “To set the [Shipping] section of the Job Ticket Format:” on page 8-22.
- For the [Billing] section, see “To set the [Billing] section of the Job Ticket Format:” on page 8-23.
- For the [Catalog] section, see “To set the [Catalog] section of the Job Ticket Format:” on page 8-24.
- To change the settings of the item group, see “To change the settings of the item group:” on page 8-25.
- To delete the added item groups, see “To delete the item group:” on page 8-26.
- To delete the added item, see “To delete the item:” on page 8-26.
- To move the added item groups, see “To move the position of the item group:” on page 8-26.
- To move the added item, see “To move the position of the added item:” on page 8-26.

8 Click [Save Ticket Template].

- Click [Cancel] to cancel creating the Job Ticket Format.

To set the [Job] section of the Job Ticket Format:

1 From [Section], select [Job].



2 From [Category], select the category to set.

- Standard: [Job Name], [Date/Time Needed] and [Estimate Required].
- Priority: [Normal] and [Rush].
- Proof: [No Proof Required], [Soft Proof] and [Hard Proof].

3 From [Items], select the item to set. In some cases, [Label] appears depending on the item selected.

4 If necessary, change [Label] to match the function of the Item Group.

- Label is a required field. You cannot leave it blank.
- The Label is what will appear on the screen.

5 Select a Control Type for the item.

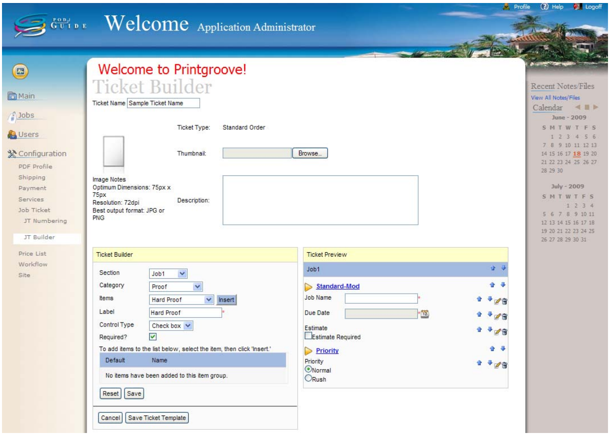
- **Check Box**: Puts a check box near each item the user may choose. Check boxes allow users to make multiple choices.
- **Date**: Makes a calendar available from which to choose a date.
- **Date/Time**: Makes a calendar with time on it from which to choose date and time.
- **Individual**: Puts radio buttons next to the item users may choose. Radio buttons only allow users to make a single choice within a group of choices.
- **Numeric Data Field**: Creates a field where users can only enter numeric values.
- **Pull Down**: Creates a pull down menu of available choices.
- **Text Field**: Creates a blank text field where users may enter text.
- Some control types are not selectable on all items.

6 Check the [Required?] box to make the item group a required element.

7 To set [Check Box], [Individual] or [Pull Down] from [Control Type], click [Insert] to make the item appear as an option the user can select.

- To add multiple options repeat as necessary.
- If you change the [Label] or [Control Type], the latest value is adopted.
- If inserted items are exclusive, you cannot insert them into the same Item group.

8 Click [Save] and check the preview of your settings on the right.

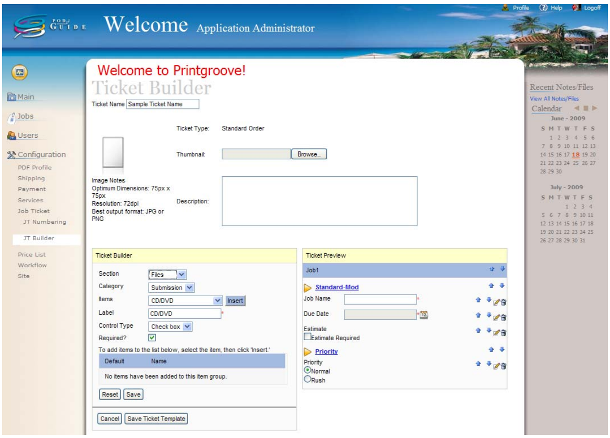


9 Repeat steps 2 through step 7 as necessary.

- To insert an item to an Item group after clicking [Save], edit the item group.
- When you insert items after clicking [Save], a new Item group is created.
- To edit Item group settings, see “To change the settings of the item group:” on page 8-25.
- If you click [Reset] instead of [Save], the fields return to their previous values.

To set the [Files] section of the Job Ticket Format:

1 From [Section], select [Files].



2 From [Category], select [Submission].

3 Select an item to set. In some cases, Label appears depending on the selected item.

4 If necessary, change the Label to make it represent the function of the item group.

- Label is a required field. You cannot leave it blank.
- The Label will appear on the Job Ticket screen.

5 From [Control Type], select [Check Box] or [Upload Control].

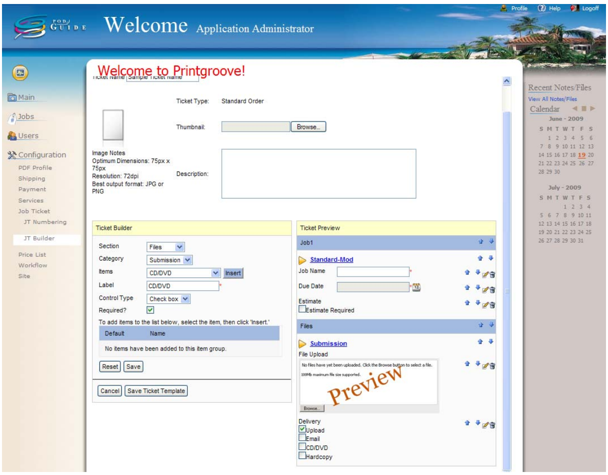
- **Check Box**: Puts a check box near each item that the user may choose.
- **Upload Control**: Displays the upload control.

6 Check the [Required?] box, to make the item group a required element.

7 Click [Insert].

- To add multiple options to one Item group repeat step 3 through step 7.
- If you change the Label or Control Type, the latest value is adopted.
- If inserted items are exclusive, you cannot insert them into the same Item group.

8 Click [Save] and check the preview of your settings on the right.

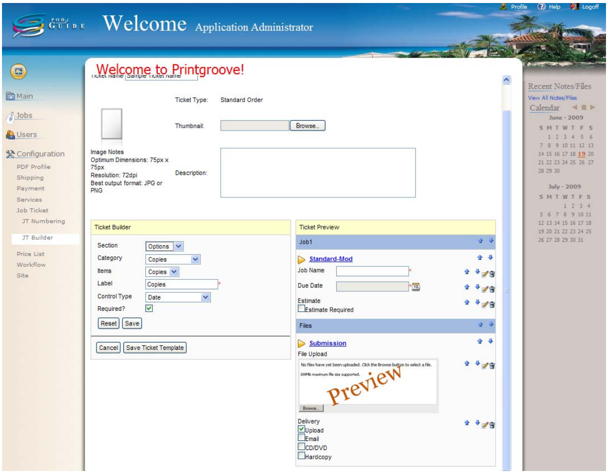


9 Repeat step 2 through step 7 as necessary.

- To insert an item to an Item group after clicking [Save], edit the item group.
- When you insert other items after clicking [Save], a new item group is created.
- To edit the settings of the item group, see “To change the settings of the item group:” on page 8-25.
- If you click [Reset] instead of [Save], the fields return to their previous values.

To set the [Options] section of the Job Ticket Format:

1 From [Section], select [Options].



2 Select the category to set. See Options Details table of “Create a Job Ticket Format” on page 8-9.

3 Select the item to set.

4 If necessary, Edit the Label to represent the function of the item group.

- Label is a required field. You cannot leave it blank.
- The Label will appear on the screen.

5 Select the control type to set for items.

- **Check Box**: Puts a check box near each item the user may choose.
- **Date**: Makes a calendar available from which to choose a date.
- **Date/Time**: Makes a calendar with time on it from which to choose a date and time.
- **Individual**: Puts a radio button next to the item that the user may mark.

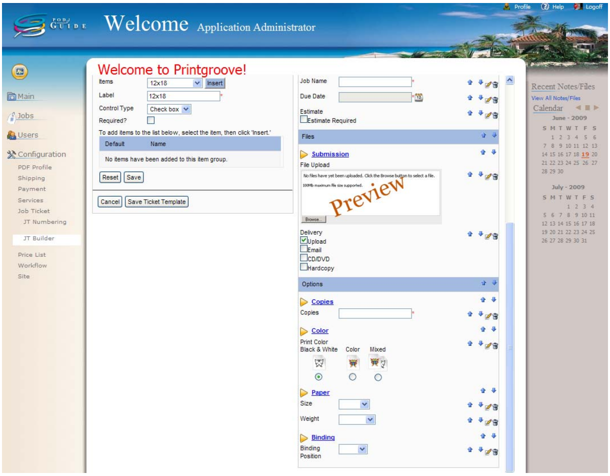
- **Numeric Data Field**: Creates a field for entering numbered values only.
- **Pull Down**: Creates a pull down menu with item choices for selection.
- **Text Field**: Creates a field for entering text.
- Some control types are not selectable for certain items.

6 Check the [Required?] box to make the item group a required element.

7 Click [Insert] to make the item appear on the Job Ticket.

- Repeat step 3 through step 7 to add multiple options.
- If you change the label, the latest value is adopted.

8 Click [Save] and check the preview of your settings on the right.

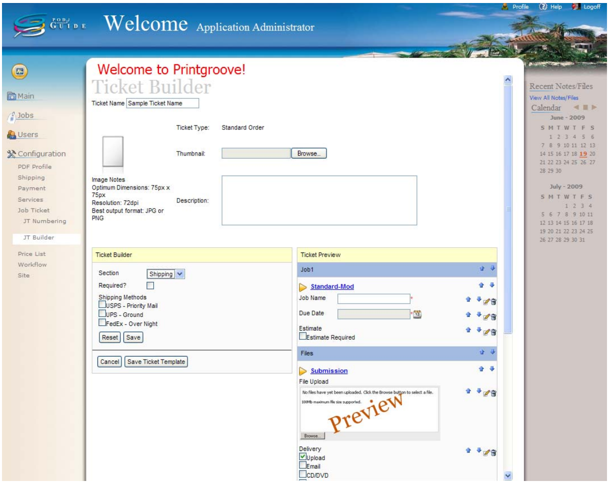


9 Repeat step 2 through step 7 as necessary.

- To insert an item to an Item Group after clicking [Save], edit the item group.
- When you insert other items after clicking [Save], a new item group is created.
- To edit an item group, see “To change the settings of the item group:” on page 8-25.
- If you click [Reset] instead of [Save], the fields return to their previous values.

To set the [Shipping] section of the Job Ticket Format:

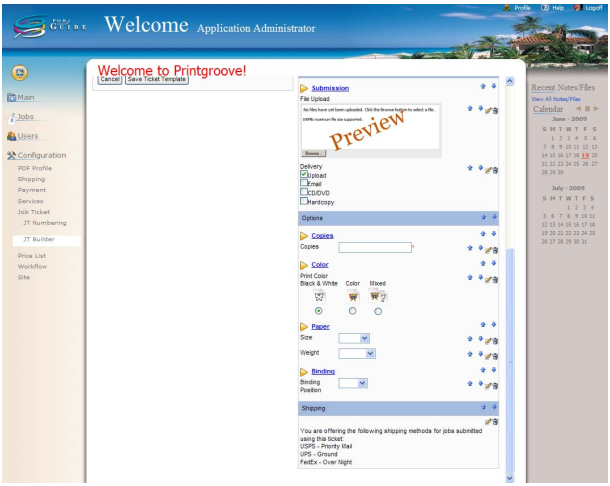
1 From [Section], select [Shipping].



2 Check the [Required?] box to make this field a required element.

3 From [Shipping Methods], mark the check box to add a shipping option to the Job Ticket.

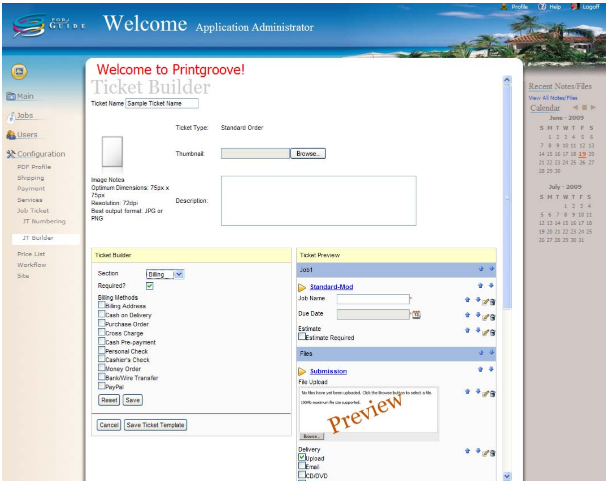
4 Click [Save] and check the preview of your settings to the right.



– If you click [Reset] instead of [Save], the fields return to their previous values.

To set the [Billing] section of the Job Ticket Format:

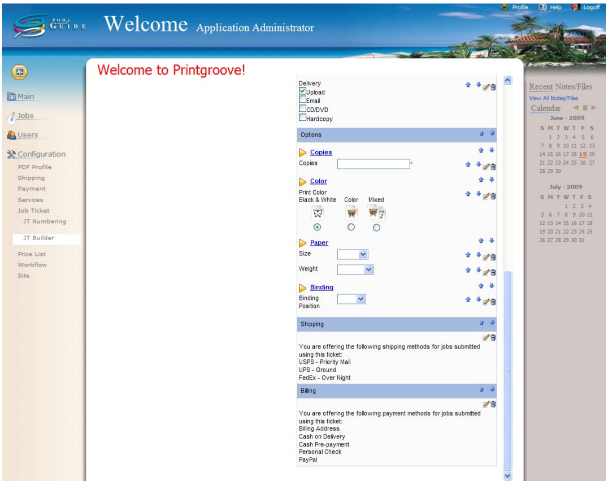
1 From [Section], select [Billing].



2 Check the [Required?] box to make this field a required element.

3 From [Billing Methods], mark the check box to add billing option to the Job Ticket.

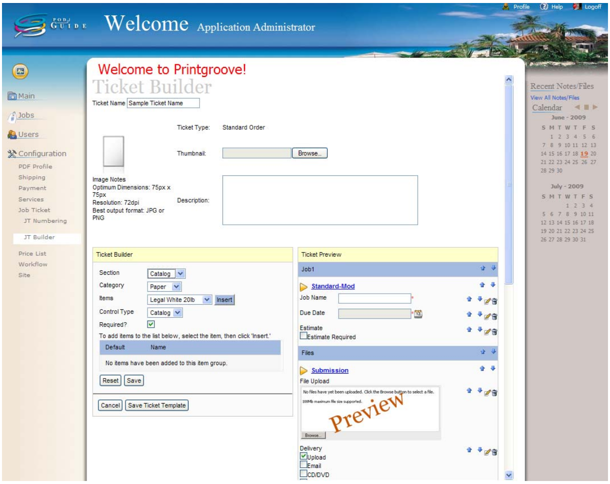
4 Click [Save] and check the preview of your settings to the right.



– If you click [Reset] instead of [Save], the fields return to their previous values.

To set the [Catalog] section of the Job Ticket Format:

1 From [Section], select [Catalog].



2 Select the category to set. See the Catalog Options table of “Create a Job Ticket Format” on page 8-9.

3 Select the item to set.

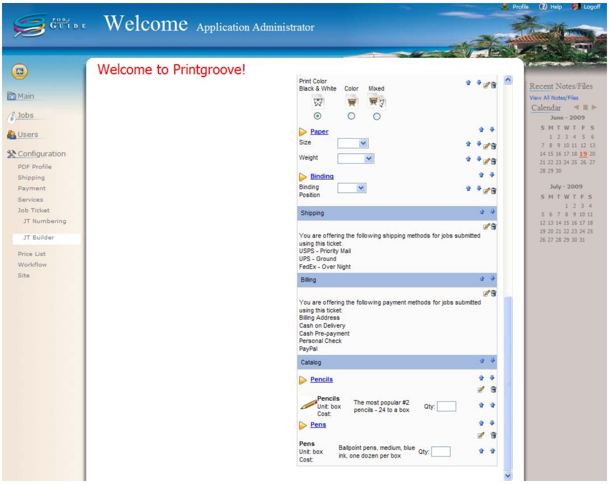
4 From [Control Type], select [Catalog].

5 Check the [Required?] box to make this field required.

6 From [Items], select the item to add and click [Insert].

7 To add another option to the category, repeat the previous step.

8 Click [Save] and check the preview of your settings to the right.



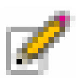
9 Repeat step 2 through step 6 as necessary.

- To insert items after clicking [Save], edit the item group.
- When you insert another item after clicking [Save], anew item group is created.
- To edit the item group, see “To change the settings of the item group:” on page 8-25.
- If you click [Reset] instead of [Save], the fields return to their previous values.

To change the settings of the item group:

1 On the Ticket Preview area, click the blue heading bar of section to edit.

2 Click the [Edit] icon at the right of the item group. The settings of the item group display in the Ticket Builder area of the screen.



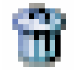
3 Change the settings on the Ticket Builder area.

4 Click [Save].

- If you click [Reset] instead of [Save], the fields return to their previous values.

To delete the item group:

1 Click the [Delete] icon to the right of the item group.

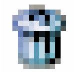


To delete the item:

1 Click the blue heading bar of section that includes the item to delete.

2 Click the [Edit] icon at the right of the item group. The settings of the item group appear on the Ticket Builder area.

3 Click the [Delete] icon at the right of the item to delete.



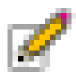
To move the position of the item group:

1 Click the [Up] or [Down] icon in line with the item group to move. On the Ticket Preview area.

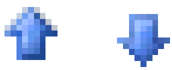
To move the position of the added item:

1 In the Ticket Preview area, click the blue heading bar of section that includes the item to move.

2 Click the [Edit] icon at the right of the item group with the item to move.

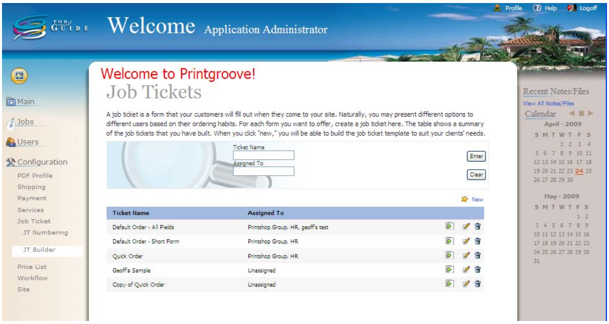


3 Click the [Up] or [Down] icon in line with the item to move.



To create a Quick Order Job Ticket Format:

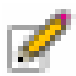
1 Click [Configuration] - [Job Ticket] - [JT Builder]. The [JT Builder] screen opens.



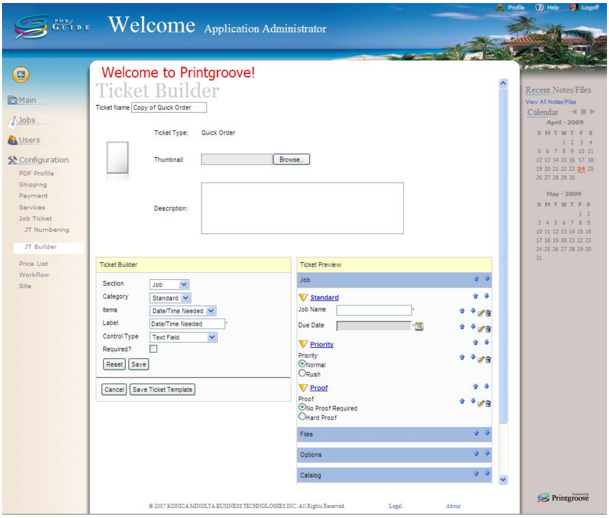
2 Locate the [Quick Order] Ticket Name in the Job Ticket table. This is the default ticket for Quick Orders. Click the [Duplicate] icon to the right of the Ticket Name.

3 A new Ticket Name [Copy of Quick Order] appears in the Job Ticket table.

4 Click the [Edit] icon to the right of the [Copy of Quick Order] entry.



5 The Ticket Builder screen opens:



6 In order to ensure that the real-time quote function continues to work properly, it is recommended that you only remove unnecessary items from the Quick Order ticket (see “Edit a Job Ticket Format” on page 8-30 for details). You may add additional items to sections using the methods noted in “To create a Standard Order Job Ticket Format:” on page 8-14. If you do add new settings, test the new Ticket when your modifications are complete to make sure the real-time quote functions properly. If it does not, added settings should be removed. The following settings are NOT recommended for Quick Orders:

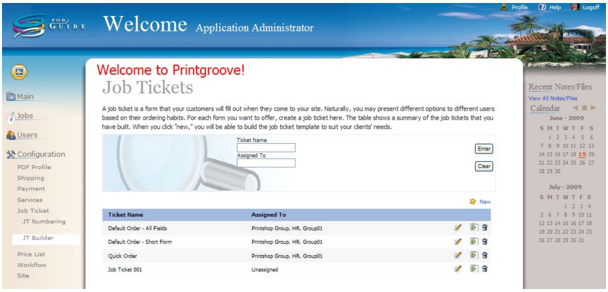
– Job --> Standard --> [Estimate Required]
– Job --> Proof --> [Soft Proof]
– Options --> Color --> [Mixed]
– Options --> Media --> Media Type
– If you click [Reset] instead of [Save], the fields return to their previous values.

8.2.2 Edit a Job Ticket Format

If you have the appropriate Role and Permissions, you can edit the Job Ticket Format.

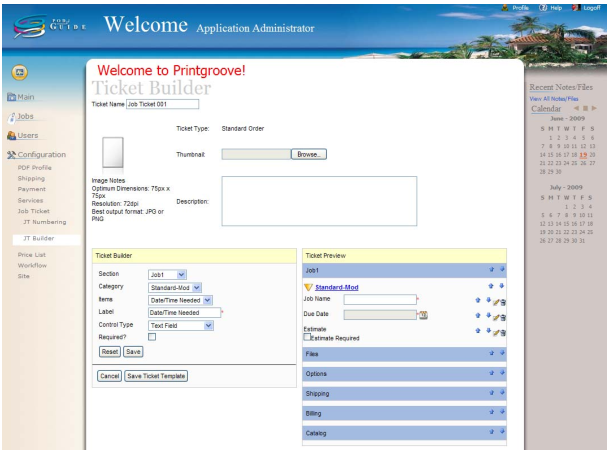
To edit a Job Ticket Format:

1 Click [Configuration] - [Job Ticket] - [JT Builder]. The [JT Builder] screen opens.



2 Click the [Edit] icon to the right of the Job Ticket Format.

3 Edit the Ticket Name.



4 Select a section.

- To set [Job] section, see “To set the [Job] section of the Job Ticket Format:” on page 8-16.
- To set [Files] section, see “To set the [Files] section of the Job Ticket Format:” on page 8-18.
- To set [Options] section, see “To set the [Options] section of the Job Ticket Format:” on page 8-20.
- To set [Shipping] section, see “To set the [Shipping] section of the Job Ticket Format:” on page 8-22.
- To set [Billing] section, see “To set the [Billing] section of the Job Ticket Format:” on page 8-23.
- To set [Catalog] section, see “To set the [Catalog] section of the Job Ticket Format:” on page 8-24.
- To change the setting of the added section or item group, see “To change the settings of the item group:” on page 8-25.
- To delete the item group, see “To delete the item group:” on page 8-26.
- To delete the item, see “To delete the item:” on page 8-26.
- To move the item group, see “To move the position of the item group:” on page 8-26.
- To move the item, see “To move the position of the added item:” on page 8-26.

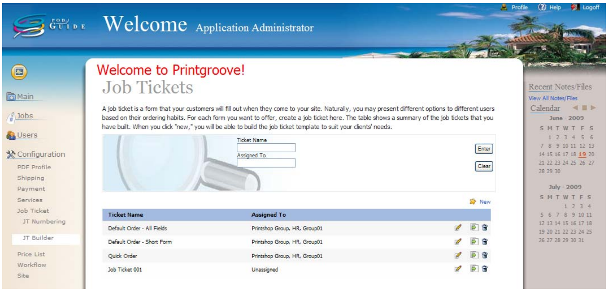
5 Click [Save Ticket Template].

8.2.3 Duplicate a Job Ticket Format

If you have the appropriate Role and Permissions, you can duplicate a Job Ticket Format.

To duplicate a Job Ticket Format:

1 Click [Configuration] - [Job Ticket] - [JT Builder]. The [JT Builder] screen opens.



2 Click the [Copy ticket] icon.

– The Name of the Duplicated Job Ticket Format is added, with the words “copy of” append to the original name.

8.2.4 Delete a Job Ticket Format

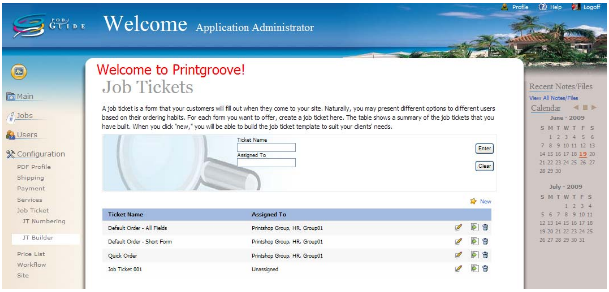
If you have the appropriate Role and Permissions, you can delete Job Ticket Formats.

Note

Job Ticket Formats cannot be deleted if they are assigned to a Group.

To delete a Job Ticket Format:

1 Click [Configuration] - [Job Ticket] - [JT Builder]. The [JT Builder] screen opens.



2 Click the [Delete] icon.

3 Click [OK].

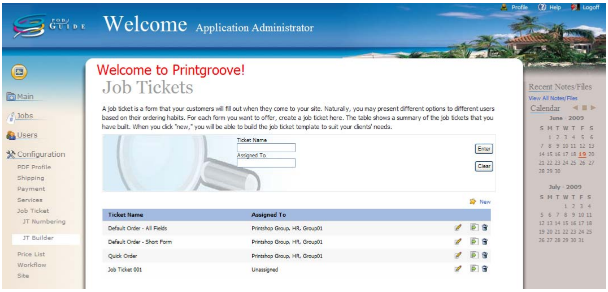
8.2.5 Search Job Ticket Formats

If you have the appropriate Role and Permissions, you can search Job Ticket Formats.

You can search for a specific Job Ticket Format, or for those with specified characteristics.

To search Job Ticket Formats:

1 Click [Configuration] - [Job Ticket] - [JT Builder]. The [JT Builder] screen opens.



2 Enter search criteria in one or both the search fields.

3 Click [Enter].

9 Other Administrative Settings

This chapter describes the following settings:
- Shipping Option
- Shipping Label Template
- Payment Method
- Invoice Template
- PayPal Support
- Printing Service
- Internal Service
- Catalog
- PDF Profile
- Inventory Management

Except for Inventory Management, only the Application Administrator can administrate these settings. The psc-level user is the only user who can set and modify the Inventory Management settings.

The follow table notes the default Roles and Permissions related to these settings.

Category	Permissions	Role "AppAdmin"					Role "Printshop_coordinator"				
		Create	Edit	Delete	View	Activate	Create	Edit	Delete	View	Activate
Configuration	Shipping Methods	ON	ON	ON	ON	ON	OFF	OFF	OFF	OFF	OFF
	Shipping Labels	-	ON	-	-	-	-	ON	-	-	-
	Payment Methods	-	-	-	-	ON	-	-	-	-	OFF
	Invoice Templates	-	ON	-	-	-	-	OFF	-	-	-
	PayPal Support	ON	ON	ON	ON	ON	OFF	OFF	OFF	OFF	OFF
	Printing Services	ON	ON	ON	ON	-	OFF	OFF	OFF	OFF	-
	Internal Services	ON	ON	ON	ON	-	OFF	OFF	OFF	OFF	-
	Catalog Services	ON	ON	ON	ON	-	OFF	OFF	OFF	OFF	-
	Inventory Management	OFF	OFF	OFF	OFF	-	ON	ON	ON	ON	-

9.1 Shipping Option

The shipping option allows your customers to specify methods of shipping.

By default, only the Application Administrator can do the following tasks to configure shipping options:

- Create shipping options
- Edit shipping options
- Delete shipping options
- View shipping options
- Activate and deactivate shipping options

9.1.1 Predefined Shipping Option

Shipping options include the name of the provider, the shipping and the handling rates. Printgroove POD Guide has three predefined shipping options.

- You can edit, delete, deactivate, and activate the default shipping options.
- You can make them available on the job ticket. For details, see "Job Ticket Format Settings" on page 8-9.
- You can add courier-specific tracking information to a shipping option.
- The default shipping options are as follows:

Provider	Shipping Rate and Handling Rate
USPS	Shipping rate: Flat rate $0, Handling Rate: Flat rate $0
UPS	Shipping rate: Based on Order Amount, Handling Rate: Flat rate $0
FedEx	Shipping rate: Flat rate $0, Handling Rate: Flat rate $0

"Flat rate" means a single amount which is charged for each shipment, no matter the size.

"Based on Order Amount" means different amounts to be charged depending on how much the customer orders.

9.1.2 Create a Shipping Option

If you have the appropriate Role and Permissions, you can create a new shipping option.

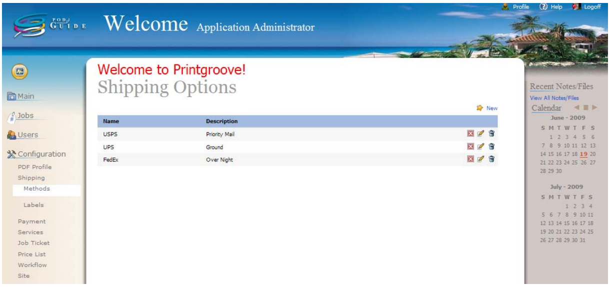
✎...

Note

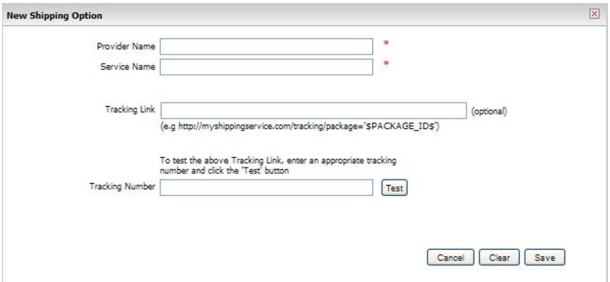
If you add a new shipping option, you must also make it available on the Job Ticket under [Configuration] - [Job Tickets] - [JT Builder].

To create a shipping option:

1 Click [Configuration] - [Shipping] - [Methods]. The [Shipping Options] screen opens.



2 Click [New]. The [New Shipping Option] screen opens.



3 Enter the name of shipping provider in [Provider Name].

4 Enter the name of shipping service in [Service Name].

– If you wish to add the courier's tracking information, complete Steps 5 - 8. If you do not wish to do this, skip to Step 9.

5 Enter the shipping courier's tracking link URL. An example of this is:

(e.g. http://myshippingservice.com/tracking/package='1Z0123567890123456')

6 Because the tracking number or Package ID of shipping courier's tracking links may not always be in the same position of the URL, the special designation $PACKAGE_ID$ allows the tracking number to be inserted at the appropriate position of the tracking link URL.

Printgroove POD Serve/Guide will replace the tracking ID portion of the Tracking Link entered above with the string $PACKAGE_ID$. The new Tracking Link value should look like this:

(e.g. http://myshippingservice.com/tracking/package='$PACKAGE_ID$')

7 To verify that this link works, enter an actual hyperlinked tracking number for the same courier in the [Tracking Number] field. (This should be a tracking link previously assigned outside of Printgroove POD Guide.)

8 Click [Test]. If the test is successful, the courier’s tracking site should open and you should be able to gather the details of the order associated with the Tracking Number you entered.

9 Click [Save].

10 To cost these Shipping Methods, go to Configuration --> Price List. Open a Price List, scroll down to the [Delivery Types] section.

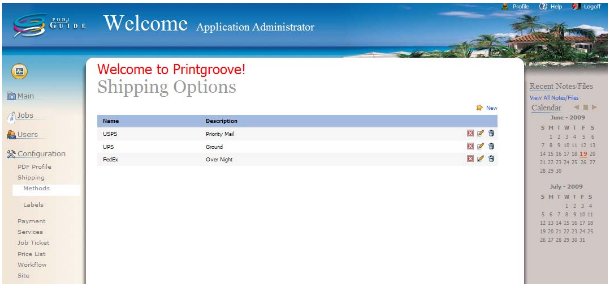
There you can set Shipping and handling rates for all Shipping Methods included in your Job Ticket (see “Create a Price List” on page 6-2 then locate the [Delivery Types] section for precise instructions).

9.1.3 Edit a Shipping Option

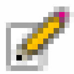
If you have the appropriate Role and Permissions, you can edit shipping options.

To edit Shipping Options:

1 Click [Configuration] - [Shipping] - [Methods]. The [Shipping Options] screen opens.



2 Click the [Edit] icon to the right of the shipping option.



3 If necessary, edit the provider name, service name or tracking link.

– Note
Since tracking URLs can change at any time and at the discretion of the courier, it is recommended that you periodically check and ensure the validity of any tracking link assigned to a courier service.

4 Click [Save].

9.1.4 Delete a Shipping Option

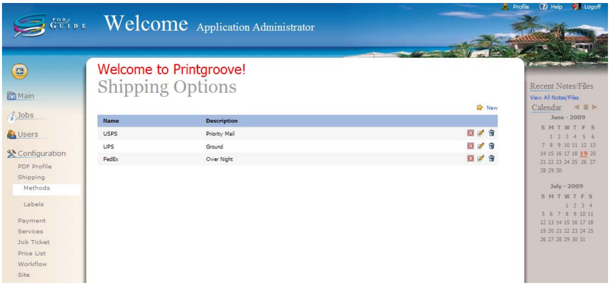
If you have the appropriate Role and Permissions, you can delete a shipping option.

You cannot delete a shipping option if it has been assigned to a Job Ticket.

Rather than delete a shipping option, you can instead deactivate it. For details, see “Deactivate or Activate a Shipping Option” on page 9-7.

To delete Shipping Option:

1 Click [Configuration] - [Shipping]- [Methods]. The [Shipping Options] screen opens.



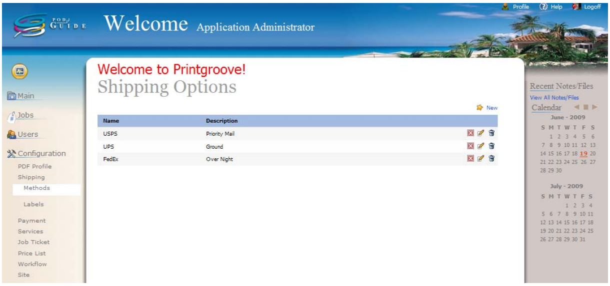
2 Click the [Delete] icon.

9.1.5 Deactivate or Activate a Shipping Option

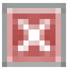
If you have the appropriate Role and Permissions, you can deactivate and activate a shipping option.

To deactivate or activate a shipping option:

1 Click [Configuration] - [Shipping]- [Methods]. The [Shipping Options] screen opens.



2 Click the [Deactivate] icon to the right of the shipping option.



—Or—

3 Click the [Activate] icon to the right of the shipping option. This option only appears if the shipping option was previously Deactivated.

9.2 Shipping Label Template

The shipping label template is for creating shipping labels. When a job is complete, one or more shipping labels can be generated by the system for you to affix to outgoing packages. Shipping label templates can be used with label printers and can be customized.

By default, only the Application Administrator, “appadmin”, and the Print-shop Coordinator, “psc”, can edit shipping label templates.

When you print the shipping label, the customer portion is created. For information about printing shipping labels, see “To print a shipping label:” on page 4-46.

9.2.1 Predefined Shipping Label Template

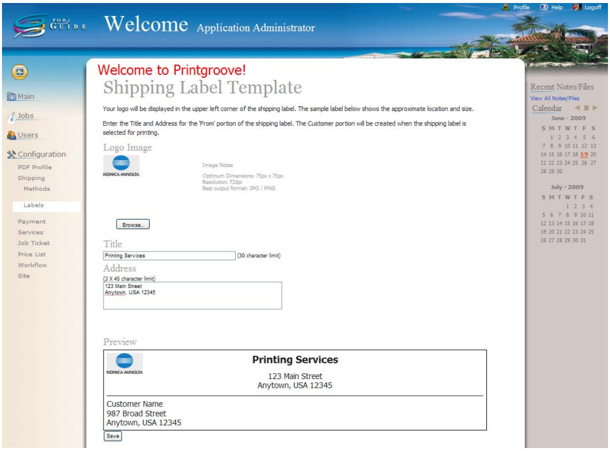
The shipping label template includes the Reprographics Department address, logo, and title. The logo will appear in the upper left corner of the shipping label. Printgroove POD Guide has a default shipping label template which you can edit:

9.2.2 Edit a Shipping Label Template

If you have the appropriate Role and Permissions, you can edit the shipping label template.

To edit a shipping label template:

1. Click [Configuration] - [Shipping] - [Labels]. The [Shipping Label Template] screen opens.



2. To upload a new logo, click [Browse] and [Select file(s) to upload].

3. Specify the image file and click [Open].

4. Enter your company name to print at the top of the shipping label.

5. Enter your company address as it should appear on the shipping label.
   - The customer address is taken from the print order placed by the customer.
   - The Printgroove POD Guide prints the customer address on the shipping label when the Printshop employee prints them.

6. Click [Save].

9.3 Payment Method

Printgroove POD Guide has predefined payment methods for users to select.

By default, only the Application Administrator can activate and deactivate payment methods.

9.3.1 Predefined Payment Method

You can make any or all of the payment methods available on the job ticket. For details, see “Job Ticket Format Settings” on page 8-9.

The following table notes the default payment methods:

Payment Method	Description
Billing Address	User can select to receive billing at the address specified by user.
Cash on Delivery	User can select to make payment with cash on delivery.
Purchase Order	User can select to use purchase order.
Cross Charge	User can select to use cross charge.
Cash Pre-payment	User can pre-pay for the order using cash
Personal Check	User can pay using a personal check
Cashier’s Check	User can pay using a cashier’s check
Money Order	User can pay using a money order
Bank/Wire Transfer	User can pay using a Bank/Wire transfer
PayPal	User can pay using PayPal

...

Note

You can deactivate and/or activate any of the payment methods.

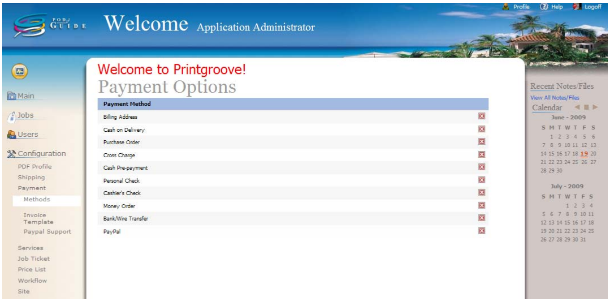
The PayPal option requires that the printshop have an existing Merchant’s Account and that account be linked to Printgroove POD Guide. See “PayPal Support” on page 9-15 for setup details.

9.3.2 Deactivate or Activate a Payment Method

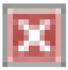
If you have the appropriate Role and Permissions, you can deactivate and activate payment methods.

To deactivate and activate a Payment Method:

1 Click [Configuration] - [Payment] - [Methods] The [Payment Options] screen opens.



2 To deactivate, click the [Deactivate] icon to the right of the payment method.



3 To activate, click the [Activate] icon to the right of the payment method. This option only appears if the payment method was previously Deactivated.

9.4 Invoice Template

Invoices are generated using the invoice template. This can be customized.

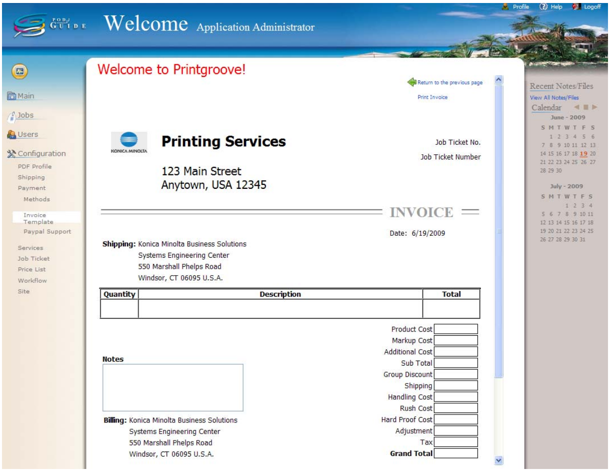
By default, only the Application Administrator can edit the invoice template.

When you print an invoice, the customer portion is created automatically. For details about this procedure, see “Generate an Invoice” on page 4-35.

9.4.1 Predefined Invoice Template

The invoice template includes the Printshop address, logo, and title. The logo will appear in the upper left corner of the invoice.

Printgroove POD Guide has one default invoice template:

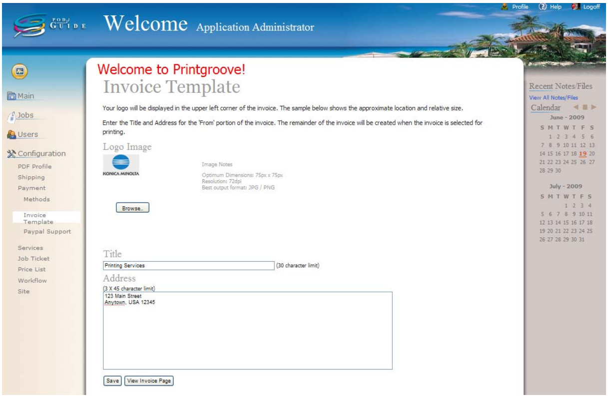


9.4.2 Edit the Invoice Template

If you have the appropriate Role and Permissions, you can edit the invoice template.

To edit the invoice template:

1 Click [Configuration] - [Payment] - [Invoice Template]. The [Invoice Template] screen opens.



2 To upload a new logo, click [Browse] and select an image file.

– The optimum size for the logo image is 75 x 75 pixels, a resolution of 72dpi, and ".jpg" or ".png" format for maximum compatibility.

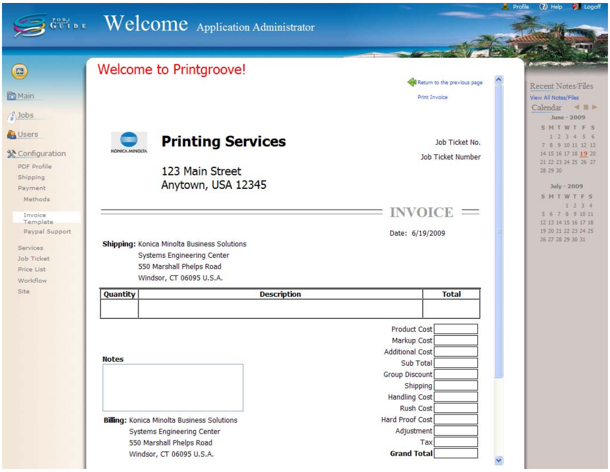
3 Specify the image file and click [Open].

– The file uploaded in Step 3 is automatically saved to Printgroove POD Guide.
– The [Save] button will have no effect on the file.

4 Enter your company name to print at the top of the invoice.

5 Enter your company address.

6 Click [View Invoice Page].



7 Click [Return to the previous page].

8 Click [Save].

9.5 PayPal Support

A printshop has the option of offering PayPal as a method their customers may use to make payments for orders. To support this, the printshop must first set up a Merchant Account with PayPal. Once that account is established, Printgroove POD Guide and Serve can be configured so that a customer must go through PayPal to pay for a job using a credit card. This also requires that each customer setup or access their existing PayPal account.

The PayPal process enables a seamless real-time experience for the user: they can place an order, receive a real-time quote, select the PayPal option and prepay the order all in one session. When the session completes, the job is sent to the printshop where it can be scheduled and processed.

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Note
When the PayPal is used to make a payment, the PFP package license of the Printgroove POD Serve is required.

PayPal also requires some advanced network setup. The network interface cards (NICs) of the Printgroove POD server must be setup to support PayPal. A dedicated firewall appliance must then be setup to protect the Printgroove POD Server from unauthorized Internet access. If required, see your Konica Minolta Sales Representative for details about these procedures.

9.5.1 PayPal Merchant Account Requirement

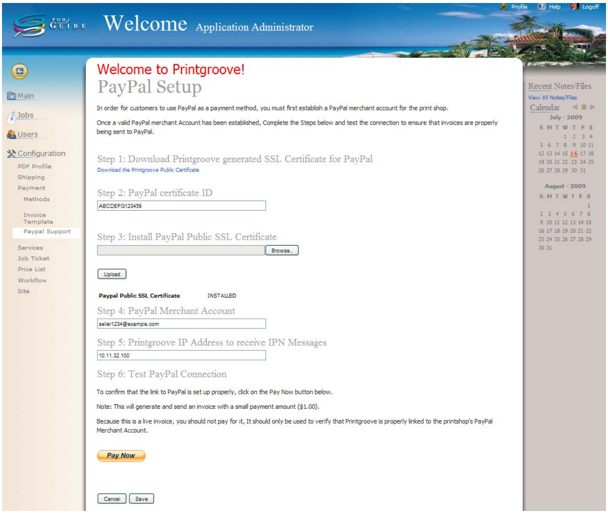
A printshop’s PayPal Merchant Account information is required in order to support PayPal's interaction with Printgroove POD. The user may refer to www.paypal.com for details about how to create an account. Once created, PayPal can be implemented and used as a payment option.

9.5.2 Set Up PayPal

If you have the appropriate Role and Permissions, you can set up PayPal, making it available for use as a customer payment method.

To set up PayPal:

1 Go to Configuration --> Payment --> PayPal Support. The PayPal Setup screen opens:



2 Click the [Download the Printgroove Public Certificate] hyperlink to download the certificate file locally.

3 Log in to your PayPal Merchant Account. The My Account screen opens. In the second menu bar, click [Profile]. The Profile Summary screens opens.

4 Under [Selling Preferences], click [Encrypted Payment Settings]. The Website Payment Certificates screen opens. In the [Your Public Certificates] section, click the [Add] button. The Add Certificate screen opens.

5 Click the [Browse...] button, navigate to and then upload the Printgroove SSL Certificate downloaded locally in the procedure above.

6 Click the [Add] button.

7 When successfully completed, a confirmation screen opens. Scroll to the bottom of the screen and locate the Cert ID number assigned to your public certificate. Copy the Cert ID. Keep the PayPal Merchant Account screen open.

8 Return to the PayPal Setup screen in Printgroove POD Guide. Paste the Cert ID in the PayPal Certificate ID field.

9 Return to the PayPal Merchant Account screen. Locate the PayPal Public Certificate section and click the [Download] button. The Opening paypal_cert_pem.txt screen opens. Save the file. You may close the PayPal Merchant Account screen.

10 Return to the PayPal Setup screen in Printgroove POD Guide.

11 Click the [Browse...] button, navigate to the file from the previous step. When located, click [Open]. The file name appears on the PayPal Setup screen.

12 Click the [Upload] button.

13 Fill in the PayPal Merchant Account field.

14 Enter the publicly accessible IP Address or URL of the Printgroove POD Server in the [Printgroove IP Address to receive IPN Messages] field. This only needs to be set once unless the publicly accessible IP Address or URL of the Printgroove POD Server changes. This IP Address/URL is used by PayPal to send payment notification to Printgroove. If the IP Address/URL is not provided, payment verification cannot be completed properly by Printgroove.

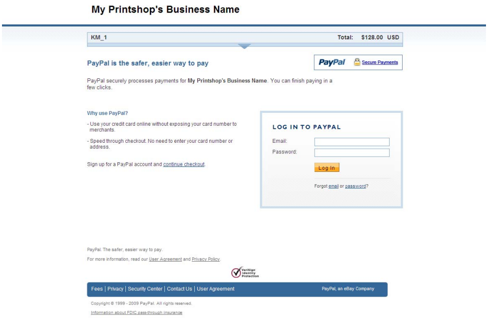
15 Once the above steps are complete, verify that the encrypted invoice is being successfully sent to PayPal. This is done using the [Pay Now] button. When you click this button, an on-the-fly invoice is sent to PayPal. This simulation will also confirm that the value entered in the PayPal Merchant Account field links Printgroove to the correct merchant portal site on PayPal.

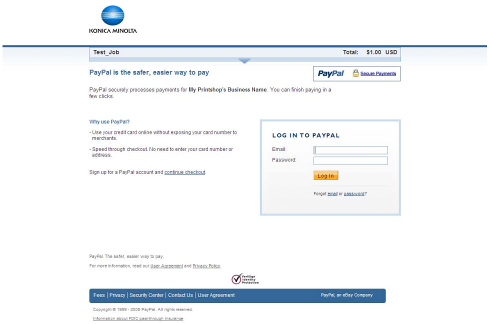
16 If you have previously entered and saved values, they will be applied when you click the [Pay Now] button. If you make changes to the settings, those values will be used for the test. To undo all changes made above, click the [Cancel] button and the previously stored settings will be retained.

17 Click the [Pay Now] button. Because this is a test invoice you should not complete the payment process.

18 The PayPal screen opens in a new browser window. The appearance of the screen can vary, based on whether or not your printshop has a logo associated with the PayPal Custom Payment Page Styles. In the example below, the first screen has a logo. The second screen does

not. When a logo is not available, the printshop's registered business name should be displayed.





19 If an invalid or non-existent PayPal Merchant Account was entered in Step 4 of the Printgroove POD Guide PayPal Setup screen (see above), an error page is displayed.

– Failure to set the correct PayPal Merchant Account value will prevent your printshop from receiving payment for PayPal orders.

20 Close the window by clicking (X).

21 Click the [Save] button to commit your changes. To keep the existing settings, click the [Cancel] button. When you click [Cancel], none of the new changes are applied.

9.6 Printing Service

Printing service is for printing with JDF (Job Definition Format) standard features like binding, stapling, folding, coloring, etc.

By default, only the Application Administrator can do the following tasks:
- Create printing service
- Edit printing service
- Delete printing service
- View printing service
- Import PDF profile .joboptions-type file

Printing services contain categories and each category is associated with the job, files, and options sections of the Job Ticket.

Categories contain “items”. Items represent user-selectable options on Job Tickets. The built-in items in Printgroove POD Guide represent a single print job value for each feature. Printgroove permits the building of items to represent multiple job feature values or “elements”.

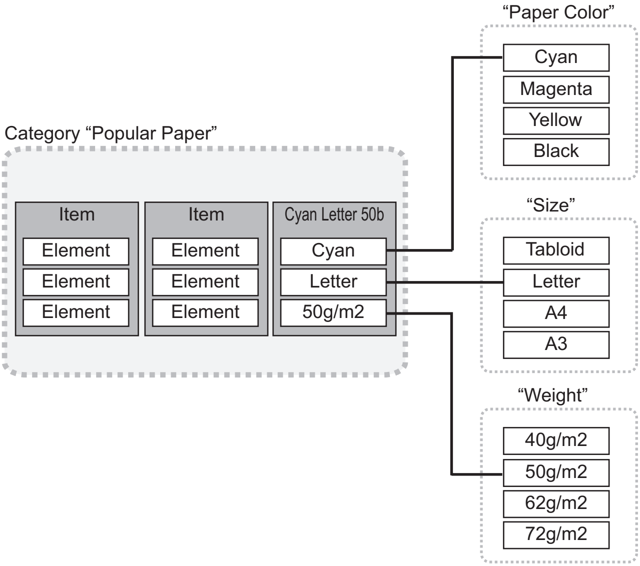
Items under each category can be defined by elements.

An element is one part of the definition of the “items.”

Elements are grouped according to JDF (Job Definition Format) standard features.

Creating and/or editing printing service means creating and/or editing categories defined by items which are defined by elements.

The relationship of categories, items, and elements is shown in the following illustration.



9.6.1 Predefined Printing Services

Printgroove POD Guide has default printing services with 21 default categories including items. You can make those available on the job ticket. For details, see "Job Ticket Format Settings" on page 8-9.

For "categories" and "items", see "Create a Job Ticket Format" on page 8-9.

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Note

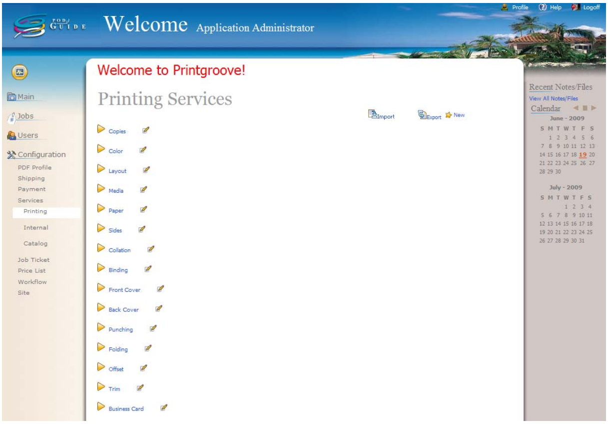
Default "items" represent single print job values for each feature, not multiple job feature values.

9.6.2 Create a Printing Service

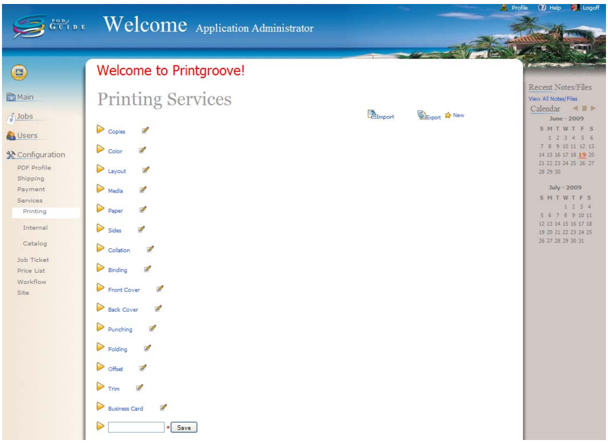
If you have the appropriate Role and Permissions, you can create printing services.

To create a printing service:

1 Click [Configuration] - [Services] - [Printing]. The [Printing Services] screen opens.

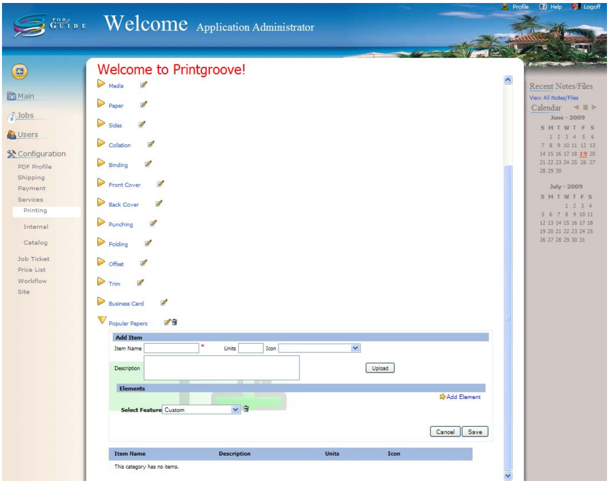


2 Click [New].



3 Enter a new category name for the printing service and click [Save].

4 To add a new item to the category, click the category name you entered.



5 Enter the item name for the printing service.

6 Enter the unit for calculation of cost. Costing is completed in the Price List (see “Create a Price List” on page 6-2 then locate the [Services] section for precise instructions).

7 Select the icon that will appear next to the item when user selects it from the list of [printing services] to attach to a job.

– If you do not find the icon file in the icon pull-down, you can upload one from your computer:

a Click [Upload] to display the Upload an Icon screen and click [Browse] to display the Select file(s) to upload screen.

b Specify the con file and click [Open].

c Click [Done].

8 Enter the item description.

9 Select the feature to be added to the item from the drop-down. Once a value is selected, a secondary drop-down opens.

– [Custom] has no secondary drop-down.

10 Select the a value from the secondary drop-down.

11 Click [Add Element].

12 Repeat Step 10 through Step 13 to add more elements.

13 Click [Save].

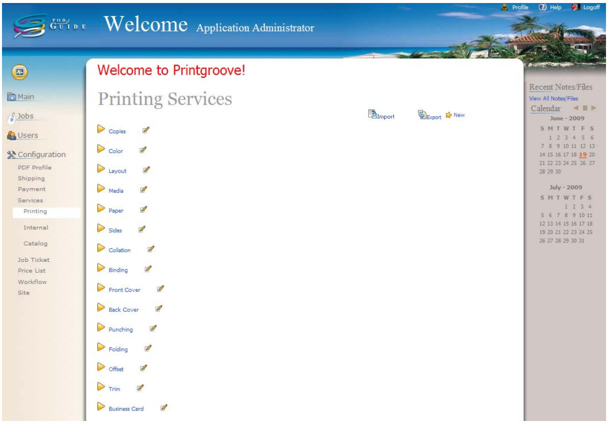
14 To close the setting fields, click the category name.

9.6.3 Edit a Printing Service

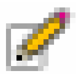
If you have the appropriate Role and Permissions, you can edit printing services.

To edit a Printing Service:

1 Click [Configuration] - [Services] - [Printing]. The [Printing Services] screen opens.



2 To change category name, click the [Edit] icon to the right of the category name to edit, change it and click [Save].



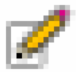
3 To add new a item, click the category name to display setting fields and follow the procedures of step 5 through step 15 described in “Create a Printing Service” on page 9-21.

4 To edit the item, click the category name to display the setting fields and item list. Then follow the procedures of “To edit an item:” on page 9-24.

5 To delete the item, click the category name to display the setting fields and item list. Then follow the procedures of “To delete an item:” on page 9-24.

To edit an item:

1 Click the [Edit] icon to the right of the item of the item list.



2 If necessary, change the item name, unit, and description.

3 To change the icon

a Click [Upload], and click [Browse].

b Select the icon file and click [Open].

c Click [Done] to return to Printing Services screen.

4 To change the element, select a different feature and element from [Select Feature] and the drop-down next to the [Select Feature].

5 To add another element click [Add Element], select the feature from [Select Feature] and select the element from the drop-down next to the [Select Feature].

6 To delete the element, click the [Delete] icon to the right of the item or element.

7 Click [Save] to save item and elements.
—or—
Click [Cancel], to cancel change the item and elements.

8 To close the setting fields, click the category name.

To delete an item:

You cannot delete items in use in active job tickets.

1 Click the [Delete] icon to the right of the item.

2 Click [OK].

9.6.4 Delete Printing Service

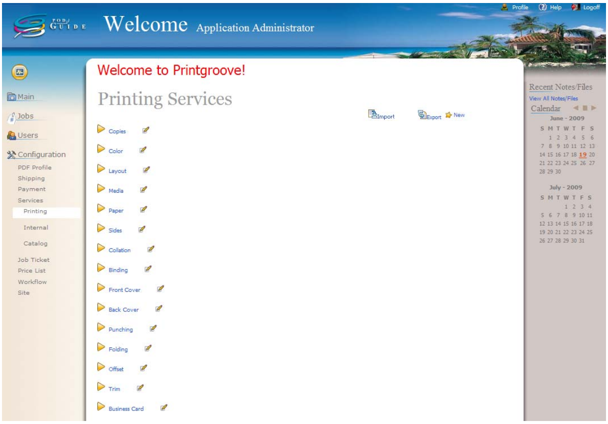
If you have the appropriate Role and Permissions, you can delete printing services.

Note

You cannot delete the default printing service or any printing service currently in use.

To delete Printing Service:

1 Click [Configuration] - [Services] - [Printing]. The [Printing Services] screen opens.



2 Click the [Delete] icon to the right of the printing service.

3 Click [OK].

– If it is used currently, printing service cannot be deleted.

9.7 Import a PDF Profile

Printgroove POD Guide may be used to located then upload a PDF Profile (a .joboptions-type file) to the Printgroove POD server. The .joboptions-type file contains configuration settings that when selected, produce a document consistent with the predefined PDF profile. Once loaded, the Printgroove POD Driver will take this profile and apply it to all print jobs it processes. This profile is applied to GhostScript as well as Acrobat.

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Note

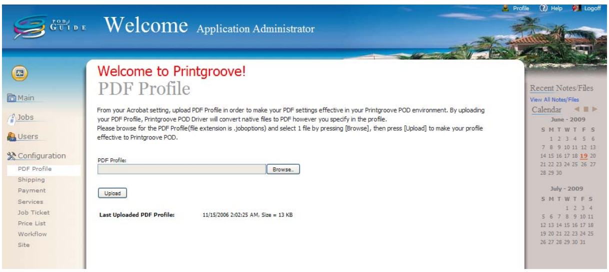
Printgroove POD Queue also provides this setting. Only one PDF Profile is stored on the Printgroove POD server.

Please note the following:

- .joboption-files are generally stored in the in Adobe's Program Files. A typical pathway would be:
  c:\Program Files\Adobe\Acrobat X.0\Distillr\Settings*.joboptions
- If you want to modify a profile, double-click the .joboptions file on a PC upon which Adobe Acrobat is installed.

To import a job options file:

1 Click [Configuration] - [PDF profile]. The [PDF Profile Upload] screen opens.



2 Browse to the folder containing the .joboptions-type file.

3 Select a *.joboptions file and click [Open] then [Upload]. The file is up-loaded to the POD Server. The [Last Updated PDF Profile] notes the time and date stamp of the last profile as well as the file size.

9.8 Internal Service

An internal service is something that a member of the Printshop does to complete a print job that has an explicit cost. (For example, spell checking could be set up as an internal service.)

By default, only the Application Administrator can do the following:

- Create an internal service
- Edit an internal service
- Delete an internal service
- View an internal service

9.8.1 Predefined Internal Services

Internal services includes item name, cost and units. Printgroove POD Guide includes two default internal services. You can make them available on the job ticket. For details, see “Job Ticket Format Settings” on page 8-9.

The following table list the default internal services:

Internal Services	Description
Spell Checking	Units = hour
Artwork	Units = hour

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Note

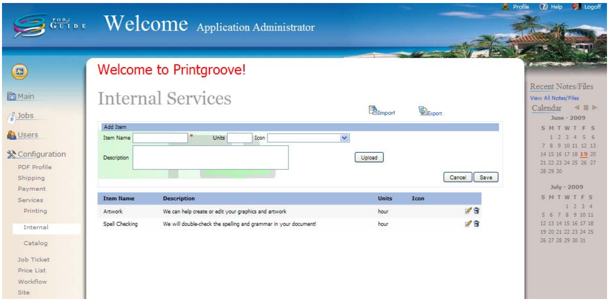
You can edit or delete the default internal services.

9.8.2 Create an Internal Service

If you have the appropriate Role and Permissions, you can create internal services.

To create an internal service:

1 Click [Configuration] - [Services] - [Internal] menu. The [Internal Services] screen opens.



2 Enter the name of the internal service.

3 Enter the unit for calculation of cost. Costing is completed in the Price List (see “Create a Price List” on page 6-2 then locate the [Internal Services] section for precise instructions).

4 Select the icon to appear next to the service when the customer selects it.

– You can upload an icon from your computer.

a Click [Upload].

b Click [Browse] to display the [Select file(s) to upload] screen.

c Select an icon and click [Open].

5 Enter a description of the internal service.

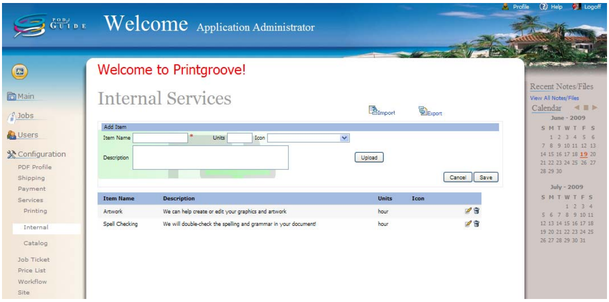
6 Click [Save].
—or—
Click [Cancel].

9.8.3 Edit an Internal Service

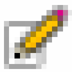
If you have the appropriate Role and Permissions, you can edit Internal Services.

To edit an Internal Service:

1 Click [Configuration] - [Services] - [Internal] menu. The [Internal Services] screen opens.



2 Click the [Edit] icon to the right of the internal service to edit.



3 If necessary, change item name, cost, unit, icon or description.

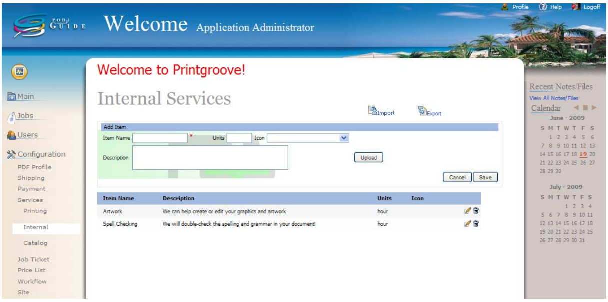
4 Click [Save].
—or—
Click [Cancel].

9.8.4 Delete an Internal Service

If you have the appropriate Role and Permissions, you can delete internal services.

To delete an Internal Service:

1 Click [Configuration] - [Services] - [Internal] The [Internal Services] screen opens.



2 Click the [Delete] icon (trash box icon) to the right of the service.

3 Click [OK].

9.9 Catalog

The Catalog can be used to offer items for sale which may not relate specifically to fulfilling a print job. For example, customers may order such items as paper and binders from your Printshop.

By default, only the Application Administrator can do the following tasks:

- Create a catalog
- Edit a catalog
- Delete a catalog
- View a catalog

9.9.1 Predefined Catalogs

Catalog includes item name, cost and units. Printgroove POD Guide has three default catalogs. You can edit or delete the default Catalogs and make them available on the job ticket. For details, see “Job Ticket Format Settings” on page 8-9.

For steps, see “Edit a Job Ticket Format” on page 8-29.

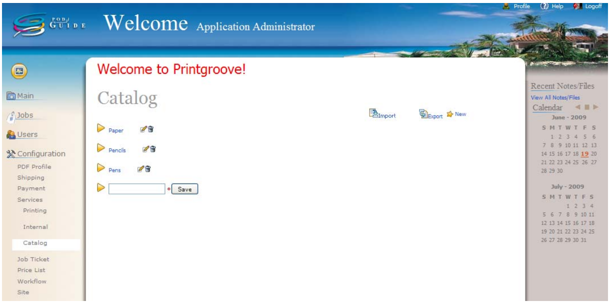
9.9.2 Create a Catalog

If you have the appropriate Role and Permissions, you can create new Catalogs.

To create a catalog:

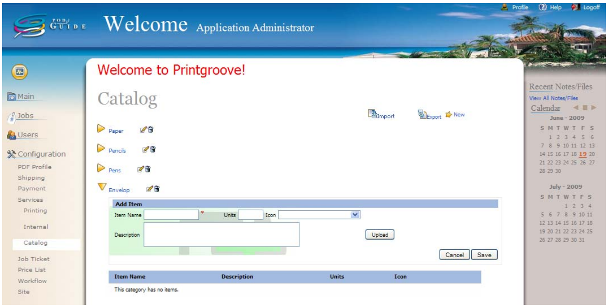
1 Click [Configuration] - [Services] - [Catalog]. The [Catalog] screen opens.

2 Click [New].



3 Enter a category name and click [Save].

4 Click the category name you entered. Setting fields for the item appear below the category name.



5 Enter the name of the item.

6 Enter the unit for calculation of cost. Costing is completed in the Price List (see “Create a Price List” on page 6-2 then locate the [Catalog Items] section for precise instructions).

7 Select the icon to appear next to the service.

– You can upload icon from your computer.
Printgroove POD Guide and Serve both support a zoom function for this image. The size of the zoom roll-over can vary and will depend upon the size of the icon uploaded here. The maximum display size is 600 x 600 dpi. If the original icon is larger than this, scroll bars are added to the zoom view. The icon display is generated by shrinking the original file down to 60 x 60 dpi. If the original image is smaller than this, the icon will display as its true size.

a Click [Upload] to display [Upload an Icon] screen.

b Click [Browse] to display [Select file(s) to upload] screen.

c Select the icon and click [Open].

d Click [Done].

8 Enter the description of the item.

9 Click [Save].
—Or—
Click [Cancel].

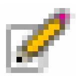
9.9.3 Edit a Catalog

If you have the appropriate Role and Permissions, you can edit the catalog.

To edit a Catalog:

1 Click [Configuration] - [Services] - [Catalog]. The [Catalog] screen opens.

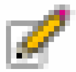
2 Click the [Edit] icon to the right of the Category name, change the name and click [Save].



– To add a new item, click the Category name to display setting fields. Then follow the procedures of Step 5 - Step 15 described in “Create a Catalog” on page 9-31.
– To edit an item, click the category name to display setting fields and item list. Then follow the procedures of “To edit an item:” on page 9-34.
– To delete an item, click the category name to display setting fields and item list. Then follow the procedures of “To delete an item:” on page 9-34.

To edit an item:

1 Click the [Edit] icon to the right of the item.



2 If necessary, change the item name, unit and description.

3 To change the icon:

a Click [Upload] to display [Upload an Icon] screen.
b Click [Browse] to display [Select file(s) to upload] screen.
c Select the icon and click [Open]. [Upload an Icon] screen reappears.
d Click [Done] to return to the [Printing Services] screen.

4 Click [Save].
—Or—
Click [Cancel].

To delete an item:

1 Click the [Delete] icon (trash icon) icon to the right of the item.

2 Click [OK].

– The item cannot be deleted when the item is in use in active job tickets.

9.9.4 Delete a Catalog

If you have the appropriate Role and Permissions, you can delete catalogs.

To delete a catalog:

1 Click [Configuration] - [Services] - [Catalog]. The [Catalog] screen opens.

2 Click the [Delete] icon to the right of the catalog.

3 Click [OK].

– The catalog cannot be deleted if it is use.

9.10 Export/Import Printing, Internal and Catalog Services Data

If you have the appropriate Role and Permissions, you can export services data as a comma separated file (CSV). Service data previously exported can be imported back into Printgroove POD Guide.

✎...

Note

An exported .CSV file can only be imported back into the same version of Printgroove POD Guide that was used to create the original, exported file. For example, if a .CSV file is exported from a 1.3.2 version of Guide it cannot be imported back into a 1.5 version of Guide; however, it can be imported back into a 1.3.2 version of Guide.

To export service data:

1. Click [Configuration] - [Services] - [Printing --or-- Internal-- or -- Catalog] - [Export].

2. Select a destination folder and click [Save].

To import service data:

1. Click [Configuration] - [Services] - [Printing --or-- Internal-- or -- Catalog] - [Import].

2. Select a CSV file and click [Open].

9.11 Hot File Folder Location Data

If you need to provide external hot folder access to your Printgroove POD Guide Workflow Nodes, as described in “Create a Node” on page 7-2, you must provide the following information.

External access to hot folder files is via SMB. From Windows Explorer, the path is:

- \\{IP Address of Printgroove POD server}\hotfolder\out\{NodeName}\{JTID}*
- \\{IP Address of Printgroove POD server}\hotfolder\in\{NodeName}\{JTID}*

File Naming Convention for the Outbound Hot Folder:

The file naming convention of HotFolder(out) is:

- //{IP Address of Printgroove POD server}/hotfolder/out/{NodeName}/{JTID}/

For example, if you have defined an outbound node named “node-B”, and if you have a job ticket ID of 000X, and related files of Body.pdf, Cover.pdf, and Instruction.txt,

The path to the files in the HotFolder will be;

- //{IP Address of Printgroove POD server}/hotfolder/out/node-B/0000X/0000X.jdf
- //{IP Address of Printgroove POD server}/hotfolder/out/node-B/0000X/Body.pdf
- //{IP Address of Printgroove POD server}/hotfolder/out/node-B/0000X/Cover.pdf
- //{IP Address of Printgroove POD server}/hotfolder/out/node-B/0000X/Instruction.txt

File Naming Convention for the Inbound Hot Folder:

The file naming convention of HotFolder(in) is:

- //{IP Address of Printgroove POD server}/hotfolder/in/{NodeName}/{JTID}/*

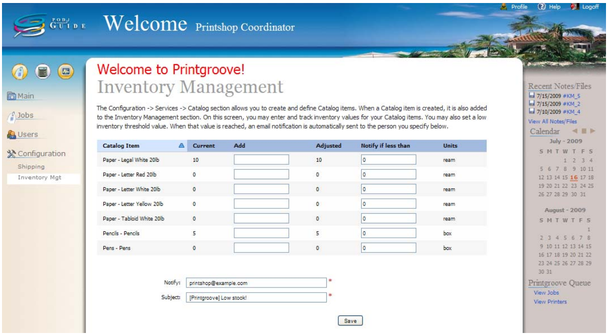
9.12 Inventory Management

Inventory Management allows the user to track and modify inventory values for all Catalog items. On this screen the user may also specify a low threshold value for inventory items and a contact person. When the low threshold is reached, Printgroove POD Guide sends an low threshold notification email message to the contact person at the noted email address.

If you have the appropriate Role and Permissions, you can enter Inventory Management values.

To use Inventory Management:

1 Go to the Configuration --> Inventory Management submenu to display the screen:



2 The values that appear in the table are the same Catalog values created via the Configuration --> Service --> Catalog screen and added to a job ticket via the JT Builder.

3 At the time of a fresh install, the [Current] column will display an initial value of 0 for all [Catalog Items].

4 From the Inventory Management screen, you may enter inventory values in the [Add] column text boxes. Negative values are allowed should you wish to manually decrease a Catalog Item's [Current] value.

5 When a value is entered in an [Add] column text box, the [Adjusted] column provides a real-time value of [Current] + [Add]. The [Current] value and the [Adjusted] value are equivalent as long as the [Add] text box remains empty.

– The quantity unit that appears in the [Adjusted] column (ream, box, etc.) is the same value assigned to the item in the Configuration --> Service --> Catalog screen.

6 When [Save] is clicked, the [Adjusted] value is saved as the [Current] value. The next time the screen is opened, the [Current] column will display the updated value.

7 By default, the [Notify if less than] column will display an empty text box as the initial value for all new Catalog Items.

8 You may enter a value in the [Notify if less than] column. If a value is entered, the [Notify] text box must contain a valid email address and the [Subject] text box must have a value entered. By default, the [Subject] text box contains [Printgroove] Low stock! If one of the noted criteria are not met, a pop-up message specific to the missing criteria opens when you click the [Save] button.

9 Once the criteria are met, [Save] and the low inventory threshold changes will be applied. When the low inventory threshold is exceeded (e.g., if the [Notify if less than] value is 30, and the [Current] value reaches or is less than 29), an email message is sent to the email address specified in the [Notify] text box.

10 Once the order is placed, POD Guide will deduct the inventory value and update the [Adjusted] value to reflect this change. If the order is later cancelled or the Catalog order section edited, POD Guide will not automatically modify any effected Inventory values. In these cases, you must manually adjust the Inventory values via the Inventory Management screen.

✎...

Note

Inventory activity is tracked in the Job Reports section. An appadmin-level user may access this information via the Job Reports screen.

10 WebSite Settings for Printgroove POD Serve

The web page text and graphics your customers see when they use Printgroove POD Serve can be edited using Printgroove POD Guide.

This chapter provides details about the following settings:
- Contact Information
- WebSite Pages
- WebSite Advertising
- WebSite Logo
- WebSite Terms and Conditions Agreement

By default, only the Application Administrator can modify these settings.

The following table notes the default Roles and Permissions for configuring the noted settings.

Category	Permissions	Role "AppAdmin"					Role "Printshop_coordinator"				
		Create	Edit	Delete	View	Activate	Create	Edit	Delete	View	Activate
Configuration	Contact Details	-	ON	-	ON	-	-	OFF	-	OFF	-
	Site Pages	-	ON	-	ON	-	-	OFF	-	OFF	-
	Advertisement	-	ON	-	ON	-	-	OFF	-	OFF	-
	Logo	-	ON	-	ON	-	-	OFF	-	OFF	-
	Site Agreement	-	ON	-	-	-	-	OFF	-	-	-

10.1 Contact Information

The Support screen of Printgroove POD Serve notes Contact Information. You can edit the information that appears on this screen using Printgroove POD Guide.

By default, only the Application Administrator can edit the Contact Information.

The Support screen lists the following contact information for your customers:

- Printshop
- Sales
- Billing
- Support

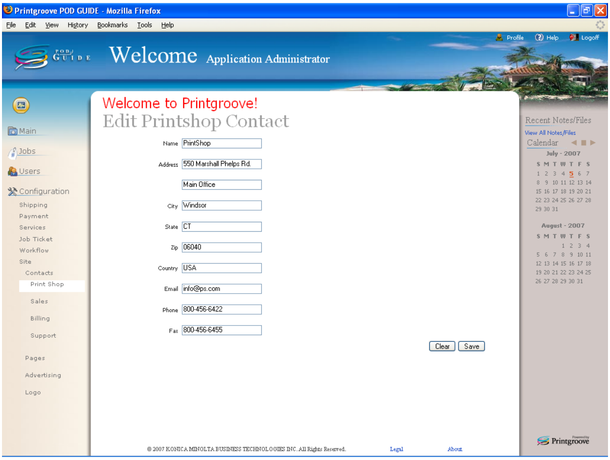
10.1.1 Edit the Contact Information

If you have the appropriate Role and Permissions, you can edit contact information.

To edit the contact information:

1 Click [Configuration] - [Site] - [Contacts]. From the sub-menu, select the Contact category you want to edit (Printshop, Sales, Billing or Support).

2 The screen that corresponds to your selection appears in the main display panel.



3 Fill out the form with the appropriate information.

4 Click [Save].

10.2 WebSite Pages

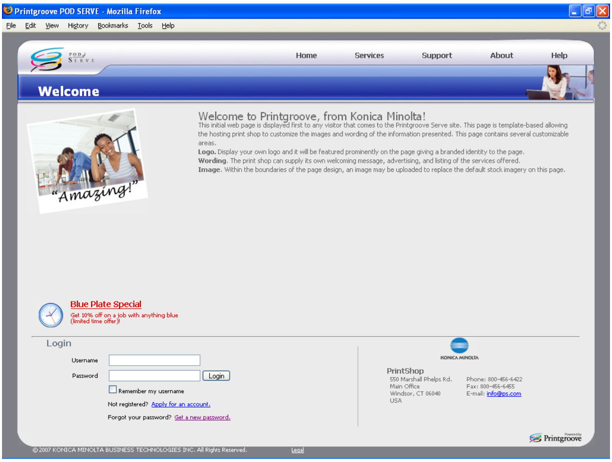
This section allows you to enter text and upload graphics to display on specific Printgroove POD Serve website pages.

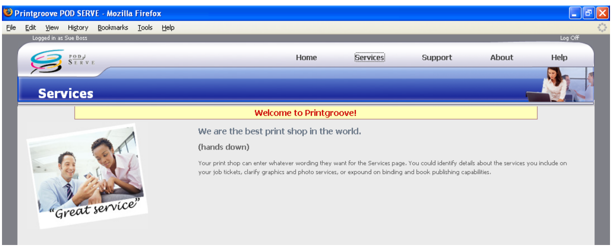
By default, only the Application Administrator can modify these settings.

To modify Site Pages:

1 Click [Configuration] - [Site] - [Pages]. The Site Pages settings screen opens. The following settings may be modified:

- Add/Remove a Link to the Printgroove POD Driver on the Support page.
- Add a Message and an image to the Welcome (Home), Services and Support screens (see next page for images of each of these screens). Instructions for modifying these settings follow.



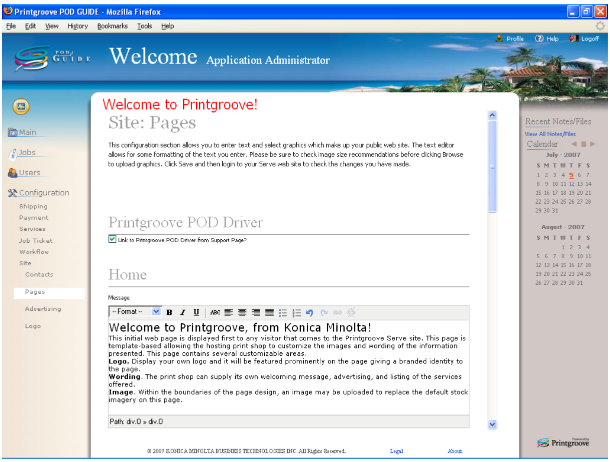


10.2.1 Display or Hide the Printgroove POD Driver Link

If you have the appropriate Role and Permissions, you can display or hide the Printgroove POD Driver link which appears on the Support screen of Printgroove POD Serve. When this link appears, the user can click on it to install the Printgroove POD Driver locally. If the Link is active, it appears in the right margin of the Support screen.

To display or hide the Printgroove POD Driver link:

1 Click [Configuration] - [Site] - [Pages]. The [Site Pages] screen opens.



2 To display the Link, select the Printgroove POD Driver checkbox. To hide the link, deselect the checkbox.

3 Click [Save].

Note

– *The Driver allows customers to submit print jobs directly to the Printshop from their own authoring applications (Word, Quark, In-Design, etc.).*

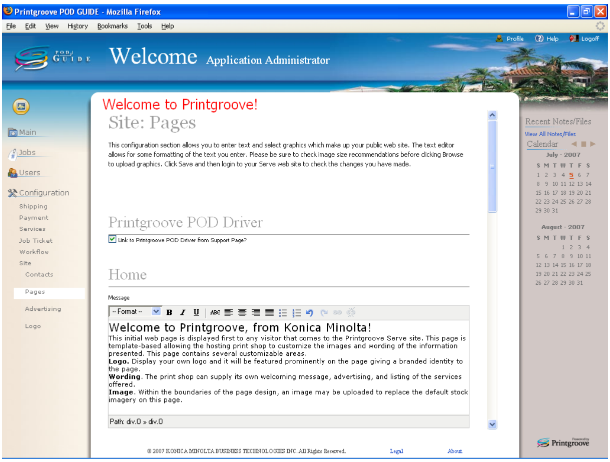
10.2.2 Configure the Welcome, Services or Support Screens

If you have the appropriate Role and Permissions, you can configure the Welcome, Services and Support screens of Printgroove POD Serve.

To configure the Welcome, Services or Support screens:

1 Click [Configuration] - [Site] - [Pages]. Each of the sections has a setting section. You must scroll to the section you want to modify.

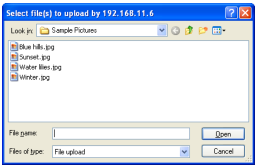
2 To set the Welcome screen, scroll to the Home section.
To set Services screen, scroll to the Services section.
To set Support screen, scroll to the Support section.



3 Use the Message section to enter and modify text.

4 To change the image displayed at the left of the selected Printgroove POD Serve screen,

– a Click [Browse] to locate the file you want to upload.



– b Select the image file and click [Open]. The best image size is 75 pixels by 75 pixels. The best resolution is 72 dpi.

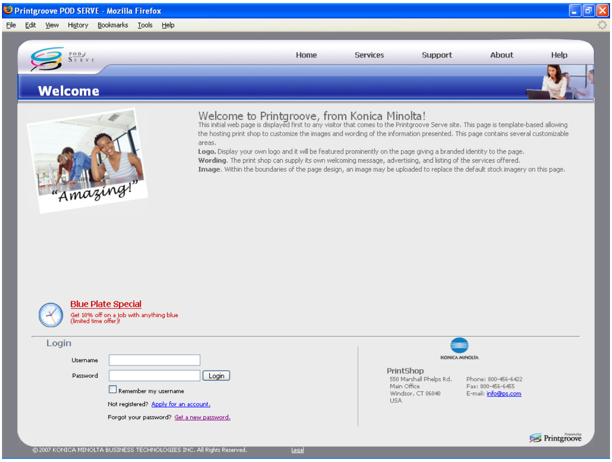
– Note:
The file uploaded in Step 4 is automatically saved to Printgroove POD Guide. The [Save] button will have no effect on the file.

5 To add or modify the text message that appears at the bottom of the image, type the text message in the Alternate Text box of the selected section.

6 Click [Save].

10.3 WebSite Advertising

You can add or modify an advertisement section that will appear on Printgroove POD Serve's Welcome screen. This is displayed to the left of the screen, just above the Login section. You may also specify start and end dates for the advertisement, setting triggers that automatically display then remove the ad from the website.



By default, only the Application Administrator can:

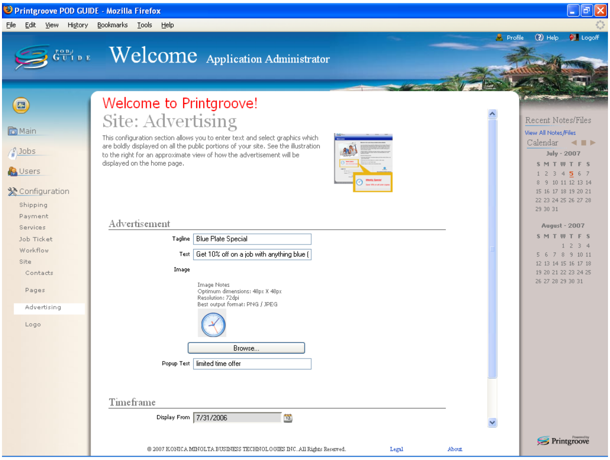
- Edit Advertising.
- Set a time frame for Advertising.

10.3.1 Edit WebSite Advertising

If you have the appropriate Role and Permissions, you can edit Advertising displayed on the Support screen of the Printgroove POD Serve.

To edit Advertising:

1 On your Home page, click [Configuration] - [Site] - [Advertising]. The [Site Advertising] screen opens.



2 Enter the title of the Advertisement in [Tagline].

3 Enter the text for the Advertisement in [Text].

4 Click [Browse] to upload the image for Advertisement. [Select file(s) to upload] screen appears. Select the image file and click [Open].

- The image will display to the left of the Advertisement's Tagline and Text.
- Note:
  The file uploaded in Step 4 is automatically saved to Printgroove POD Guide. The [Save] button will have no effect on the file.

5 If you want to add text that appears when the user moves the cursor over the Advertisement, enter the pop-up text in [Pop-up Text].

6 Click [Save].

10.3.2 Set a Time Frame for Advertising

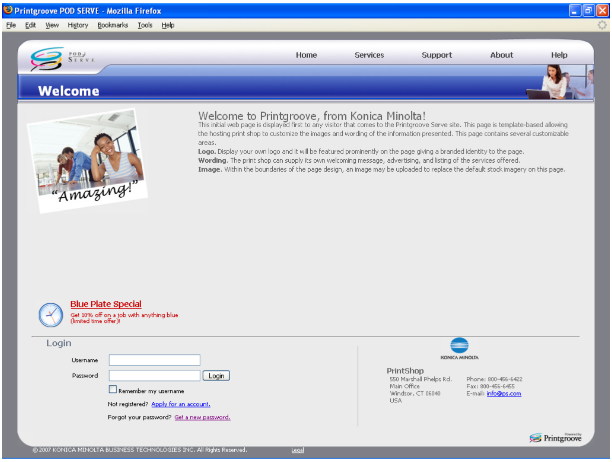
If you have the appropriate Role and Permissions, you can specify the start and end dates that the Advertisement will display on the Support screen on Printgroove POD Serve.

To set a time frame for Advertising:

1. Click [Configuration] - [Site] - [Advertising].
2. Scroll to the [Time Frame] section. Specify the starting date for the Advertisement in [Display From] by selecting the date from the calendar.
3. Specify the last date for the Advertisement in [Display To] by selecting the date from the calendar.
4. Click [Save].

10.4 WebSite Logo

A WebSite Logo and a printshop Logo can be added to Printgroove POD Serve using Printgroove POD Guide.



The WebSite Logo is displayed in the upper left corner of all pages.

The Printshop Logo is displayed at the bottom right corner of the Welcome screen along with any Printshop contact information you enter.

By default, only the Application Administrator can:

- Edit the WebSite Logo
- Edit the printshop Logo

...

Note

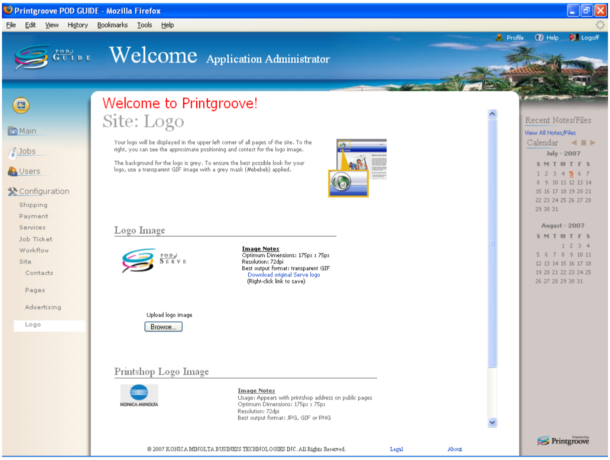
The background of the web pages is grey. To ensure the best possible look for your logo, use a transparent GIF image with a grey mask.

10.4.1 Edit the WebSite Logo

If you have the appropriate Role and Permissions, you can edit the WebSite Logo that appears in Printgroove POD Serve.

To edit the WebSite Logo:

1 Click [Configuration] - [Site] - [Logo]. The [Site Logo] screen opens.



Scroll to the [Logo] section and click [Browse] to upload the image for Site Logo. [Select file(s) to upload] screen appears. The optimum Dimensions and resolution are 175 x 75 (px) and 72 dpi.

2 Specify the image file and click [Open].

10.4.2 Edit the Printshop Logo

If you have the appropriate Role and Permissions, you can edit the Printshop logo that appears in Printgroove POD Serve.

To edit the printshop Logo:

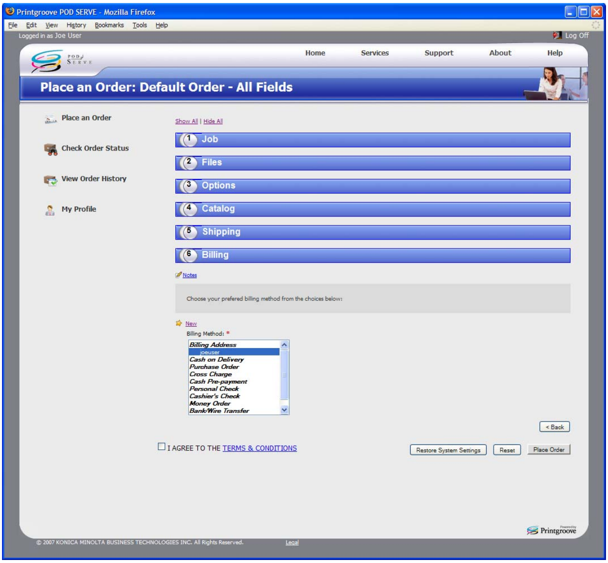
1 Click [Configuration] - [Site] - [Logo] menu.

Scroll to the Printshop Logo section and click [Browse] to upload the image for printshop Logo. [Select file(s) to upload] screen appears. The optimum dimensions and resolution are 175 x 75 (px) and 72 dpi.

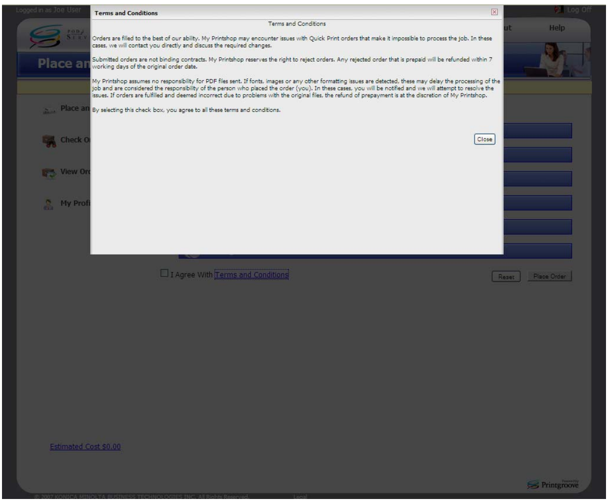
2 Specify the image file and click [Open]. The image will display at the bottom right corner of the Welcome screen along with the printshop contact information.

10.5 WebSite Terms and Conditions Agreement

Before a Printgroove POD Server user can place an order, they must select the [I AGREE TO THE TERMS & CONDITIONS] check box. Once they do this, the [Place Order] button is active.



If the user wishes to view the Terms and Conditions Agreement, click the “TERMS & CONDITIONS” hyperlink:



By default, only the Application Administrator can:

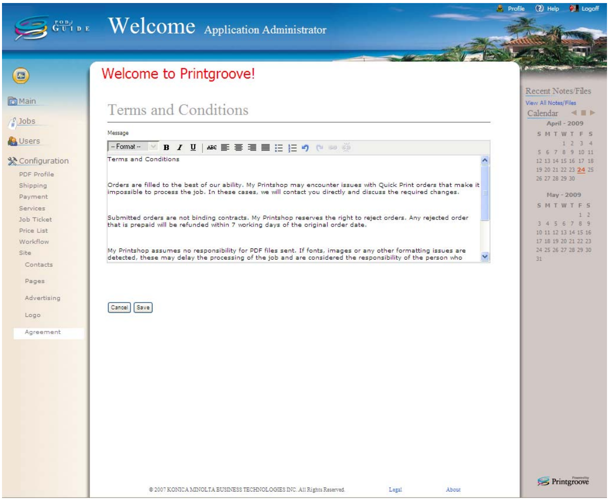
- Edit the WebSite Terms and Conditions Agreement

10.5.1 Edit the WebSite Terms and Conditions Agreement

If you have the appropriate Role and Permissions, you can edit the WebSite Terms and Conditions Agreement that appears in Printgroove POD Serve.

To edit the Terms and Conditions Agreement:

1. Click [Configuration] - [Site] - [Agreement]. The [Terms and Conditions] screen opens.



2. Enter the necessary text in the [Message] text box. Use the formatting header bar, as required.

3. When finished, click [Save].

11 Appendix

11.1 Glossary of Terms

Word	Definition
AppAdmin	The Application Administrator manages the Printgroove application, Users and Groups, Job Tickets and numbering schemes. The Application Administrator also identifies the services and options offered by the Reprographics Department.
CRD	Central Reprographics Department
Dongle	A dongle is small hardware device that connects to a computer to act as a security key to authenticate software. The dongle must be plugged into the server at all times for Printgroove modules to operate.
Drop-down or Pull-down Menu	A list of selectable options displayed when a User clicks on the downward arrow.
Guide	The Printshop User Solution of the Printgroove POD Suite, Guide enables workflow management, application administration, and job ticket processing.
Home Page	The main screen to which a User is taken upon login and returns to after performing actions within the application. A User is able to access all the menus and necessary functions from their Home page.
Interface	The screens, dialog boxes, and messages with which the user interacts to use the Printgroove application.
JDF	Job Definition Format is a digital data formatting standard providing a basic building block to manage the complete print production workflow. JDF uses XML (extensible markup language) to streamline information exchange between different applications systems and includes a set of messaging rules and communications protocols to ensure that all job related data can be shared.
Job Ticket	An order form or template built to JDF standards which is used to submit jobs online to the Reprographics Department.
Nodes	Locations where work is performed on jobs in a (Printshop) workflow.
PDF	Portable Document Format is an open file format created by Adobe Systems. It is used for representing two-dimensional documents in a fixed layout format.
Permissions	Settings, defined by the Application Administrator, that determine User ability to perform certain functions within the application.

Word	Definition
Printgroove POD Suite	The Printgroove POD Suite enables the Printshop to expand the ability to reach their customers. Working as a virtual storefront on the web, it allows external customers to submit and customize jobs, perform proof checks and track the status of orders. It provides advanced capabilities for set up, processing, tracking and administrative tasks for internal employees.
PSC	The Printshop Coordinator is a default Printshop user enabled to receive, accept or reject, and manage jobs for the Printshop.
Queue	The Printing Solution of Printgroove POD, Queue consists of print management from device control to last-minute job ticket editing.
Role	A grouping of permissions assigned to Printshop Users, usually based on services performed.
Serve	The customer solution part of Printgroove POD, Serve is a web service application for print job submission with real-time status verification as the print job goes through the Printshop process.
Tracker	A Printgroove function which allows the PSC to mark print jobs to be tracked as they are processed through the Printshop workflow.
Upload (files)	This function allows you to transfer or upload a copy of a file to the Printshop, over the web, for printing.
User Profile	Personal and application information about the User.
Welcome Screen	The first screen shown when a user enters the Printgroove server address into their web browser address bar.
Workflow	A workflow is a predefined process path used to manage the flow of work. Within Printgroove POD, the workflow function allows you to define the way a job is managed (internally) through the Printshop.
Workflow, Advanced	A workflow allowing nodes to send jobs to other nodes within the workflow without restriction. (e.g. A to B to C to D to B to C to A to D)
Workflow, Standard	A workflow restricting the order processing path. (e.g. A to B to C to D only)

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