

FreeFlow® Process Manager Operator and Administrator Guide



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Changes are periodically made to this document. Changes, technical inaccuracies, and typographical errors will be corrected in subsequent editions.

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Notices and Certifications

Approvals and certification

For the UK, this product is serviced under a BS5750 Quality system accepted by the British Standards Institution.

60HZ, 115V

The equipment is listed by the Underwriters Laboratories, UL1950, certified by Canadian Standards Association, CSA22.2, No. 1950.

50HZ, 220V-240V

The equipment is certified by the British Standards Institution, IEC950 (EN60950). The equipment is manufactured under a BS5750 Quality system accepted by the British Standards Institution. The equipment is also certified in compliance with applicable standards by various national bodies.

Radio Frequency Emissions

USA

This equipment generates, uses and can radiate radio frequency energy. It may cause radio interference to radio communications if not installed according to the installation instructions. The equipment complies with the limits for a Class A computing device as documented in Subpart J, Part 15 of the FCC rules which are designed to provide reasonable protection against such interference when operated in a commercial environment. Operation of this equipment in a residential area is likely to cause interference. In such cases, the user is responsible for the expense of correcting the interference.

Canada

The equipment does not exceed the class A limits for radio noise emissions from a digital apparatus as documented in the radio interference regulations of the Canadian Department of Communications.

Cet appareil numérique est conforme aux limites d'émission de bruits radioélectriques pour les appareils de classe A stipulées dans le Règlement sur le brouillage radioélectriques du ministère des Communications du Canada.

Europe 50HZ, 220V-240V Equipment

The equipment was tested and is certified in conformance with the European commission directive 82/499/ECC and VDE 0871/0875, class B which relates to radio frequency interference. This equipment is certified, manufactured and tested in compliance with strict safety and radio frequency interference regulations.

Safety

Your Xerox equipment and supplies were designed and tested to meet strict safety requirements. These include safety agency examination, approval and compliance with established environmental standards.

Attention to the following notes ensures the continued safe operation of your equipment.

If you need any additional safety information concerning the equipment or materials, contact your local representative.

Ozone Safety

This product will produce ozone during normal operation. The ozone produced is heavier than air and is dependent on copy volume. Providing the correct environmental parameters as specified in the Xerox installation procedures will ensure that the concentration levels meet safe limits.

If you need additional information about ozone, please request the Xerox publication **Ozone** (part number 600E74140) by calling 1-800-828-6571 in the United States and Canada.

Electrical Safety

Always follow a code of safe habits as described in the following statements:

1. Use only the power cable supplied with this equipment.
2. Plug the power cable directly into a properly grounded electrical outlet. Do not use an extension cord. If you are not sure whether or not an outlet is properly grounded, consult a qualified electrician.
3. Do not use a ground adapter plug to connect this equipment to an electrical outlet that lacks a ground connection terminal.



WARNING: Improper connection of the equipment grounding conductor can result in severe electrical shock.

4. Do not place this equipment where people might step or trip on the power cable.
5. Do not place objects on the power cable.
6. Do not override or disable electrical or mechanical interlock devices. Covers, guards, and interlock switches are provided to prevent operator access to unsafe areas.
7. Do not obstruct ventilation openings. These openings are provided to prevent overheating of the machine.



WARNING: Never push objects of any kind into slots and openings on this equipment. Contacting a voltage point or shorting out a part could result in electrical shock or fire

8. If any of the following conditions occur, turn off the machine immediately and disconnect the power cable from the electrical outlet. Contact an authorized Xerox Service Representative to correct the problem:
 - The equipment emits unusual odors or makes unusual noises.
 - The power cable is damaged or frayed.
 - A wall panel circuit breaker, fuse, or other safety device has been tripped.
 - Liquid is spilled into the machine.
 - The machine is exposed to water.
 - Any part of the machine is damaged.

Operational Safety

Your Xerox equipment and supplies have been designed and tested to meet strict safety requirements. These include safety agency examination, approval, and compliance with established environmental standards.

To ensure the continued safe operation of your Xerox equipment, follow these safety guidelines at all times:

Do These

- **Always** connect equipment to a correctly grounded power outlet. If in doubt, have the outlet checked by a qualified electrician.
- **Always** follow all warnings and instructions that are marked on or supplied with the equipment.
- **Always** exercise care when moving or relocating equipment. Please contact your local Xerox Service Department to arrange relocation of the copier to a location outside of your building.
- **Always** locate the machine on a solid support surface (not on plush carpet) that has adequate strength to support the weight of the machine.
- **Always** locate the machine in an area that has adequate ventilation and room for servicing.
- **Always** use materials and supplies specifically designed for your Xerox equipment. Use of unsuitable materials may result in poor performance and possibly a hazardous situation.
- **Always** unplug this equipment from the electrical outlet before cleaning.

Do Not Do These

- **Never** use a ground adapter plug to connect the equipment to a power outlet that lacks a ground connection terminal.
- **Never** attempt any maintenance function that is not specifically described in this documentation.

-
- **Never** obstruct ventilation openings. They are provided to prevent overheating.
 - **Never** remove covers or guards that are fastened with screws. There are no operator serviceable areas within these covers.
 - **Never** locate the machine near a radiator or any other heat source.
 - **Never** push objects of any kind into the ventilation openings.
 - **Never** override or "cheat" any of the electrical or mechanical interlock devices.
 - **Never** operate the equipment if you notice unusual noises or odors. Disconnect the power cord from the electrical outlet and contact your Xerox Service Representative immediately.

Illegal Usage in USA

Congress, by statute, has forbidden the copying of the following subjects under certain circumstances. Penalties of fines or imprisonment may be imposed on those guilty of making such copies.

1. Obligations or Securities of the United States Government, such as:

- Certificates of indebtedness
- United States Bonds
- National Bank Currency
- Treasury Notes
- Coupons from bonds
- Federal Reserve Notes
- Federal Reserve Bank Notes
- Fractional Notes
- Silver Certificates
- Certificates of Deposit
- Gold Certificates
- Paper Money
- Bonds and obligations of certain agencies of the government, such as FHA, etc.
- Bonds



NOTE: *U.S. Savings Bonds may be photographed only for publicity purposes in connection with the campaign for the sale of such bonds.*

- Internal Revenue Stamps



NOTE: *If necessary to copy a legal document on which there is a canceled revenue stamp, this may be done, provided the reproduction of the document is performed for lawful purposes.*

-
- Postage Stamps, canceled or not canceled



NOTE: *For philatelic purposes, Postage Stamps may be photographed, provided the reproduction is in black and white, and is less than 3/4 or more than 1-1/2 times the linear dimensions of the original.*

- Postal Money Orders
 - Bills, Checks, or Drafts for Money, drawn by or upon authorized officers of the United States
 - Stamps and other representatives of value, of whatever denomination, which have been or may be issued under any Act of Congress
2. Adjusted Compensation Certificates for Veterans of World Wars.
 3. Obligations or Securities of any Foreign Government, Bank, or Corporation.
 4. Copyrighted material, unless permission of the copyright owner has been obtained or the copying falls within the fair use or library reproduction rights provisions of the copyright law.



NOTE: *Further information on these provisions may be obtained from the Copyright Office, Library of Congress, Washington, D.C. 20559. Ask for Circular R21.*

5. Certificates of Citizenship or Naturalization.



NOTE: *Foreign Naturalization Certificates may be photographed.*

6. Passports.



NOTE: *Foreign passports may be photographed.*

7. Immigration Papers.
8. Draft Registration Cards.

9. Selective Service Induction Papers, which bear any of the following information:

- Registrant's earnings or income
- Registrant's previous military service
- Registrant's dependency status
- Registrant's physical or mental condition
- Registrant's court record



NOTE: *U.S. Army and Navy discharge certificates may be photographed.*

10. Badges, Identification Cards, Passes, or insignia carried by Military, Naval personnel, or by members of the various Federal Departments and Bureaus, such as FBI or Treasury, unless the photograph is ordered by head of such department or bureau.

11. Copying the following is also prohibited in certain states:

- Automobile Licenses
- Driver Licenses
- Automobile Certificates of Title

The above list is not all inclusive, and no liability is assumed for its completeness or accuracy. In case of doubt, consult your attorney.

Illegal Usage in Canada

Parliament, by statute, has forbidden the copying of the following subjects under certain circumstances. Penalties of fines or imprisonment may be imposed on those guilty of making such copies.

1. Current bank notes or current paper money.
2. Obligations or securities of a government or bank.
3. Exchequer bill paper or revenue paper.
4. The public seal of Canada or of a province, or the seal of a public body or authority in Canada, or of a court of law.
5. Proclamations, orders, regulations or appointments, or notices thereof (with intent to falsely cause same to purport to have been printed by the Queen's Printer for Canada, or the equivalent printer for a province).
6. Marks, brands, seals, wrappers, or designs used by or on behalf of the Government of Canada or of a province, the government of a state other than Canada or a department, board, commission, or agency established by the Government of Canada or of a province or of a government of a state other than Canada.
7. Impressed or adhesive stamps used for the purpose of revenue by the Government of Canada or of a province or by the government of a state other than Canada.
8. Documents, registers, or records kept by the public officials charged with the duty of making or issuing certified copies thereof, where the copy falsely purports to be a certified copy thereof.
9. Copyrighted material or trademarks of any manner or kind without the consent of the copyright or trademark owner.

The above list is provided for your convenience and assistance, but it is not all inclusive and no liability is assumed for its completeness or accuracy. In case of doubt, consult your solicitor.

Product Recycling and Disposal

Xerox operates a worldwide equipment takeback and reuse/recycle program. Contact your Xerox sales representative (1-800-ASK-XEROX) to determine whether this Xerox product is part of the program. For more information about Xerox environmental programs, visit www.xerox.com/environment.html.

If your product is not part of the Xerox program and you are managing its disposal, please note that the product may contain *lead, mercury* and other materials whose disposal may be regulated due to environmental considerations. For recycling and disposal information, contact your local authorities. In the United States, you may also refer to the Electronic Industries Alliance web site: www.eiae.org.

About this guide

The *Xerox FreeFlow Process Manager Operator and Administrator Guide* provides information and procedures for using the Process Manager applications.

About this chapter

This chapter explains the information found in this guide and how the information is organized. It helps you get the most out of this guide by:

- Identifying the audience and the basic skills required to use this guide effectively.
- Explaining the standard conventions and cues that highlight important information.
- Listing related documentation you might find helpful.
- Listing available online FreeFlow Process Manager Help systems.
- Providing information on ordering additional materials and supplies.
- Providing information on obtaining additional information.



NOTE: *If you are using Process Manager for the first time, it is recommended that you first read Chapter 1, About Process Manager, in this guide.*

Audience

The *Xerox FreeFlow Process Manager Operator and Administrator Guide* is a comprehensive reference manual intended for administrators and operators.

How to recognize important information

The following sections provide the conventions and flag icons that are used in the *Xerox FreeFlow Process Manager Operator and Administrator Guide*.

Conventions

The *Xerox FreeFlow Process Manager Operator and Administrator Guide* uses the conventions listed in the table, below, to help you recognize information:

Table 1-1. Description of conventions

| Convention | Description |
|--------------------------|---|
| <CAPS in angle brackets> | Within procedures, the names of keys to press are displayed in capital letters and enclosed in angle brackets (for example, press <ESCAPE>). Keyboard combinations are represented by the plus sign (+) between names of keys (for example, press <CONTROL+C> to copy). |
| <Angle brackets> | Variable information is enclosed in angle brackets (for example, select <filename>). |
| [Square brackets] | Names of options you select, including toolbar buttons and buttons in dialog boxes, are enclosed in square brackets (for example, select [Close]). Menu commands are also displayed in square brackets, with the menu name appearing first, then a colon, followed by the option name (for example, select [File: Close]). |
| Bold | Text you should enter exactly as it appears is displayed in bold (for example, enter test1.rdo). |

Table 1-1. Description of conventions

| Convention | Description |
|----------------|---|
| <i>Italics</i> | Titles of documents and manuals that provide additional information on the current topic are displayed in italics (for example, the <i>Xerox FreeFlow Process Manager Operator and Administrator Guide</i>). |

Flag icons

The *Xerox FreeFlow Process Manager Operator and Administrator Guide* uses the following flag icons to help you recognize important information:



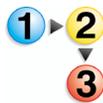
NOTE: *The NOTE symbol and text in italics indicate there is important or supplemental information when performing a task or procedure.*



CAUTION: The CAUTION symbol and bold text indicate that you may lose data or damage equipment if care is not taken when performing the task or procedure following the caution.



WARNING: The WARNING symbol and red text indicate that you may cause personal injury or death if care is not taken when performing the task or procedure following the warning.



Step-by-step

The step-by-step icon identifies the beginning of a procedure.

Related information

This section lists additional materials you may need, or find helpful, when using your FreeFlow Process Manager system.

To order the Xerox documentation listed below, or for additional information on Xerox solutions, contact your Xerox Representative.

FreeFlow Process Manager documentation

For more information on FreeFlow Process Manager, refer to the following publications:

- *Xerox FreeFlow System Administrator Guide*
- *Xerox Customer Software Release Document (CSRD) for FreeFlow Process Manager*

Windows related information

Microsoft provides users and administrators with several different resources to support the Windows 2003 environment. Some of these resources include web sites and online Help. The following sections describe these sources and tell you how to find and use them.

Windows Online Help

Windows 2003 Server includes extensive online Help for all aspects of the operating system. Most likely, the online Help will be your primary source for information. Administrative procedures, from adding users and managing groups to installing Windows printers, can be found in the online Help files. Furthermore, most Windows applications also contain their own online Help system containing information that is specific to the application.

To access online Help, select [Start: Help] from the Windows task bar. If you are looking for help within a specific application, use the options available from the Help menu within that application.

Windows Microsoft Web site

Microsoft has a World Wide Web site that contains the latest Windows 2003 Server news and information about upgrades. The URL for this site is:

<http://www.microsoft.com/>

Using the FreeFlow Process Manager Online Help

This section provides a brief overview of the type of Help available online from the FreeFlow Process Manager software.

You can access the FreeFlow Process Manager Online Help system by selecting [**<application> Help**] in the Help menu, located on the main window menu bar in each Process Manager application. You can also access Help by selecting the [**Help**] button, when available, in dialog boxes.

Finding a Help topic

In Help, click one of the following tabs:

- To browse through topics by category, select the **Contents** tab.
- To see a list of index entries, select the **Index** tab; you can then either search or scroll through the list or keywords.
- To search for words or phrases that might be contained in a Help topic, select the **Search** tab.

In the left of the Help window, click the topic, index entry, or phrase to display the corresponding topic in the right frame.



NOTE: *Under the Index tab and the Search tab, you must select <Display> to show the highlighted topic in the right frame.*

To get Help in a dialog box

Select the question mark **[?]** in the title bar of the dialog box, and then click the item in the dialog box you need help with.



NOTE: You can print or copy the information in a pop-up window by right-clicking inside the pop-up window, and then selecting **[Print Topic]** or **[Copy]**.



NOTE: If the dialog box does not have the **[?]** button, press **<F1>** or search for the item in the Help system.



NOTE: You can also get Help with an item by right-clicking on it, and selecting **[What's This?]**.

Using the Process Manager Help system

For detailed information on using the online Help system, refer to the topic “Using Help” in the Process Manager online help.

Obtaining additional support

For additional information about the following topics, refer to the *Xerox Customer Software Release Document (CSRD) for FreeFlow Process Manager*.

- X-PRESS FAX
- FreeFlow FAQ Xerox web site
- Xerox Welcome Center

1. About FreeFlow Process Manager

This section provides information about Xerox FreeFlow Process Manager applications, hardware and software components, preparatory steps for workflow building and job management, user and group access, the log in process, adding and removing printers, creating Preps Job files, and backup and restore functions.

FreeFlow Process Manager applications

FreeFlow Process Manager consists of three applications that allow you to create, submit, and manage automated workflows:

- Workflow Builder
- Workflow Submission Client
- Workflow Job Manager

The Workflow Builder application

Use Workflow Builder to:

- Create workflows
 - Use graphical tools to assemble customized workflows from workflow process steps.
 - Configure the settings for workflow process steps.
 - Enable workflows to receive jobs.
 - Disable workflows to modify them or to prevent job submission.
- Import and export workflows.
- Take processes offline and change concurrency counts.
- Create preflight profiles by launching Adobe Acrobat.
- Set up and manage hot folders.
- Add external PDF processes to support third party software.
- Set up third-party scripts.
- Set up Notify attributes on the SMTP server; set up the Proxy server.
- Set up repository credentials.

The Workflow process steps include:

Table 1-1. Workflow process steps

| Step | Description |
|---------|---|
| Input | Displays automatically as the first workflow node when you select <Enter> during new workflow creation. Does not have a settings dialog in Workflow Builder. In Workflow Job Manager, the settings dialog and the tool tip display the original input files. |
| AIE | Automatic Image Enhancement (AIE) optimizes sharpness, color balance, saturation, exposure, noise reduction and contrast of TIFF, JPEG, and BMP images, whether standalone or embedded in a PDF. AIE also supports redeye removal for humans and shadow detail enhancement. The AIE feature works only for color and grayscale images. |
| Convert | Converts documents submitted to the workflow to PDF. Converts the following formats: MS Word, MS PowerPoint, MS Excel (includes Microsoft Office 2007), MS Publisher, Adobe Photoshop, Adobe InDesign, Adobe Illustrator, JPG, JPEG, TIFF, TIFF-IT, TIF, BMP, PS, RDO, QXD, QXP, VPC, and EPS. Allows you to flatten PDFs for printing. Users can select from various job options to generate optimal PDFs. |
| Join | Combines multiple PDF files into a single PDF file. |

Table 1-1. Workflow process steps

| Step | Description |
|-----------------|--|
| Optimize | The Optimize process allows you to modify a PDF file to be PDF/X compliant, specify how fonts should be embedded, define PDF Box settings, configure spot color settings, and manage color profiles. You can also remove trap layers and replace hairlines. |
| Preflight | <p>Uses a preflight profile to validate and check formatting, verify the image, fonts, and verify references to OPI image server images. The preflight checks depend on the profile selected.</p> <p>You can also use Preflight to let the workflow automatically discover conditions. For example, you can create a single-rule profile, use it as a filter to check a file for a specific condition, for example, a certain page size, and then direct the file to the next appropriate process or workflow.</p> |
| Watermarks | Allows you to add a text or image watermark to each page of an input PDF file. You can specify a combination of opaque or transparent images or text, in various alignments, that can appear either underneath or on top of the page content. The Preview option allows you to dynamically view the content before committing to the selected settings. |
| Bates Numbering | Allows you to add bates stamps to each page of an input PDF file. Bates stamps consist of a page number with optional leading zeros and an optional fixed text prefix. An optional extra line of fixed text can appear either above or below the page number. The Preview option allows you to dynamically view the content before committing to the selected settings. |
| Page Numbering | Allows you to add page numbers to each page of an input PDF file. The Preview option allows you to dynamically view the content before committing to the selected settings. |
| Barcode | Allows you to add a barcode to your workflow. You can specify the barcode type, font, placement, alignment, rotation, frequency, size and other options. Provides support for variable data in the text and page range areas. The Preview option allows you to dynamically view the content before committing to the selected settings. |
| Rotate Pages | Allows you to rotate each page in the PDF file 90 degrees right or left, or 180 degrees. |
| Flip Pages | Allows you to flip each page in the PDF file horizontally or vertically to create a mirror image. |
| Resize | Allows you to select a specific size, or a size based on a percentage of the original image size. For TIFFs, JPGs, or BMPs, the image is resized; for PDFs, the page is resized. |

Table 1-1. Workflow process steps

| Step | Description |
|------------|---|
| Impose | <p>Allows you to do the following:</p> <ul style="list-style-type: none"> • Use imposition to define the placement of page elements. • Place crop marks. • Select various job types—for example, signature booklets and N-up. • When the PREPS imposition node is selected, choose from a list of preconfigured PREPS imposition job files. • Select from various PDF Boxes. • Select Cell Clustering, which provides the option of pulling together cells on a sheet in a way that results in cell sizes that contain the imposed page image with no waste space between cells. <p>The Preview option allows you to dynamically view the content before committing to the selected settings.</p> |
| Crop | <p>Allows you to automatically crop jobs consisting of one or more PDF pages and JPEG, TIFF, or BMP file images. For PDF documents, crops the pages; for JPEG, TIFF, or BMP files, crops the images.</p> |
| Pressmarks | <p>Allows you to add a fixed pressmark to a workflow. You can specify the pressmark placement, rotation, frequency, and transparency, and then preview the specifications. The Preview option allows you to dynamically view the content before committing to the selected settings.</p> |
| Review | <p>Can be used multiple times, at critical points in a workflow, to view, check and edit the PDF file using Adobe Acrobat.</p> <p>When stopped at the Review step, you can change process settings, resubmit the job to a previous step for additional processing, view a soft proof, or print a hardcopy proof.</p> <p>You can approve the job and allow it to move to the next step in the workflow, or you can fail the job.</p> <p>If there is a Print step after the Review step, you can select [Copies] to access the Copies dialog and change the number of copies to print.</p> |
| Notify | <p>Provides job status notification via e-mail. Allows you to attach job files up to a maximum size of 1 GB.</p> |
| Print | <p>Allows you to print PDF, VPC, or RDO (for reprint) files to a specified production printing queue using a specified job ticket. For information about reprinting RDOs, refer to the topic “About submitting RDOs.”</p> |
| Save | <p>Allows you to save all supported file types from the workflow to a specified location in a Windows file system or document repository.</p> <p>You can also use Save to direct or “branch” a job to other workflows by designating a hot folder as the Save location.</p> |

Table 1-1. Workflow process steps

| Step | Description |
|------------------|---|
| JDF Export | <p>Creates a JDF ticket and exports a PDF and JDF ticket to a specified location in a Windows file system or document repository. You have the option to export the JDF with changes made by the external process nodes.</p> <p>The output file of a JDF export task can be re-imported and re-run by dropping it into a hot folder associated with an appropriate workflow. The files associated with the JDF must exist in the same location as the original job.</p> |
| Conditional | <p>Conditional branching provides an added level of logic to a workflow, allowing it to examine the properties of submitted jobs, and then act accordingly without human intervention.</p> <p>You can add one or more conditional branches to a workflow, each with one or more user-designated conditions that specify the desired attributes or properties of the submitted jobs.</p> |
| External Process | <p>External Processes enable the use of third party workflow components. The processes are added and configured in Workflow Job Manager.</p> |

The Workflow Submission Client application

Use Workflow Submission Client to:

- Select files for submission from Windows or from a document repository.
- Save and load a file list.
- Select an optional job ticket for submission with the files.
- Submit the files to one of the automated workflows.
- Modify the workflow process settings.
- View the job ticket and resolve job ticket conflicts.
- Launch Workflow Builder
- Submit files remotely from a workstation or server with Remote Workflow Submission Client installed.

The Workflow Job Manager application

Use Workflow Job Manager to:

- View job details and status.
- Review and edit jobs in Adobe Acrobat.
- Edit process settings.
- Print hardcopy proofs.
- Identify faulted jobs.
- Resubmit jobs.
- Approve, fail, pause, or delete jobs.
- Generate, view, and export reports.
- Launch Workflow Submission Client, Workflow Builder, Printer Registration, and FreeFlow Administration Tool.
- Review and configure incoming third party jobs from Management Information Systems (MIS).
- Perform selected tasks remotely from a workstation or server with Remote Workflow Job Manager Client installed.

FreeFlow Process Manager hardware and software configurations

For information pertaining to FreeFlow Process Manager hardware and software configurations, refer to the *Xerox Customer Software Release Document (CSRD) for FreeFlow Process Manager*.

Post-installation setup

Table 1-2 provides a post-installation checklist you must complete after your FreeFlow Process Manager system has been installed.



NOTE: *This checklist assumes that a Xerox Representative has installed of all hardware and software necessary to run the FreeFlow Process Manager system.*

Table 1-2. Workflow and Job Management Preparatory Procedures

| Procedure | Overview |
|---|---|
| Configure document repository connections | <p>Use the FreeFlow Administration Tool to configure the connection between FreeFlow Process Manager and the supported document repositories.</p> <p>For detailed procedures on configuring repository connections, refer to the System Administrator Guide or to the FreeFlow Administration Tool online Help system.</p> |
| Create user accounts; add or edit user contact information; change XDL Admin account password | <p>Creating User Accounts Process Manager user accounts are created and managed using the Windows Local Users and Groups functionality in the Computer Management application. Users that are created and added to the appropriate Process Manager group accounts using Windows appear in the FreeFlow Administration Tool list of users.</p> <p>Storing User contact information The FreeFlow Administration Tool is used to view user accounts that have been created in Windows, and to add or edit user contact information.</p> <p>Changing the XDL Admin account password The FreeFlow Administration Tool allows you to change the password for the XDL Admin account. This password is set during the installation of the software.</p> <p>For detailed procedures on creating user accounts, refer to the Windows online help. For detailed procedures on adding or editing user contact information or changing the XDL Admin account password, refer to the System Administrator Guide or to the FreeFlow Administration Tool online Help system.</p> |

Table 1-2. Workflow and Job Management Preparatory Procedures

| Procedure | Overview |
|--|--|
| <p>Manage production printers for workflows</p> | <p>Production printers must be added to FreeFlow Process Manager before you attempt to drag a Print process into a workflow during the workflow building process.</p> <p>In FreeFlow 6.0, a new common printer interface enables all FreeFlow applications to maintain a single database of configured printers and to have a common job setup GUI interface across FreeFlow applications. The common printer interface includes the following utilities:</p> <p>Registered Printer List Locator: Allows you to set whether the registered printer list in use by a FreeFlow application is located on a local computer or on a remote computer.</p> <p>Printer Registration: Allows you to register and manage supported production printers and queues for use by FreeFlow software applications. To configure the Print process step in a workflow, production printers must first be added via the FreeFlow Printer Registration application.</p> <p>Printer Status/Job Status Tool: Allows you to status jobs, queues, and printers.</p> <p>For additional information about Production Printing, refer to the <i>Xerox Customer Software Release Document for FreeFlow Process Manager</i>, or the <i>Xerox Production Printing Guide for FreeFlow Applications</i>.</p> <p>You can also access the online Help for the Registered Printer List Locator, Printer Registration, or the Printer Status/Job Status Tool.</p> |
| <p>Configure the SMTP server</p> | <p>The Simple Mail Transport Protocol (SMTP) Server is used for e-mail notification. The SMTP Setup dialog, accessed via the Workflow Builder application, allows you to identify the mail server for outgoing mail or notifications and to establish the maximum size for e-mail attachments.</p> <p>For details, refer to the following procedure in the <i>Freeflow Process Manager Operator and Administrator Guide</i> or the online help: "Setting up the SMTP Server."</p> |
| <p>Set up workflows</p> | <p>Three default workflows are provided with the software: Simple, Main, and Reprint. Modify these workflows or create your own, based on the needs of your organization. You may want to name workflows based on clients (XYZ Co.) or types of jobs (brochure, newsletter, flyer).</p> <p>For details, refer to the following procedure in the <i>Freeflow Process Manager Operator and Administrator Guide</i> or the online help: "Configuring process settings;" "Building a new workflow."</p> |
| <p>Generate the preflight profile repository on a clean install.</p> | <p>Preflight profiles do not exist on a clean install. You will need to generate the profile repository.</p> <p>For details, refer to the following procedure in the <i>Freeflow Process Manager Operator and Administrator Guide</i> or the online help: "Configuring preflight settings."</p> |

Table 1-2. Workflow and Job Management Preparatory Procedures

| Procedure | Overview |
|--|---|
| Create or modify preflight profiles. | <p>The preflight step validates and checks formatting and verifies the image, fonts and references to OPI image server images. You may want to modify the preflight profiles that are provided with FreeFlow Process Manager.</p> <p>For details, refer to the following procedure in the <i>Freeflow Process Manager Operator and Administrator Guide</i> or the online help: “Creating preflight profiles.”</p> |
| Set the default job option in Adobe Acrobat | <p>For the Convert process, you can select from various job options, or create custom job options, to generate optimal PDFs in Process Manager. The default job option that is displayed in Process Manager is selected in Adobe Acrobat Distiller. You can ensure that Process Manager displays the desired Adobe Acrobat Distiller default job option by selecting a profile from the Default Settings drop box in Acrobat Distiller.</p> <p>For details, refer to the following procedure in the <i>Freeflow Process Manager Operator and Administrator Guide</i> or the online help: “Configuring Convert settings.”</p> |
| Upgrade legacy workflows that contain the Job Level Edit process. | <p>In previous versions of FreeFlow Process Manager, all job level edit functions (for example, watermarks, page numbering, page rotation) were available via a single Job Level Edit dialog. Legacy workflows that contain Job Level Edit processes will perform as they did in earlier versions, but you will not be able to edit them. To use the version 6.0 job level edit functions, save the existing Job Level Edit workflow, and it will be converted into a series of individual, Watermark, Bates Numbering, Page Numbering, Flip and Rotate nodes, as appropriate.</p> <p>For details, refer to the following procedure in the <i>Freeflow Process Manager Operator and Administrator Guide</i> or the online help: “Upgrading legacy workflows that contain the Job Level Edit process.”</p> |
| <p>Ensure Color Manage workflow consistency between the server and a remote client.</p> <p>Importing 5.0 workflows with a Color Manage node.</p> | <p>Workflows that include color management can become inconsistent between the Process Manager server and the remote client when profiles are uninstalled on the server.</p> <p>Color profiles are now managed in the Optimize node Color tab. If you import a 5.0 workflow with a Color Manage node into FreeFlow Process Manager 6.0, the 5.0 Color Manage icon is converted to an Optimize icon and the settings transfer automatically to the Optimize settings Color tab.</p> <p>For information, refer to the <i>Ensuring Color Manage workflow consistency between the server and a remote client</i> procedure and <i>Importing a 5.0 workflow with a Color Manage node</i>.</p> |
| <p>Import ICC profiles</p> <p>ICC profile rights</p> | <p>Import any required ICC profiles.</p> <p>You must own the rights to use the ICC profiles accessed by FreeFlow Process Manager.</p> <p>For details, refer to the following procedure in the <i>Freeflow Process Manager Operator and Administrator Guide</i> or the online help: “To import an ICC profile.”</p> |

Table 1-2. Workflow and Job Management Preparatory Procedures

| Procedure | Overview |
|---------------------------|---|
| Set up hot folders | <p>You may want to designate hot folders ahead of time. You can open a common browse folder dialog and select or create a folder in the system via the Hot Folders dialog in Workflow Builder.</p> <p>You can:</p> <ul style="list-style-type: none"> Schedule all hot folders for the same times of day or schedule hot folders individually. Pause/resume all hot folders or individual hot folders. Enable file clustering on a per hot folder basis. <p>For details, refer to the following procedure in the <i>Freeflow Process Manager Operator and Administrator Guide</i> or the online help: "Setting up a hot folder."</p> |
| Set up external processes | <p>You may want to add external processes to support third party software, or to set up third party scripts.</p> <p>For details, refer to the following procedure in the <i>Freeflow Process Manager Operator and Administrator Guide</i> or the online help: "Using third party external processes."</p> |
| Set up Preps | <p>To use Preps, you will need to install it, configure the default Preps workflow, and create and save Preps job files.</p> <p>For details, refer to the following procedure in the <i>Freeflow Process Manager Operator and Administrator Guide</i> or the online help: "Setting up Preps."</p> |

Using the FreeFlow Administration Tool

The FreeFlow Administration Tool provides the following options:

- **Repository** icon: Displays the **Repository Connections** tab, where you can administer the connections between a Repository Management System (RMS) server to available Document Management System (DMS) repositories.
- **Conversion Settings** icon: Displays the Conversion Settings tab which contains the settings for the dynamic conversion of documents uploaded to document repositories. These settings will serve as the defaults for the File Conversion Tool application.
- **Process Manager** icon: Available only on machines running FreeFlow Process Manager. Opens the following tabs:
 - **Backup**: Allows you to back up FreeFlow Process Manager user and group information, workflows, jobs, and task information to a user selectable directory location.
 - **Restore**: Allows you to restore previously back up FreeFlow Process Manager user and group information, workflows, jobs and task information.
- **User Accounts** icon: Available only on machines running FreeFlow Process Manager. Displays tabs used to view and edit select FreeFlow Process Manager user account contact information.

Process Manager user accounts are created and managed using the Windows Local Users and Groups functionality in the Computer Management application. Users that are created and added to the appropriate Process Manager group accounts using Windows will appear in the FreeFlow Administration Tool list of users. The following options are available:

- **Storing User contact information**: The FreeFlow Administration Tool is used to view user accounts created in Windows, and to add or edit user contact information.
- **Changing the XDL Admin account password**: The FreeFlow Administration Tool allows you to change the password for the XDL Admin account. This password is set during the installation of the software.

For more information refer to the *Xerox FreeFlow System Administrator Guide* and the FreeFlow Administration Tool online Help system.

Legacy Document Library

Document Library is no longer available with the FreeFlow 6.0 product offering. Supported document repositories in FreeFlow 6.0 include Xerox DocuShare and SharePoint.



NOTE: *Any previous version of FreeFlow Makeready, FreeFlow Process Manager, and FreeFlow Web Services customers using Document Library, must migrate to a supported repository. For more information, contact your Xerox representative.*

Document conversion

Previously, Document Library users used the background batch utility, provided via the Conversion tab in the Library Administration Tool, to convert documents within Document Library cabinets to PDF.

In FreeFlow 6.0, you may wish to use the FreeFlow File Conversion Tool, available via the **Start** menu, to convert documents residing in file systems or repositories to PDF.

Managing backup and restore functions

In FreeFlow 6.0, the customer is ultimately responsible for backing up and restoring the FreeFlow system, whereas in previous versions of FreeFlow, a backup strategy was recommended.

The FreeFlow Administration Tool is used to back up and restore FreeFlow Process Manager user information, workflow, job, and task information to a user-selectable directory location.

For detailed information about backing up and restoring data with *the FreeFlow Administration Tool*, refer to the *FreeFlow Administration Tool online Help*.

Logging in to the FreeFlow Process Manager applications

You can open all FreeFlow Process Manager applications via the Start menu or the Control Center shortcut bar.

- You can open Workflow Builder via Workflow Submission Client and Workflow Job Manager.
- You can open Workflow Submission Client via Workflow Job Manager.

Process Manager user accounts are created and managed using the Windows Local Users and Groups functionality in the Computer Management application. During install, Xerox FreeFlow Process Manager Administrators and Xerox FreeFlow Process Manager Operators groups are created. Your administrator then populates these groups with users. Permissions to launch applications are based on group membership. For more information, see [Group membership and authorization](#).

When attempting to open a FreeFlow Process Manager application:

- If you are currently logged into a Process Manager server, but are not a member of either the Xerox FreeFlow Process Manager Administrators or Xerox FreeFlow Process Manager Operators group, a message displays and you may not have permission to run the application. This also applies to logged-in users on remote client machines.
- If you are currently logged into a Process Manager server, are a member of the Xerox FreeFlow Process Manager Operators group, and you are attempting to access an application that requires Xerox FreeFlow Process Manager Administrators group privileges, a login screen displays and you must enter the required credentials. This also applies to logged-in users on remote client machines.
- If you have permission to launch an application by virtue of membership in an authorizing group, the application launches without asking for credentials. See your administrator for questions about your user account.

Authorization error message

The Windows OS caches a user's group membership information. If you add yourself to an authorization group (e.g., Xerox FreeFlow Process Manager Administrators) and then try to launch an application, you will receive an error message indicating you do not have permission to launch FreeFlow Process Manager applications. To rectify this issue, log off and then log back on.

To log in to the FreeFlow Process Manager applications

If you enter the incorrect username or password, you receive an incorrect username or password error message. You can then enter your correct username and password.



1. Select **[Start: Programs: Xerox FreeFlow Software: FreeFlow Process Manager: <application>]**. The Login dialog opens for the selected application.
2. In the User name text box, enter your user name.
3. In the Password text box, enter your password.
4. The Domain text box is populated with the domain of the currently logged in user, or the last domain entered in the login form. Confirm that the proper domain name appears.
5. Enter the appropriate Process Manager server name in the Server text box.
6. Select **[OK]**. The main window for the selected application opens.

Group membership and authorization

The following table shows authorization based on membership in FreeFlow Process Manager Administrators or FreeFlow Process Manager Operators groups.

Table 1-3. Group Membership and Authorization

| Administrator | Operator |
|---|---|
| Can launch Workflow Job Manager, Workflow Submission Client, Manifest Automation from Xerox (MAX) | Can launch Workflow Job Manager, Workflow Submission Client, Manifest Automation from Xerox (MAX) |
| Can launch Workflow Builder | Cannot launch Workflow Builder |
| Can launch FreeFlow Administrator Tool and perform all administrative tasks | Can launch FreeFlow Administrator Tool and edit repository connection information |



NOTE: *Printer Registration also supports user authentication through the operating system and application-level authorization through membership in operating system groups.*

Managing production printers

In FreeFlow 5.0, Workflow Printer Administration was used to configure and manage production printers. In FreeFlow 6.0, a new common printer interface enables all FreeFlow applications to maintain a single database of configured printers and to have a common job setup GUI interface across FreeFlow applications. The common printer interface includes the following utilities:

- **Registered Printer List Locator:** Allows you to set whether the registered printer list in use by a FreeFlow application is located on a local computer or a remote computer.
- **Printer Registration:** Allows you to register and manage supported production printers and queues for use by FreeFlow software applications. To configure the Print process step in a workflow, production printers must first be added via the FreeFlow Printer Registration application.
- **Printer Status/Job Status Tool:** Allows you to status jobs, queues, and printers.

Xerox FreeFlow Common Printer Administrators group

In order to make changes to registered printers with the Printer Registration tool, a user must be a member of the Xerox FreeFlow Common Printer Administrators group.

A logged-in user who is a member of the group has full access to the add/edit functionality in the Printer Registration tool.

If the user is not a member of the group, the error message “The logged in user does not have administrative access” displays and the tool runs in read-only mode. A login dialog, accessed from the file menu, allows the user to log in and turn on the add/edit functionality. The login dialog requires a user name, a password, and a domain.

To register and add a production printer



1. Select [**Start: Programs: Xerox FreeFlow Software: Printer Registration**], or in Workflow Job Manager, select [**Launch: Printer Registration**]. The Installed Products dialog displays.
2. Ensure the radio button for Process Manager is marked.
3. Select [**OK**].
4. In the Printer Registration dialog, select the desired task: [**Add...**], [**View/Edit...**], or [**Delete**].
5. For additional information about registering and managing printers, select [**Help**] in the Printer Registration dialog to open the online Help.

For additional information about Production Printing, refer to the *Xerox Customer Software Release Document for FreeFlow Process Manager*, or the *Xerox Production Printing Guide for FreeFlow Applications*, or access the online Help for the *Registered Printer List Locator*, *Printer Registration*, or the *Printer Status/Job Status Tool*.

Setting up Preps



To use PREPS, install PREPS in the following way:

NOTE: *FreeFlow Process Manager, Version 6.0, supports Kodak PREPS 5.2.2.*

NOTE: *When the PREPS documentation uses the term Xerox DigiPath, it is referring to FreeFlow.*

- For Setup Type, select the Custom Install.
- Select the following components during installation:
 - PREPS Program
 - Languages
 - Xerox Digipath
 - Automation
 - iKey Hardware Key Driver or Sentinel Hardware Key Driver

You also have to physically install the appropriate hardware key.

Once PREPS is installed, you need to perform the following:

- Configure PREPS to use the Default workflow PDF to PDF.
- Create and save PREPS Job files.

See also

[To configure the Preps default workflow](#)

[To create and save Preps Job files](#)

[To select a device type for PREPS versions prior to 5.2.2](#)

[Missing hardware key error](#)

[Using PREPS with Adobe Acrobat 8.0](#)

To configure the Preps default workflow



1. Start PREPS.
2. Select [**Edit: Preferences...**] to display the Preferences dialog.
3. Select the [**General**] tab. In the Default workflow box, select [**PDF -> PDF**].
4. Select [**OK**] to close the Preferences dialog.
5. Select [**Setup: Save Profile...**] to display the Save Profile dialog.
6. In the Profile Name text box, ensure that “default” is entered, and select [**OK**] to save the profile.
7. If the message “Profile default already exists. Overwrite anyway.” displays, select [**Yes**].
8. Exit Preps.
9. The Save current configuration dialog prompts “Do you want to save the current configuration into the profile,” select [**Yes**]. Preps closes.



NOTE: *The profile must be manually edited in a text editor to allow output to a PDF file. After completing steps 1-9, above, do the following:*

10. On the Process Manager server, locate the file “default.cfg” under <Preps Install dir>\Preps 5.2\Profiles\Default.
11. Open the file with a text editor.
 - a. Double-click “default.cfg”.
 - b. In the Windows dialog, select [**Select the program from a list**], and select [**OK**].
 - c. In the Open With dialog, select Notepad, and select [**OK**].

12. Find and change the following entries:
 - Change -O:P to -O:D
 - Change -ADOBEPJTF:NO to -ADOBEPJTF:YES
 - Change -JDFOUTPUT:YES to -JDFOUTPUT:NO
 - Change -EXPORTPDF:NO to -EXPORTPDF:YES
 - Change SkipDeviceSizeWarning:NO to SkipDeviceSizeWarning:YES
13. Save and close the file.
14. For Preps 5.2.2, make the default.cfg readonly once you have made all changes:
 - a. In Windows Explorer, select the default .cfg file.
 - b. Right -click and select [**Properties**].
 - c. In the General Tab, in the Attributes area, mark the check box for [**Read-only**].
 - d. Select [**OK**].
15. If there is a .cfg file under <Preps Install dir>\Preps 5.2\Profiles, make the same changes as in steps 11 - 13 to this file, also.

To create and save Preps Job files

When you use PREPS, the FreeFlow Workflow Builder system searches the Imposition Jobs directory for Preps files with a .job suffix. Since no default .job files are provided, the user must create them.



1. Start PREPS.
2. To create a new PDF job, select [**File: New Job: PDF->PDF**]
3. In the Signature List window, select [**Signatures...**] to open the Signature Selection dialog.
4. In the Signature Selection dialog, select a style from the list in the Binding style drop box.
5. Click [**+**] to expand the Sample Templates tree and display a list of templates.

6. In the displayed list of templates, click **[+]** to expand the desired template, then select the appropriate signature.
7. Select **[Add]** to add the template and signature to the job file. The job file template displays in the Template/Signature/Page window.
8. Select **[OK]** to close the Signature Selection dialog. The job file template displays in the Signature List window.

You must select a device type for each signature.

9. In the Signature List window, select the desired signature. The **[Device...]** button is enabled.
10. Click **[Device...]**.
11. In the Choose Device window, select **[Press Sheet Size]** as the target device. You must select a device for each signature.
12. Select **[OK]** to close the Choose Device window.
13. To save the job file, select **[File: Save Job]** or **[File: Save Job As...]**. Either opens the Save Job As dialog.
14. In the Save in list box, navigate to the FreeFlow Install Directory\ImpositionJobs directory, typically, E:\ FreeFlow\ ImpositionJobs.
15. Type the appropriate file name, and select **[Save]**.
16. Repeat steps 2-11 to add more job file templates.

To select a device type for PREPS versions prior to 5.2.2

You must select a device type for each signature in order to use old PREPS job files.



1. Start PREPS.
2. Select [**Setup: Device Setup**].
3. Select [**Press Sheet Size**] in the “Installed Devices” section.
4. Select [**OK**] to close the Device Setup dialog.
5. Close the PREPS application. You can now use the old job files.

For more information about device setup, refer to your PREPS documentation.

Missing hardware key error

If the “Preps Server error, check Preps Automation Front-End server” error message is displayed on your PREPS UI or on the server that you are using to run PREPS, do the following, even if the PREPS hardware key is not missing:



1. Stop the PREPS Automation Front-End server by performing one of the following:
 - If there is a yellow folder icon (with the tooltip “Waiting for Jobs”) in the systray, double-click the icon to open the Preps UI.
 - In the UI, select [**File: Exit**] to close PREPS.
 - If there is not a yellow folder icon (with the tooltip “Waiting for Jobs”) in the systray, then the application must be stopped in the Windows Task Manager.
 - Open Windows Task Manager, find the **PrepsSlv.exe** process, and end the process.
 - Find the **PrepsSrv.exe** process and end the process.
2. Close the FreeFlow Process Manager applications and shut down the FreeFlow Process Manager server.
3. Reinsert the hardware key.
4. Reboot the FreeFlow Process Manager server.
5. Open the FreeFlow Process Manager applications and resubmit the job. The Preps Automation Front-End server starts automatically.

Using PREPS with Adobe Acrobat 8.0

When using Adobe Acrobat 8.0, after PREPS installation, you must change the PDF Conversion Acrobat directory.

To use PREPS with Adobe Acrobat 8.0



1. Start PREPS.
2. Select [**Edit: Preferences...**] to display the Preferences dialog.
3. Select the [**PDF**] tab.
4. Select Adobe Acrobat and select the directory in which you installed Adobe Acrobat 8.0, for example C:\Program Files\Adobe\Acrobat 8.0\Acrobat.exe.
5. Select [**OK**] to close the Preferences dialog.

2. Workflow Builder

Xerox FreeFlow Workflow Builder provides the ability to create workflows by dragging and dropping processes into a user-defined sequence. The optional ability to configure and add third party software workflow components to a workflow enhances the flexibility and capabilities of the Process Manager system.

About Workflow Builder

A workflow is a sequence of uniquely configured steps that define how a document is processed. Use Workflow Builder to:

- Create workflows
 - Use graphical tools to assemble customized workflows from workflow process steps.
 - Configure the settings for workflow process steps.
 - Enable workflows to receive jobs.
 - Disable workflows to modify them or to prevent job submission.
- Import and export workflows.
- Take processes offline and change concurrency counts.
- Create preflight profiles by launching Adobe Acrobat.
- Set up and manage hot folders.
- Add external PDF processes to support third party software.
- Set up third-party scripts.
- Set up Notify attributes on the SMTP server; set up the Proxy server.
- Set up repository credentials.

Logging in to Workflow Builder

Process Manager user accounts are created and managed using the Windows Local Users and Groups functionality in the Computer Management application. During install, Xerox FreeFlow Process Manager Administrators and Xerox FreeFlow Process Manager Operators groups are created. Your administrator then populates these groups with users. Permissions to launch applications are based on group membership.

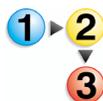


NOTE: *If you are not a member of an authorizing group, contact your administrator. If you forget your username and password, notify your administrator.*

To log in to Workflow Builder

A login screen may or may not display, depending on group membership and server location.

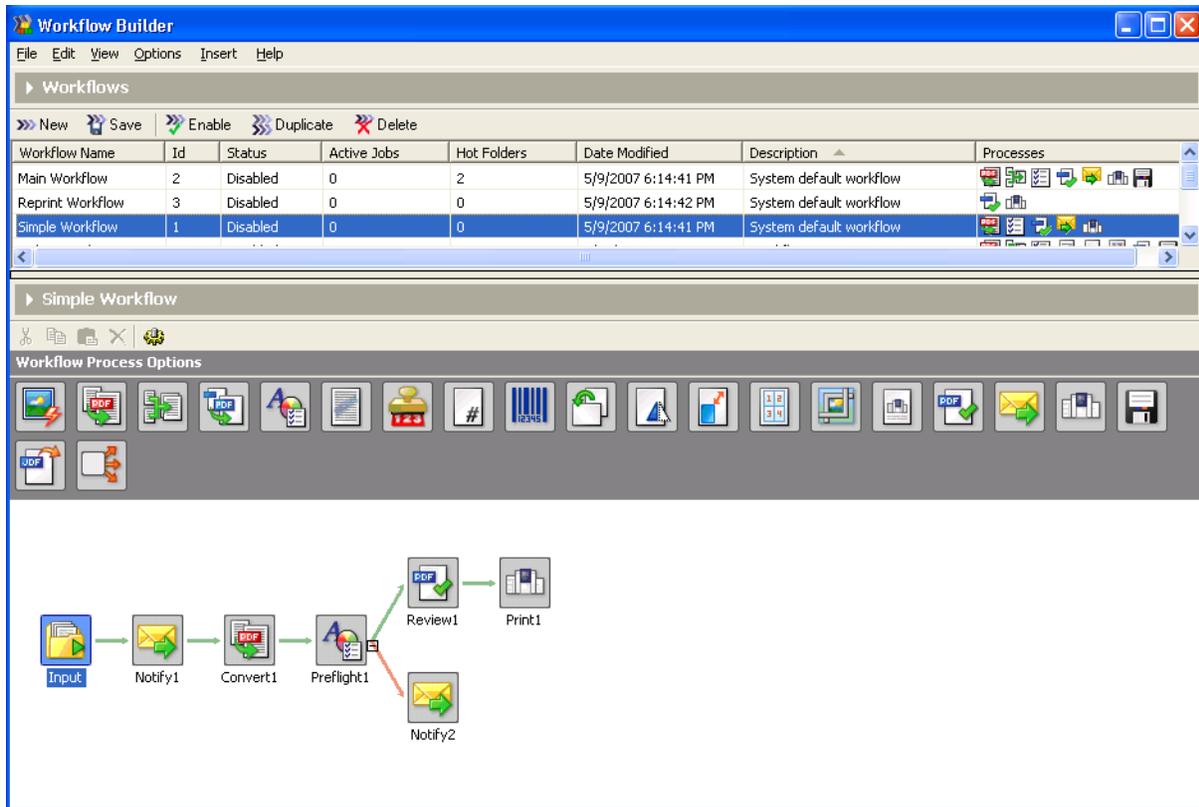
If you enter the incorrect username or password, you receive an incorrect username or password error message. You can then enter your correct username and password.



1. Select **[Start: Programs: Xerox FreeFlow Software: FreeFlow Process Manager: Workflow Builder]**. The Login dialog opens for the selected application.
2. In the User name text box, enter your user name.
3. In the Password text box, enter your password.
4. The Domain text box is populated with the domain of the currently logged in user, or the last domain entered in the login form. Confirm that the proper domain name appears.
5. Enter the appropriate Process Manager server name in the Server text box.
6. Select **[OK]**. The main window opens.

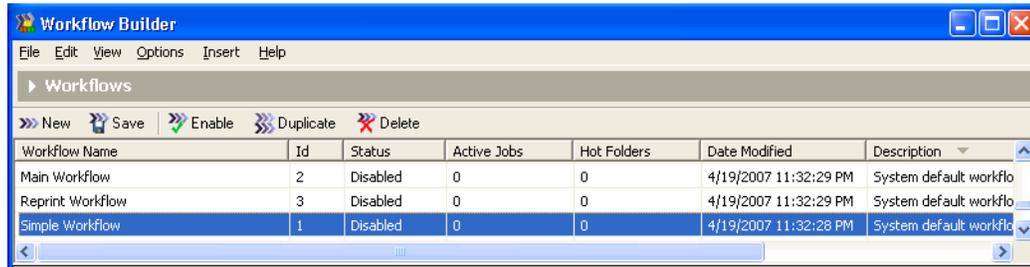
Workflow Builder main window

Two major areas comprise the Workflow Builder main window: the workflow list and the workspace.



Workflow list

Workflow List Area



Workspace Area

The workflow list, in the upper portion of the window, includes the following components:

- Menu bar
- Workflows toolbar
- List of the current workflows
- Three default application workflows:
 - Main Workflow
 - Simple Workflow
 - Reprint Workflow

Workflow list columns

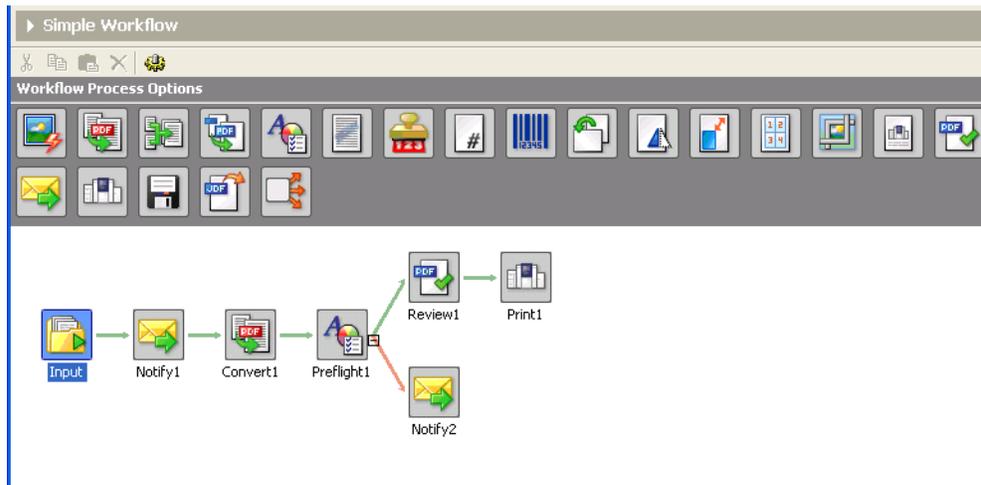
The workflow list contains the following columns:

Table 2-1. Workflow list columns.

| Column | Description |
|---------------|--|
| Workflow Name | Lists the names of the workflows. |
| Id | Lists the workflow Ids. |
| Status | Lists whether the workflow is Enabled, Disabled, Enabled-Busy, or Disabled-Busy. |
| Date Modified | Lists the time and date the workflow was last changed. |
| Description | Displays workflow comments entered by users. |
| Processes | Shows a small graphical representation of each workflow. |
| Active Jobs | Lists the number of active jobs. |
| Hot Folders | Lists the number of hot folders associated with the selected workflow. |

In the workflow list, you can sort the list by the items in any column by clicking the column heading.

Workspace



The workspace, in the lower portion of the workflow window, includes the following components:

- Name of the currently selected workflow
- Workspace toolbar
- Workflow Process Options— the workflow building blocks
- Workspace—for workflow assembly, display, and modification

When a user selects a workflow in the list, it is graphically displayed in the workspace. If the workflow is in the “disabled” status and does not currently have jobs that are being processed, it is available for editing.

Zooming in and out of the workflow view

For large or complex workflows, this feature allows more processes to be displayed in the workflow window. Three zoom levels are available:

Small Icons: Displays small icons.

Medium Icons: Displays mid-sized icons.

Large Icons: Default; displays large icons.



NOTE: To display the process name in this view, hover over a process with the mouse cursor to show the tool tip.

To zoom in or zoom out



- Select [**View: Workflow Icons**], and then select the desired option, or
- Right-click in the graphical workflow area, select [**Workflow Icons**], and select the desired option.

Expanding and restoring the viewing space

The expand and restore capability provides more viewing space in selected areas.

To expand and restore the view



1. To expand the view, click the right-facing [**Expand**] arrow to the left of the title area—for example, “Workflows” in Workflow Builder.
2. To restore the view to the original size, click the down-facing [**Restore**] arrow.

Enabling and disabling process tool tips

You can view process settings via tool tips in the graphical workflow display by positioning the mouse pointer over a workflow process.



NOTE: *In Workflow Job Manager, the tool tip for the Input node displays the original input files.*

To enable/disable tooltips



- In the View menu,
- To enable tool tips, select [**Show Process Tool Tips**].
 - To disable tool tips, select [**Hide Process Tool Tips**].

Finding a process node

The Find feature simplifies the task of locating process node in a workflow.

To find a node



1. In Workflow Builder, Workflow Job Manager or Workflow Submission Client, select a workflow or a job.
2. Select **[Edit: Find...]**.
3. In the Find what text box, enter the process name and select **[Find Next]**.
4. If the process is located, it becomes the selected process.
5. Select **[Find Next]** to locate the next instance of the process. If no additional processes are found, the Reached end of Workflow message displays.
6. To continue the search from the beginning, select **[OK]**.
7. If the process is not located, a “Node name not found” message displays. Select **[OK]** to close the Not Found dialog.
8. Begin a new search or close the dialog to end the search.

Workflow Builder menus

The Workflow Builder menu bar provides commands for creating and modifying workflows.

Commands can also be accessed by right-clicking on a workflow or workflow option to display the context menu. Menu items that are not available are grayed out.

See also:

[The File menu](#)

[The Edit menu](#)

[The View menu](#)

[The Options menu](#)

[The Insert menu and workflow process icons](#)

[The Help menu](#)

The File menu

The Workflow Builder File menu contains the following options:

Table 2-2. Workflow Builder File menu

| File Menu Option | Description |
|------------------|--|
| New | Adds a new workflow to the list. Provides a cursor for editing the workflow name. The new workflow is added to the list and graphically displayed in the workspace by a yellow Input folder. |
| Save | Saves changes to the workflow that is currently open for modification. |
| Revert | Opens the selected workflow to its last saved state. Displays a confirmation dialog. |
| Import... | Opens the Open dialog; allows you to choose .xml workflow files. |
| Export... | Opens the Export dialog. Available if one or more workflows are selected. |
| Exit | Closes the Workflow Builder application. If a workflow is open and has been changed since it was last saved, displays a confirmation dialog. |

The Edit menu

The Workflow Builder Edit menu contains the following options:

Table 2-3. Workflow Builder Edit menu

| Edit Menu Option | Description |
|------------------------|--|
| Workflow Properties... | Opens the workflow properties dialog, which allows you to edit the workflow name, add a description of the workflow, and enable submission to the workflow. |
| Enable/Disable | <p>Enable: Allows a job to be submitted to the selected workflow. Enabled workflows are displayed in the Workflow Submission Client window. Enable also auto-saves the workflow.</p> <p>Disable: Prevents jobs from being submitted to the workflow. Disabled workflows are not visible or available via the Workflow Submission Client.</p> |
| Duplicate | Adds a copy of the selected workflow to the list; provides a cursor for editing the workflow name. The user must select <Enter> to complete the duplication operation. |
| Rename Workflow | Highlights the selected workflow name and provides a cursor for editing the name. The workflow must first be disabled. |
| Delete Workflow(s) | Deletes the selected workflow with a confirmation dialog. |
| Cut | Deletes and stores the selected process and its properties for pasting into the same workflow. |
| Copy | Stores the selected process and its properties for pasting elsewhere in the same workflow. |
| Paste | Pastes the process stored in the clipboard. |
| Paste as Fail Branch | Pastes the process stored in the clipboard as a fail branch of the selected process. |
| Delete Process | Deletes the selected process. |
| Rename Process | Invokes the process rename mode for the selected process. |
| Process Settings... | Opens the settings dialog for the selected workflow process. |
| Find... | Opens the Find dialog, which allows you to locate a process node in a workflow. |

The View menu

The View menu contains the following options:

Table 2-4. Workflow Builder View menu

| View Menu Option | Description |
|-----------------------------|--|
| Show/Hide Process Tool Tips | Show: Allows you to view process settings via tool tips in the graphical workflow display by positioning the mouse pointer over a workflow process. Hide: Disables the tool tips. |
| Workflow Icons | Small Icons: Displays small icons. Medium Icons: Displays mid-sized icons. Large Icons: Default; displays large icons. |

The Options menu

The Options menu includes the following options:

Table 2-5. Workflow Builder Options menu

| Options Menu Option | Description |
|---------------------|--|
| Processes | Opens the Processes dialog, which allows you to check the status of a workflow process. Allows you to open the Process Settings dialog to place the process online or offline, and to check or change the concurrent count value. Impose Process Settings allows you to turn the copy count divisor functionality on or off. This allows you to adjust the copy count to maintain the original quantity intent for workflows that contain multiple-up impositions. See To enable the Copy Count Divisor |
| Hot Folders | Opens the Hot Folders dialog, in which you can access the Hot Folder Setup dialog and manage existing hot folders. You can delete hot folders, pause and resume scanning for new files, open the Hot Folder Settings dialog, or check hot folder status. |
| External Processes | Opens the External Processes dialog, which allows you to move and delete processes, and to access various dialogs for adding and configuring external processes. |

Table 2-5. Workflow Builder Options menu

| Options Menu Option | Description |
|-------------------------------------|---|
| SMTP Setup... | Opens the SMTP Setup dialog, which allows you to set up the SMTP server for e-mail notification and to establish a maximum e-mail attachment size. |
| Proxy Setup... | Opens the Proxy Setup dialog, which is used to configure proxy settings. This enables the iWay Prime application to submit PDF jobs to Process Manager workflows. |
| Preflight Setup... | Opens Adobe Acrobat, which is used to configure preflight profiles. |
| Repository Credentials Setup... | Opens a dialog that allows the current user to enter a Username and Password for the active repository. |
| Email Attachment Watermark Setup... | Opens the Email Attachment Watermark Setup dialog. Allows you to set up and customize the security watermark on PDF documents sent via email notification. |

The Insert menu and workflow process icons

The Workflow Builder Insert menu allows you to insert processes into a displayed workflow.

To insert a process, select a process in a workflow, and select [**Insert:** <item>]. The new process is inserted to the right of the selected process.

Workflow processes are also available as icons in the Workflow Process Options area. The icons can be dragged and dropped into the workspace to assemble a workflow. Processes marked with an asterisk (*) in the table, below, are not configurable.

See also:

[Customizing a workflow process name](#)

Table 2-6. Workflow Builder Insert menu and workflow process icons

| Insert Menu Options | Workflow Process Icon | Description |
|--|---|---|
| Input NOTE: Not an Insert Menu option |  | Displays automatically as the first workflow node when you select <Enter> during new workflow creation. Does not have a settings dialog in Workflow Builder. In Workflow Job Manager, the settings dialog and the tool tip display the original input files. |
| AIE |  | Automatic Image Enhancement (AIE) optimizes sharpness, color balance, saturation, exposure, noise reduction and contrast of TIFF, JPEG, and BMP images, whether standalone or embedded in a PDF. AIE also supports redeye removal for humans and shadow detail enhancement. The AIE feature works only for color and grayscale images. |
| Convert |  | Converts documents submitted to the workflow to PDF. Converts the following formats: Microsoft Word, Microsoft Excel, Microsoft PowerPoint (including Microsoft Office 2007), Microsoft Publisher, Adobe Photoshop, Adobe InDesign, Adobe Illustrator, JPG, JPEG, TIFF, TIFF-IT, TIF, BMP, PS, RDO, QXD, QXP, VPC and EPS. You can select from various job options to generate optimal PDFs. Allows you to flatten PDFs for printing. |
| Join |  | Combines multiple PDF files into a single PDF file. |

Table 2-6. Workflow Builder Insert menu and workflow process icons

| Insert Menu Options | Workflow Process Icon | Description |
|---------------------|---|--|
| Optimize |  | The Optimize process allows you to modify a PDF file to be PDF/X compliant, specify how fonts should be embedded, define PDF Box settings, configure spot color settings, and manage color profiles. You can also remove trap layers and replace hairlines. |
| Preflight |  | <p>Uses a preflight profile to validate and check formatting, verify the image, fonts, and verify references to OPI image server images. The preflight checks depend on the profile selected.</p> <p>You can also use Preflight to let the workflow automatically discover conditions. For example, you can create a single-rule profile, use it as a filter to check a file for a specific condition, for example, a certain page size, and then direct the file to the next appropriate process or workflow.</p> |
| Watermarks |  | Allows you to add a text or image watermark to each page of an input PDF file. You can specify a combination of opaque or transparent images or text, in various alignments, that can appear either underneath or on top of the page content. The Preview option allows you to dynamically view the content before you commit to the selected settings. |
| Bates Numbering |  | Allows you to add bates stamps to each page of an input PDF file. Bate stamps consist of a page number with optional leading zeros and an optional fixed text prefix. An optional extra line of fixed text can appear either above or below the page number. The Preview option allows you to dynamically view the content before committing to the selected settings. |
| Page Numbering |  | Allows you to add page numbers to each page of an input PDF file. The Preview option allows you to dynamically view the content before committing to the selected settings. |
| Barcode |  | Allows you to add a barcode to your workflow. You can specify the barcode type, font, placement, alignment, rotation, frequency, size and other options. Provides support for variable data in the text and page range areas. The Preview option allows you to dynamically view the content before committing to the selected settings. |
| Rotate Pages |  | Allows you to rotate each page in the PDF file 90 degrees right or left, or 180 degrees. |

Table 2-6. Workflow Builder Insert menu and workflow process icons

| Insert Menu Options | Workflow Process Icon | Description |
|---------------------|---|---|
| Flip Pages |  | Allows you to flip each page in the PDF file horizontally or vertically to create a mirror image. |
| Resize |  | Allows you to select a specific size, or a size based on a percentage of the original image size. For TIFFs, JPGs, or BMPs, the image is resized; for PDFs, the page is resized. |
| Impose |  | <p>Allows you to do the following:</p> <ul style="list-style-type: none"> • Use imposition to define the placement of page elements. • Place crop marks. • Select various job types—for example, signature booklets and N-up. • When the PREPS imposition node is selected, choose from a list of preconfigured PREPS imposition job files. • Select from various PDF Boxes. • Select Cell Clustering, which provides the option of pulling together cells on a sheet in a way that results in cell sizes that contain the imposed page image with no waste space between cells. <p>The Preview option allows you to dynamically view the content before committing to the selected settings.</p> |
| Crop |  | Allows you to automatically crop jobs consisting of one or more PDF pages and JPEG, TIFF, or BMP file images. For PDF documents, crops the pages; for JPEG, TIFF, or BMP files, crops the images. |
| Pressmarks |  | <p>Allows you to add a fixed pressmark to a workflow. You can specify the pressmark placement, rotation, frequency, and transparency, and then preview the specifications.</p> <p>The Preview option allows you to dynamically view the content before committing to the selected settings.</p> |

Table 2-6. Workflow Builder Insert menu and workflow process icons

| Insert Menu Options | Workflow Process Icon | Description |
|---------------------|---|--|
| Review |  | <p>Can be used multiple times, at critical points in a workflow, to view, check and edit the PDF file using Adobe Acrobat.</p> <p>When stopped at the Review step, you can change process settings, resubmit the job to a previous step for additional processing, view a soft proof, or print a hardcopy proof.</p> <p>You can approve the job and allow it to move to the next step in the workflow, or you can fail the job.</p> <p>If there is a Print step after the Review step, you can select [Copies] to access the Copies dialog and change the number of copies to print.</p> |
| Notify |  | <p>Provides job status notification via e-mail. Allows you to attach job files up to a maximum size of 1 GB.</p> |
| Print |  | <p>Allows you to print PDF, VPC, or RDO (for reprint) files to a specified production printing queue using a specified job ticket.</p> <p>For information about reprinting RDOs, refer to the topic “About submitting RDOs.”</p> |
| Save |  | <p>Allows you to save all supported file types from the workflow to a specified location in a Windows file system or document repository.</p> <p>You can also use Save to direct or “branch” a job to other workflows by designating a hot folder as the Save location.</p> |
| JDF Export |  | <p>Creates a JDF ticket and exports a PDF and JDF ticket to a specified location in a Windows file system or document repository. You have the option to export the JDF with changes made by the external process nodes.</p> <p>The output file of a JDF export task can be re-imported and re-run by dropping it into a hot folder associated with an appropriate workflow. The files associated with the JDF must exist in the same location as the original job.</p> |
| Conditional |  | <p>Conditional branching provides an added level of logic to a workflow, allowing it to examine the properties of submitted jobs, and then act accordingly without human intervention.</p> <p>You can add one or more conditional branches to a workflow, each with one or more user-designated conditions that specify the desired attributes or properties of the submitted jobs.</p> |

Table 2-6. Workflow Builder Insert menu and workflow process icons

| Insert Menu Options | Workflow Process Icon | Description |
|---|---|---|
| External Process (only an option if one is set up) |  | External Processes enable the use of third party workflow components. The processes are added and configured in Workflow Job Manager. |

Customizing a workflow process name

The ability to change a process name is useful when multiple instances of a process exist in a workflow. The new name displays beneath the workflow icon and in the process settings window, along with the process name. Follow these guidelines:

- Each process in a workflow must have a unique name.
- The name cannot have more than 60 characters.
- You cannot use the following characters: \, /, :, *, ?, ", <, >, or |.

To customize a workflow process name



1. In Workflow Builder, ensure the workflow is disabled.
2. Double-click the process name below the desired workflow node. The name highlights
3. Type a new name.



NOTE: You can also right-click a process, select **[Rename]**, and type a new name.

4. Select **[Enter]**.
5. Save and enable the workflow to make the change effective in Workflow Job Manager and Workflow Submission Client.

The Help menu

The Workflow Builder Help menu contains the following options:

Table 2-7. The Workflow Builder Help menu

| Help Menu Option | Description |
|---------------------------|--|
| Help Topics... | Displays the Help application to allow you to list the Help topics for Workflow Builder. |
| About Workflow Builder... | Displays program, copyright and version information for Workflow Builder. |

Workflow Builder toolbars

The Workflow Builder toolbars provide commands for creating and modifying workflows.

See also:

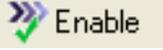
[Workflows toolbar](#)

[Workspace toolbar](#)

Workflows toolbar

The Workflows toolbar contains the following options:

Table 2-8. Workflows toolbar

| Toolbar Option | Toolbar Icon | Description |
|----------------|--|--|
| New |  | Adds a new workflow to the list. Provides a cursor for editing the workflow name. A Start icon is displayed in the workspace. |
| Save |  | Saves changes to the workflow that is currently open for modification. |
| Enable/Disable |   | <p>Enable: Allows a job to be submitted to the selected workflow. Enabled workflows are displayed in the Workflow Submission Client window. Enable also auto-saves the workflow.</p> <p>Disable: Prevents jobs from being submitted to the workflow. Disabled workflows are not visible or available via the Workflow Submission Client.</p> |
| Duplicate |  | Adds a copy of the selected workflow to the list; provides a cursor for editing the workflow name. The user must select <Enter> in order to complete the duplication operation. |
| Delete |  | Deletes the selected workflow with a confirmation dialog. |

Workspace toolbar

The Workspace toolbar allows you perform the following functions on a selected workflow process step.

Table 2-9. Workspace Toolbar

| Toolbar Option | Toolbar Icon | Description |
|----------------|---|--|
| Cut |  | Deletes and stores the selected process and its properties for pasting into the same workflow. |
| Copy |  | Stores the selected process and its properties for pasting elsewhere in the same workflow. |
| Paste |  | Pastes a process that has been copied. |
| Delete Process |  | Deletes the selected process. |
| Settings |  | Displays the settings dialog for a selected process. |

Building workflows

You can create Workflows from scratch or by duplicating, and then modifying, an existing workflow. To build or modify a workflow, you perform the following basic steps:

- Drag and drop process icons into the workspace. Processes move from left to right in the workflow.
- Configure the process settings, as needed, to meet the requirements of the workflow.
- Save and enable the workflow.



NOTE: *All workflows are disabled after an upgrade or migration. A pop-up message displays if you try to enable a workflow that requires additional configuration. Complete the configuration, and then enable the workflow.*

Rules for building workflows

Apply the following rules when you sequence workflow process steps in the workspace:

Input is the first step in any workflow. **Input** is automatically displayed in the workspace when you begin a new workflow.

If **Convert** exists in a workflow, it must precede the following processes:

- Join
- PDF Optimize
- Preflight
- Impose
- Bates Numbering
- Page Numbering
- Watermarks
- Rotate Pages
- Flip Pages
- Print
- Barcodes
- Pressmarks

If **Join** exists in a workflow, it must precede the following processes:

- Preflight
- Color Manage
- Impose
- Bates Numbering
- Page Numbering
- Watermarks
- Rotate Pages
- Flip Pages
- Print
- Barcodes
- Pressmarks
- Optimize

Building a new workflow

To build a new workflow, drag and drop process icons into the workspace, configure the process settings to meet the workflow requirements, and then save and enable the workflow.

To build a new workflow

1. Launch Workflow Builder.
 2. In the Workflows toolbar, select **[New]**. A new workflow is added to the list. A highlighted name cell is provided for editing.
 3. Type a workflow name in the cell, and select **<Enter>**. An Input icon displays in the Workspace.
 4. Select the desired process from the Workflow Process Options area, and drag and drop the process into the workflow workspace into the desired position. A Gray placeholder indicates where a process can be placed. Links automatically display between processes.
- You can also use the Insert menu to add a process. The process is inserted after the selected process in the workflow.
5. If necessary, configure the process settings.
 6. Select **[Save]** and **[Enable]**.



NOTE: A workflow must be enabled before it can accept new jobs for processing.

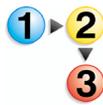
Duplicating and modifying an existing workflow

Instead of creating a workflow from scratch, determine if an existing workflow has the process steps and process settings that approximate your needs. Then copy the existing workflow, add or delete process steps, change the properties of a process step, or otherwise modify the workflow.

To duplicate and modify an existing workflow



NOTE: *To modify a workflow, it must first be disabled and all jobs received for processing in the workflow must be completed.*



1. In Workflow Builder, select a workflow from the list.
2. Select **[Duplicate]** in the Workflows toolbar.
3. Type a new workflow name in the cell, and select **<Enter>**. The new workflow displays in the workspace.
4. Select from the following:
 - a. **To delete a process:** Select a process step, and select **[Delete]** in the Workspace toolbar to remove the step from the workflow.
 - b. **To add a process:** Select a process step from the Workflow Process Options area, and drag and drop it into the workflow. Repeat to add more processes. If necessary, reconfigure the process steps.
5. Select **[File: Save]** to save the workflow, or select **[Enable]** to enable and auto-save the workflow.



NOTE: *After you edit a workflow, it must be enabled to accept new jobs.*

Enabling a workflow

A workflow is disabled by default. It must be enabled before it can accept new jobs for processing.

“Enabled Busy” is the status of an enabled workflow that is processing a job. The workflow is not available for editing.



NOTE: *In Workflow Builder, all options in the node dialogs are grayed and cannot be edited when a workflow is enabled.*

To enable a workflow



1. In Workflow Builder, select a disabled workflow from the list.
2. Select **[Enable]** from the Workflows toolbar.



NOTE: *If changes are made to a workflow, it must be saved before can be enabled.*

Disabling a workflow

A disabled workflow cannot accept new jobs for processing.

“Disabled Busy” is the status of a disabled workflow that is waiting for jobs to finish processing. Once the jobs are completed, the status changes to “Disabled” and the workflow is available for editing.

To disable a workflow



1. In Workflow Builder, select an enabled workflow from the list.
2. Select **[Disable]** from the Workflows toolbar. The workflow is disabled.

Deleting a workflow



NOTE: To delete a workflow, the workflow must first be disabled, and all jobs received for processing in the workflow must be completed.

To delete a workflow

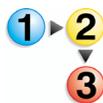


1. In Workflow Builder, select a workflow in the list.
2. In the Workflows toolbar, select [**Delete**]. A confirmation message displays.
3. Select [**Yes**] to delete the workflow.

Editing workflow properties

The Workflow Properties dialog allows you to change the workflow name and description that appear in the list area. In the Description field, you may want to include notes regarding when to use a particular workflow.

To edit workflow properties



1. In Workflow Builder, select a workflow from the list.
2. Double-click on the workflow to display the Workflow Properties dialog.
3. In the Name field, type a workflow name.
4. In the Description field, type a workflow description.
5. To enable the workflow, select “Enable submission to this workflow.”
6. Select [**OK**] to save the changes and close the dialog.

Creating fail branches

You may also add fail branches -- contingency workflow steps for fail conditions. For example, after a Preflight process, you might want to add a fail branch that contains the following:

- A Notify process that contains Preflight results.
- A Review process, to check or edit the document.

The workflow defaults to having no fail branches open. You can open a branch by clicking on the “plus” icon and collapse the branch by clicking on the “minus” icon. Only one branch may be open at a time. If you open another branch, the branch that is currently open automatically closes.

To create a fail branch



1. Select the desired fail branch process and drag it downward, after the desired process in a workflow.
2. Drag the process into the gray space holder that appears after the red arrow.



NOTE: *You can also place a fail branch after a process step as follows: Select, and then [Copy] a process, point to the desired position in the workflow, and select [Paste as Fail Branch] from the Edit menu.*

Exporting workflows

The Process Manager export/import workflow function provides workflow portability and a method for backing up and restoring workflows.

To import a workflow, you must first generate an .xml workflow file by selecting a workflow and exporting it to the desired folder location. The .xml file can then be imported into Workflow Builder on the same Process Manager server or imported into Workflow Builder on a second Process Manage server.

At the conclusion of the export process, the status of workflow nodes is listed and the operator is notified if actions are required to fully enable the exported workflows.

The Export Workflow dialog displays after you select the file to export.

Status text: Status text displays above the upper and lower tables and changes to reflect the on-going or completed status of the export process.

In the Export Workflow dialog, the upper table shows the export status of each workflow. The lower table shows the status of nodes of the workflow selected in the upper table.

To export a workflow



1. In Workflow Builder, select a workflow or multiple workflows.
2. Select [**File: Export**].
3. In the File name window of the initial Export Workflow dialog, type a new name, if desired.
4. To establish an export location, select [**Browse**].
5. In the Browse For Folder dialog, do one of the following:
 - Select a folder. Select [**OK**].
 - Select [**Make New Folder**]. Name the folder, and select [**OK**].

6. In the Export Workflow dialog, select **[OK]**. A new Export Workflow dialog displays. The blue process bar cycles until the export process is complete.
7. Select a workflow and review the status of each workflow node.
 - The Workflows Exported table lists the workflow(s) in the selected workflow file.
 - The Export Action Summary displays the required actions, if any, for nodes of the workflow selected in the upper table. See [Import and Export Status Descriptions](#) for a description of status icons.
8. Take the action required, if any, for each workflow node.
9. Select **[Done]**.



NOTE: A *.wfc* folder displays in the export save location, along the *.xml* file. It contains configuration files, profiles and other workflow information to enable workflow restoration during import.

Importing workflows

The Process Manager export/import workflow function provides workflow portability and a method for backing up and restoring workflows.

To import a workflow, you must first generate an .xml workflow file by selecting a workflow and exporting it to the desired folder location. The .xml file can then be imported into Workflow Builder on the same Process Manager server or imported into Workflow Builder on a second Process Manager server.

The workflow is fully restored, including any referenced directories, hot folders, and profiles that were deleted after the workflow was exported. At the conclusion of the import process, the status of workflow nodes is listed and the operator is notified if actions are required to fully enable the imported workflows.

The Import Workflow dialog displays after you select the file to import.

Status text: Status text displays above the upper and lower tables and changes to reflect the on-going or completed status of the import process.

The upper table shows the import status of each workflow. The lower table shows the status of nodes of the workflow selected in the upper table.

To import a workflow



NOTE 1: Only .xml files can be selected.

NOTE 2: If the .xml file is incorrectly formatted, an error message similar to this displays: “The file [complete path] does not contain readable workflow data.”

NOTE 3: If the .xml file contains workflows of the same names, the following message displays: “Cannot import the following workflows [workflow names]. Existing workflows of the same name already exist. Please rename or delete the existing workflows first.” Names are not case-sensitive: “Newsletter Workflow” is the same as “newsletter workflow.”



1. In Workflow Builder, select [**File: Import**].

2. In the Open dialog, browse to the desired workflow file and select from the following:
 - If the .xml file contains one workflow, in the Open dialog, select the workflow and select [**Open**].
 - If the .xml file contains more than one workflow, it opens an initial Import Workflow dialog, which allows you to selectively import the workflows in the .xml file. Select from the following:
 - Select [**Select all workflows**] to import all the workflows in the .xml file.
 - In the list box, select specific workflows to import.



NOTE: A .wfc folder displays in the export save location, along the .xml file. It contains configuration files, profiles and other workflow information to enable workflow restoration during import.

3. In the new Import Workflow dialog, review the status and/or action required for each workflow node, and take the necessary action.
 - The Workflows Imported table lists the workflow(s) in the selected workflow file.
 - The Import Action Summary displays the nodes of the workflow selected in the upper table.
 - A check mark in a node means the node imported successfully. A check mark in all the nodes results in a checkmark for the entire workflow in the upper table.
4. Take any necessary action(s).
5. Select [**Done**]. The imported workflows display in the Workflows list.

Import and Export Status Descriptions

The following table describes the import and export status icons and provides a general description of actions required.

Table 2-10.

| Icon | Indicates | Action Required |
|---|--|---|
|  | Successful workflow or node import. A check mark in all nodes results in a checkmark for the entire workflow in the upper table. | None |
|  | Successful workflow or node import but attention is required. | Locate node(s) with this symbol; perform required action. |
|  | Failed workflow or node import or export. Overrides all other icons. | Locate node(s) with this symbol; note the provided information. |

Ensuring imported workflow compatibility

Workflows can be successfully imported from one Process Manager server system to another Process Manager server if both servers have the same software version of Process Manager and if all the configurations on the second server are compatible.

The following items should be checked for compatibility:

- PREPS jobs lists
- Fonts used in Bates Numbering, Page Numbering, Watermarks

Configuring process settings

Workflow process settings are configured after a step is inserted into a workflow. Changes to the settings apply only to that instance of the step.

All process settings, except the following, can be configured:

- Join
- Review
- Input



NOTE: *In Workflow Job Manager only, you can open the Input dialog and view a list of submitted files.*

To modify the process settings

Refer to a specific process for a detailed description of the settings. In general, do the following:



1. Select a workflow. The workflow displays in the workspace.
2. Double-click a process step in the workflow or right-click and select [**Process Settings...**] to open the settings dialog.
3. Change the process settings as desired.
4. Select [**OK**] to save the settings and close the dialog.



NOTE: *For all process settings, the option “Always use these settings” has a default of “unchecked,” unless otherwise specified. If checked, settings in the dialog override any similar settings in an incoming JDF job ticket. The settings appear in the Workflow Submission Client controls, but are grayed out and unchangeable.*

About Input

When you create and name a new workflow and select **<Enter>** an Input node automatically displays at the beginning of the workflow.

In Workflow Builder, the Input node does not have a settings dialog. In Workflow Job Manager, you can open the Input settings dialog and view a list of the original input files, the file path, file size and date modified. Input files can also be viewed via the tool tip.

Configuring Automatic Image Enhancement (AIE) settings

Automatic Image Enhancement allows the application of a range of image processing operations that optimize the sharpness, color balance, saturation, exposure, noise reduction and contrast of TIFF, JPEG, and BMP images, whether standalone, or embedded in a PDF. AIE also supports re-eye removal for humans and shadow detail enhancement. The AIE feature works for only color and grayscale images.

To configure Image Enhance settings



1. To access the Automatic Image Enhancement Settings, double-click the AIE step in a workflow.
2. In the Enhance Files - [node name] dialog, select from the following options:



NOTE: You must select the Contrast option to enable Shadow Detail.

- **[Contrast]** to apply the selected contrast level enhancements to incoming jobs. Choose from:
 - **Off:** To disable the option.
 - **Low:** For an image with less contrast.
 - **Normal:** Default; for an image with normal contrast.
 - **High:** For an image with higher contrast.
- **Saturation** to apply the selected color saturation enhancements to incoming jobs. Choose from:
 - **Off:** To disable the option.
 - **Low:** For a less colorful image.
 - **Normal:** Default; for an image with normal color saturation.
 - **High:** For a more colorful image.
- **Sharpness** to apply the selected image sharpness enhancements to incoming jobs. Choose from:
 - **Off:** To disable the option.
 - **Low:** For a less sharp image.
 - **Normal:** Default; for a normally sharp image.
 - **High:** For a sharper image.

- **Exposure** to apply the selected exposure enhancements to incoming jobs. Choose from:
 - **Off**: To disable the option.
 - **Darker**: For a darker image
 - **Normal**: Default; for a normally enhanced image.
 - **Lighter**: For a light image.
- **Color Balance** to apply normal color balance enhancements to incoming jobs. Choose from:
 - **Off**: To disable the option.
 - **On**: Default; to enable the option.
- **Noise Reduction** to apply normal IE noise reduction enhancements to incoming jobs.
 - **Off**: To disable the option.
 - **Low**: For less noise reduction.
 - **Normal**: Default; for moderate noise reduction.
 - **High**: For greater noise reduction.
- **Red Eye Reduction** to remove the red eye defect from incoming jobs. For human red eye only. Choose from:
 - **Off**: Default; to disable the option.
 - **On**: To enable the option.
- **Shadow Detail** to enhance dark areas of the image in incoming jobs. Choose from:



NOTE: *You must select the Contrast option to enable Shadow Detail.*

- **Off**: To disable the option.
 - **On**: Default; to enable the option.
3. Select [**Always use these settings**] to prevent users from modifying the settings. The settings will appear in the Submission Client controls, but will be grayed out and unchangeable.

AIE and DocuSP

If you include the AIE process in a FreeFlow Process Manager workflow and submit the job to a DocuSP 5.1 or a Xerox FreeFlow Print Server 6.0, ensure that you submit it to a queue for which AIE is not enabled.

If you have the option of performing the AIE processing in either FreeFlow Process Manager or in the current DocuSP 5.1 or Xerox FreeFlow Print Server 6.0, for reasons of flexibility and performance, it is recommended that you do so in FreeFlow Process Manager, rather than in DocuSP 5.1 or Xerox FreeFlow Print Server 6.0.

Limitations for AIE

- AIE can be applied only to raster image files such as TIFFs, JPEGs, and BMPs. It also supports those files if they are embedded in PDFs.
- The image quality improvement for BMPs may be minimal.
- AIE red eye reduction applies only to photographs of humans, and not to photographs of animals.
- The Exif data that is found in some JPEG files is not currently supported by AIE and will result in the loss of resolution information.

Configuring Convert settings

General tab: Process Manager automates the processing of PDF documents. The Convert process step enables Microsoft Word, Microsoft Excel, Microsoft PowerPoint, Microsoft Publisher, Adobe InDesign, Adobe Illustrator, Adobe Photoshop, JPG, JPEG, BMP, TIFF, TIFF-IT, TIF, PS, VPC, QXD, QXP, RDO, and EPS document types to be converted to a PDF document for submission to Process Manager workflows.

You can select from various job options to generate optimal PDFs for Microsoft Office (including Microsoft Office 2007) or PS files. The job options include the basic Adobe Acrobat Distiller set with the addition of various Xerox-specific job options, including DocuColor iGen3. You can also create custom job options in Adobe Acrobat Distiller for use in Process Manager.

The default job option that displays in Process Manager is selected in Adobe Acrobat Distiller.

The [**Flatten submitted PDF files for printing**] option allows you to re-process PDF files with known printing problems. “Flattening” converts a PDF file to PostScript, and then converts it back to a PDF file. This feature may result in a loss of features and image degradation, including:

- Flattening of transparency.
- Loss of some interactive features such as thumbnails, bookmarks, article threads, logical structure and trapping information.
- Loss of functionality of other interactive features such as forms, hyperlinks, JavaScript.
- Loss of some annotations such as comments, embedded files, embedded media such as video/audio, and references to external files or media.

Limitations for Flatten This feature potentially requires a large amount of disk space for creating both the intermediate PostScript and the flattened PDF file. The conversion will fail if the disk space is insufficient.

Manual Conversion tab: Adobe Creative Suite and QuarkXPress files must be manually converted to PDFs before they can be processed in a workflow. To do this:

- Set up a working directory via the Convert Settings dialog. Files are held in the directory until they are manually converted.
- Set up an email notification address via the Convert Settings dialog. This allows you to send an e-mail message to indicate that a Adobe Creative Suite or QuarkXPress document is waiting to be converted to PDF. A message will be sent for each document processed.
- Submit Adobe Creative Suite or QuarkXPress files via Workflow Submission Client to a workflow with a Convert node. Files are sent to the appropriate working directory; an email notification is sent.
- Manually convert the files to PDF via Adobe Creative Suite or QuarkXPress, when the workflow is stopped at the Convert step in Workflow Job Manager. Place the converted files in the appropriate working directory to continue workflow processing.



NOTE: *You are solely responsible for obtaining all appropriate licenses from Adobe Creative Suite and QuarkXPress and their licensors and for maintaining full compliance with those licenses.*

See also:

[To configure Convert settings](#)

[To set up a working directory](#)

[Unlimited User Conversion option](#)

[Working with PDF Files](#)

[Converting Adobe Illustrator and Adobe InDesign documents to PDF](#)

To configure Convert settings



1. (Optional) To ensure that Process Manager displays the desired Adobe Acrobat Distiller default job option, select **[Start: Programs: Acrobat Distiller]** and choose a profile from the Default Settings drop box.
2. To access the Convert Settings dialog in Workflow Builder, double-click the Convert step in a workflow.
3. Select **[Flatten submitted PDF files for printing]** to re-process PDF files with known printing problems. This option may result in a loss of features and image degradation.
4. In the “Select the job options that submitters can choose from” text box, select the desired job options. The job options will populate the “Select the default job option” drop box.
5. In the “Select the default job option” drop box, select a default job option.
6. Select **[Always use these settings]** to prevent users from modifying the settings. The settings will appear in the Submission Client controls, but will be grayed out and unchangeable.



NOTE: *When “Always use these settings” is selected, it locks in the default job option as the conversion type.*

7. Select **[OK]** to accept changes and close the window.

To set up a working directory



1. To access the Convert Settings dialog in Workflow Builder, double-click the Convert step in a workflow.
2. Select the Manual Conversion tab.
3. Select either [**Enable manual QuarkXPress file (*.QXP, *.QXD) conversion.**] or [**Enable manual Adobe Creative Suite file (*.INDD, *.AI, *.PSD) conversion.**] to save files to the working directory for manual conversion to PDF. After conversion, files are saved to the working directory using the given file name.
4. To set up a Working Directory in which to save and convert the files to PDF, select [**Browse**]. Perform one of the following:



NOTE: *You may be prompted for a login and password if you attempt to access a mapped location.*

NOTE: *If you are using hot folders to support other FreeFlow Process Manager features, such as job submission and third party external processes, refer to the topic [Limitations when setting up directories as input/output hot folders for more than one feature](#).*

- In the Browse For Folder dialog, navigate to the desired folder, and select [**OK**].
 - Select Make New Folder, name the folder, and select [**OK**].
5. Enter an address in the Email Notification Address text box. The recipient will be automatically notified that a document is waiting to be manually converted to a PDF.
 6. Select [**Always use these settings**] to prevent users from modifying the settings. The settings will appear in the Workflow Submission Client controls but will be grayed out and unchangeable.
 7. Select [**OK**].

Unlimited User Conversion option

An Unlimited User Conversion option is available for Process Manager. If you are upgrading from previous versions of Process Manager, you will remain as no “Unlimited User Conversion” installed unless you purchase this option.

The Unlimited User Conversion option allows:

- Unlimited high resolution generation and authoring.
- The conversion of all supported document types to PDF when a hot folder is shared or is on a mapped drive.

The following conditions apply if the Unlimited User Conversion option is not installed:

- **Reprint of a FreeFlow 5.0 saved and password encrypted job:** If a reprint is requested of a saved job, the job is decrypted and processed for Print. The job is not re-encrypted during Save.
- **100 User Conversion** This optional component allows a maximum of one hundred users to submit applications for PDF conversion for all supported document types.

See also:

[Hot Folder submission with and without the Unlimited User Conversion License](#)

[Setting up a watermark in an email attachment](#)

- **PDF files created through the conversion process and saved by Save and JDF Export nodes:** These files will be password-protected against “Open.” This applies to PDF files saved in both the Windows file system and the repository system.
 - A password is assigned by Process Manager and known only by Process Manager.
 - Acrobat and other FreeFlow applications will NOT be able to open or process those PDF files.
 - If any of the PDF files protected by the Save/JDF Export node is selected for input to either Workflow Submission Client or a hot folder, Process Manager will apply the password and process the PDF files accordingly.

- If the workflow used in this case contains Save or JDF Export nodes, the password protection will be reapplied to output PDF files.
- If the “Unlimited User Conversion” option is installed and those password protected PDF files were selected as input, password protection will be permanently removed from the PDF files. Review, Notification, Save, and JDF Export will all behave normally, as before.

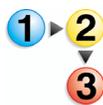
Working with PDF Files

- Adobe does not support PDF files larger than 2.25 Gb on the Windows platform.
- PDF files containing more than 30,000 pages and are not supported.
- To process only a range of pages within a PDF file, manually edit the file in Adobe Acrobat in the Review step.
- If the input PDF file requires a password to open the PDF file, most operations will fail.

Converting Adobe Illustrator and Adobe InDesign documents to PDF

The third party software packages, Adobe Illustrator and Adobe InDesign, must be installed and registered for the PDF conversion capability to perform in a FreeFlow system.

If you encounter problems converting Adobe Illustrator and Adobe InDesign documents to PDF, do the following:



1. Close all instances of Adobe Illustrator or Adobe InDesign that are running in the Task Manager.
2. Invoke Illustrator or InDesign from the Start menu. The “Would you like to register now?” dialog appears.
3. Register, then close the application. Conversion should now work properly.

About Join

Join combines -- or concatenates -- multiple PDF files into a single PDF file. All the PDF files must exist before you attempt to use the Join process.

When submitting multiple files to a workflow:

- To create a single joined job, Join must be in the workflow.
- To create multiple separate jobs that are processed individually, Join should not be in the workflow.

Join does not have a settings dialog.

See also:

[Limitations for Join](#)

[Fault handling for Join](#)

Limitations for Join

Bookmarks, logical structure, internal hyperlinks, and article threads within PDF files might not be preserved by the PDF Join component.

Fault handling for Join

Errors are logged in the Windows Event log and displayed in the Job Manager status display area. The following errors cause the Join operation to fail:

- If the input PDF file is missing.
- If the input PDF file is invalid.
- If the output PDF file is locked and cannot be overwritten, or if the user lacks sufficient security privileges to access the destination directory.
- If the input PDF file requires a password to open the PDF or does not permit any of the following: content copying and extraction, document assembly, or content accessibility.

Configuring Optimize settings

The Optimize process allows you to modify a PDF file to be PDF/X compliant, specify how fonts should be embedded, define PDF Box settings, configure spot color settings, manage color profiles, and configure image quality settings for hairline correction and the removal of color trapping layers.

You can have multiple instances of the Optimize node in a workflow. However, there is no conflict checking for multiple instances.

When working with non-PDF documents, the Convert node must precede the Optimize node.

The Optimize Options dialog includes five tabs: General, PDF Boxes, Color, Spot Colors, and Image Quality. The availability of dialog options varies, depending on whether the [**Create a document that complies with PDF/X standards**] option is selected, for example:

- When compliance is selected, font embedding is automatically set to ON, and output compliance error handling is available.
- When compliance is not selected, font embedding is automatically set to OFF; Color Management is enabled, and independent use of the PDF Box is enabled.

See also:

[To configure the General Optimize settings](#)

[To configure the PDF Boxes settings](#)

[To configure the Color settings](#)

[To configure the Spot Colors settings](#)

[To configure Image Quality settings](#)

[Description of PDF/X-1a Standards](#)

[About PDF Boxes](#)

[Managing Color profiles](#)

[Ensuring Color Manage workflow consistency between the server and a remote client](#)

[Importing a FreeFlow 5.0 workflow with a Color Manage node](#)

To configure the General Optimize settings

The General tab allows you to select a Settings File, define compliance criteria, designate font embedding options, and optimize for fast web viewing.



1. Double-click the Optimize step in a workflow.
2. In the “Settings File” area, select from the following to load a settings file:

- pdfx-1a2001.xml (pre-installed settings file)
- pdfx-1a2003.xml (pre-installed settings file)



NOTE: *If created, other user-defined settings files are also displayed.*

3. To save the options you have selected in the Optimize node as a custom settings file, and to display the file as an option in the Settings File drop box, select [**Save As...**] to open the Save Settings File dialog. For more information, see [To save the Settings File as](#)
4. To remove a settings file from the list, select the file in the drop box, and then select [**Delete**].
5. In the “Compliance” area, mark the check box for [**Create a document that complies with PDF/X standards**] and select from the following options:
 - PDFX-1a 2001
 - PDFX-1a 2003

For more information, see [Description of PDF/X-1a Standards](#).

6. In the “When a PDF/X compliant document cannot be created” area, select from the following options:
 - [**Ignore**] to disregard errors and move the job to the next workflow process.
 - [**Warn and continue**] to note errors in the error log for the current job and move the file to the next workflow node.
 - [**Cancel job**] to note errors in the error log for the current job and to halt the job. A fail message displays for the Optimize PDF node in Workflow Job Manager.

7. In the “Fonts” area, select from the following:
 - **[Embed Fonts]** Selected by default and grayed out when compliance is selected.
 - **[Embed as subset]** to minimize the document file size.
 - Select **[Embed all fonts]** to enable future text editing. If a font has been previously subset embedded, it will be fully embedded. This option increases the file size.



NOTE: *The font family must be loaded on the PC. Only fonts with the appropriate permission bits will be embedded.*

8. In the “When an error occurs embedding the fonts” area, select from the following:
 - **[Ignore]** to disregard errors and move the job to the next workflow process.
 - **[Warn and continue]** to note errors in the error log for the current job and move the file to the next workflow node.
 - **[Cancel job]** to note errors in the error log for the current job and to halt the job. A fail message displays for the Optimize PDF node in Workflow Job Manager.
9. In the Fast Web Viewing area, mark the check box for **[Optimize the document for fast web view]** to enable fast page-at-a-time downloading from web servers.
10. Select **[Show job submitter the settings file name only. Settings details will be hidden]** to display only the Settings File drop box to job submitters. All other dialog features are hidden.
11. Select **[Always use these settings]** to prevent users from modifying the settings. The settings will appear in the Workflow Submission Client controls but will be grayed out and unchangeable.
12. Select **[OK]** to accept the changes or select another tab and continue configuring.

To save the Settings File as

The Save Settings File dialog allows you to save the current settings of the Optimize node. For more information about the available options, see [To configure the General Optimize settings](#)

1. In the Optimize Options dialog General Tab, select **[Save As...]**.
2. In the File Name text box, enter a new file name.
3. Select **[Save]**.

To configure the PDF Boxes settings

The PDF Boxes tab allows you to define PDF Box settings. For a description of the PDF boxes, see [PDF Box Descriptions](#).

The availability of dialog options varies, depending on whether the **[Create a document that complies with PDF/X standards]** option is selected in the General tab.



1. Double-click the Optimize step in a workflow and select the PDF Boxes tab.
2. Mark the check box for **[Set crop box to media box]**.
 - If a PDF document has a crop box, it is replaced with one the size of the media box.
 - If the PDF document does not have a crop box, one is generated and set to the size of the media box.
3. In the “When both trim box and art box are missing” drop box, select from the following:
 - **[Set trim box to media box and offset inwards by:]**
 - Select or type a value for each option: **[Left]**, **[Right]**, **[Top]**, and **[Bottom]**.
 - **[Report an error]** to register an error in the error log.



NOTE: *Depending on the error handling specified in the General tab in the Compliance area, the job may or may not fail.*

- **[Ignore]** to disregard errors and move the job to the next workflow process.
4. In the “When bleed box is missing” drop box, select from the following:
 - **[Set bleed box to media box]**.
 - **[Set bleed box to trim box and enlarge by:]**
 - Select or type a value for each option: **[Left]**, **[Right]**, **[Top]**, and **[Bottom]**.
 - **[Ignore]** to disregard errors and move the job to the next workflow process.

5. Select [**Show job submitter the settings file name only. Settings details will be hidden**] to display only the Settings File drop box to job submitters. All other dialog features are hidden.
6. Select [**Always use these settings**] to prevent users from modifying the settings. The settings will appear in the Workflow Submission Client controls but will be grayed out and unchangeable.
7. Select [**OK**] to accept the changes or select another tab and continue configuring.

To configure the Color settings

The Color tab allows you to select the output color space, source color space, define the appropriate action when an error occurs, and select the desired transparency.

The availability of options varies, depending on whether the [**Create a document that complies with PDF/X standards**] option is selected in the General tab.

See also:



[Importing a FreeFlow 5.0 workflow with a Color Manage node](#)



1. Double-click the Optimize step in a workflow and select the Color tab.

2. In the Output Color Space area, define the desired output color space by selecting from the following options:
 - In the [**Change all colors in document**] drop box, select from the following:

- Convert colors to gray (always available)
- Convert colors to CMYK (always available)

The following options are available only if [**Create a document that complies with PDF/X standards**] is **not** selected on the General tab:

- **Don't change colors** -- to gray out the Source Color Space options; prevent color changes in the document
- **Manage Color profiles** -- to enable color management. This enables the "Don't change ICC profiles for [xx]" option in the CMYK, RGB and Gray drop boxes in the Profiles to use section. Enables "Treat managed [xx] as."
- **Convert colors to RGB**



NOTE: *The Color Manage node from earlier versions of FreeFlow Process Manager is replaced by the Manage Colors profiles option. For more information about managing color profiles, see [Managing Color profiles](#).*

- In the [**ICC profile**] drop box, select the desired profile. If you must import a profile to your PC, see [To import an ICC profile](#).



NOTE: *You must own the rights to use the ICC profiles accessed by FreeFlow Process Manager.*

3. If required, mark the check box for [**Use Output Intent, if present, for Source Color Space**]. Select this option to allow the document's output intent to override the designated source color space profile.

4. In the Source Color Space area, the following information applies to the CMYK, RGB, and Gray drop box options:
 - **Treat untagged [CMYK, RGB, or Gray] as:** Assigns the selected ICC profile to all non-profiled [*CMYK, RGB, or Gray*] objects.
 - **Treat managed [CMYK, RGB, or Gray] as:** Available when “Manage Color Profiles” is selected in the “Change all colors in document” area. Assigns the selected ICC profile to all profiled [*CMYK, RGB, or Gray*] objects.
 - **Treat all [CMYK, RGB, or Gray] as:** Assigns the selected ICC profile to both non-profiled and profiled [*CMYK, RGB, or Gray*] objects.
 - **Don’t change ICC profiles for [CMYK, RGB, or Gray]:** Available with “Manage Color Profiles” selection. Grays out the [*CMYK, RGB, or Gray*] profile. Preserves the original profile of [*CMYK, RGB, or Gray*] objects within the document.

Select the desired option from the following Source Color Space area drop boxes:

- **[CMYK]**
 - **[CMYK ICC Profile]**
 - **[RGB]**
 - **[RGB ICC Profile]**
 - **[Gray]**
 - **[Gray ICC Profile]**
5. In the When a color space error occurs area, select from the following options:
 - **[Ignore]** to disregard errors and move the job to the next workflow process.
 - **[Warn and continue]** to note errors in the error log for the current job and move the file to the next workflow node.
 - **[Cancel job]** to note errors in the error log for the current job and to halt the job. A fail message displays for the Optimize PDF node in Workflow Job Manager.

6. In the Transparency/Overprint area, select [**Rasterize transparent/overprint objects**] to enable the feature.
7. Specify the desired Resolution at which to rasterize the objects: [**150**], [**300**], or [**600**] dpi.
8. In the When a transparency error occurs area, select from the following options:
 - [**Ignore**] to disregard errors and move the job to the next workflow process.
 - [**Warn and continue**] to note errors in the error log for the current job and move the file to the next workflow node.
 - [**Cancel job**] to note errors in the error log for the current job and to halt the job. A fail message displays for the Optimize PDF node in Workflow Job Manager.
9. Select [**Show job submitter the settings file name only. Settings details will be hidden**] to display only the Settings File drop box. All other dialog features are hidden.
10. Select [**Always use these settings**] to prevent users from modifying the settings. The settings will appear in the Workflow Submission Client controls but will be grayed out and unchangeable.
11. Select [**OK**] to accept the changes or select another tab and continue configuring.

Importing a FreeFlow 5.0 workflow with a Color Manage node

If you import a 5.0 workflow with a Color Manage node into FreeFlow Process Manager 6.0, the 5.0 Color Manage icon is converted to an Optimize icon and the settings transfer automatically to the Optimize settings Color tab.

To configure the Spot Colors settings

Spot colors usually designate a fifth housing color, an offset printing device that contains a special ink. The Spot Color tab allows you to keep spot colors, convert to common CMYK standard colors, or to convert to an alternative color space. It provides a normalization process with the ability to allow you to specify how to treat PANTONE® Color values with C, CV, U, CVC, and CVU suffixes.



1. Double-click the Optimize step in a workflow and select the Spot Colors tab.

2. Mark the check box for [**Convert spot colors to process colors**] to convert Spot Colors to the Output Color Space.

If no spot colors are defined in the exclusion list, then all spot colors in the document will be converted. Objects that contain multiple spot colors must have all of their spot colors defined in the exclusion list or the objects will be converted to the Output Color Space. The exclusion list appears below the text box.

3. To add a spot color to the exclusion list:

- a. In the “Spot colors not to convert” text box, enter the spot color name. Names are case and space insensitive.
- b. Select [**Add**].

When an item is selected in the exclusion list, you can change or delete the item:

4. To change the name of a spot color:

- a. Enter a new name in the “Spot colors not to convert” text box.
- b. In the exclusion list, select the spot color you wish to change.
- c. Select [**Change**].

5. To delete a spot color:

- a. In the exclusion list, select a spot color.
- b. Select [**Delete**].

6. Mark the radio button for [**Set spot color suffix to match media type**] to convert all suffixes to one of the following suffixes:

- [**Coated paper**] to support PANTONE® coated spot color.
- [**Uncoated paper**] to support PANTONE® uncoated spot color.
- [**Matte paper**] to support PANTONE® matte spot color.

7. Select [**Show job submitter the settings file name only. Settings details will be hidden**] to display only the Settings File drop box to job submitters. All other dialog features are hidden.
8. Select [**Always use these settings**] to prevent users from modifying the settings. The settings appear in the Workflow Submission Client controls but are grayed out and unchangeable.
9. Select [**OK**] to accept the changes or select another tab and continue configuring.

To configure Image Quality settings

The **Hairline Correction** feature thickens stroke lines within a document that may be too thin for printing purposes.

The **Remove color trapping layers** option allows you to eliminate color trap layers from the PDF. Color trap layers are originally intended to provide fill between two objects that abut in a document but end up printing with white space along the abutting borders. Color trap layers solve the issue by printing an overlapping border between the abutting objects.



1. Double-click the Optimize step in a workflow and select the Image Quality tab.
2. Mark the checkbox for **[Replace all hairlines narrower than]** to enable the feature, and select or enter a threshold value.
 - Inches: Default is 0. Maximum value is .0625 (1/16th inch).
 - Pixels: Default is 0. Maximum value is 75 (1/16th inch on a 1200 dpi. printer).
 - mm: Default is 0.0. Maximum value is 1.5875.
 - Points: Default is 0. Maximum value is 4.5.
3. Select or enter a value to replace anything lower than threshold value.
 - Inches: Default is 0.01389. Maximum value is .0625 (1/16th of an inch).
 - Pixels: Default is 16.67. Maximum value is 75 (1/16th of an inch on a 1200 dpi. printer) .
 - mm: Default is 0.3528. Maximum value is 1.5875.
 - Points: Default is 1. Maximum value is 4.5.
4. Select the desired unit for the hairline correction: **[inches]**, **[pixels]**, **[mm]** or **[points]**.
5. In the “Color Trapping” area, mark the check box for **[Remove color trapping layers]** to eliminate trap layers from the PDF.



NOTE: *Removal of trap layers is supported for traps created by Prinergy, Prinect and Esko Graphics.*

6. Select **[Show job submitter the settings file name only. Settings details will be hidden]** to display only the Settings File drop box to job submitters. All other dialog features are hidden.
7. Select **[Always use these settings]** to prevent users from modifying the settings. The settings will appear in the Workflow Submission Client controls but will be grayed out and unchangeable.

Description of PDF/X-1a Standards

Table 2-11. Description of PDF/X-1a Standards

| File Type | Description |
|---------------|---|
| PDF/X-1a 2003 | <p>ISO standard for graphic content exchange. Files can be opened in Acrobat 5.0 and Acrobat Reader 5.0 and later. The standard requires that:</p> <ul style="list-style-type: none"> • All fonts are embedded. • The appropriate bounding boxes are specified: Media Box, Trim Box, or Art Box. • Color appears as CMYK, spot colors, or both (RGB and LAB spaces are not allowed). • Compliant files must contain describe the output printing condition (e.g. SWOP) for which they are prepared. • The Trap Key is set. |
| PDF/X-1a 2001 | Same as above, except files can be opened in Acrobat 4.0 and Acrobat Reader 4.0 and later. |

About PDF Boxes

The following table describes the PDF media box, bleed box, trim box and art box.

Table 2-12. PDF Box Descriptions

| PDF Box | Description |
|-----------|--|
| Media box | <p>Page size; contains all the objects of a page, including text and images that appear on the page or that bleed or extend off the edge of the finished document.</p> <p>Media box dimensions are always greater than or equal to the trim box dimensions.</p> <p>Media box dimensions are always greater than or equal to the bleed box dimensions.</p> |
| Crop Box | <p>The crop box represents the region in which the page contents are trimmed when displayed or printed. It defines how the page contents are placed on the output medium.</p> <p>The crop box dimensions are always greater than or equal to the trim, art, and bleed box.</p> <p>The crop box dimensions are always smaller than or equal to the media box.</p> |

Table 2-12. PDF Box Descriptions

| PDF Box | Description |
|-----------|--|
| Bleed box | <p>Represents an extended area around the trim box at which contains content that will be trimmed during finishing.</p> <p>A document that requires a bleed also requires a bleed box.</p> <p>The bleed box must be smaller than the media box, and can be the same or larger than the trim box.</p> |
| Trim box | <p>Represents the final finished size of the document after printing and finishing. A document intended for commercial printing requires a trim box.</p> <p>The trim box must be smaller than the media box, and can be the same as the bleed box.</p> <p>Trim marks are nominally placed around the trim box.</p> |
| Art box | <p>Represents an area of the page (for example, a piece of clip art) to be positioned when the PDF content is placed in an application, such as a page layout program.</p> <p>The art box must be smaller than the bleed box.</p> <p>Trim and art boxes may have the same dimensions.</p> |

Managing Color profiles

Color Manage allows you to:

- Add CMYK profiles to untagged CMYK content.
- Replace CMYK profiles for tagged content.
- Add RGB profiles to untagged RGB content.
- Replace RGB profiles for tagged RGB content.
- Add gray profiles to untagged gray content.
- Replace gray profiles for tagged gray content.
- Allows you to **not** change a profile for a specific color space.

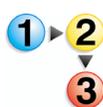
A CMYK, RGB or gray profile is added to untagged content when colors need to be transformed or accurately displayed or printed. Untagged color spaces (also known as “device” spaces) have an ambiguous interpretation; adding a profile resolves the ambiguity by providing a specific interpretation of the data.

CMYK, RGB or gray profiles are replaced for tagged content when the original profile—the original specification of how the color values should be interpreted—is wrong or has changed. This can occur when:

- The original profile is known to be incorrect—for example, because of a known error in prior processing.
- The color is being edited, and the output is desired in a different color space.

Only profiles installed on the Windows Operating System are visible.

To import an ICC profile



1. Navigate to the .icc profile you wish to import.
2. Right-click profile and select [**Install Profile**].
3. The profile is installed in the color directory of your Windows system folder. The location of the directory depends on your operating system. For example, in Windows 2000, it is often found in C:\WinNT\system32\spool\drivers\color.

Ensuring Color Manage workflow consistency between the server and a remote client

Workflows with color management enabled in the Optimize node can become inconsistent between a Process Manager server and remote client when profiles are uninstalled on the server. Use the following procedure to ensure workflow consistency.

To ensure Color Manage workflow consistency



1. Disable the Workflow.
2. Open the Optimize node.
3. Enable the workflow to reset the profile database.

Configuring Preflight settings

At minimum, preflight can validate the file and check formatting, verify the image format (resolution, color space, and color profile), fonts, and verify references to OPI image server images. The preflight validation depends on the profile you select. The administrator defines preflight profiles using Adobe Acrobat Professional's profile repository and Xerox custom profiles. The operator can select a profile to use as the default profile for a specific workflow.

The Xerox FreeFlow Recommended Preflight profile, provided with the FreeFlow Process Manager product, includes the following checks:

- Font is not embedded
- Image resolution is less than 250 ppi
- Bitmap (1bit monochrome) image resolution is less than 600 ppi
- Document is damaged and needs repairs
- PDF contains errors or is damaged

Preflight can also be used to automatically filter and route incoming PDF files. This is done by setting up multiple preflight nodes as filters at key points in a workflow to check for specific conditions. Based on the results, the file is directed to the appropriate process or workflow branch.

See also:

[To generate the preflight profile repository on a clean install](#)

[To configure Preflight settings](#)

[Using preflight as a filter](#)

To generate the preflight profile repository on a clean install

Preflight profiles do not exist on a clean install. After a clean install, do the following to generate the profile repository:

1. Select [**Start: Programs: Adobe Acrobat Professional**].
2. In the Advanced menu, select [**Preflight Setup**]. This generates the profile repository from which you can select profiles in the Preflight Settings dialog.
3. Close Adobe Acrobat Professional.

To configure Preflight settings

-  1. To access the Preflight Settings dialog, double-click the Preflight step in a workflow.
-  2. In the “Select Preflight profiles that submitters can choose from” text box, select the desired profiles. The profiles will populate the “Select the default profile” drop box.
-  3. In the “Select the default Preflight profile” drop box, select a default profile.
4. Select [**Always use these settings**] to prevent users from modifying the settings. The settings will appear in the Submission Client controls, but will be grayed out and unchangeable.
5. Select [**OK**] to accept changes and close the window.

Using preflight as a filter

To help alleviate prepress bottlenecks, you can set up preflight nodes at various points in a workflow to automatically check for specific conditions, for example:

- Color or black and white
- Specific page size
- Portrait or landscape orientation

Depending on whether the files pass or fail the check, they are automatically directed to the appropriate workflow node or branch.

Table 2-13. Examples: Using preflight as a filter

| To check for... | Pass/Fail results |
|--|---|
| Embedded fonts, legitimate fonts, and other basic preflight requirements. Purpose: To perform initial sorting of submitted customer files. | If passes, then go to next node. If fails, then check the preflight report, fix, and resubmit. |
| Pages 12 x 18 or larger Purpose: To sort files with large page dimensions from those with small dimensions. | If passes, then send to printer A, which handles large format jobs. If fails, then send to the fail branch for printer B, which handles small format jobs. |
| Color or black and white files Purpose: To sort files into black and white and color. | If color, the file passes; send it to Color Manage, and then to the color printer A. If b&w, the file fails; send it to the fail branch for b&w printer B. |

Tips for using Preflight as a filter

- Begin the workflow with a general preflight profile that checks for legitimate fonts and/or other basic requirements.
- Continue filtering with one-rule profiles that check for specific conditions.
- Use as many one-rule preflight profiles as necessary to filter and direct the jobs to the appropriate node or workflow branch.

Upgrading legacy workflows that contain Job Level Edit nodes

In previous versions of FreeFlow Process Manager (2.0 through 4.0), all job level edit functions (for example, watermarks, page numbering, page rotation) were available via a single Job Level Edit dialog. In version 6.0, you must add an individual process step to the workflow for each function. Legacy workflows that contain Job Level Edit processes will perform as they did in earlier versions, but you will not be able to edit them. To use the version 6.0 job level edit functions, save the existing Job Level Edit workflow, and it will be converted into a series of individual, Watermark, Bates Numbering, Page Numbering, Rotate and Flip nodes, as appropriate.

Limitations for job level edits

The font specified for Bates numbering, page numbering and/or textual watermarks must be loaded on the system running the automated PDF editing module.

Fault handling for job level edits

Errors are logged in the Windows Event log and display in the Job Manager status display area. The following errors cause the Job Level Edit operation to fail:

- If the input PDF file is missing.
- If the input PDF file is invalid.
- If the output PDF file is locked and cannot be overwritten, or if the user lacks sufficient security privileges to access the destination directory.
- If the input PDF file requires a password to open the PDF or does not permit any of the following: content copying and extraction, document assembly, or content accessibility.

Adding watermarks

Up to 1000 user-configured text and image watermarks can be set up and applied to each page of an input PDF file. The List box shows watermarks that have been configured. The attributes for a selected watermark are displayed in the Description area. Image and text icons to the left of each watermark indicate the watermark type.

Dialog options include:

New: Opens the New Text Watermark dialog or New Image Watermark dialog, in which you can create a new watermark.

Modify: Opens the Modify Text Watermark or Modify Image Watermark dialog for the selected watermark.

Duplicate: Copies the selected watermark.

Delete: Deletes the selected watermark.



NOTE: *All watermarks in the Watermarks list are applied to the job and are applied in the order in which they are listed.*

See also:

[Setting up or modifying a text watermark](#)

[Setting up or modifying an image watermark](#)

[Duplicating or deleting a watermark](#)

Setting up or modifying a text watermark

Text watermarks can consist of multiple lines with hard line breaks. They can be created in a variety of font types, sizes and colors; can be transparent or opaque, rotated, or variably positioned from the document edge; and can appear either underneath or on top of the page content.

To set up or modify a text watermark



1. Double-click the Watermarks step in a workflow.
2. Select one of the following:
 - Select [**New**], and then select [**Text Watermark**] to set up a new text watermark.
 - Select a watermark from the list, and then select [**Modify**] to change an existing text watermark.
3. To change the font typeface, select a font from the Font name drop box.
4. To change the font style, select a style from the Font style drop box.
5. To change the font size, select a point size from the Size drop box.
6. Select a color for the watermark from the Color drop box.
 - a. To select a color that is not available in the drop box, select [**Customize...**].
 - b. Select the desired Hue, Saturation, and Value.
7. In the text box, enter the desired text. Line breaks are accepted.



NOTE: *The text box supports variable data syntax when the workflow is submitted from FreeFlow Process Manager MAX, Manifest Automation from Xerox. The content of the text should be specified as follows: (e.g. "Order Number: \$CSV1\$ - Job ID: \$CSV2\$"). Variable text is specified by the Order Jacket file column number (e.g. \$CSV1\$). All non-variable text, including spaces, will be treated as static text. If the workflow is submitted in ways other than via Process Manager MAX, variable data text will be ignored.*

8. Select or type the horizontal position from the PDF document box: **From left**, **Center**, or **From right**.
9. Select or type the vertical position from the PDF document box: **From top**, **Center**, or **From bottom**.
10. Select the position relative to **Crop Box**, **Media Box**, **Bleed Box**, **Trim Box** or **Art Box**.
11. Select the desired degree of rotation, from 0-359 degrees. The icon changes to reflect the selected rotation.
12. Select a transparency from 0-100. The greater the transparency level, the less opaque the watermark.
13. In the “Apply to pages” area, specify the pages upon which the watermark will appear.
 - If **Page range** is selected, enter a text string using commas and hyphens. For example, select “1-3, 7, 12-14, 17” to print bar codes on pages 1 through 3, on page 7, on pages 12 through 14, and on page 17.



NOTE: *Various order jacket file variables are supported by FreeFlow Process Manager MAX, Manifest Automation from Xerox.. You can enter variable data syntax in the page range text box. For example, given an Order jacket file (OJF) with columns 1, 2, 3, 4 containing page range data “1-3”, “7”, “12-14”, “17” respectively, you can enter text “\$CSV1\$, \$CSV2\$, \$CSV3\$, \$CSV4\$” into the page range text box. If OJF column contains an invalid page range, the workflow will fail with an invalid page range error in Workflow Job Manager. Process Manager supports multiple text watermarks, each potentially utilizing different Order Jacket variables.*

14. Select **[OK]**.
15. To preview the watermark placement in the document, select **[Preview>>]**. For more information about the Preview option, see [Previewing job level edits](#).
16. Select **[OK]** to accept the changes and close the window.

The watermark displays in the Watermarks list. Select a watermark to display its description to the right.

17. If desired, select **[Move Up]** or **[Move Down]** to move the selected watermark up or down in the list, and to define the order in which each watermark is layered on the page.
18. Select from the following:
 - **[Place all watermarks behind page content]** to place the watermark underneath the page contents.
 - **[Place all watermarks in front of page content]** to place the watermark on top of the page contents.



NOTE: *The setting applies to all image and text watermarks.*

See also:

[Adding watermarks](#)

[Setting up or modifying an image watermark](#)

[Duplicating or deleting a watermark](#)

Setting up or modifying an image watermark

Image watermarks can be transparent or opaque, scaled, rotated, variably positioned from the document edge and can appear either underneath or on top of the page content. Colorization is not supported.

To set up or modify an image watermark



1. Double-click the Watermarks step in a workflow.
2. Select one of the following:
 - Select [**New**], and then select [**Image Watermark**] to set up a new image watermark.
 - Select a watermark from the list, and then select [**Modify**] to change an existing image watermark.
3. Enter a file path or select [**Browse**] to locate a TIFF, JPEG, BMP, or PDF image file.



NOTE 1: *The selected image must reside on a local drive.*

NOTE 2: *Only page 1 of the PDF is selected.*

- a. In the Browse for watermark image file dialog, select a file.
 - b. Select [**Open**]. The dialog closes and the path and file name display in the Watermark filename text box.
4. Select a percentage from 1 to 200 to scale the image.
 5. Select or type the horizontal position from the PDF document box: **From left**, **Center**, or **From right**.
 6. Select or type the vertical position from the PDF document box: **From top**, **Center**, or **From bottom**.
 7. Select the position relative to **Crop Box**, **Media Box**, **Bleed Box**, **Trim Box** or **Art Box**.
 8. Select the desired degree of rotation, from 0-359 degrees. The icon changes to reflect the selected rotation.
 9. Select a transparency from 0-100. The greater the transparency level, the less opaque the watermark.

10. In the “Apply to pages” area, specify the pages upon which the watermark will appear.
- If **Page range** is selected, enter a text string using commas and hyphens. For example, select “1-3, 7, 12-14, 17” to print bar codes on pages 1 through 3, on page 7, on pages 12 through 14, and on page 17.



NOTE: *Various order jacket file variables are supported by FreeFlow Process Manager MAX, Manifest Automation from Xerox. You can enter variable data syntax in the page range text box. For example, given an Order jacket file (OJF) with columns 1, 2, 3, 4 containing page range data “1-3”, “7”, “12-14”, “17” respectively, you can enter text “\$CSV1\$, \$CSV2\$, \$CSV3\$, \$CSV4\$” into the page range text box. If OJF column contains an invalid page range, the workflow will fail with an invalid page range error in Workflow Job Manager.*

11. To preview the watermark placement in the document, select **[Preview>>]**. For more information about the Preview option, see [Previewing job level edits](#).
12. Select **[OK]** to accept the changes and close the window.
The watermark displays in the Watermarks list. Select a watermark to display its description to the right.
13. If desired, select **[Move Up]** or **[Move Down]** to move the selected watermark up or down in the list, and to define the order in which each watermark is layered on the page.
14. Select from the following:
- **[Place all watermarks behind page content]** to place the watermark underneath the page contents.
 - **[Place all watermarks in front of page content]** to place the watermark on top of the page contents.



NOTE: *The setting applies to all image and text watermarks.*

See also:

[Adding watermarks](#)

[Setting up or modifying a text watermark](#)

[Duplicating or deleting a watermark](#)

Duplicating or deleting a watermark

You can duplicate or remove a selected watermark.

To duplicate or delete a watermark

1. Double-click the Watermarks step in a workflow.
2. To duplicate a watermark:
 - Select a watermark from the list.
 - Select **[New]**.
 - Select **[Duplicate]** from the drop box.
3. To delete a watermark:
 - Select a watermark from the list.
 - Select **[Delete]** to remove the watermark.
4. Select **[OK]** to accept the changes and close the window.

See also:

[Adding watermarks](#)

[Setting up or modifying a text watermark](#)

[Setting up or modifying an image watermark](#)

Adding Bates numbers

Bates numbering can be added to each page of an input PDF file. Bates numbering consists of a page number with optional leading zeros and an optional fixed text prefix. An optional line of fixed text can appear either above or below the bates number.

To add Bates numbers



1. Double-click the **[Bates Numbering]** step in a workflow.
2. In the Start with area, enter the starting number for the bates numbers.
3. Select whether to enable leading zeros and setting the total number of digits.
4. Select the total number of digits, including leading zeros, from 1-60.
5. If you wish to have text appear before the bates numbers, select **[Include Prefix]** and enter the desired text in the text box.
6. If desired, select **[Include second line of text]** and enter the desired text in the associated text box.
7. Choose whether to position the text above or below the bates number.
8. To change the font typeface, select a typeface from the Font drop box.
9. To change the font style, select a style from the Font style drop box.
10. To change the font size, select a point size from the Size drop box.
11. From the Color drop box, select a color for the prefix and the second line of text.
 - a. To select a color that is not available in the drop box, select **[Customize...]**.
 - b. Select the desired Hue, Saturation, and Value.
12. Select or type the horizontal position from the PDF document box: **[From left]**, **[Center]**, or **[From right]**.
13. Select or type the vertical position from the PDF document box: **[From top]**, **[Center]**, or **[From bottom]**.
14. Select the position relative to **[Crop Box]**, **[Media Box]**, **[Bleed Box]**, **[Trim Box]** or **[Art Box]**.
15. To preview the Bates number placement in the document, select **[Preview>>]**. For more information about the Preview option, see [Previewing job level edits](#).
16. Select **[Always use these settings]** to prevent users from modifying the settings. The settings will appear in the

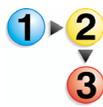
Submission Client controls, but will be grayed out and unchangeable.

17. Select **[OK]** to accept the changes and close the window.

Adding page numbers

Page numbers can be added to each page of a PDF file. Page numbers are available in a selection of styles, including 1, 2, 3; I, II, III; or i, ii, iii. Options include adding a prefix and/or suffix, and selecting font, color, and position.

To add page numbers



1. Double-click the **[Page Numbering]** step in a workflow.
2. In the Start with area, enter the starting number for the page numbers.
3. Select the desired numbering style from the drop box.
4. If you want text to appear before the page numbers, select **[Include prefix]**, and enter the text in the associated text box.
5. If you want text to appear after the page numbers, select **[Include suffix]**, and enter the text in the associated text box.
6. To change the font typeface, select a typeface from the Font name drop box.
7. To change the font style, select a style from the Font style drop box.
8. To change the font size, select a point size from the Size drop box.
9. Select a color for the prefix and the suffix from the Color drop box.
 - a. To select a color that is not available in the drop box, select **[Customize...]**.
 - b. Select the desired Hue, Saturation, and Value.
10. Select or type the horizontal position from the PDF document box: **[From left]**, **[Center]**, or **[From right]**.
11. Select or type the vertical position from the PDF document box: **[From top]**, **[Center]**, or **[From bottom]**.

12. Select the position relative to [**Crop Box**], [**Media Box**], [**Bleed Box**], [**Trim Box**] or [**Art Box**].
13. To preview the page number placement in the document, select [**Preview>>**]. For more information about the Preview option, see [Previewing job level edits](#).
14. Select [**Always use these settings**] to prevent users from modifying the settings. The settings will appear in the Submission Client controls, but will be grayed out and unchangeable.
15. Select [**OK**] to accept the changes and close the window.

Adding a Barcode

The Barcode node allows you to add a variety of barcodes to your workflows. You can specify the barcode type, font, placement, alignment, rotation, frequency, and size.

You can specify additional features for some bar code types. For example:

- Two-digit or 5-digit supplements. The supplement is a second barcode, separate from the primary barcode and positioned to its right.
- A checksum, for barcode verification, which may be either optional or mandatory.
- Start and stop characters that bracket the bar code content.
- A fixed first digit, which you can specify it from a range.

See also:

[To configure Barcode settings](#)

[To configure the barcode readable text](#)

[To configure barcode data](#)

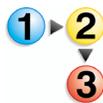
[To add or modify text or a data field](#)

[To manage barcode data](#)

To configure Barcode settings



NOTE: View the dynamic effect of your selections in the Preview window at the bottom of this dialog, or click the **[Preview >>]** button to preview the barcode placement in the document. For more information about the Preview option, see [Previewing job level edits](#).



1. To open the Add Barcode dialog, double-click the **[Barcode]** process in a workflow.
2. In the Barcode tab, specify the barcode symbology from the drop box.
3. In the Options area, select from the following:



NOTE: Options vary depending on the selected symbology.

- **[Include check digits]** to enable barcode verification.
- **[Include start character]** to include a start character in the barcode.
- **[Include stop character]** to include a stop character in the barcode.

4. In the Size area, specify the following:

- **Font Size:** Select or type the desired “font size.” This is an approximation of the width of the narrowest bar in the bar code in “mils” (one thousandths of an inch). The Bar Codes node does not require you to have bar code fonts installed on the FreeFlow system.
- **Height:** Select or type the desired barcode height.



NOTE: *The size of the human-readable text is not included in the requested bar code height. If you specify height = 1 inch, the total size of the graphic is one inch plus the height of the readable text extending above or below the bar code.*

NOTE: *Height can be specified in inches or millimeters, except for PostNet (Japan) and QR Code because the height for those types is determined uniquely to bar width or cell size.*

- **Horizontal padding:** Select or type the desired padding to control the amount of white space on either side of the barcode.
 - **Vertical padding:** Available for QR Code type only. Select or type the desired padding to control the amount of white space at the top or the bottom of the barcode.
5. Select the desired degree of rotation, in increments of 90 degrees. The icon changes to reflect the selected rotation.
 6. Select or type the horizontal position from the PDF document box: [**From left**], [**Center**], or [**From right**].
 7. Select or type the vertical position from the PDF document box: [**From top**], [**Center**], or [**From bottom**].
 8. Select the position relative to [**Crop Box**], [**Media Box**], [**Bleed Box**], [**Trim Box**] or [**Art Box**].



NOTE: *You can specify offset in inches or in millimeters either as positive (inward from the selected box), or negative (outward from the selected box) numbers. Default placement is Top-Left of the Crop Box, with horizontal and vertical offsets (0.0, 0.0).*

9. In the “Apply to pages” area, specify the pages upon which the barcode will appear.
 - If **Page range** is selected, enter a text string using commas and hyphens. For example, select “1-3, 7, 12-14, 17” to print bar codes on pages 1 through 3, on page 7, on pages 12 through 14, and on page 17.



NOTE: *Various order jacket file variables are supported by FreeFlow Process Manager MAX, Manifest Automation from Xerox.. You can enter variable data syntax in the page range text box. For example, given an Order jacket file (OJF) with columns 1, 2, 3, 4 containing page range data “1-3”, “7”, “12-14”, “17” respectively, you can enter text “\$CSV1\$, \$CSV2\$, \$CSV3\$, \$CSV4\$” into the page range text box. If OJF column contains an invalid page range, the workflow will fail with an invalid page range error in Workflow Job Manager.*

10. Select [**Always use these settings**] to prevent users from modifying the settings. The settings will appear in the Submission Client controls, but will be grayed out and unchangeable.
11. Select [**OK**] to accept the changes or select another tab to continue configuring.

To configure the barcode readable text

The Readable Text tab allows you to specify that the data encoded in the bar code prints in a human-readable format. The default is disabled.



NOTE: *The size of the human-readable text is not included in the requested bar code height. If you specify height = 1 inch, the total size of the graphic is one inch plus the height of the readable text extending above or below the bar code.*

Readable text is **not** enabled for the following bar code types:

- Bookland
- ISBN
- Postbar (Japan)
- QR Code (FX market)

The specifications, below, are not available for all barcode types.



NOTE: *View the dynamic effect of your selections in the Preview window at the bottom of this dialog, or click **[Preview>>]** to preview the barcode placement in the document. For more information about the Preview pane option, see [Previewing job level edits](#).*



1. To open the Add Barcode dialog, double-click the **[Barcode]** process in a workflow.
2. In the Readable Text tab, mark the check box for **[Include human readable text]** to enable the feature.
3. If available, mark the check box for **[Include check digits]** to specify whether checksum character(s) should be shown in the human-readable text.
4. If available, mark the check box for **[Split UPC characters]** or **[Shrink UPC Characters]** to specify that the first character and/or last character of the human-readable text is split apart from the rest of the human-readable text and/or printed in a smaller font.
5. If available, mark the check box for **[To include start and stop characters]** t
6. Specify whether the text is **Opaque** (cannot see through text) or **Transparent** (can see-through text).

7. Specify the Vertical Placement as either: **Place text below bars** or **Place text above bars**.
8. Specify a Horizontal Alignment, either **[Left]**, **[Center]**, or **[Right]**.
9. Select or type the text Vertical offset.
10. Select or type a Horizontal offset.
11. From the font drop boxes, specify the font, font style and font size.
12. Select **[Always use these settings]** to prevent users from modifying the settings. The settings will appear in the Submission Client controls, but will be grayed out and unchangeable.
13. Select **[OK]** to accept the changes or select another tab to continue configuring.

To configure barcode data

You can specify the data to be encoded as a bar code.



NOTE: *Guidelines for valid characters and total numbers of characters are displayed in the center of the dialog.*

NOTE: *You can enter data using characters outside of the valid character set for a bar code type if those characters are bracketed by the start/stop sequences used by variables in FreeFlow Process Manager MAX, Manifest Automation by Xerox.*

See also:

[To add or modify text or a data field](#)

[To manage barcode data](#)

To add or modify text or a data field



1. To open the Add Barcode dialog, double-click the [**Barcode**] process in a workflow.
2. Select the Data tab.
 - In the “Enter data” area, select [**Add**]. The Add Data dialog displays.
 - If you are modifying text or data, select the desired item in the display window, and select [**Modify**]. The Modify Data dialog displays.
3. In the Add Data or Modify Data dialog, to add or modify text, select [**Text**], enter the desired text in the text box, and select [**Add**]. Your selection displays in the lower area of the dialog. Notice that the data is concatenated to form one string of data.
4. To add or modify data, select [**Data Field**] and select from the following variables:
 - Job ID
 - Job Name
 - Sheet In Signature
 - Sheet Number
 - Sheets Per Signature
 - Signature Number
 - Total Sheets
 - Total Signatures



NOTE: *If the data field contains characters that the barcode does not support, the job may fail for invalid data.*

5. To add leading zeroes, mark the check box to enable the feature, then select the desired number of digits from the drop

box.

6. Select **[Add]**. Your selections display in the lower area of the dialog.
7. If adding, select **[Done]**; if modifying, select **[OK]**.

See also:

[To manage barcode data](#)

To manage barcode data



1. To open the Add Barcode dialog, double-click the **[Barcode]** process in a workflow.
2. In the Data tab dialog, review your selections in the window. As necessary, select from the following:
 - To add text or data, select **[Add]**. Data is concatenated to form one string of data. Refer to [To add or modify text or a data field](#).
 - To modify text or data, select the text or data and then select **[Modify]**. Refer to [To add or modify text or a data field](#).
 - To remove text or data, select the desired text or data, and then select **[Delete]**.
 - To move the selected text or data up or down in the list, select **[Move Up]** or **[Move Down]**.
3. In the “Variable data options” area, select or type the desired Sheets per signature, from 1 to 999. This value is used if the Signature Number and Total Signatures variables are selected.
4. In the “When sheets are part of the barcode data” area, select from the following to specify a count direction to be used with the SheetNumber, SignatureNumber, and SheetInSignature variables. A single count direction is applied to all three variables.
 - **[Increments, starting with the first sheet number (ascending)]** (1 to N)
 - **[Decrements, starting with the last sheet number (descending)]** (N to 1)



NOTE: *If bar code frequency is set to Even Pages or Odd Pages, the Bar Codes node treats the document as duplex, and the Sheet Number variable increments for every bar code (i.e., not for every PDF page), while the TotalSheets variable is half the number of PDF pages. The document is also treated as duplex if any of the Signature variables are used.*

5. Select [**Always use these settings**] to prevent users from modifying the settings. The settings will appear in the Submission Client controls, but will be grayed out and unchangeable.
6. Select [**OK**] to accept the changes or select another tab to continue configuring.

Previewing job level edits

The Preview option allows you to dynamically view content added to a PDF document before you commit to the selected settings. You can preview the following workflow processes:

- Bates Stamping
- Page Numbering
- Watermarks
- Barcodes
- Pressmarks
- Imposition



NOTE: *The Preview feature does not support Crop, Resize, Flip, and Rotate.*

You can preview content on one or more blank pages or on a sample PDF document.

To preview job level edits



1. Open one of the following processes in a workflow:
 - Bates Stamping
 - Page Numbering
 - Watermarks
 - Barcodes
 - Imposition
 - Pressmarks
2. Select [**Preview >>**] to display the preview controls. The controls allow you to preview selections, but do not affect the output.



NOTE: *In the Imposition settings, mark the checkbox for [Preview].*

You can specify a sample PDF document upon which to preview the content. Otherwise, the content is displayed on one or more blank pages.

3. Select [**Use sample PDF**] to use the browse function to specify a sample PDF document. A Workflow [*Process*] dialog displays.



NOTE: *You can also drag and drop a PDF document into the Preview window.*

4. Select [**Yes**] to browse for a sample PDF.
5. In the Browse for sample PDF dialog, browse select a file.
6. Select [**Open**] to choose the file and close the dialog.
 - The path and file name display in the text box.
 - The file displays in the Preview window.
 - **Preview page count** displays the number of pages in the sample PDF document.
4. If there are multiple pages to preview, use the Page Forward and Page Back arrows to navigate. In the Imposition Preview pane, right-click and select from [**First Sheet**], [**Previous Sheet**], [**Next Sheet**] or [**Last Sheet**].
5. Select [**Preview page image size**] to select a preview page size. The content displays on a blank page of the selected stock size. The Imposition node supports Auto. The default for all other nodes is 8.5 x 11 inches or A4 metric. Select Custom to enable Width and Height boxes.
6. Select [**Show Rulers**], or in the Imposition Settings dialog, select [**Show Preview rulers**], to turn on or turn off the Preview screen rulers.
7. For the Imposition Preview window only:
 - Select [**Show corner page numbers**] to display the page number in all corners of each displayed page.
 - For Maxium N-Up jobs, in the Imposition Settings dialog, the “Automatic output prognosis” area shows the status of the specified job options.

Rotating pages

Each page in the PDF file can be rotated by 90 degrees clockwise or counterclockwise, or by 180 degrees.

To rotate pages



1. Double-click the Rotate Pages step in a workflow.
2. Select from None, Right 90, Left 90, or 180 degrees to turn a page from its current position.
3. Select **[Always use these settings]** to prevent users from modifying the settings. The settings will appear in the Submission Client controls, but will be grayed out and unchangeable.
4. Select **[OK]** to accept the changes and close the window, or continue setting job level edit options.

Flipping pages

Each page in the PDF file can be flipped horizontally or vertically to create a mirror image.

To flip pages



1. Double-click the Flip Pages step in a workflow. Select from the following:
 - In the Horizontal area, select **[Flip]** to flip pages along the horizontal axis and create a mirror image.
 - In the Vertical area, select **[Flip]** to flip pages along the vertical axis and create a mirror image.
2. Select **[Always use these settings]** to prevent users from modifying the settings. The settings will appear in the Submission Client controls, but will be grayed out and unchangeable.
3. Select **[OK]** to accept the changes and close the window.

Resizing

The Resize feature allows you to automatically resize images at the document and page level. You can select a specific size, or a size based on a percentage of the original image size. Jobs containing PDF, JPEG, TIFF, and BMP files, including mixed files, are supported.

- Settings are applied to all files in the job and all pages in the file.
- For TIFFs, JPGs, or BMPs, the image is resized; for PDFs, the page is resized.
- For pages with multiple images, each page—not each individual image on a page—will be scaled or resized to the specified size.



NOTE: *You cannot resize individual images on a PDF page.*

To resize

1. To access the Resize settings dialog, double-click the [**Resize**] step in a workflow.
2. Select from the following:
 - [**Scale to size**] to select image resizing to a specific size.
 - [**Scale by percent**] to select image resizing based on a percentage of the original image or PDF page size.
 - [**Width**] to select a specific width or a percentage of the original width. Default: 8.5” or 100%.
 - [**Height**] to select a specific height or a percentage of the original width. Default: 11.00” or 100%.
 - [**Constrain proportions**] to set an equal width and height scale percentage by changing only the width value. The link below the spin boxes is connected when this option is selected and unconnected when not selected. Available when [**Scale by percent**] is selected.
3. Select [**Always use these settings**] to prevent users from modifying the settings. The settings will appear in the Submission Client controls, but will be grayed out and unchangeable.
4. Select [**OK**] to accept the changes and close the window.

Configuring Imposition settings

The Imposition process allows you to define the placement of page elements to increase production press efficiency and to create specific applications—for example, booklets.

If PREPS is installed on the computer, the initial Imposition Settings dialog allows you to choose one of the following:

- **Specify imposition settings:** When you select **[OK]**, displays the FreeFlow Process Manager Imposition Settings dialog, in which you can establish the desired settings.
- **Use Preps job file:** When you select **[OK]**, displays the Preps Imposition Settings dialog, in which you can select Preps templates.

See also:

[Previewing job level edits](#)

[To configure Imposition settings - General tab](#)

[To configure Imposition settings - Crop Marks tab](#)

[Guidelines for Cell Clustering](#)

[PDF Page Box Considerations](#)

[PDF Page Box Limitations](#)

[About Job types](#)

[Maximum N-Up considerations](#)

[Automatic stock type considerations](#)

[Maximum N-Up limitations](#)

[Configuring Preps settings](#)

[Limitations for Imposition and PREPS](#)

[Fault handling for Imposition](#)

To configure Imposition settings - General tab

The General tab allows you to select a job type and establish settings—for example, orientation, stock, margins, and various signature options.

1. Double-click the Imposition step in a workflow.
 - If Preps is detected on the computer, the initial Imposition Settings dialog displays. Select [**Specify imposition settings**], and then select [**OK**] to close the window and display the Imposition Settings dialog.
 - If Preps is not detected on the computer, the standard Imposition Settings dialog displays.
2. In the Imposition Settings dialog, select the General tab.
3. Select a job type from the drop box.
 - For more information about job types, see [About Job types](#), [Maximum N-Up considerations](#), and [Maximum N-Up limitations](#).
4. The Preview pane allows you to dynamically view the selected settings. Mark or deselect the [**Preview**] check box to open or close the Preview pane. For more information about the Preview option, see [Previewing job level edits](#).
5. For Custom N-up jobs, in the Rows and Columns area, select or type the number of rows or columns, up to a maximum of 16.
6. In the Pages on sheet side area, select from the following:
 - [**Repeated**] to fill a multi-up sheet side with copies of a single page.
 - [**Sequential**] to place a single page in each cell of the multi-page up.
 - [**Cut and Stack**] to arrange the order that the images are printed on the sheets so the printed sheets can be cut and easily stacked into one copy of the final document.
 - [**Alternating**] to place the pages sequentially, but alternating the front side and the back side of a page.
7. In the Orientation area, select from of the following:
 - [**Portrait**] to orient vertically.
 - [**Landscape**] to orient horizontally.

8. In the Sides imaged area, select from the following:
 - **[1 sided]** to print on one side of a page.
 - **[2 sided]** to print on both sides of a page.
 - **[Head to Toe]** to print the reverse side of a page so the finished document has a calendar format.
9. In the Paper Stock area, select a stock type from the drop box.
10. Select **[Automatic]** from the drop box to enable the automatic selection of stock or creation of custom stock based on the cells of a specific job.
 - Mark the check box for **[Select auto stock from the nearest standard type if possible]** and select from the following stock types:
 - **Constrain to English stock types:** to search the list of named English stocks for one large enough to encompass the layout area.
 - **Constrain to metric stock types:** to search the list of Metric stocks for one large enough to encompass the layout area.
 - **No regional constraint:** to search the list of Metric and English stocks for one large enough to encompass the layout area. For more information, see [Automatic stock type considerations](#).



NOTE 1: *If the Select auto stock from the nearest standard type check box is not marked, a custom stock is created that encompasses the layout area. It may or may not equate to a standard named stock.*

NOTE 2: *The auto stock feature produces an imposition result, not a print result. Print output stock is selected in the Print node dialog.*

11. Select **[Custom]** paper stock to enable the **[Width]** and **[Height]** options, and then type the desired value.

12. In the Margins area, select or type the margin for each option: **[Top]**, **[Left]**, **[Bottom]**, and **[Right]**; or select **[Uniform]** to change all settings to the Top setting.
13. In the Page Position and Autofit area, select from the following:
 - In the Position Relative to area, designate a PDF box, either **[PDF Crop Box]**, **[PDF Trim Box]**, **[PDF Bleed Box]**, and **[PDF Art Box]**, upon which the size of the cells that are being imposed is based.
14. You can specify a horizontal and vertical cell-relative position for the PDF image (logical page) within an imposed sheet cell, and thereby reduce the amount of cut and trim post-printing. Select from the following:
 - **[Horizontal]** to specify the horizontal anchor position reference edge of the image alignment. Available if not centered. Select from the following:
 - **[From left]**, **[From right]**, **[Center]**: Always available.
 - **[From binding edge]**: Available if 2-sided document.
 - **[From non-binding edge]**: Available if 2-sided document.
 - **[Vertical]** to specify vertical anchor position reference edge of the image alignment. Available if not centered. Select from the following:
 - **[From top]**, **[From bottom]**, **[Center]**: Always available
 - **[From binding edge]**: Available if Head-to-toe document.
 - **[From non-binding edge]**: Available if Head-to-toe document.



NOTE: *Earlier versions of Process Manager (2.0, 3.0, 4.0) used the uni-dimensional Anchor Image function. Legacy workflows will be translated into a 2-dimensional format. Horizontal and vertical values will be 0.00. Edge settings will be translated into the appropriate dimensional control element, taking into consideration document plex.*

NOTE: *Page imagery is typically allowed to bleed beyond the selected PDF box. However, the selected PDF box can act to crop imagery that lies beyond it if the user specifies a margin of any size or dimension.*

15. To enable cell clustering, mark the check box for **[Cluster imposed cells]**. For more information about clustering, see [Guidelines for Cell Clustering](#).

16. Select from the following to specify the space or “gutter” between the clustered cells:

- **[Gutter width]** To specify a single horizontal gutter value.
- **[Gutter height]** To specify a single vertical gutter value.

Gutters are applied between the cells and do not affect border gutters.



NOTE: *With the Autofit check box marked and gutter values specified, the Autofit cell size is reduced by half the gutter in both the vertical and horizontal dimension. Any page content that exists outside of the selected PDF box bleeds into (half) the gutter area between imposed cells.*

17. Select **[Autofit]** to scale the image to fit inside the cell.

18. Select from the following signature options:

- **[Signature Shift]** to specify an incrementing offset for incoming PDF pages on the output paper stock for Book, Pamphlet, and Calendar job styles.
- **[Single signature]** when cleared, to specify the number of sheets per signature segment; when selected, to place all sheets in one signature.
- **[Sheets per signature]** to enter the number of sheets that will comprise a single segment of a multiple-segment signature document, from 1-999. Available when Single signature checkbox is unchecked.
- **[Fill last segment]** to fill the document with blank sheets to ensure the last segment in the job is filled to the value specified in Sheets per signature. Available when Single signature checkbox is not selected.



NOTE: *The number of sheets in the final signature may not equal the requested value when Sheets per signature does not divide evenly into the number of sheets.*

19. Select **[Always use these settings]** to prevent users from modifying the settings or to override any similar settings in an incoming JDF job ticket or an RDO file. The settings will appear in the Submission Client controls, but will be grayed out and unchangeable.

To configure Imposition settings - Crop Marks tab

The Crop Marks tab includes options that allow you to print guide or “cut” marks that define the edges of multiple pages of a job printed on larger paper stock. You can:

- Define the size and color of the crop marks.
- Define the sheet faces to which to apply the crop marks for simplex and duplex jobs.



1. Double-click the Imposition step in a workflow.
2. If Preps is detected on the computer, the initial Imposition Settings dialog displays. Select [**Specify imposition settings**], and select [**OK**] to close the window and display the Imposition Settings dialog.

If Preps is not detected on the computer, the standard Imposition Settings dialog displays.

3. In the Imposition Settings dialog, select the **Crop Marks** tab.
4. In the Crop mark box window, select from the following:
 - [**Media Sheet**] to define the crop margin relative to the sheet regardless of imposition job type. Range is:
 - 0 to remaining width of paper stock for Left and Right controls.
 - 0 to remaining height of paper stock for Top and Bottom controls.
 - [**Media Cell**] to define the crop margin relative to each cell on the sheet. Range is:
 - 0 to remaining width of cell for Left and Right controls.
 - 0 to remaining height of cell for Top and Bottom controls.
 - [**Cell Cluster**] to define the crop margin relative to each cell cluster on the sheet.
For more information about clustering, see [Guidelines for Cell Clustering](#).
 - [**PDF Crop Box**] to define the boundary for the contents of the page when it is displayed or printed.
 - [**PDF Trim Box**] to define the finished dimensions of the page after trimming.

- **[PDF Bleed Box]** to define the amount of extra area to image outside of the final page size defined by the PDF Trim Box.
- **[PDF Art Box]** to define the area of the page where PDF content is placed.

For more information about PDF boxes, see [PDF Page Box Considerations](#) and [PDF Page Box Limitations](#).



NOTE: *Bleed, Trim, and Art boxes must be smaller than or equal to the defined PDF Crop Box.*

5. In the crop marks offsets area, specify offsets from the edges of the selected crop mark box:

- **[Top]**, **[Bottom]**, **[Left]**, and **[Right]** to set the desired offsets.
- **[Uniform]** to define all offsets; defined by the Top offset.
- **[Inward offset]** to place offsets inside the perimeter of the selected box.
- **[Outward offset]** to specify offsets outside the perimeter of the selected box.



NOTE: *The Outward offset option is disabled for media sheet crop marks.*

Offsets must be all inward or all outward. Negative offset values are not allowed.



NOTE: *For the PDF box options, the above options define the box relative to the size of the PDF page being imposed. The box is affected by and moved according to all transformations of the page such as Autofit, Margin, and Page Image Position/Alignment settings. The range is 0 to 60 inches and the metric equivalent.*

Use care with this option as it is possible to specify a box rectangle that exceeds the actual page size or that is clipped off by the sheet cell(s) during imposition.

6. Select from the following Sheet Face options:
 - **[Mark both sides]** to place crop marks on the front and back of sheets. This is the default selection when a duplex job is defined.
 - **[Mark front side only]** to place crop marks on the front side of sheets. This is the default selection when a simplex job is defined.
 - **[Mark back side only]** to place crop marks on the back of sheets.
7. Select from the following Interval options:
 - **[Mark every sheet]** to apply crop marks to all sheets in the output.
 - **[Mark first sheet]** to apply crop marks to the first sheet in the output
 - **[Mark last sheet]** to apply crop marks to the last sheet in the output.
 - **[Mark every]** to apply crop marks to every “n” sheet as defined by the user via the sheets spin box. Range: 1 to 500.
 - **[Starting with the first sheet]** to start crop marks on the first sheet when selected, or on sheet(s) N when not selected.
8. Select from the following Size and Color options:
 - **[Crop mark length]**: Defines the length of the crop mark from corner offset outward to the edge of the cell, sheet, or page.
 - **[Crop mark color]**: Defines the color of the crop mark.
 - **[Crop mark bleed]**: Defines the distance between the crop marks and the corner of the rectangle the crop marks identify. For example, if the bleed length is set to “0,” the horizontal and vertical crop mark lines that form a corner would meet. Larger values space the lines away from each other.
9. Select **[OK]** to accept the changes and close the window.



NOTE: *If printing, ensure that the sides imaged and the paper stock options in the print component are consistent with the options specified here.*

Guidelines for Cell Clustering

A cell is the area on a sheet occupied by a multipage imposition scheme. Cell Clustering provides the option of pulling together cells on a sheet in a way that results in cell sizes that contain the imposed page images with no waste space between cells. The Cell Cluster is positioned and aligned as a single entity.

- Cell Clustering is not available for Standard and Signature job types. The cells in a signature job configuration are pulled together using the “Binding-edge” alignment option.
- With Autofit off it is possible to yield cell sizes that when clustered, produce a layout area that exceeds the dimensions of the paper stock. As a result, only a portion of the NxN cell matrix may appear on the cell with the rest of the cells partially or completely clipped by the defined paper stock size.
- The position and alignment controls control the cell cluster. The ability to justify content within a cell is lost. All content is justified top-left within a cell.
- With Cell Clustering OFF, the imposition entities being controlled are the individual page images with respect to position, alignment, and autofit. With Cell clustering ON, the entity being controlled is the entire cluster of cells.

PDF Page Box Considerations

- The PDF Boxes allow you to perform an “automated crop” by using a box defined within the PDF, rather than tailoring a workflow specific to an input document type. You can use the PDF boxes to meet specific job requirements—for example, the PDF Art Box can represent document fold lines.
- The PDF Media box option is not supported in imposition, but you can create an equivalent during imposition via the Paper Stock setting. The PDF Media Box describes the whole area of the PDF document including gutters and trim areas. All other box definitions are sub-areas of the media box. It is not changeable by the user and is established when the PDF document is created.
- The Trim, Bleed and Art boxes must be smaller than the Crop Box. Box edges defined in the input document that are beyond the corresponding crop box edge are limited to the crop box edge during imposition.
- You can select which of the four supported PDF boxes to be used for positioning and autofit. Note that the PDF page is not clipped by the selected box unless margins are applied. Enabling autofit will cause the selected box to scale to fit the sheet cell it is being imposed into. PDF page data may bleed outside of the selected box into any sheet cell waste-space created during autofit scaling as long as it does not intrude into a neighboring imposition cell.
- Bleeds beyond the selected PDF box are disabled if any margins are applied.
- From the perspective of downstream workflow components, page size in the output document is the selected paper stock upon which the input document is imposed.

PDF Page Box Limitations

- There is no support for Media Boxes.
- Bleed, Trim, and Art boxes must be smaller than or equal to the defined Crop box.
- Box offsets in the input document do not carry over into the imposed output document – all offsets are set at 0 in the output document.
- You can make PDF box definitions unique on a page-by-page basis. Asymmetric imposition results occur if these definitions are not consistent throughout the document.

About Job types

The following job types are available via the Imposition Settings dialog:

- **Standard:** The pages are printed in a sequential order with one page on one side of a sheet of defined paper stock. There is one Standard job type, for which you can specify the image orientation and sides imaged.
- **Signature:** Two separate pages are printed side-by-side on one side of a sheet of paper. All Signature documents are 2-sided. The pages of the document are sequenced when printed to produce output that can be folded to create a booklet type of document. There are three signature job types, each characterized by the fold (binding edge) of the document:
 - **Signature Booklet:** Portrait, fold (binding edge) is parallel to short edge of the stock
 - **Signature Calendar:** Head to Toe orientation, fold (binding edge) is parallel to short edge of the stock
 - **Signature Pamphlet:** Portrait orientation, fold (binding edge) is parallel to the long edge of the stock
- **N-up:** The pages are printed in sequential order with each page of the document appearing a specified number of times (n) on the same side of a sheet of paper. (This is also known as multiple imposition or tiling.) Each copy of the page is called a cell. There are ten n-up job types:
 - **2 Up:** Each page is imaged twice on one side of a sheet of paper.
 - **2 Up Flip Left:** Each page is imaged twice on one side of a sheet of paper with the left of the two imaged pages flipped 180 degrees to appear upside down.
 - **2 Up Flip Right:** Each page is imaged twice on one side of a sheet of paper with the right of the two imaged pages flipped 180 degrees to appear upside down.

- **3 Up:** Each page is imaged three times on one side of a sheet of paper.
- **3 Up Flip Left:** Each page is imaged three times on one side of a sheet of paper with the left of the three imaged pages flipped 180 degrees to appear upside down.
- **3 Up Flip Right:** Each page is imaged three times on one side of a sheet of paper with the right of the three imaged pages flipped 180 degrees to appear upside down.
- **4 Up:** Each page is imaged four times on one side of a sheet of paper. There is no flip option for 4-Up.
- **8 Up:** Each page is imaged eight times on one side of a sheet of paper. There is no flip option for 8-Up.
- **16 Up:** Each page is imaged sixteen times on one side of a sheet of paper. There is no flip option for 16-Up.
- **Custom N-Up:** Allows the user to specify rows and columns in combination with Orientation, Sides Imaged, Margins, Paper Stock, and Autofit options. The following options are grayed out if Custom N-Up is not selected:
 - Rows (maximum of 16)
 - Columns (maximum of 16)
 - Pages on Sheet Side; Repeated; Sequential; Cut and Stack; Alternating
- **Maximum N-Up:** Given an input page size, calculates how many of those pages can be fit onto the sheet. See also [Maximum N-Up considerations](#) and [Maximum N-Up limitations](#).

Maximum N-Up considerations

- Maximum N-up might benefit workflows where resource utilization is of a higher-priority than layout scheme.
- The N-up cell count is based on the size of the configured imposition reference box (PDF box) on the first page of the document only. If the selected reference box is not of consistent size throughout the input document, unusual clipping or seemingly asymmetric output will result.
- The application of gutters when this feature is used with imposition cell clustering will be accounted for in the layout computations and therefore, total N-up cells maybe be reduced as a result.
- The use of gutters in conjunction with imposition cell clustering may result in a reduction of total N-up cells.
- If the input page size reference is larger than the selected stock size, a Standard non-Autofit job style output results.
- If the number of pages in the input document cannot fill all the cells for the N-up, a partial N-up output results.
- Autofit functionality is not available with this configuration.
- The maximum number of rows and/or columns is limited to 16 in each direction.

Automatic stock type considerations

The Automatic Paper Stock type option selects or creates a custom stock configuration that completely contains the cells of a specified job type. This option is useful for “intermediate” imposition steps in multi-imposition workflows.

Imposition result vs print result The automatic stock feature produces an imposition result – not a print result. The stock size defined by the code logic cannot be communicated to the print component logic because there is no means in Process Manager to achieve this at job run-time. The printed output stock is selected in the print node or as configured by the XPIF ticket during hot-folder operation.

Stock dimensions based on reference box The stock dimensions are based on the resulting cell layout of the job type and the size of the configured imposition reference box (PDF box) on the *first page of the input document only*. If the reference box is consistent size throughout the input document, unusual clipping or unexpected border-gutter space may result.

Regional prioritization If you prioritize the automatic selection to one of the standard named stock configurations, you may further constrain the standard stock type used by regionality.

For each of the options, If no stock among the set is large enough to encompass the layout area, a Custom type is created.

- If a standard stock type is identified, orientation is dynamically configured to choose a stock orientation that minimizes post-imposition waste areas.
- If the subsequent layout exceeds the size of an identifiable standard stock type, a Custom stock type that encompasses the layout area is created.
- If you choose not to prioritize among standard stock types, a stock type that wholly encompasses the layout area is created. This might equate dimensionally to a standard named stock type.

Maximum size The maximum size for an automatic stock is 60” in either direction.

Both Maximum N-up and Automatic stock selected If you select both Maximum N-up and Automatic stock configurations, the result is a Standard, non-Autofit job style output as the maximum number of cells that can be fit onto a undefined area is always equal to one.

Maximum N-Up limitations

- Cannot be used to automatically configure the printed stock.
- No support for Media Boxes.
- Bleed, Trim and Art boxes must be smaller than or equal to the defined Crop box.
- Defined boxes in the input document are not carried over into the imposed output document.

Configuring Preps settings

If Preps is installed on the computer, the initial Imposition Settings dialog allows you to choose one of the following:

- **Specify imposition settings:** Displays the Imposition Settings dialog, in which you can establish the desired imposition settings.
- **Use Preps job file:** Displays the Preps Imposition Settings dialog, in which you can select Preps job files.

In Preps, job files are layout masters used in conjunction with a set of pages to produce imposed jobs. The Administrator establishes the selectable job files from the Preps software. The Preps dialog settings allow you to select from a list of Preps imposition job files.

To configure Preps settings

1. Double-click the Imposition step in a workflow.
2. If Preps is detected on the computer, the initial Imposition Settings dialog displays. Select **[Use Preps job file]**. Select **[OK]** to close the window and display the Preps Imposition Settings dialog.



NOTE: *If Preps is not detected on the computer, the regular Imposition Settings dialog displays. For information about Preps installation, refer to the procedure “Setting up Preps” in the About FreeFlow Process Manager section.*

3. In the “Select the Preps Job files that submitters can choose from” text box, select the desired Job files. The Job files will populate the “Select the default Preps Job file” drop box.
4. In the “Select the default Preps Job file” drop box, select a default Job file.
5. If applicable, select **[Always use these settings]** to prevent users from modifying the settings or to override any similar settings in an incoming JDF job ticket. The settings will appear in the Workflow Submission Client controls, but will be grayed out and unchangeable.

See also:

[Configuring Imposition settings](#)

[About Job types](#)

[Limitations for Imposition and PREPS](#)

[Fault handling for Imposition](#)

Limitations for Imposition and PREPS

- If more than one Impose node exists in a workflow – for example, workflows with Conditional branches and/or fail branches with Impose nodes in more than one branch – the propagation code selects the impose node on the top branch (or the main branch in case of fail branches) as the "first" impose node and propagates it with information from the ticket. If the job takes the second branch during the execution, the impose node on the second branch, although technically the "first" impose node to be encountered by the job, will not contain the ticket information.
- JDF imposition parameters cannot be translated into Preps imposition templates, and Preps does not support JDF.
- Non-printable content such as bookmarks, sounds, movies, logical structure, hyperlinks, and article threads will not be preserved by the Preps imposition component.
- No support for imposition marks such as exposure keys will be provided within the Xerox imposition templates. Such items are typically placed in the "gutter" area of the press sheet. This type of advanced feature is available in Kodak Preps.
- VI Containers should not be used with PREPS. Process Manager handles these as containers, not PDF files.
- When you submit a job to a Process Manager workflow that includes Imposition with PREPS, ensure that the PREPS application is not running if the license is only for one instance of PREPS.

Fault handling for Imposition

Errors are logged in the Windows Event log and display in the Workflow Job Manager status display area. The following errors cause the Imposition operation to fail:

- If the input PDF file is missing.
- If the input PDF file is invalid.
- If the output PDF file is locked and cannot be overwritten or if the user lacks sufficient security privileges to access the destination directory.
- If the input PDF file requires a password to open the PDF or does not permit any of the following: content copying and extraction, document assembly, or content accessibility.

Cropping

The Crop feature allows you to automatically crop PDF, JPEG, TIFF, and BMP files. A job can include all supported file types. Equal cropping is applied to all files in the job.

To crop



1. To access the Crop dialog, double-click the [**Crop**] step in a workflow.
2. In the Edge offset section, enter a number or click the up and down arrows to define crop position from the Left, Right, Top, or Bottom edge of the page.
3. If desired, select [**Uniform**] to enable the following options:
 - [**All edges**]: Makes all values equal to the Left entry.
 - [**Opposite edges**]: Makes Left and Right values equal to the Left entry; makes Top and Bottom values equal to the Top entry.
4. Select [**Always use these settings**] to prevent users from modifying the settings. The settings will appear in the Submission Client controls, but will be grayed out and unchangeable.
5. Select [**OK**] to accept the changes and close the window.

Configuring Pressmarks settings

The Pressmarks node allows you to add a fixed pressmark to a workflow. You can specify the pressmark placement, rotation, frequency, transparency, and then preview the specifications.

To set up or modify a pressmark



1. Double-click a Pressmarks process in a workflow to open the Add Pressmarks dialog.
2. To preview the pressmark placement in the document, select **[Preview>>]**. For more information about the Preview option, see [Previewing job level edits](#).
3. Select one of the following:
 - Select **[New]**, and then select **[Image Pressmark]** to open the New Image Pressmark dialog and set up a pressmark.
 - Select a pressmark from the list, and then select **[Modify]** to open the Modify Image Pressmark dialog and change the pressmark.
 - To Duplicate or delete a pressmark, see [Duplicating or deleting a pressmark](#).
4. Select **[Browse]** to locate an image file of the type listed in the drop box.



NOTE: *The selected image must reside on a local drive.*

- a. In the Browse for Pressmark Image File dialog, select a file.
- b. Select **[Open]**. The dialog closes and the path and file name display in the Pressmark filename text box.
5. In the Modify Image Pressmark or New Image Pressmark dialog, select a percentage from 1 to 200 to scale the image.
6. Select or type the horizontal position from the PDF document box: **[From left]**, **[Center]**, or **[From right]**.
7. Select or type the vertical position from the PDF document box: **[From top]**, **[Center]**, or **[From bottom]**.
8. Select a position relative to **[Crop Box]**, **[Media Box]**, **[Bleed Box]**, **[Trim Box]** or **[Art Box]**.

9. Select the desired degree of rotation, from 0-359 degrees. The icon changes to reflect the selected rotation.
10. Select a transparency from 0-100. The greater the transparency level, the less opaque the pressmark.
11. In the “Apply to pages” area, select a pressmark frequency from the drop box.
 - If a range is selected, enter a text string using commas and hyphens. For example, select “1-3, 7, 12-14, 17” to print bar codes on pages 1 through 3, on page 7, on pages 12 through 14, and on page 17.



NOTE: *Various order jacket file variables are supported by FreeFlow Process Manager MAX, Manifest Automation from Xerox. You can enter variable data syntax in the page range text box. For example, given an Order jacket file (OJF) with columns 1, 2, 3, 4 containing page range data “1-3”, “7”, “12-14”, “17” respectively, you can enter text “\$CSV1\$, \$CSV2\$, \$CSV3\$, \$CSV4\$” into the page range text box. If OJF column contains an invalid page range, the workflow will fail with an invalid page range error in Workflow Job Manager.*

12. Select **[OK]** to accept the changes, close the window and return to the Add Pressmark dialog. The new pressmark displays in the Pressmarks list; its description displays to the right.

NOTE: *All pressmarks in the list are applied to the job and are applied in the order in which they are listed.*

13. If desired, select a pressmark and select **[Move Up]** or **[Move Down]** to move it up or down in the list, and to define the order in which the image is layered on the page.
14. Select from the following:
 - **[Place all pressmarks behind page content]** to place the pressmark underneath the page contents.
 - **[Place all pressmarks in front of page content]** to place the pressmark on top of the page contents.



NOTE: *The setting applies to all pressmarks.*

15. Select **[OK]** to accept the changes and close the window.

See also:

[Duplicating or deleting a pressmark](#)

Duplicating or deleting a pressmark

You can duplicate or remove a selected pressmark from the list.

To duplicate or delete a pressmark

1. Double-click the Pressmark step in a workflow.
2. In the Pressmark list, select a pressmark.
3. Select from the following:
 - Select **[Delete]** to remove the pressmark.
 - Select **[New]**, and then select **[Duplicate]** to copy the pressmark.
4. Select **[OK]** to accept the changes and close the window.

See also:

[Configuring Pressmarks settings](#)

About Review

The Review process allows you to view the PDF file in its current state and approve or fail the document. When a workflow is stopped at a Review step, in Workflow Job Manager you can also perform the following functions, depending on the makeup of the workflow:

- View and edit the file using Adobe Acrobat Professional.
- View a soft proof using Adobe Acrobat Professional.
- Print a hardcopy proof.
- Modify the copy count.
- Change process settings and resubmit the job.

A settings dialog is not available for Review.

Configuring Notify settings

The Notify process provides job status notification via e-mail. Examples of uses include:

- Job start notification: Notifies the operator that the job is beginning.
- Preflight fail notification: Notifies the operator when preflight fails, which allows immediate intervention.
- Job finish notification: Notifies the operator that the job is completed.

Email attachments

If you choose to attach job files, the recipient will be able to remotely proof, validate, or repair the PDF file. Compound document types, such as RDOs, cannot be attached. The maximum attachment size is established using the SMTP Setup dialog in Workflow Job Manager. The maximum allowable attachment size depends on your email configuration. The email notification will fail if the file exceeds the limitation.

You have the option to add a watermark to the email attachment. For more information, see [Setting up a watermark in an email attachment](#).



NOTE 1: *If they are allowed to change the settings, operators can add, delete, or change the email address in Workflow Submission Client when the job is submitted and the workflow is selected.*

NOTE 2: *Email notification requires configuration of the SMTP server via the Workflow Builder application.*

To configure Notification settings



1. To access the Notification Settings dialog, double-click the Notification step in a workflow.

NOTE: *In the FreeFlow Administration Tool, the administrator can modify the user's contact information and email address. When the user logs in to Process Manager, the To and From fields in the Notification Settings dialog are automatically set to that email address.*

2. Select from the following:
 - **[Use the job submitter's email address]:** Picks up the job submitter's email address as configured in the FreeFlow Administration Tool and uses it as the sender address for the notification.
 - **[Use the following address]:** Allows you to enter an email address. By default, the text field displays the email address of the logged-in user. When submitting a job via a hot folder, the user set up in the hot folder dialog is the submitting user, and his/her email is used in the notification when that option is selected.
3. In the **To** text box, type the recipient(s) e-mail address(s). Be sure to separate multiple addresses with semicolons.



NOTE: *If addresses are not in the correct format, an error message displays.*

4. If desired, select **[Send copy of notification to sender]** to send a copy to the sender.
5. Select **[Enter recipient address during job processing]** to gray out and clear the "To:" field and hold the job when the Notify step is reached. You must then enter recipient addresses before continuing with the job.

6. Select [**Enable Custom Subject Line**] to enter a text string of your choice in the text box, or to select which of the following options to include in the subject line:
 - Append Job ID
 - Append Job Name
 - Append Job Status
7. Select which of the following options to include in the body of the mail note:
 - Job ID
 - Job Name
 - Job Status
 - Job Submit Date
 - Preflight Results
 - Job Files
 - Low Res version
8. To include a watermark on the job file, see [Setting up a watermark in an email attachment](#)



NOTE 1: *Job files will include the PDF files at this stage of the processing.*

NOTE 2: *Attached Job files can be viewed, but not printed or edited.*

NOTE 3: *All options, except Preflight Results and Job Files, are selected by default. When Job Files is selected, Send low resolution image is selected by default.*

9. Type a message with a maximum of 256 characters.
10. Select [**Allow job to continue even if no notification is sent**] to ensure that the job does not fail if the email notification is not sent due to lack of recipient address or other failure.



NOTE: *When selected, along with [**Enter recipient address during job processing**], the job will stop at Notify, but it will continue as successfully completed when you select Resume, if you do not enter a recipient.*

11. Select [**Always use these settings**] to prevent users from modifying the settings. The settings will appear in the Workflow Submission Client controls, but will be grayed out and unchangeable.
12. Select [**OK**] to accept the changes and close the window.

Setting up a watermark in an email attachment

Users with the Unlimited User Conversion License have the option to add a fully customizable security watermark to email attachments.

If properly licensed, the user can disable the addition of a security watermark by unmarking the [**Specify the text to be applied as watermark on PDF email attachments**] check box.

For users without the Unlimited User Conversion License, the attachment watermark defaults to "PROOF." Users can append customized text to "PROOF." The Unlimited User Conversion restrictions apply when submitted via hot folders and not via Workflow Submission Client.

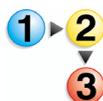
The watermark does not appear on the job document.

See also:

[Unlimited User Conversion option](#)

[Hot Folder submission with and without the Unlimited User Conversion License](#)

To set up a watermark in an email attachment



1. In Workflow Builder, Workflow Submission Client, or Workflow Job Manager, select [**Options: Email Attachment Watermark Setup...**] to open the Email attachment Watermark Setup dialog.
2. If unmarked, mark the [**Specify the text to be applied as watermark on PDF email attachments**] check box.
3. Select the desired font from the drop down menu.
4. In the Text box, type the desired text, up to 20 characters. The text displays in the Sample graphic.
5. Select [**OK**] to accept changes and close the window.

Configuring Print settings

The Print settings dialog allows you to print PDF, VPC, or RDO (for reprint) files to a specified production print queue using a specified job ticket. A job ticket stores all your document information for printing to a production printer.

Using the Print settings dialog, you can:

- Open a job ticket from a Windows file or document repository.



NOTE: *Job tickets can be applied only to workflows that contain the Print task.*

- Access the Job Setup dialog for production printing and make the desired changes.
- Insert separator pages via the Job Setup dialog.

If the printer is not available on a standalone client

If you attempt to open the Print Settings dialog on a Workflow Job Manager or Workflow Submission Client standalone client and an error message states that the current printer is not available, you will need to obtain the list of registered printers.

On the standalone client, Select [**Start: Programs: Registered Print List Locator**]. In the Registered Print List Locator dialog, select [**Remote**] and enter the computer address of the Printer Administration server.

See also:

[To configure Print settings](#)

[Inserting separator pages](#)

[Fault handling for Print](#)

To configure Print settings



1. To access the Print Settings dialog, double-click the Print step in a workflow.
2. In the “Select printers that submitters can choose from” text box, select the desired printers. The printers will populate the “Select the default printer” drop box.



NOTE: *Printers are added to the list in the “Select printers that submitters can choose from” text box via the Printer Registration application.*

3. In the “Default printer” drop box, select the appropriate default printer.
4. Select [**Job Setup**] to open the Job Setup dialog from production printing. Make the desired selections. Options vary depending on the selected printer. Refer to the job setup help for additional information.
5. In the Print Settings dialog, select [**Always use these settings**] to prevent users from modifying the settings or to override any similar settings in an incoming JDF job ticket or an RDO file. The settings will appear in the Workflow Submission Client controls, but will be grayed out and unchangeable.
6. Select [**OK**] to accept the changes and close the window.



NOTE: *Be sure the Print process settings reflect the needs of your job. The workflow defaults to the print settings. For example, if you select 2-sided in the Imposition settings and the default Print process setting is 1-sided, the job will print 1-sided.*

Inserting separator pages

Separator pages are available on printers that support special page programming. This feature is available only in Process Manager, for PDF files.



NOTE 1: For the “Insert after each set” option, there is a limit of 1000 separator pages per job.

NOTE 2: Separator pages cannot be programmed with page ranges, finishing, special pages, blank page inserts, or chapter starts, in the same job.

Table 2-14. Example output from each separator page option

| Multiple PDF Files submitted, collated, 1 copy | One PDF file submitted, collated, 2 copies | One PDF file submitted, uncollated, 2 copies |
|--|--|--|
| Option: Insert after each file | Option: Insert after each set | Option: Insert after each set |
| PDF file 1, page 1 PDF file 1, page 2 PDF file 1, page 3 PDF file 1, page 4 SEPARATOR PAGE PDF file 2, page 1 PDF file 2, page 2 PDF file 2, page 3 SEPARATOR PAGE | PDF file 1, page 1, copy 1 PDF file 1, page 2, copy 1 PDF file 1, page 3, copy 1 PDF file 1, page 4, copy 1 SEPARATOR PAGE PDF file 1, page 1, copy 2 PDF file 1, page 2, copy 2 PDF file 1, page 3, copy 2 PDF file 1, page 4, copy 2 SEPARATOR PAGE | PDF file 1, page 1, copy 1 PDF file 1, page 1, copy 2 SEPARATOR PAGE PDF file 1, page 2, copy 1 PDF file 1, page 2, copy 2 SEPARATOR PAGE |



1. In the Print settings dialog, select [**Job Setup**] to open the Job Setup dialog for production printing.
2. To insert a blank separator page after a file or a set, select the **Output Format** tab. The tab name and options might vary, depending on the printer.
3. Choose from the following in the Separator pages section of the tab dialog:
 - [**Insertion after each set**]: Inserts a separator page after each set. Depending on your collation settings, if only one set is requested, the separator page is inserted after the last page of the job.
 - [**Insert after each file**]: Inserts a separator page after each PDF file. If the job has only one PDF, the separator page is inserted after the last file.

4. Select a paper stock for the separator page by stock number from the drop box.



NOTE: *Options might vary, based on the printer.*

5. In the Job setup tab, select the appropriate orientation to ensure that the separator page orientation matches the job orientation.



NOTE: *The Orientation option is enabled when the separator page feature is selected.*

6. Select **[OK]**.

Limitations for separator pages

- Separator pages are available for PDF file printing only. Other file types generate an error message.
- No imaging is available on the separator page.

Fault handling for Print

Errors are logged in the Windows Event log and displayed in the Job Manager status display area. The following errors cause the print operation to fail:

- If the specified PDF file(s), queue(s), or job ticket(s) are missing or invalid.
- If the specified PDF file(s) or job ticket(s) are invalid.
- If any of the input PDF file(s) require a password to open the PDF.
- If a user submits a non-PDF file to a workflow that has been programmed with separator pages, an “unsupported job ticket feature” error message displays.
- DocuSP printers printing via Process Manager will error if the user has not entered an FTP login, or has entered invalid credentials.

Configuring Save settings

The Save process allows you to copy all supported file types to a specified location within a document repository or Windows File system. Dialog options include:

Save job ticket information: Allows you to save the job ticket (XPIF) with the PDF file for reprinting purposes.

See also:

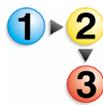
[To configure Save settings](#)

[Saving a job ticket with the PDF file for reprinting](#)

[Limitations for Save](#)

[Fault handling for Save](#)

To configure Save settings



1. To access the Save Settings dialog, double-click the Save step in a workflow. Select from the following:

- a. **[Use job name as file name]** to use the job name as a basis for the file name for job submission.

- b. **[Use the following as file name]** to enter the desired name. In the File name text box, type a name that will be used as the basis for the file name for job submission.



NOTE: *If incorrect file characters (for example, \ | : * ? < >) are entered, an error message displays.*

2. Select one of the following:



NOTE 1: *You might be prompted for a login and password if you attempt to access a mapped location.*

NOTE 2: *Prior to performing operations that require repository access, you must set up and save your repository credentials in FreeFlow Process Manager. If you select **[Browse Repository]** and no credentials have been established, you will be prompted to enter credentials. For more information, see [Setting up repository credentials](#).*

- **[Browse Windows...]** to open the Windows file dialog for selecting a file location.
- **[Browse Repository...]** to open a repository dialog for selecting a repository location.

The Location text box is populated with the path specified during the browse process.

3. Select **[Save job ticket information]** to save a job ticket (.xpf) with the PDF file for reprinting later. The .xpf job ticket is saved, along with the PDF file, in the location designated in Save.
4. Select **[Always use these settings]** to prevent users from modifying the settings. The settings will appear in the Workflow Submission Client controls, but will be grayed out and unchangeable.
5. Select **[OK]** to accept the changes and close the window.

Saving a job ticket with the PDF file for reprinting



NOTE: *To save the job ticket, a Print process must be included in the workflow prior to the Save process.*

The [**Save the job ticket**] option in the Save Settings dialog allows you to save the job ticket (.xpf) information with the PDF file for reprinting purposes. An .xpf job ticket is automatically saved in the same folder as the PDF. The last settings that were used to successfully process the Print node are saved. The settings can be from any of the following:

- An .xpf job ticket.
- Print node settings if “Always use these settings” is selected.
- A job ticket that was updated in Workflow Job Manager using the Settings button.

To associate the .xpf job ticket with the files to be processed, an .xpf job ticket is saved using the following naming conventions:

- For files: <file name>. <file extension>.xpf, for example:
 - PDF file name = brochure.pdf
 - .xpf file name = brochure.pdf.xpf



NOTE: *If you move or rename the job files, you must also move and rename the associated .xpf job ticket.*

Using Workflow Submission Client to reprint

Submit *only the saved PDF file* to the reprint workflow. Process Manager automatically picks up the associated job ticket and applies it to all print nodes in the workflow.

Using a hot folder to reprint

You must submit the saved PDF file *and* the associated .xpf file to the reprint workflow. The files are dropped into the **Waiting for Job Ticket** folder inside the hot folder. Process Manager applies the saved job ticket to all print nodes in the workflow.



NOTE: *When reprinting with Workflow Submission Client or a hot folder, if “Always use these settings” is checked in the Print node, the Print node settings take precedence over the .xpf job ticket.*

Limitations for Save

- You cannot create collections or folders during save operations. These must be set up in advance.
- For Process Manager to pick up the associated .xpf job tickets, the tickets must be in the same directory as the files to be processed, and must follow the appropriate naming convention. If you move or rename the job files, you must move and rename the associated .xpf ticket as well.

Fault handling for Save

Errors are logged in the Windows Event log and display in the Job Manager status display area. The following errors cause the save operation to fail:

- If the input PDF file is missing.
- If the destination PDF is locked and cannot be overwritten, or if the user lacks sufficient security privileges to access the destination directory or document repository.
- If the destination directory or document repository has been deleted.
- If invalid credentials have been set up, or no credentials have been established.

Configuring JDF Export settings

Job Definition Format (JDF) is a universal job ticket format. JDF capabilities enable Process Manager to use existing JDF job tickets and to create new JDF job tickets.

JDF job tickets are submitted via a hot folder. The hot folder is monitored by the Process Manager application, which looks for JDF tickets and submits them to the workflow.

To configure JDF Export settings

JDF Export settings allow you to designate a JDF Export file destination. The filename cannot exceed 80 characters, and the directory path cannot exceed 160 characters.

The output file of a JDF export task can be reimported and rerun by dropping it into a hot folder associated with an appropriate workflow. The files associated with the JDF must be in the same location as the original job.



1. To access the JDF Export Settings dialog, double-click the JDF Export step in a workflow.
2. In the Export Options section, select from the following:
 - **[Export the Process Manager workflow job as a new JDF]** to export the supported workflow nodes as JDF.
 - **[Export the JDF submitted with any modifications made by external processes]** to export the submitted JDF. If external processes are present in the workflow, the exported JDF will contain the changes made by the external process nodes. For more information, see [About JDF Export options](#).
3. Select one of the following:
 - **[Use job name as file name]** to use the job name as the exported JDF file name.
 - **[Use the following as file name]** to specify a file name. In the File name text box, type the name.



NOTE: *If incorrect file characters (for example, \ | : * ? < >) are entered, an error message displays.*

4. Select from the following:



NOTE 1: *You might be prompted for a login and password if you attempt to access a mapped location.*

NOTE 2: *Prior to performing operations that require repository access, you must set up and save your repository credentials in FreeFlow Process Manager. For more information, see [Setting up repository credentials](#).*

- **[Browse Windows...]** to open the Windows file dialog for selecting a folder location.
- **[Browse Repository...]** to open a repository dialog for selecting a repository location.

The Location text box is populated with the path specified during the browse process.

5. Select **[Always use these settings]** to prevent users from modifying the settings. The settings will appear in the Submission Client controls, but will be grayed out and unchangeable.
6. Select **[OK]** to accept the changes and close the window.

See also:

[About JDF Export options](#)

[Fault handling for JDF Export](#)

[Limitations when creating JDF Tickets in Adobe Acrobat Professional](#)

[JDF and Color Manage](#)

[About JDF Export options](#)

If you export the workflow JDF by selecting **[Export the Process Manager workflow job as a new JDF]** the JDF Export node functions as it always has.

If you submit a JDF file to a workflow that contains a JDF Export node:

- If the job does not encounter an External Process node, the JDF Export node exports a copy of the submitted JDF file.
- If the job encounters an External Process node, and you select the option to send the JDF and an XML file by selecting **[Export the JDF submitted with any modifications made by external processes]**, the JDF Export node exports a copy of the JDF file returned by the External Process node.

- If the job encounters an External Process node, and you do not select the option to send the JDF and an XML by selecting **[Export the Process Manager workflow job as a new JDF]**, the JDF Export node exports a copy of the submitted JDF file.
- If you select to export the submitted JDF file and a JDF file was not submitted to the workflow, the JDF Export node will fail.
- In all cases that a JDF file is exported, the exported JDF file is updated to reference the PDF file being exported.

Fault handling for JDF Export

Errors are logged in the Windows Event log and display in the Job Manager status display area. The following errors cause the export operation to fail:

- If the destination specified during JDF Export is missing or invalid.
- If the user lacks sufficient security privileges to create the specified files in the destination directory specified during JDF Export.
- If the workflow contains a non-supported task.
- If the workflow does not contain all the tasks it needs.
- If the JDF file is missing the original file paths.

JDF and Color Manage

When submitting a JDF ticket to a workflow, only the color profile being used by the JDF ticket is visible in the Color settings in the Optimize node. Normally, when submitting jobs, all default options — the set of installed CMYK color profiles, and the srgb color space profile.icm — are visible.



NOTE 1: *To enable color management, the Optimize node settings should be set as follows: in the General tab, de-select the check box for “Create a document that complies with PDF/X standards.” In the Color tab, in the “Change all colors in document” drop box, select “Manage Color profiles.”*

NOTE 2: *When the JDF ticket specifies a color profile, the color profile must be installed on the Process Manager Server or the job will fail.*

Limitations when creating JDF Tickets in Adobe Acrobat Professional

To create a JDF ticket in Adobe Acrobat Professional for submission to FreeFlow Process Manager, for the JDF ticket to be handled properly, you must specify the number of pages in the document or the pages in the range.

To specify the number of pages



1. Select [**Start: Programs: Adobe Acrobat Professional**].
2. In Adobe Acrobat Professional, select [**Tools: Print Production: JDF Job Definitions...**].
3. Select [**New**]
4. In the Create New Job Definition dialog, browse to the desired selection and select [**Save**]. The file path displays in the Filename text box.
5. Select [**Create and Edit**].
6. In the Edit JDF Job Definitions dialog, select [**Add Section**].
7. In the Number of Pages section, enter the appropriate value.
8. Select [**OK**].
9. Close the dialog.
10. Exit Adobe Acrobat Professional.

To specify the pages in the range

1. Select [**Start: Programs: Adobe Acrobat Professional**].
2. In Adobe Acrobat Professional, select [**Tools: Print Production: JDF Job Definitions...**].
3. Select [**New**].
4. In the Create New Job Definition dialog, browse to a selection and select [**Save**]. The file path displays in the Filename text box.
5. Select [**Create and Edit**].
6. In the Edit JDF Job Definitions dialog, select [**Add Section**].
7. Select [**Add File**].
8. In the Pages to Pages to use in Document section, enter a value for Pages in the Range.
9. Select [**OK**].
10. Close the dialog.
11. Exit Adobe Acrobat Professional.

Creating conditional branches

Conditional branching provides an added level of logic to a workflow, allowing it to examine the properties of submitted jobs, and then act accordingly without human intervention.

You can add one or more conditional branches to a workflow, each with one or more user-designated conditions that specify the desired attributes or properties of the submitted jobs.

During execution, the condition(s) of each branch are compared with the information retrieved from the job. The first branch whose conditions or specifications “match” the properties retrieved from the job will be taken.

Each Conditional node can include up to 12 branches; each branch can include up to 12 conditions that must be satisfied.

You can specify two main categories of conditions:

- PDF-related conditions
- JDF ticket-related conditions

For more information about these conditions, see the [Conditions to Add](#) table.

The branches of a Conditional node can be merged into a common workflow. For more information, see [Linking conditional branches](#).

Conditional branching provides an alternative to using Preflight as a means to filter and route jobs. For more information, see [Using preflight as a filter](#).

See also:

[Guidelines for successful conditional branching](#)

[Adding and configuring branch conditions](#)

[Conditional branch conditions](#)

[Managing conditional branches](#)

[Editing conditional branches](#)

[Deleting conditional branches](#)

[Linking conditional branches](#)

Guidelines for successful conditional branching

Number of branches and conditions: A Conditional node is limited to 12 outbound branches. Each branch can have up to 12 conditions.

Nested branching: Nesting occurs when a Conditional node directly follows a branch of another Conditional node. You can have up to two nested Conditional nodes.

Execution sequence: Branches are checked from the top branch to the bottom. The top branch conditions are checked first. If the conditions are satisfied, the top branch is taken. Otherwise, the second branch is checked, and so on. Branch order is defined in the Conditional Branch Settings dialog.

Number of documents per job: Single document jobs can be processed by the Conditional Branching node. Multiple document jobs can be processed only if a Join node precedes the conditional branch.

Fail branches: A Fail branch can be added to Conditional node. The Fail branch is not considered part of the Conditional Branch and is not displayed in the Conditional Branch Settings dialog.

JDF Export: Workflows with a Conditional Branch do not support JDF Export.

Conditions from more than one category: Different categories can be combined in one branch. For example, a branch can contain both PDF and JDF conditions.

Modifying conditional branches in Workflow Submission

Client: You can add or remove conditions for a Conditional branch. You cannot do the following:

- Add or remove branches.
- Rearrange the order of the branches.
- Change branch names.

Failed status: A job will fail if:

- None of the conditional branches match the job and there is no pass-through branch.
- The file is corrupted.
- If the necessary information is not available to evaluate a condition. For example, if a PDF file is submitted to a branch with a PDF bleedbox condition and bleedbox is not defined in the PDF file, the job will fail.

See also:

[Creating conditional branches](#)

[Adding and configuring branch conditions](#)

[Conditional branch conditions](#)

[Managing conditional branches](#)

[Editing conditional branches](#)

[Deleting conditional branches](#)

[Linking conditional branches](#)

Adding and configuring branch conditions

You can place a Conditional process anywhere in a workflow that a decision must be made. Node configuration is performed via the Branch Conditions [*Branch Name*] dialog, where you add branches and define or edit their conditions. Twelve branches are allowed per Conditional node, 12 conditions are allowed per Conditional branch.

To add and configure branch conditions



1. In Workflow Builder, drag and drop a Conditional process into the workflow. The Conditional Branch Settings dialog automatically opens.
2. Select **[New Branch...]**.
3. In the Branch Conditions dialog, enter a name in the Branch name text box. The name display in the dialog title later, when you open the dialog to view or edit conditions.

The options in the “This branch will only accept” area ensure that only the desired file types are examined by the branch. For example, if you select **[PDF format files]** and you submit a .doc file to the workflow, the system does not attempt to apply PDF-only conditions to the file. The branch is skipped; no errors are generated.

4. In the “This branch will only accept” area, select from the following:
 - **[PDF format files]**: To enable the addition of PDF conditions.
 - **[Documents submitted with JDF job tickets]**: To enable the branch to accept only files submitted with JDF job tickets and to enable the addition of JDF-specific conditions.
 - Select both options.
 - Select neither option.

5. In the “Conditions that must be met” drop box, select from the following:
 - **[Any]**: To establish that one or more conditions must be met for the branch to be considered a match.
 - **[All]**: To establish that all conditions must be met for the branch to be considered a match.
6. In the “Conditions to add” area, select a condition.



NOTE: Refer to the [Conditions to Add table](#) for a description of the conditions and their qualifiers. Qualifiers vary based on the selected condition, for example, “PDF format files.”

7. Select the desired qualifiers for the condition.
8. Enter text, if required.
9. After all fields are configured, select **[Add]** to add the condition and display it in the Conditions List.
10. If required, select a condition, and then select **[Delete]** to remove the condition from the Conditions List.
11. Add more conditions, if desired, up to 12 per branch.
12. Select **[OK]**. The Conditional Branch Settings dialog displays.
13. To change the branch order or otherwise manage the existing branches, see [Managing conditional branches](#).
14. Select **[OK]**. A new branch displays in the workflow next to the Conditional node.



NOTE: A workflow process must follow a conditional branch or the workflow cannot be saved.

See also:

[Creating conditional branches](#)

[Conditional branch conditions](#)

[Condition Definitions](#)

[Managing conditional branches](#)

[Editing conditional branches](#)

[Deleting conditional branches](#)

[Linking conditional branches](#)

Conditional branch conditions

Table 2-15. Conditions to Add

| Available For | Condition | 1st Qualifier | 2nd Qualifier |
|----------------------------|---|---|--------------------------|
| PDF Only | Number of Impressions* Number of Pages Mediabox Width Mediabox Height Trimbox Width Trimbox Height Bleedbox Height Bleedbox Width Artbox Height Artbox Width Cropbox Height Cropbox Width Maximum Bleed Size* | Equal to Not equal to Less than or equal to Greater than | Make a numeric selection |
| | Author Title Subject Keyword Creator Producer | Contains Does not contain Starts with Ends with Is equal to | Enter text |
| | Color or B&W | All B&W Containing any grayscale or color images | None |
| | First Page Orientation | Portrait Landscape | None |
| | All Page Orientations Same All Page Sizes Equal | Yes No | |
| JDF Job Ticket Only | Customer Billing Code Customer ID Customer Job Name Customer Order ID | Contains Does not contain Starts with Ends with Is equal to | Enter text |
| Always | Job name File Extension | Contains Does not contain Starts with Ends with Is equal to | Enter text |
| | Number of Copies* | Equal to Not equal to Less than or equal to Greater than | Make a numeric selection |

* For more information, see [Condition Definitions](#)

Condition Definitions

For a list of available conditions and their qualifiers, see [Conditions to Add](#).

Number of copies

The value that a Conditional Branching node uses for the “number of copies” condition is the copy count value associated with the job at the time of Conditional branching execution. Regardless of how a job was submitted (through submission client, Hot Folder, Manifest), if there is a copy count value associated with the job, that is the value that the Conditional Branching node will use at execution time for the number of copies condition.

A copy count value is associated with a job through the following ways:

- If an XPIF ticket was submitted with the Job (for example as part of an RDO) and it has a copy count value, that value will be considered the Job copy count value.
- If a JDF ticket was submitted with the job and it has a copy count value, that value will be considered the Job copy count value.
- If the user sets a value for the “Quantity” attribute in FreeFlow Process Manager MAX, Manifest Automation from Xerox, that value is considered the Job copy count value.
- If the user sets a copy count value during Review in Job Manager, that value is considered the Job Copy count value from that point on.
- If “Imposition affects copy count switch” is set in the WorkFlow Builder, and the copy count value has been modified by Imposition, once the job reaches the Conditional branching node, the modified value is considered the Job copy count value for Conditional Branching. For more information, see [To enable the Copy Count Divisor](#) and [Copy Count Divisor examples](#).

If the job has no associated copy count value, Conditional branching fails when it examines the number of copies condition. A message saying “no copy count value is available” message displays.



NOTE: *Printer copy count value is not the same as Job copy count value. The “number of copies” condition of Conditional branching works independently of the Print nodes in a workflow and the copy count values, if any, set during workflow design.*

Number of impressions

This is the number of copies multiplied by number of pages in PDF file.

Maximum bleed size

If a Trim Box and a Bleed Box are defined, and the Trim Box is contained within the Bleed Box, then the Bleed size is the four offsets from the four sides of the Bleed Box to the four sides of the Trim Box, and the Maximum Bleed size is the greatest of the four.

Managing conditional branches

The Conditional Branch Settings [*Name*] dialog allows you to:

- View and manage existing branches for the selected Conditional node.
- Access the Branch Conditions dialog to create and configure new conditional branches.

To manage a conditional branch



1. In Workflow Builder, double-click a Conditional process in the workflow to open the Conditional Branch Settings dialog.
2. Select a workflow branch.
3. Select from the following options to view, manage, and create conditional branches:
 - **Conditional Set Description** pane: Lists the conditions that must be met for the selected workflow branch.
 - **Up arrow**: Moves the selected workflow branch up one level of order.
 - **Down arrow**: Moves the selected workflow branch down one level of order.



NOTE: *Branches are processed from top to bottom. The first branch conditions are checked and, if met, the branch is taken. If not met, the next branch is checked, and so on.*

- **View/Edit...**: Opens the Branch Conditions dialog for the selected workflow branch. See [Adding and configuring branch conditions](#).
- **Delete**: Removes the selected workflow branch with a confirmation dialog.

- **Include pass-through branch with no conditions:**
Active if 11 or fewer branches are defined. Adds a branch to the workflow branch list called “pass-through.” This branch is not selectable in the list and has no conditions associated with it. It accepts all documents that could not be passed to prior order branches. Unmark the check-box to delete the pass-through branch.



NOTE: *The system automatically sequences the pass-through branch as the last branch.*

- **New Branch...:** Opens the Branch Conditions dialog for creating a new branch. See [Adding and configuring branch conditions](#).

See also:

[Creating conditional branches](#)

[Adding and configuring branch conditions](#)

[Conditional branch conditions](#)

[Editing conditional branches](#)

[Deleting conditional branches](#)

[Linking conditional branches](#)

Editing conditional branches

You may wish to view and/or edit a conditional branch.

To edit a conditional branch



1. In Workflow Builder, double-click a Conditional node in a workflow.
2. In the Conditional Branch Settings dialog, select the desired workflow branch from the list, and then select [**View/Edit...**].
3. In the Branch Conditions [*Name*] dialog, make the desired edits. See [Adding and configuring branch conditions](#).
4. Select [**OK**].
5. In the Conditional Branch Settings dialog, make any additional changes. See [Managing conditional branches](#).
6. Select [**OK**].

See also:

[Creating conditional branches](#)

[Adding and configuring branch conditions](#)

[Conditional branch conditions](#)

[Managing conditional branches](#)

[Deleting conditional branches](#)

[Linking conditional branches](#)

Deleting conditional branches

You may wish to remove a conditional branch.

To delete a conditional branch



1. In Workflow Builder, double-click a Conditional node in a workflow.
2. In the Conditional Branch Settings dialog, select the desired workflow branch from the list.
3. Select **[Delete]**.
4. In the Delete confirmation dialog, select **[Yes]**.
5. Select **[OK]**.
6. To delete a pass-through branch, unmark the check-box for “Include pass-through branch with no conditions.”

See also:

[Creating conditional branches](#)

[Adding and configuring branch conditions](#)

[Conditional branch conditions](#)

[Managing conditional branches](#)

[Editing conditional branches](#)

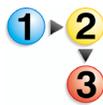
[Linking conditional branches](#)

Linking conditional branches

The branches of a Conditional node can be merged into a common workflow once they have been processed. Follow these rules:

- If a link is used, all of the branches of a Conditional node must merge.
- The branches of one conditional node cannot merge with branches of another Conditional node.

To link conditional branches



1. Right-click the Conditional node to which you wish to add a link.
2. Select **[Create Common Links]**. Links display at the end of the branches for that node. Another link displays beneath the first workflow, creating a common workflow.
3. Drag and drop the necessary workflow processes into the common workflow to continue processing the job.

See also:

[Creating conditional branches](#)

[Adding and configuring branch conditions](#)

[Conditional branch conditions](#)

[Managing conditional branches](#)

[Editing conditional branches](#)

[Deleting conditional branches](#)

Configuring external process settings

Process Manager allows you to configure up to 5 external processes, from any third party software that supports hot folders, to use as process options in Workflow Builder. First, set up the profiles for each external process in Workflow Job Manager. Then, in Workflow Builder, use the [*Process Name*] Settings dialog to:

- Designate from which profiles users can select.
- Select the default profile.

External Processes are indicated either by a plus symbol and a curved arrow or, if the user chooses an existing process icon, by a plus symbol overlay.



To configure external process settings

1. Double-click an external process in a workflow to access the [*Process Name*] Settings dialog.
2. In the “Select the profiles that submitters can choose from” text box, select the desired profiles. The profiles will populate the “Select the default profile” drop box.
3. In the “Select the default profile” drop box, select a default profile.
4. Select [**Always use these settings**] to prevent users from modifying the settings. The settings will appear in the Workflow Submission Client controls, but will be grayed out and unchangeable.
5. Select [**OK**] to accept changes and close the window.

Setting up repository credentials

Repository credentials are used in all transactions that require logging into a repository in FreeFlow Process Manager. This includes:

- **[Add Repository File]** in Workflow Submission Client.
- **[Browse Repository...]** in the Save and JDF export nodes.
- **Hot folders** When you create a hot folder, you must specify the “Submitting user” whose repository credentials are associated with the hot folder: either a member of the Process Manager Administrator group or a member of the Operators group. This informs the system whose repository credentials to use when a job must access a repository during hot folder submission.
- **Resubmit** operation in Workflow Job Manager.

Prior to performing operations that require repository access, you must set up and save your repository credentials in FreeFlow Process Manager. Credentials are set up and saved per user. Once a user has RMS credentials saved, all future repository transactions by that user through the Workflow Builder, Workflow Submission Client, or Workflow Job Manager use the same saved RMS credentials.

Before setting up repository credentials in FreeFlow Process Manager, you must have previously:

- Set up an account on the repository.
- Set up a link between the desired repository and FreeFlow Process Manager via the FreeFlow Administration Tool.

See also:

[Ensuring success with repository credentials](#)

To set up repository credentials



1. In Workflow Builder, Workflow Submission Client, or Workflow Job Manager, select [**Options: Repository Credentials Setup...**] to open the Repository Credentials Setup dialog.
2. Enter the following repository account credentials:
 - User name
 - Password
3. Re-enter the password to confirm it.
4. Select [**Save**]. The credentials are saved and you are not prompted for them again. To change repository credentials, you must open the repository credentials dialog, as described in step 1.

Ensuring success with repository credentials

The following examples illustrate the importance of setting up repository credentials before submitting jobs.

- If you do not enter repository credentials, upon clicking [**Add Repository File**] in Workflow Submission Client or [**Browse Repository**] in the Save or JDF Export settings dialogs, the Repository Credentials Setup dialog automatically displays.
- If a logged in user, without saved repository credentials, submits a job via Workflow Submission Client to a workflow with a Save or JDF Export node, the job will fail during the Save or JDF Export operation, if those nodes interact with the repository.
- During the resubmit operation in Workflow Job Manager, if there is interaction with a repository, the RMS credentials of the current user (the user running Workflow Job Manager) are used. If the current user of Workflow Job Manager does not have proper RMS credentials saved, the job will fail during resubmit.
- For Hot Folder job submission, if the submitting user selected during Hot Folder setup does not have RMS credentials saved, and the job needs to interact with Repository, the job will fail.

Checking the status of a process

The Processes dialog lists information about each process, including:

- Name
- Status
- Concurrent count

Take Offline/Set Online: Allows you to change the offline or online status of a selected process; pauses jobs that reach the process. Available if no jobs are using the process. The option displays as a context menu option when you right-click a process.

Settings: Opens the Process Settings dialog.

To change the offline or online status of a process



1. In Workflow Builder, select [**Options: Processes**] to display the Processes dialog.
2. Select a process and select [**Take Offline/Set Online**] to change the status.
3. Close the Processes dialog.

See also:

[Setting the number of concurrent processes and the copy count divisor](#)

[To set the number of concurrent processes](#)

[To enable the Copy Count Divisor](#)

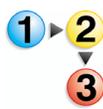
[Copy Count Divisor examples](#)

Setting the number of concurrent processes and the copy count divisor

The Process Settings for the [*Process*] dialog allows you to:

- Select the number of concurrent processes. This sets the number of instances of a process that can be used to concurrently process jobs.
- Place the process online or offline.
- Turn the copy count divisor functionality on or off, available for Imposition only.

To set the number of concurrent processes



1. In Workflow Builder, select [**Options: Processes**] to display the Processes dialog.
2. Select a process, then select [**Settings**] to open the Process Settings for [*Process*] dialog.
3. Select the number of concurrent processes, from 1-4.
4. As appropriate, select or deselect the check box to place the process online.
5. Select [**OK**] to accept the changes and close the Process Settings for [*Process*] dialog.
6. Close the Processes dialog.

See also:

[To enable the Copy Count Divisor](#)

[Copy Count Divisor examples](#)

To enable the Copy Count Divisor

You can enable the system to adjust the copy count to maintain the original quantity intent for workflows that contain multiple-up impositions. The value is changed to output the original quantity of the original document given that the imposition node has changed the PDF document to contain multiple instances of the original document.

In the Job Manager Copy Count and the Print node Job Setup dialogs, the quantity value is modified when you:

- Process the job through a Xerox imposition node (not PREPS) that is multi-up repeated.
- Enable the Copy Count Divisor switch.
- Submit a job with a job ticket quantity intent.
- Use Print nodes that do **not** have “Always use these settings” selected.

Example: If the original document is 1 page, the original quantity is 100 copies, and the imposition is 4-up repeated, then the post imposition copy count quantity will be 25, since each copy of the imposed document now contains 4 copies of the original document.

If there is a JDF Export node in the workflow, the JDF ticket created through the JDF export node does not include the modified copy count.

See also:

[Copy Count Divisor examples](#)



1. In Workflow Builder, select [**Options: Processes**] to display the Processes dialog.
2. Select the Impose process, then select [**Settings**] to open the Impose Process Settings dialog.
3. Mark the check box for [**Imposition affects copy count**].
4. As appropriate, select or deselect the check box to place the process online.
5. Select [**OK**] to accept the changes and close the Process Settings for [*Process*] dialog.
6. Close the Processes dialog.

Copy Count Divisor examples

The following examples illustrate various uses of the Copy Count Divisor:

Example 1: Original quantity is 20 with 2-up; actual copies =10

1. The user sets the Copy Count Divisor switch to **On**.
2. The user creates a workflow with the following nodes:
 - Imposition (**2up; Always use these settings** is set);
 - Print (**Always use these settings** is not set)
3. User submits a job with an XPIF ticket: **Copies: 20**
4. The job successfully goes through the Imposition node.
5. The job prints **10 actual copies of the imposed document**.

Example 2: Original quantity is 20 with 2-up + 2-up; actual copies = 5

1. The user sets the Copy Count Divisor switch to **On**.
2. The user creates a workflow with the following nodes:
 - Imposition (**2up; Always use these settings** is set)
 - Imposition (**2up; Always use these settings** is set)
 - Print (**Always use these settings** is not set)
3. User submits a job with an XPIF ticket: **Copies: 20**
4. The job successfully goes through the two Imposition nodes.
5. The job prints **5 actual copies of the imposed document**.

Example 3: Original quantity is 20 with 2-up; observe changes to Print quantity settings

1. The user sets the Copy Count Divisor switch to **On**.
2. The user creates a workflow with the following nodes:
 - Review
 - Imposition (**2up; Always use these settings** is set)
 - Review
 - Print (**Always use these settings** is not set)
3. User submits a job with an XPIF ticket: **Copies: 20**
4. At the first Review the user opens the Copy Count Dialog. They will see: Quantity (original document):**20**
5. At the first Review the user looks at the Print task setting. They will see: Quantity: **20**

6. After the job passes successfully through the Imposition node, the user opens the Copy Count dialog at the second Review. They see:
 - Quantity (original document): **20**
 - Quantity (imposed document): **10**
7. At the second Review the user looks at the Print task setting. They see: Quantity: **10**
8. The job prints **10 actual copies of the imposed document**.

Example 4: Original quantity is 20 with 2-up + 2-up; quantity modified after first Imposition; actual copies = 6

1. The user sets the Copy Count Divisor switch to **On**.
2. User creates a workflow with the following nodes:
 - Imposition (**2up; Always use these settings** is set)
 - Review
 - Imposition (**2up; Always use these settings** is set)
 - Review
 - Print (**Always use these settings** is not set)
3. User submits a job with an XPIF ticket: **Copies=20**
4. After successful execution of the first Imposition, at the first Review, the user opens the Copy Count Dialog. The user sees:
 - Quantity (original document): **20**
 - Quantity (imposed document): **10**
5. The User modifies the Quantity (imposed document) value in the Copy Count Dialog to **12**:
 - Quantity (original document): **20**
 - Quantity (imposed document): **12**
6. After successful execution of the second Imposition, at the second Review, the user opens the Copy Count Dialog. They see: Quantity (original document): **20**
7. Quantity (imposed document): **6**. Since the user modified this value at the first Review, the second Imposition node takes the modified value and applies the copy count divisor logic.
8. The job prints **6 actual copies of the imposed document**.

Example 5: Modified quantity ignored/overwritten

1. The user sets the Copy Count Divisor switch to **On**.
2. User creates a workflow with these nodes:
 - Review
 - Imposition (**2up; Always use these settings** is set)
 - Print (**Always use these settings** is not set)
3. User submits a job with an XPIF ticket: **Copies: 20**
4. At the Review node the user brings up the Copy Count dialog. They will see: Quantity: **20**
5. The user closes the Copy Count Dialog and opens the Print task setting.
6. The user sets the Quantity value in Print task setting to **18**, closes the dialog and continues executing the job.
7. The job successfully executes the Imposition node.
8. The job prints **10 actual copies of the imposed document**. The Quantity value entered at the Print task setting was ignored and overwritten once the job went through the Imposition node. When the divisor logic switch is on and there are imposition(s) nodes in the workflow, if the user wants to modify the quantity of the imposed document during the Review task of Job Manager, they should do it through the Copy Count dialog to ensure that the value will not be ignored and overwritten.

Checking the status of a workflow

The Workflows dialog provides the following information about the listed workflows:

Hot Folders button: Opens the Hot Folders dialog.

Name: Lists the names of workflows.

Workflow Id: Lists the system-generated workflow Id.

Status: Lists the following status of the workflows:

- Enabled - Busy
- Enabled
- Disabled - Busy
- Disabled

Active Jobs: Lists the number of active jobs.

Hot Folders: Lists the number of hot folders associated with the selected workflow.

Description: Lists the description text for the workflows.

Processes: Displays the small icon processes for the workflows.



NOTE 1: *You can double-click a workflow to open the Hot Folder Setup dialog.*



NOTE 2: *You can right-click in the window to display the context menu.*

Status text (bottom of screen): Lists the total number of workflows.

To check the status of a workflow



1. In Workflow Builder, select [**Options: Workflows**].
2. View the information about the desired workflow.

About hot folders

The hot folder function allows you to designate one or more folders on your system to be monitored, at set intervals, by the Process Manager application. When a file is detected in a hot folder, it is automatically submitted to the workflow associated with that hot folder.

See Also:

[Hot folders and Join](#)

[Hot folders and RDOs](#)

[Hot folders and linked RDOs](#)

[Limitations for hot folder submission of RDOs and job files associated with .xpf or .xml files](#)

[Hot folders and Zip files](#)

[Hot folders and JDF](#)

[Hot folders and error checking](#)

[Hot folders: supported files](#)

[Hot folders on mapped or shared drives and resources](#)

[Hot Folder submission with and without the Unlimited User Conversion License](#)

[Limitations when setting up directories as input/output hot folders for more than one feature](#)

[Managing hot folders](#)

[Hot folders and read-only files](#)

Hot folders and Join

To process multiple files as a single joined file, you can:

- Use a Zip file to submit the jobs to a hot folder.
- Submit an .xml workflow with a folder to a dynamic workflow.
- Submit an .xml workflow with a Zip file to a dynamic workflow.

If you do not use these methods to submit multiple files to a hot folder, each file is processed as a separate job, even if the associated workflow contains a Join task.

See also:

[Hot folders and Zip files](#)

[Submitting .xml workflow files to a hot folder](#)

Hot folders and RDOs

Use File Manager, Document Library, Makeready, or Web Services to copy or move RDO documents into a hot folder, otherwise, the RDO may be corrupted. The hot folder checks RDOs for readiness to ensure that both the RDO and .CON directory are present. If the RDO is not ready, it is checked at the next interval.

Hot folders and linked RDOs

Successful submission of linked RDOs (an RDO containing a link to another RDO) and set labeling RDOs via Workflow Submission Client or hot folders cannot be assured.

Limitations for hot folder submission of RDOs and job files associated with .xpf or .xml files

To ensure better processing, when submitting RDOs to a hot folder, the user should ensure that all contents inside the .CON are copied over, before copying the RDO file.

When submitting subdirectories that contain job files associated with either .xpf files or .xml files, the user should copy the directories first, and wait until the files are copied -- if there are RDOs inside the subdirectory, make sure that they are copied over, as well -- before dropping the .xpf or .xml file into the hot folder.

Hot folders and Zip files

A hot folder can unzip a Zip file containing multiple PDFs or mixed file formats.

To process multiple files as a single joined job: Submit the Zip file to a hot folder associated with a workflow that has a Join task. Files are joined in the order they were added to the Zip file.

Hot folders can process Zip files that contain all supported file types.

Hot folders support the following Zip file formats:

- Microsoft Windows Compressed (zipped) files packaged with Windows Server 2003
- WinZip 7.0 and 8.0 zipped files

Hot folders do not support:

- Folders inside a Zip file, except for .CON directories when a matching .rdo is present. Folders inside the Zip file are unzipped but are not submitted.
- Nested Zip files (a Zip file within a Zip file)
- Files for which, when unzipped, there is not enough room on the drive. If problems occur, the file is moved to the error folder.

The following limitations apply to InfoZip files:

Table 2-16. InfoZip file limitations

| Item | Limit |
|--|---|
| Number of files | 64 K |
| Uncompressed size of a single file | 4 GB |
| Compressed size of a single file | 4 GB |
| Total size of archive | 256 TB |
| Maximum path/ filename length (characters) | DOS: 256 Unix: 1024 CD-ROM 8 level sub directory; depending on the type of file system |

Hot folders and JDF

Job Definition Format (JDF) job tickets can be submitted only via a hot folder. JDF is a universal job ticket format. JDF capabilities enable Process Manager to use existing JDF job tickets and to create new JDF job tickets. The JDF job ticket is created with a third party submission tool.

The following workflow processes support JDF:

- Optimize
- Convert
- Join
- Print
- Impose

The workflow processes currently support two types of JDF Intent:

- Business card
- Saddle stitch



NOTE: *If a JDF ticket does not contain the correct file path to the job that is being processed, the job fails.*

JDF files take precedence over other files types; they are processed first.

Hot folders and error checking

Non-supported file types are moved to an Unsupported Files folder within the hot folder. It is the user's responsibility to manually delete these files from the folder.

Hot folders: supported files

The hot folder supports the same files that are supported through the Workflow Submission Client: Adobe Illustrator CS, Adobe InDesign CS, Adobe Photoshop (currently supported version), Bitmap, JPG, JPEG, Microsoft Office 2007, Microsoft Publisher (Excel, PowerPoint, and Word), PDF, RDO, TIFF, TIFF-IT, VPC, QXD, EPS and PS.

Hot folders and read-only files

Read-only files are not picked up by the hot folder.

Hot folders on mapped or shared drives and resources

To work properly, full access for the hot folder must be granted to XDL_ADMIN, particularly if the hot folder is on a mapped drive. XDL_ADMIN passwords must match client and server.

Hot Folder submission with and without the Unlimited User Conversion License

If you do not have the Unlimited User Conversion or the 100 User license, and you are submitting an image file via a hot folder:

- The file attachment is sent as high resolution and can be viewed, but not printed or edited.
- For saved/encrypted files from FreeFlow 5.0, PDF encryption is removed when you save via a Save or JDF export node, or when you view the PDF via the Review node.

See also:

[Unlimited User Conversion option](#)

[Setting up a watermark in an email attachment](#)

Limitations when setting up directories as input/output hot folders for more than one feature

Within Process Manager, users can set up directories as input/output hot folders for Process Manager Hot Folders (for job submission), QuarkXPress file conversion, and Third party external processes. When setting up a directory as an input or output hot folder, make sure that it is not being used as a hot folder for either of the other two features, by visiting their corresponding dialogs.

The system does not currently perform conflict checking across these different features.

Managing hot folders

The Hot Folders dialog allows you to manage existing hot folders, or to access dialogs to set up new hot folders and modify existing hot folders.

It lists the hot folder name, the workflow associated with the hot folder, the full file location path for the hot folder, the assigned submitter's name, the clustering number of files before submission and the scheduled times of day to activate.



NOTE: *Only one workflow can be associated with a hot folder. However, several hot folders can be associated with the same workflow.*

The Hot Folders dialog options include:

New: Opens the New Hot Folder dialog.

Modify: Opens the Hot Folder dialog for the selected hot folder.

Delete: Deletes the selected hot folder. Also available as a context menu by right-clicking an item listed in the Hot Folders window.

Pause: When selected, the hot folder mechanism processes all files currently in the selected hot folder. It stops scanning for new files after all current files are processed. The button toggles between the pause and resume states.

Resume: When selected, the hot folder mechanism resumes monitoring the selected hot folder at the defined interval. The button toggles between the pause and resume states.

Settings...: Opens the Hot Folder System Settings dialog.

Stop/Start: Allows you to stop/start the hot folder services, effectively pausing/resuming all hot folders at once.

Status line: (bottom of screen) Lists the total number of hot folders, the Processing or Paused status, and the monitoring interval.

See also:

[About hot folders](#)

[Setting up or modifying a hot folder](#)

[Deleting a hot folder](#)

[Pausing and resuming hot folder monitoring](#)

[Configuring the hot folder system settings](#)

[Submitting a job to a hot folder](#)

[Submitting an RDO to a hot folder](#)

[Submitting a job ticket file \(*.xpf\) to a hot folder for reprinting](#)

[Submitting .xml workflow files to a hot folder](#)

[Submitting .vpc files to a hot folder](#)

To manage hot folders

You can use the Hot Folders dialog to manage hot folders independently of workflows.



1. Select [**Options: Hot Folders**], or right-click a workflow listed in the Workflows dialog.
2. Perform the necessary actions.
3. Close the Hot Folders dialog.

Setting up or modifying a hot folder

The New Hot Folder or Hot Folder (for modifying a hot folder) dialogs contain the following options:

Hot folder location: Lists the full file location path for the hot folder associated with the selected workflow.

Browse: Opens a common browse folder dialog and allows you to select or create a folder in the system.

Target Workflow: Lists all workflows in the system. The list reflects the sort order of the Workflows dialog.

Submitted with documents: This option, in the Target Workflow drop down menu, supports the hot folder submission of .xml workflows that have been exported from the Workflow Builder application. For more information, see [Submitting .xml workflow files to a hot folder](#).

Submitting User: Allows you to specify the user whose repository credentials will be associated with the hot folder: either a member of the Process Manager Administrator group or a member of the Operators group. This informs the system whose credentials to use when a job must access a repository during hot folder submission.



NOTE: *If the submitting user does not have saved repository credentials, the job will fail if attempting to access a repository during hot folder submission. For more information, see [Setting up repository credentials](#).*

The following options are available when **Enable file clustering**, **Enable hot folder scheduling**, and **Set scheduled times for hot folders individually** are selected in the Hot Folder System Settings dialog:

Enable file clustering for this hot folder: Enables the system to wait until the specified number of files are placed in the hot folder before processing them.

Number of files: Allows you to specify the minimum number of files before processing is initiated on the set. The default is 2; the maximum is 100.

Enable scheduling for this hot folder: Enables the scheduling functions:

- **Time of Day:** Allows you to specify the times during the day that you want the hot folder scanned. The default is 12:00 AM.
- **Add:** Available if **Enable scheduling for this hot folder** is selected. Adds the selected time of day to the list. If you try to add a time more than once, the “Time Already Added” message displays.
- **Scheduled times:** Available if **Enable scheduling for this hot folder** is selected. Lists the times during a day when the hot folder system scans the hot folder for files. A maximum of 10 polling times can be set.



NOTE: *Intervals between polling times cannot be smaller than the hot folder scan interval.*

- **Remove:** Removes the select time from the list.

OK: Closes the dialog and saves the settings.

Cancel: Closes the dialog and does not save the settings.

Waiting for Job Ticket folder: Each hot folder contains a Waiting for Job Ticket folder. When submitting .xpf job tickets with a job file, both items must be placed into this folder. For more information, see [Submitting a job ticket file \(*.xpf\) to a hot folder for reprinting](#).

To set up or modify a hot folder



1. In Workflow Builder, select [**Options: Hot Folders**]. The Hot Folders dialog displays.
2. Select the desired options in the Hot Folder System Settings dialog. See [Configuring the hot folder system settings](#).
3. Select [**New...**] or [**Modify..**].
4. Select [**Browse...**].



NOTE: *To work properly, full access for the hot folder must be granted to XDL_ADMIN, particularly, if the hot folder is located on a mapped drive.*

5. In the Browse for Folder window, do one of the following:
 - Select a folder, then select [**OK**]; or
 - Select [**Make New Folder**]. Right-click the new folder and select [**Rename**] in the context menu. Type a folder name, and then select [**OK**].

6. In the Target Workflow drop down list, select a workflow. Ensure that the workflow contains the process steps necessary to support the job.
7. In the Submitting User drop down list, specify the user whose repository credentials will be associated with the hot folder.
8. If required, select [**Enable file clustering for this hot folder**] to enable the system to wait for the minimum number of files before submitting them to the hot folder. This option is available when **Enable file clustering** is selected in the Hot Folder System Settings dialog.
 - Specify the number of files.
9. If required, select **Enable scheduling for this hot folder**, available when **Enable hot folder scheduling**, and **Set scheduled times for hot folders individually** are selected in the Hot Folder System Settings dialog.
 - In the Time of Day area, highlight minutes or hours and click to specify the time during the day that you want the hot folder scanned.
 - Select [**Add**] to display the designated time of day on the Scheduled times list. A maximum of 10 scheduled times can be set.
 - If required, in the Scheduled times area, select a time and select [**Remove**] to delete the time from the list.
10. Select [**OK**] to accept the changes and close the dialog.
11. Close the Hot Folders window.

See also:

[Limitations when setting up directories as input/output hot folders for more than one feature](#)

Deleting a hot folder

This option is available when a hot folder is not paused.

To delete a hot folder



1. Workflow Builder, select [**Options: Hot Folders**].
2. Select a hot folder.
3. Select [**Delete**], and then select [**Yes**] to confirm the deletion.
4. Close the Hot Folders window.

Pausing and resuming hot folder monitoring

The hot folder monitoring function can be paused in order to perform any necessary actions.

To pause and resume hot folder monitoring



1. In Workflow Builder, select [**Options: Hot Folders**].
2. Select a hot folder from the list and select [**Pause**].
3. When appropriate, select [**Resume**].
4. Close the Hot Folders dialog.

Stopping and starting all hot folder monitoring

The hot folder monitoring function can be paused for the entire hot folder service in order to perform any necessary actions.

To start and stop all hot folder monitoring



1. In Workflow Builder, select [**Options: Hot Folders**].
2. Select [**Stop**].
3. When appropriate, select [**Start**].
4. Close the Hot Folders dialog.

Configuring the hot folder system settings

The Hot Folder System Settings dialog allows you to set the scan interval, to enable file clustering, and to select between scheduling all hot folders for the same times of day or scheduling hot folders individually. It contains the following options:

Scan Interval: Sets the time between system scans of the hot folders for new files. The default interval is 10 seconds. The available range is 10 – 100 seconds. Workflows are submitted as files are found, unless clustering or scheduling is enabled.

Enable file clustering: Enables the system to wait until the specified number of files are placed in the hot folder before processing them. The number is set on a per hot folder basis. If selected, the scan interval is set to 10 seconds and grayed out.

Enable hot folder scheduling: Enables the scheduling function.



NOTE: *The clustering and scheduling options each have the ability to invoke the system to submit jobs independent of the other's settings. If both clustering and scheduling are selected, then reaching either the clustering number of files or the scheduled time results in the submission of hot folder files as workflow jobs.*

Set scheduled times for each hot folder individually: Allows you to specify times on a per hot folder basis. See [Setting up or modifying a hot folder](#).

Use the following scheduled times for all hot folders: Allows you to specify times for all hot folders. When selected, the following options are available:

- **Time of Day:** Allows you to specify the times during the day that you want all hot folders scanned. The default is 12:00 AM.
- **Add:** Adds the selected time of day to the list. If you try to add a time more than once, the “Time Already Added” message displays.
- **Scheduled times:** Lists the times during a day when the hot folder system scans all hot folders for files. A maximum of 10 scheduling times can be set.



NOTE: *Intervals between polling times cannot be smaller than the hot folder scan interval.*

- **Remove:** Available if the “Schedule daily times...” check box is selected and a time in the list is selected. Removes the listed time.

OK: Closes the dialog and saves the settings.

Cancel: Closes the dialog and does not save the settings.

To configure the hot folder system settings

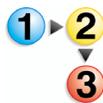
1. In Workflow Builder, select [**Options: Hot Folders**].
2. Select [**Settings...**].
3. Set the desired interval, from 10 to 100. Available if **Enable clustering** and **Enable hot folder scheduling** are not selected.
4. If required, select **Enable file clustering** to wait for a minimum number of files before processing.
5. If required, select **Enable hot folder scheduling** to enable the scheduling function.
6. Select **Set scheduled times for each hot folder individually** to specify times that you want hot folders scanned on a per hot folder basis.
7. Select **Use the following scheduled times for all hot folders** to specify times for all hot folders, and then schedule or remove the desired scheduling times:
 - Click to set the time of day and select [**Add**], or
 - Select a time of day from the Scheduled times list and select [**Remove**].
8. Close the Hot Folder System Settings dialog and the Hot Folders dialog.

Submitting a job to a hot folder

Points to remember when submitting a job to a hot folder:

- Jobs submitted with a job ticket must be placed, with the job ticket, into the Waiting for Job Ticket folder, inside the hot folder.
- RDO files can be submitted to a hot folder via File Manager and Web Services.
- If a JDF ticket does not contain the correct file path for the file that is being processed, the job fails.
- When submitting a Zip file to a workflow with Join task, the files within the Zip file will be joined in the order that they were added to the Zip file.
- Read-only files are not picked up by a hot folder.

To submit a job to a hot folder



1. Locate the desired file using Windows Explorer.
2. Use Windows Explorer to copy, move, paste, or drag and drop the file into the appropriate hot folder. The submission is automatically processed.



NOTE: *If you move a file into a hot folder, you will not be able to retrieve it. The system automatically deletes the files from the hot folder. Copy the file if you need to retrieve it.*

See also:

[Submitting an RDO to a hot folder](#)

[Submitting a job ticket file \(*.xpf\) to a hot folder for reprinting](#)

[Submitting .xml workflow files to a hot folder](#)

[Hot folders and Join](#)

Submitting an RDO to a hot folder



CAUTION: If you are submitting an RDO to a hot folder, do not open, copy, move, delete, or rename an RDO document using Windows Explorer. You will corrupt the document.

To submit an RDO to a hot folder

1. Select [**Start: Programs: Xerox FreeFlow Software: File Manager**].



NOTE: To submit files to a hot folder, you can also use legacy Document Library if you have a FreeFlow Process Manager upgrade, or you can use Web Services.

2. In File Manager, navigate to the appropriate RDO.



NOTE: In File Manager, the .CON file is not visible.

3. Right-click the file. In the context menu, select [**Copy**].
4. In the Copy dialog, select [**To**]. Type the path to the desired hot folder, for example, C:\Documents and Settings\Administrator\Desktop\RDO Hot Folder.



NOTE: To display the path to the desired hot folder, select [**Options: Hot Folder**] and locate the hot folder path.

5. Select [**OK**]. The file is automatically submitted to the workflow associated with the hot folder.

If either the RDO or the .CON folder is missing from the hot folder, the file will not be processed. You must then manually delete the file from the hot folder.

Submitting a job ticket file (*.xpf) to a hot folder for reprinting

You can save an .xpf job ticket file with the PDF file for reprinting purposes by including a Save process in a workflow and selecting [**Save job ticket information**] in the Save Settings dialog.

For more information about creating the job ticket file, refer to the topic “Saving a job ticket with the PDF for reprinting” in the Workflow Builder section.



NOTE: *You can also create the job ticket with FreeFlow Print Manager Advanced Print Path.*

To associate the .xpf job ticket file with the files to be picked up by the hot folder for processing, the .xpf job ticket file is automatically saved along with the PDF file, in the location designated in the Save settings, using the following naming conventions:

- File name: <file name>.<file ext>
- .xpf job ticket name: <file name>.<file ext>.xpf

When submitting files in a folder, the following naming conventions are used:

- Folder name: <folder name>
- .xpf job ticket name: <folder name>.xpf



NOTE: *If you are not using a hot folder for submission, you can submit only the saved PDF to a reprint workflow. The .xpf associated with the file is automatically picked up and applied.*

To submit an .xpf job ticket to a hot folder for reprinting

Waiting for Job Ticket folder: The job file and its associated .xpf must be placed in the Waiting for Job Ticket folder inside the hot folder.

When an .xpf job ticket is submitted to the hot folder’s Waiting for Job Ticket folder, with an associated job file, the job ticket is applied to all the print nodes in the workflow associated with the hot folder.



1. Locate the saved PDF. The PDF is in the location that was designated in the Save settings when the job was initially processed.

2. Locate the associated .xpf job ticket. The .xpf should be in the same location as the PDF, and the associated .xpf file name should match the PDF. For example:

File name = newsletter.pdf

Job ticket name = newsletter.pdf.xpf

3. Do one of the following:

- **For a file:** Drag and drop or copy and paste the file to be processed and its associated .xpf into the Waiting for Job Ticket folder inside the hot folder.



NOTE: *To reprint via Workflow Submission Client, submit only the saved PDF file to the reprint workflow. Process Manager automatically picks up the associated job ticket and applies it to all print nodes in the workflow.*

- **For a folder:** Drag and drop or copy and paste the folder to be processed and its associated .xpf into the Waiting for Job Ticket folder inside the hot folder. The .xpf file must be outside the folder to be processed. Each file in the folder is submitted separately as a single job with the job ticket.

4. The job prints using the job ticket.



NOTE: *If the Print node has “Always use these settings” selected, the Print node setting overwrites the .xpf job ticket; otherwise, the .xpf job ticket overwrites the Print node settings.*

Error conditions

- JDF is a “job ticket” and cannot be associated with an .xpf.
- Since RDO files already contain an internal job ticket, any associated .xpf file and the RDO are moved to the Unsupported Files folder.
- If the .xpf ticket is invalid, the .xpf file and the associated document are moved to the Unsupported Files folder.
- .xpf files without any associated document are ignored.
- .xpf files placed in the hot folder outside the Waiting for Job Ticket folder, are moved to the Unsupported Files folder.

Imposition handling with .xpf tickets

- If the .xpf ticket contains Imposition information and the workflow contains Imposition nodes, imposition information is applied to the first imposition node automatically.
- If the Imposition node has “Always use these settings” selected, the Imposition node settings overwrite the .xpf ticket; otherwise, the .xpf ticket overwrites the Imposition node settings.
- If the .xpf ticket contains any imposition information and the workflow does not contain any imposition node, the imposition information is ignored.

Submitting .xml workflow files to a hot folder

This feature allows you to submit exported workflow(s) in xml format, with either a file or a folder containing several files, to a hot folder.

The .xml file name must match the name of its associated file or folder to be picked up for hot folder processing.

Dynamic workflows: Files are submitted to a dynamically created “Submitted with documents” workflow, which is available in the target workflow drop box. Each time a new job is submitted to a dynamic workflow, a new workflow, with a unique workflow Id, is created. Dynamic workflows are not visible and are deleted from the Process Manager database when jobs using the workflows are deleted. Data from the dynamically created workflow is available for accounting information, but the “Submitted with documents” workflow does not contain any accounting info.

Matching file names: The .xml must be named <filename>.<file ext>.xml to be associated with <filename>.<file ext>.

Matching folder names: The .xml must be named <folder name>.xml to be associated with <folder>.

When submitting a folder to a hot folder, the .xml must be outside the submitted folder. Each file in the folder is submitted as a single job to each of the workflows in the .xml file.

To submit .xml workflow files to a hot folder



1. Create the desired workflow in Workflow Builder.
2. To create an .xml workflow file, export the workflow. Ensure that the .xml file name matches the name of the PDF file or the folder that you will be submitting to the workflow. If the workflow name does not match, rename it.



NOTE: *The workflow does not need to exist or be enabled in Workflow Builder to process the .xml.*

3. In Workflow Builder, select [**Options: Hot Folders**].
4. Set up a hot folder using the target workflow “Submitted with documents.”
5. Using Windows Explorer, locate the .xml file and the matching file or folder you will be submitting.
6. Copy, move, paste, or drag and drop the .xml and its matching file or folder into the “Submitted with documents” hot folder.



NOTE: *If you are submitting a folder to a hot folder, ensure the .xml is outside the folder.*

7. The submission is automatically processed.

Error conditions for dynamic workflows

- Corrupted RDO's will not be processed.
- Unsupported file types will be moved to the Unsupported Files folder.
- Invalid or unsupported .xml files will be moved to the Unsupported Files folder.
- If a workflow contains a print node and a printer is not available, the job will fail.
- The following dynamic workflow file names are restricted; files will be moved to the Unsupported Files folder:
 - Unsupported Files folder.xml
 - Waiting for Job Ticket. xml
 - Manifest Status.xml

Submitting .vpc files to a hot folder

VPC files can be submitted only to workflows containing Review, Print, Save, Convert and Impose processes. Jobs submitted to workflows with processes other than these will fail.

VPC file limitations

- **Review:** Identification of the number of document sets within a VI Container is limited to database mode VIPP and PPML print files. Selection of a set, or a range of sets is limited to database mode VIPP print files. Viewing and editing VI containers via Adobe Acrobat requires conversion to PDF.
- **Convert:** Supports conversion of VI Containers with VIPP print files. Once the VI container is converted to PDF, the VI job remains as a PDF file throughout the remainder of the workflow.
- **Impose:** Supports VI containers converted to PDF
- **Preflight:** Supports VI containers converted to PDF. Validates that all required elements of the VI Container Job are contained in the VI Container and that the container is a valid VI container. If validation is successful the job will pass; otherwise, it will fail.
- **Print:** Limited to DocuSP DFEs.

Using third party external processes

Administrators can add up to 5 external processes from third party software. Each process can have a combined maximum of 10 folder-based and CLI profiles.

Submitting from third party processes via hot folders: Folder-based profiles allow the submission of jobs from third party processes via hot folders. During setup, each profile is assigned to a process input hot folder, a process output hot folder, and an optional errors hot folder.

For folder-based profiles, third party software must be installed and running on the Process Manager server or a third party machine in order to use external processes in a workflow. When the Process Manager workflow reaches the third party step, the job is retrieved by the third party application, processed, and then returned to the Process Manager workflow to complete any remaining workflow steps.

Running third party scripts: CLI profiles are available for input via command line interfaces and scripts. During setup, each profile is assigned a file name and location for the script, optional parameters, and locations for the input and output files.

Once an external process is set up, it displays in Workflow Process Options area, where the operator can drag it into a workflow and select the desired profile.

See also:

[Guidelines for using third party external processes](#)

[Setting up third party input and output hot folders](#)

[Managing external processes](#)

[Setting up external processes](#)

[Adding or editing an external process](#)

[Moving or deleting an external process](#)

[Setting up folder-based profiles](#)

[Adding or editing a folder-based profile](#)

[Setting up CLI profiles](#)

[Adding or editing a CLI profile](#)

[Configuring parameters](#)

[Deleting an external process profile](#)

Guidelines for using third party external processes

- For folder-based profiles, the third party software must support input and output via hot folders.
- In addition to PDFs, External Process nodes accommodate all supported file types, except RDOs.
- The third party application must accept and send out the same types of files. For example, PDF in must result in PDF out. The function of the third party software cannot be to convert PDF to JPEG.
- The third party application must accept and send out the same file name. For example, table.PDF in must result in table.PDF out. The function of the third party software cannot be to convert table.PDF to door.PDF.
- Users must supply a user name and password when a remote location is selected during setup.
- The folder-based, input, output, and error locations must reside on the same remote machine or the same local machine.
- The CLI profile Script full path, Working directory, and Output location (if used) must reside on the same remote machine or on the same local machine.

Setting up third party input and output hot folders

For folder-based profiles, to ensure the exchange of files between the Process Manager external process and the third party software, you must set up input and output hot folders for the third party software that match the input and output folders of the profile used to execute the external process.



NOTE: *It is your responsibility to ensure that your third party software has the proper Windows write access to the folders (input folder, output folder, etc.) you create and/or set up during the External Process node configuration in Workflow Builder.*

Example

In Process Manager - The following input and output folders are set up in Process Manager for an external process profile called Profile 1:

- Process input folder: C:\Profile1In
- Process output folder: C:\Profile1Out

In the third party software - The following input and output hot folder locations must be set up to match the above input and output folders for Profile 1:

- Third party input hot folder location is mapped to the Process input folder: C:\Profile1In
- Third party output hot folder location is mapped to the Process output folder: C:\Profile1Out



NOTE: *The third party software must be running for you to use the external process in a workflow.*

See also:

[Using third party external processes](#)

[Limitations when setting up directories as input/output hot folders for more than one feature](#)

Managing external processes

The External Processes dialog allows you to move or delete processes and provides access to the external process configuration dialogs. It includes the following options:

Move Left: Moves a selected process one space to the left.

Move Right: Moves a selected process one space to the right.



NOTE: *Moving a process also changes the order in Workflow Builder.*

New Process...: Opens the External Process Setup dialog which allows you to add a new external process; available if four or fewer processes are configured. If there are already five external processes when [**New Process...**] is selected, the Maximum Allowed error dialog displays.

Edit...: Opens the External Process Setup dialog for the selected process. Allows you to edit an external process or to add additional profiles to an external process.

Delete: Deletes a selected process and all its settings.

See also:

[Setting up external processes](#)

[Using third party external processes](#)

Setting up external processes

The External Process Setup dialog allows you to set up or edit process icons, names, and profiles, or to delete a profile from the Process Profiles list. It includes the following options:

Process icon: Allows you to select an icon.

Process name: Allows you to enter a name for the external process.

Process profiles: Lists, by name, the existing profiles up to a maximum of 10. Listed profiles are selectable.

Add folder profile...: Available if 9 or fewer profiles are configured. Opens the Folder Profile Setup dialog, which allows you to enter a new configuration. If there are ten profiles configured when [**Add**] is selected, the Maximum Allowed error dialog displays.

Add CLI profile...: Opens the CLI Profile Setup dialog which allows you to enter a new configuration.

Edit...: Opens the setup dialog for the selected profile.

Delete: Deletes the selected profile with a confirmation dialog.

See also:

[Setting up folder-based profiles](#)

[Setting up CLI profiles](#)

[Using third party external processes](#)

Adding or editing an external process

External processes must be added and configured before they can be used in a workflow. Initial configuration involves:

- Selecting a process icon
- Assigning a process name

Final configuration involves:

- Setting up input, output, and error hot folders for folder-based profiles
- Setting up a script location, parameters, a working directory, and output location for CLI profiles
- Defining the timeout interval for each profile

For folder-based profiles, the third party software must be running for you to use the external process in a workflow.

To add or edit an external process



1. In Workflow Builder, select [**Options: External Processes**].
2. In the External Processes dialog, select [**New Process...**]. This option is available only if four or fewer processes are configured.
3. In the External Process Setup dialog, select an icon from the Process icon drop box.



NOTE: *External Processes are designated by a plus symbol overlay.*

4. In the Process name text box, enter a name for the process.



NOTE 1: *The name must be no longer than 14 characters, and it must be a unique name.*

NOTE 2: *If incorrect file characters (for example, \ | : * ? < >) are entered, an error message displays.*

5. Do one of the following:
 - a. To add a folder-based profile, select [**Add folder profile...**]. The Folder Profile Setup dialog opens.
 - b. To add a CLI profile, select [**Add CLI profile...**]. The CLI Profile Setup dialog opens.
 - c. To modify an existing profile, select a profile in the Process Profiles list, and select [**Edit**].
6. Continue to the appropriate procedure to add or modify a folder profile or CLI profile:
 - Folder-based profiles: [Setting up folder-based profiles](#)
 - CLI profiles: [Setting up CLI profiles](#)

See also:

[Setting up third party input and output hot folders](#)

[Using third party external processes](#)

Moving or deleting an external process

Moving a process changes its position one space to the left or right with respect to the other external processes. It also changes the process position in Workflow Builder.

When you delete a process, you delete all the profiles for the process.

To move or delete an external process



1. In Workflow Builder, select [**Options: External Processes**].
2. Select a process and then select from the following:
 - [**Move Left**] or [**Move Right**] to move the process.
 - [**Delete**] to remove the selected process and all associated profiles.



NOTE: *Deleting an external process affects existing workflows.*

3. Select [**Close**].

See also:

[Using third party external processes](#)

Setting up folder-based profiles

The Folder Profile Setup dialog allows you to set up hot folders for input, output, and error files, and to define a timeout interval.



NOTE: *Input, output, and error files must be assigned to unique locations.*

The dialog includes the following options:

Profile name: Allows you to enter a name for the profile.

Input location: Allows you to select a hot folder on a local or remote drive for Process Manager to place the files and for the third party software to retrieve the files.

Provide available job data to external process by XML file: Allows you to request the system to provide additional information to the external process via an XML file written to the external process input folder. Information includes job name, job ID, date submitted, JDF and preflight results file path information, manifest order jacket file information.



NOTE: *The third party application should also be configured to retrieve input at this location.*

Output location: Allows you to select a hot folder on a local or remote drive for the third party software to store successfully processed files.



NOTE: *The third party application should also be configured to store successfully processed files at this location.*

Error location: Allows you to select a hot folder for the third party software to place error files. If error files are generated, the job will fail.



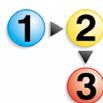
NOTE: *Creating an error file location is optional.*

Timeout: Allows you to enter a duration to wait for the external process to return processed files. If this time elapses with no returned files or errors, the job fails. Seconds and minutes values cannot both be zero.

Adding or editing a folder-based profile

A combined total of 10 folder-based profiles and CLI profiles can be configured for each external process. For folder-based profiles, the input, output, and error locations must reside on the same remote machine, or on the same local machine.

To add or edit a folder-based profile



Refer to [Adding or editing an external process](#) to add an external process, and then set up a folder-based profile as follows:

1. In the Folder Profile Setup dialog, enter or change the name for the profile.



NOTE: *Changing a name or a folder affects existing workflows.*

2. To select process input, process output, and error folders, do the following:



NOTE: *You will be asked for a user name and password when a remote location is selected during setup.*

- a. Select [**Browse**].
 - b. In the Browse For Folder dialog, do one of the following:
 - Select the desired folder, and then select [**OK**].
If you select a remote location, the Remote Connection dialog displays. Enter the appropriate User name and Password, and select [**OK**].
 - Select [**Make New Folder**], name the folder, and select [**OK**].
3. In the timeout drop box, select a duration.
 4. Select [**OK**]. If you edited an existing profile, a confirmation dialog displays. The new profile displays in the Process Profiles text box.

5. To configure additional process profiles, repeat steps 1-4. Otherwise, select **[OK]** to close the External Process Setup dialog.



NOTE 1: *You must set up input and output hot folders for the third party software that match the input and output folders of the profile.*

NOTE 2: *For folder-based profiles, the third party software must be running to use the external process in a workflow.*

See also:

[Deleting an external process profile](#)

[Using third party external processes](#)

[Limitations when setting up directories as input/output hot folders for more than one feature](#)

Setting up CLI profiles

The CLI Profile Setup dialog allows you to select a script location and enter optional parameters, set up working directory and output locations, and define a timeout interval. The dialog includes the following options:

Profile name: Allows you to enter a name for the profile.

Script full path: Allows you to enter or select the location and file name of the script file to be used for the external process.

Browse...: Opens a common file dialog that allows you to select a file.

Parameters: Allows you to enter optional script parameters. Default parameters are \$in\$ \$out\$.

Provide available job data to external process by XML file: Allows you to request the system to provide additional information to the external process via an XML file written to the external process input folder.

Working directory: Allows you to designate a location on a local or remote drive in which the external process node can place input files and from which the script can retrieve the files.

Output location: Optional; allows you to enter the location on a local or remote drive in which the script stores successfully processed files.

Timeout: Allows you to enter a duration to wait for the external process to return processed files. If this time elapses with no returned files or errors, the job fails. Seconds and minutes values cannot both be zero.

See also:

[Configuring parameters](#)

Adding or editing a CLI profile

A combined total of 10 folder profiles and CLI profiles can be configured for each external process. The CLI script full path, working directory, and output location (if used) must reside on the same remote machine or on the same local machine.

To add or edit a CLI profile



Refer to [Adding or editing an external process](#) to add an external process, and then set up a CLI profile as follows:

1. In the CLI Profile Setup dialog, enter or change the name for the profile.



NOTE: *Changing a name or a folder affects existing workflows.*

2. To select a Script full path, select [**Browse**].
3. In the Open dialog, locate the script, and select [**Open**].
4. (Optional) In the parameters text box, enter additional script parameters. For more information on configuring parameters refer to [Configuring parameters](#).



NOTE: *You may add parameters before, after, or between the default parameters, but you should not delete the defaults. If a default is deleted, an error message displays when you click [**OK**].*

5. To select a working directory location or an output location, do the following:



NOTE: *You will be asked for a user name and password when a remote location is selected during setup.*

- a. Select [**Browse**].
- b. In the Browse For Folder dialog, do one of the following:
 - Select the desired folder, and then select [**OK**].
 - Select [**Make New Folder**], name the folder, and select [**OK**].

6. In the timeout drop box, select a duration.



NOTE: *If you select a timeout value of zero minutes and zero seconds, an error message displays. Select [OK], and then enter a valid value.*

7. Select **[OK]**. If you edited an existing profile, a confirmation dialog displays. The new profile displays in the Process Profiles text box.
8. To configure additional process profiles, repeat steps 1-7. Otherwise, select **[OK]** to close the External Process Setup dialog.

See also:

[Configuring parameters](#)

[Deleting an external process profile](#)

[Using third party external processes](#)

[Limitations when setting up directories as input/output hot folders for more than one feature](#)

Configuring parameters

The following examples illustrate various options for configuring parameters for CLI profiles.

Example 1: Using the default parameters

Scenario: The user would like to execute a script named “SomeScript” on the C drive during the execution of the External Process node in FreeFlow Process Manager. The script takes an input file as its first parameter, does something to the file, and stores the result in an output file specified by the second parameter.

The External Process Node for Script is configured in the CLI Profile Setup dialog as follows:

Profile name: Something

Script Full Path: c:\SomeScript

Parameters: \$in\$ \$out\$

Working directory: c:\temp (user’s choice)

Output Location: c:\brianOut (user’s choice)

Time interval: 30 seconds

During execution, the user submits the file “someFile”. The External Process launches “SomeScript” by launching the following command:

C:\SomeScript c:\temp\someFile c:\brianOut\someFile

The file “someFile” is copied to the working directory by the External Process node prior to launching the script. Also, the External Process node automatically uses the same name for the input file as for the output file.

The External process node waits for the script to finish executing successfully for the maximum of the time interval (if the time interval passes, an error has occurred) and then looks for c:\brianOut\someFile.

If the file is there it is picked up; if not, an error has occurred.

Example 2: Adding a parameter between the input and output parameters

Scenario: Now, assume that the user wants “SomeScript” to use an additional parameter, “someParameter,” between the input and output parameters. The only difference to the configuration is this:

Parameters: \$in\$ someParameter \$out\$

During execution, External Process node launches the following command:

```
C:\SomeScript c:\temp\someFile someParameter
c:\brianOut\someFile
```

Example 3: Adding a parameter after the output parameter

Assume the same scenario as **Example 1**, except the user wants “someParameter” to follow the output parameter. The user would configure this way:

Parameters: \$in\$ \$out\$ someParameter

During the execution, External Process node launches the following command:

```
C:\SomeScript c:\temp\someFile c:\brianOut\someFile
someParameter
```

Example 4: Adding two parameters

Scenario: Assume the same scenario as **Example 1** except “SomeScript” uses two additional parameters “someParameter1” and “someParameter2,” and the user wants “someParameter1” to come in between input and output parameters, and “someParameter2” to come after output Parameter. The configuration would be as follows:

Parameters: \$in\$ someParameter1 \$out\$ someParameter2

During execution, the External Process node launches the following command:

```
C:\SomeScript c:\temp\someFile someParameter1
c:\brianOut\someFile someParameter2
```

Example 5: When the output location is not specified

Scenario: Assume the same scenario as **Example 1**, except the user does not specify an output location.

During the execution, External process node launches the following command:

C:\SomeScript c:\temp\someFile c:\temp\someFile

With no output location specified, the External Process node automatically uses the same output parameter as the input parameter when the script is launched.

Example 6: Using “ ” for a path that contains a space

Scenario: If you are using a path with a space for your DOS script, you can use “ ”, per this example. Assume the same scenario as **Example 1**, except the working directory is c:\program files. Note the space between program and files. The user configures the External Process node as follows:

Profile name: Something

Script Full Path: c:\SomeScript

Parameters: “\$in\$” \$out\$

Working directory: c:\program files

Output Location: c:\brianOut

Time interval: 30 seconds

Notice the quotations (“ ”) around \$in\$

During execution, the External Process node launches the following command:

**C:\SomeScript “c:\program Files\someFile”
c:\brianOut\someFile**

Example 7: Specifying parameter order

Scenario: In this scenario, the user submits the file “someFile.” The user can specify the parameters in any order in the Parameters field.

Profile name: Something

Script Full Path: c:\SomeScript

Parameters: -I \$in\$ -O \$out\$

Working directory: c:\temp (user's choice)

Output Location: c:\brianOut (user's choice)

Time interval: 30 seconds (user's choice)

During execution, the External Process launches SomeScript with the following command:

C:\SomeScript -I c:\temp\someFile -O c:\brianOut\someFile

Deleting an external process profile

You can select and remove individual profiles from an external process.

To delete an external process profile



1. In Workflow Builder, select [**Options: External Processes**].
2. In the External Processes dialog, select the process that contains the profile you wish to delete, and select [**Edit**].



CAUTION: If you select [Delete] in the External Processes dialog, you will delete the external process and all profiles associated with the process.

3. In the External Process Setup dialog, select the desired profile from the Process Profiles list.
4. Select [**Delete**]. The selected profile is deleted. A confirmation message displays.
5. Select [**OK**].

See also:

[Using third party external processes](#)

Setting up the SMTP Server

The Simple Mail Transport Protocol (SMTP) Server is used for email notification. To support the Notify process step, you must designate a mail server for outgoing mail or notifications.



NOTE: *Incoming and outgoing mail cannot be directed without the SMTP address of your mail server.*

The SMTP Setup dialog contains the following options:

SMTP Server text box: Allows you to enter the SMTP Server name, for example: **smtp.galaxynet.net**.



NOTE: *Only valid characters and strings for SMTP Servers are accepted. An error message displays if the syntax is incorrect.*

Maximum attachment size: Allows you to set a size limit for e-mail attachments in the Notification process. The available range is 20 - 1024 MB.

OK: Closes the dialog and saves the settings.

Cancel: Closes the dialog and does not save the settings.

To set up the SMTP server



1. In Workflow Builder, select [**Options: SMTP Setup...**].
2. In the SMTP server text box, enter the name of the mail server used for outgoing mail or notifications.
3. Select a maximum attachment size from 20 - 1024 MB.
4. Select [**OK**].

Setting up the proxy server

Job submission using JMF/JDF might require communication via a proxy server. The Proxy Setup dialog is used to configure an address and port number on your proxy server.

To set up the proxy server

1. In Workflow Builder, select [**Options: Proxy Setup...**].
2. In the Address text box, enter an address for the proxy server.
3. In the Port text box, enter a port number for the proxy server.
4. Select [**OK**].

Creating preflight profiles

This is an administrator function.

The Preflight step validates and checks formatting, and verifies the image, fonts, and references to the OPI image server images. Preflight profiles are provided via a Callas plug-in using Adobe Acrobat Professional.

To create a preflight profile

1. In Workflow Builder, select [**Options: Preflight Setup...**].
2. Adobe Acrobat Professional launches.
3. In Adobe Acrobat Professional, select [**Advanced: Preflight...**].
4. In the Preflight dialog, select [**Edit**].
5. In the Preflight: Edit Profiles dialog, select the [**Create a new Preflight profile**] icon.
6. Select [**New profile**].
7. Enter a profile name and other desired information, and select the desired options.
8. Refer to the “Creating new preflight profiles” procedure in Adobe Acrobat Professional to add or create rules and conditions, as required.
9. Exit Adobe Acrobat.



NOTE: For in-depth information about creating preflight profiles, refer to the preflight Help topics in Adobe Acrobat.

To modify a preflight profile



NOTE: If a profile has been selected in a Preflight node, and then the profile is modified in Adobe Acrobat Professional, the modification is not reflected in the already-selected Preflight node. In order to use the modified profile, you must create a new Preflight node and select the profile again.

1. In Workflow Builder, select [**Options: Preflight Setup...**].
2. Adobe Acrobat Professional launches.
3. Select [**Advanced: Preflight...**].
4. Select one of the predefined profiles.
5. Select [**Edit**].

5. Refer to the “Modifying preflight profiles” procedure in Adobe Acrobat to add or create rules and conditions, as required.
6. If desired, to create a duplicate, select [**Duplicate**].
7. Exit Adobe Acrobat Professional.



NOTE: *For additional information about creating preflight profiles, refer to the preflight Help topics in Adobe Acrobat Professional.*

3. Workflow Submission Client

Xerox FreeFlow Workflow Submission Client allows you to perform major job submission tasks, from choosing files to enter in a designated workflow to selecting the best workflow for the job.

About Workflow Submission Client

Use Workflow Submission Client to:

- Select files for submission from Windows or from a document repository.
- Create a file list (.xfl) to save one or more files for future submissions
- Select an automated workflow to which to submit files.
- Launch Workflow Builder.
- Set up Repository credentials.

If a workflow is set up to accept changes, use Workflow Submission Client to:

- Modify the workflow process settings.
- View the job ticket, select an optional job ticket for submission with the files, and resolve job ticket conflicts.

You can also submit files remotely from a workstation or server with Remote Workflow Submission Client installed.

Logging in to Workflow Submission Client

Process Manager user accounts are created and managed using the Windows Local Users and Groups functionality in the Computer Management application. During install, Xerox FreeFlow Process Manager Administrators and Xerox FreeFlowProcess Manager Operators groups are created. Your administrator then populates these groups with users. Permissions to launch applications are based on group membership.

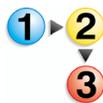


NOTE: *If you are not a member of an authorizing group, contact your administrator. If you forget your username and password, notify your administrator.*

To log in to the Workflow Submission Client application

A login screen may or may not display, depending on group membership and server location.

If you enter the incorrect username or password, you receive an incorrect username or password error message. You can then enter your correct username and password.

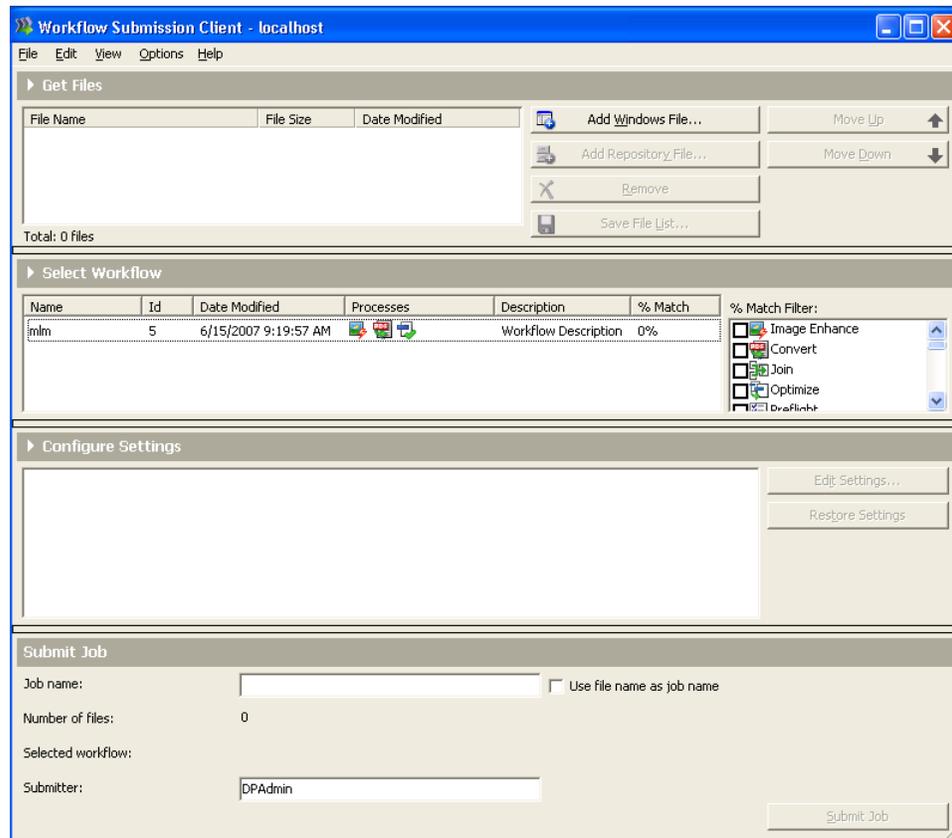


1. Select **[Start: Programs: Xerox FreeFlow Software: FreeFlow Process Manager: Workflow Submission Client]**. The Login dialog opens for the selected application.
2. In the User name text box, enter your user name.
3. In the Password text box, enter your password.
4. The Domain text box is populated with the domain of the currently logged in user, or the last domain entered in the login form. Confirm that the proper domain name appears.
5. Enter the appropriate Process Manager server name in the Server text box.
6. Select **[OK]**. The main window opens.
7. If during login to a remote client you enter the incorrect username or password, an incorrect username or password error message displays. Enter your correct username and password.

Workflow Submission Client main window

The Workflow Submission Client main window contains four areas that represent the main steps in the job submission process: Get Files, Select Workflow, Configure Settings, and Submit Job.

Get Files Area



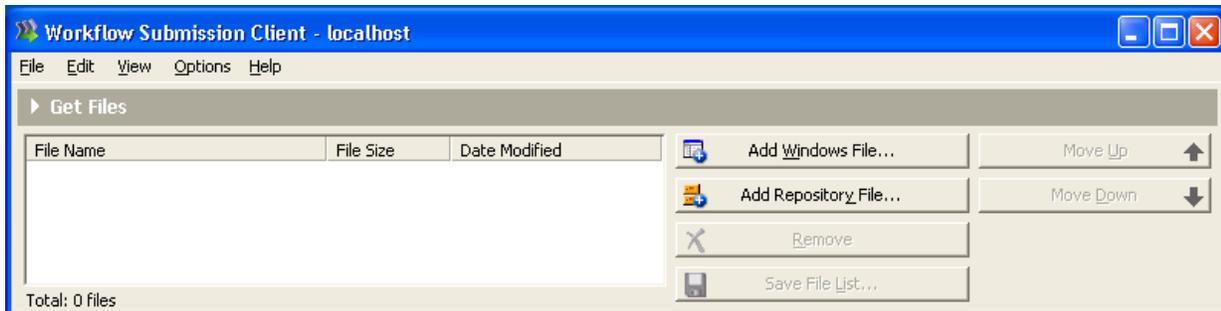
Select Workflow Area

Configure Settings Area

Submit Job Area

The Get Files area

The Get Files area contains a scrollable window that allows you to select and manage files from local disks or document repositories.



The files display in the order in which they are submitted.

Files are managed with the following buttons:

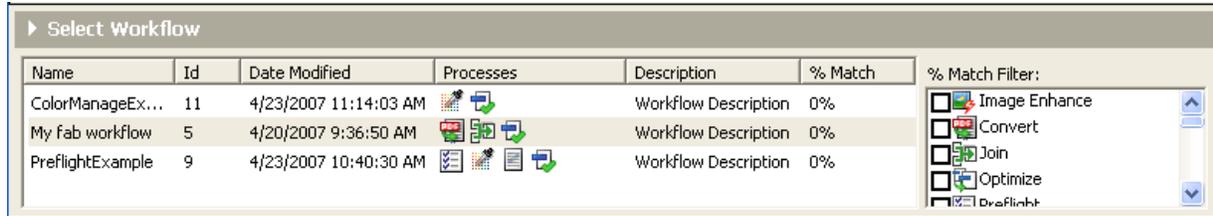
Table 3-1. Get Files buttons

| Button Name | Description |
|------------------------|---|
| Add Windows File... | Displays a Windows browse screen. |
| Add Repository File... | Displays a repository browse screen. |
| Remove | Removes selected files from the text box. |
| Save File List | Opens a Save common file dialog and allows you to save the list of files as a .xfl (Xerox File List) file. The file lists can then be submitted using the "Add Windows File" and "Add Repository File" dialogs. |
| Move Up | Moves a selected file up one position in the list. |
| Move Down | Moves a selected file down one position in the list. |
| Expand/Collapse | Shows/hides the Select Workflow, Configure Settings, and Submit Job areas of the window. The Submit Job button is not hidden when Collapse is selected. |

The Total status text, under the Get Files text box, lists the number of files in the text box.

The Select Workflow area

The Select Workflow area displays a scrollable list of the available workflows.



NOTE: A workflow must be enabled in Workflow Builder for it to display in the Workflow Submission Client window.

The list can be sorted by each column by selecting the column heading. The following information is displayed for each workflow:

Table 3-2. Select Workflow columns

| Column | Description |
|----------------|--|
| Name | Displays the workflow name. |
| Id | Displays the workflow Id. |
| Date Modified | Displays the date the workflow was last changed. |
| Processes | <p>Displays the workflow process icons.</p> <p>Only the icons associated with Pass states are shown; Fail states are not shown.</p> <p>A workflow is grayed out if it is unavailable due to a Join, Convert, or Image Enhance conflict.</p> <p>When you sort by this column, the order is determined by the number of processes.</p> |
| Description | Displays the workflow description. |
| % Match | <p>Shows the % match: the number of matching processes, divided by the number of selected processes, multiplied by 100.</p> <p>For example, if a user selects 5 check boxes and a workflow includes 4 of the processes marked by the check boxes, the % Match would be 80%.</p> |
| % Match Filter | Allows you to select check boxes for the processes you want to include or exclude in the workflow. |

The Configure Settings area

The Configure Settings area displays the selected workflow. The pane displays the workflow processes, including the fail pathways, in a view similar to Workflow Builder.



Settings are configured using the following options:

Table 3-3. Configure Settings options

| Button Name | Description |
|------------------|--|
| Edit Settings | Allows you to access and change process settings for the selected process if the administrator has configured the settings to allow changes. |
| Restore Settings | Allows you to restore settings to those that accompanied the workflow when it was originally opened. |

The Submit Job area

The Submit Job area allows you to configure the job and sender names and displays other job details.

The screenshot shows a 'Submit Job' window with the following fields and values:

- Job name:** [Empty text box] Use file name as job name
- Number of files:** 0
- Selected workflow:** My fab workflow
- Submitter:** DPAdmin
- Submit Job** button

Table 3-4. Submit Job area options

| Component | Description |
|---------------------------|---|
| Job name | Allows you to type a meaningful job name. Default: If there is only one file, the file name displays here. If there are two or more files, the prefix “multi” displays, followed by the first filename, until a character limit of 40 is reached. |
| Use file name as job name | Available when multiple files are selected and a workflow without a Join node is selected. When selected, the “Job name:” field is grayed out and the job names match the submitted file names. |
| Number of files | Reflects the number of files in the Get Files list. |
| Selected workflow | Contains the name of the workflow selected in the Select Workflow area. |
| Submitter | Allows you to type a sender name. The default is the current username. |
| Submit Job(s) | Submits the job and displays a confirmation message. Label displays as “Jobs” when multiple jobs are submitted. |

Workflow Submission Client menus

The Workflow Submission Client menu bar provides commands for selecting files and submitting jobs.

File menu

The File menu contains the following options:

Table 3-5. Workflow Submission Client File menu

| File menu option | Description |
|-------------------------|--|
| Add Windows File... | Opens a Windows browse screen. |
| Add Repository File... | Opens a repository browse screen. |
| Save File List... | Opens the Save File List dialog. |
| Submit Job | Submits the job. Displays the Submission Progress dialog, which shows the submission progress in percentage. |
| Exit | Closes the Workflow Submission Client application. |

Edit menu

The Edit menu contains the following options:

Table 3-6. Workflow Submission Client Edit menu

| Menu options | Description |
|------------------|--|
| Remove | Removes a selected file from the text box. |
| Move Up | Moves a selected file up one position in the list. |
| Move Down | Moves a selected file down one position in the list. |
| Edit Settings... | Opens the Edit Settings dialog for the workflow process. |
| Restore Settings | Restores settings to those that accompanied the workflow when it was originally opened. |
| Workflow Builder | Displays the Workflow Builder login dialog if you are not logged in; if you are logged in, activates Workflow Builder. |
| Find... | Opens the Find dialog, which allows you to locate a process node in a workflow. |

View menu

The View menu contains the following options:

Table 3-7. Workflow Submission Client View menu

| Menu option | Description |
|-----------------------------|--|
| File Details | Shows the details (file name, file size, date modified) in the Get Files area. |
| File List | Shows the list (file name only) in the Get Files area. |
| Hide % Match | Hides % Match and % Match Filter. |
| Show/Hide Process Tool Tips | Show: Allows you to view process settings via tool tips in the graphical workflow display by positioning the mouse pointer over a workflow process. Hide: Disables the tool tips. |
| Workflow Icons | Small Icons: Displays small icons. Medium Icons: Displays mid-sized icons. Large Icons: Default; displays large icons. |

Options menu

The Options menu contains the following option:

Table 3-8. Workflow Submission Client Option menu

| Menu Option | Description |
|---------------------------------|---|
| Remove Files After Submission | Removes files from the Get Files list after the files are submitted for processing. |
| Repository Credentials Setup... | Opens a dialog that allows the current user to enter a Username and Password for the active repository. |

Help menu

The Help menu contains the following options:

Table 3-9. Workflow Submission Client Help menu

| Menu option | Description |
|-------------------------------------|--|
| Help Topics... | Displays the Help application to allow you to list the Help topics for Workflow Submission Client. |
| About Workflow Submission Client... | Displays program and copyright information for Workflow Submission Client. |

Job submission

Job submission involves a few basic steps.

Job submission process

- **Locate and sequence the files:** You can select files from local disks, DocuShare, or from the document repositories. If you are submitting multiple files for joining, list them in the desired sequence.
- **Select a workflow:** Only workflows that have been enabled in Workflow Builder display. Ensure the selected workflow includes the processes necessary to meet the job criteria.
- **Modify the process settings:** You can modify process settings to meet the needs of a job in the Configure Settings area; for example:
 - You can change page numbers or watermarks settings via the appropriate process settings dialogs.
 - You can change the job ticket settings (for example, the number of copies, the stock) using the Job Setup dialog in Print Settings.
- **Name and submit the job:** Use the default name or select a new name, and then submit the job.

Workflow selection methods



NOTE: A workflow must be enabled in Workflow Builder for it to display in the Workflow Submission Client window.

Two basic workflow selection methods are described below.

Direct method

Select a workflow if you are familiar with the workflows and the job requirements. Keep in mind the following:

- If a workflow does not contain the Convert process, and if you have files that require conversion to PDF, the workflow will be grayed out.
- When submitting multiple files to a workflow:
 - To create a single joined job, Join must be in the workflow.
 - To create multiple separate jobs, Join should not be in the workflow.

% Match method

Select the required components and generate a list of workflows that meet the job criteria.

- Check the workflow components that you need to complete a given job.
- To sort by processes not included in the workflows, do not select the workflow components.

% Match equals the number of matching processes divided by the total number of selected processes, multiplied by 100.

For example, if you select 5 check boxes, and a workflow includes 4 of the checked processes and no additional processes, the percent match is 80%.

Submitting a job

With a single submission, you can process either a single file, multiple files as a single joined job, or multiple files as separate jobs. The table shows how submission input and the presence of a Join node in the workflow defines the job output:

Table 3-10. File submission with and without join

| Submission | Join node in workflow | Job(s) created |
|----------------|-----------------------|------------------------|
| Single file | No | Single job |
| Multiple files | Yes | Single joined job |
| Multiple files | No | Multiple separate jobs |

To submit a job to a workflow



1. In Workflow Submission Client, select from the following:

- To locate a Windows file(s), select [**Add Windows File...**], and browse for the file.



NOTE: To retrieve files from DocuShare, select *My Network Places* and navigate to the appropriate Docushare web folder.

- To locate repository files, select [**Add Repository File...**], and browse for the file.



NOTE: Prior to performing operations that require repository access, you must set up and save your repository credentials in *FreeFlow Process Manager*. For more information, see [Setting up repository credentials](#).

2. Select [**Open**] to add the file(s) to the Get Files list.
3. For jobs that use a workflow with a Join node, the order of the list indicates the joined sequence of the files. If necessary, re-order the files or file list by selecting an item in the list, and then select [**Move up**] or [**Move Down**].



NOTE: To automatically clear files from the Get Files list after submission, select [**Options: Remove Files after Submission**].

4. (Optional) To save one or more files to a file list (.xfl) for future submissions, select [**Save File List...**]. For more information about saving a file list, see the [Saving a File List](#) procedure.

5. Select a workflow directly if you are familiar with the workflows and the job requirements, or select the check boxes for the workflow components required to complete the job.



NOTE: *To process multiple files as separate jobs, select a workflow without a Join step.*

6. To view or modify the process settings for a selected workflow:
 - Double-click a workflow process to display the settings dialog, or click [**Edit Settings**]. Modify the settings, and select [**OK**] to save the changes.
7. Select from the following:
 - Type a name in the Job name text box. The default is the name of the document, unless multiple files are selected.
 - Select [**Use file name as job name**] to give each job a name that matches the submitted file. Each job receives the job name specified in Workflow Submission Client with an incremental number appended (such as, MyJob 1, MyJob2, MyJob3).
8. If necessary, type a name in the Submitter text box.
9. Select [**Submit Job(s)**] to process the files.

Saving a File List

The [**Save File List**] option facilitates the multiple submission of files by saving the current list of one or more selected files as a Xerox File List (.xfl). Since the files in the file list are really “paths” to the source files, any updates to the source files are captured when the file list is submitted. File lists are useful for:

- Multiple submissions of the same files to various workflows without reselecting the files.
- Rerunning a job in which only one or two of the files in the list is updated.



NOTE: *A file list cannot be submitted to a hot folder.*

Consider the following points when creating and using a file list:

- The same file can be included in multiple file lists.
- The same file can be included more than once in the same file list.
- The file list exists only in the local Workflow Submission Client.
- If during submission any of the files in the file list no longer exist, you are notified, and the missing file(s) are skipped.

See also:

[Limitations for Save File List](#)

To save a file list

To save one or more files for future submissions, do the following.

1. In the Workflow Submission Client Get Files area, locate, and then select the desired files in the list.
2. Select [**Save File List...**]. The Save File List dialog displays.
3. In the File Name text box, enter a name for the file list.
4. Select [**Browse...**]. In the Browse for Folder dialog, select a location for saving the File List, and then select [**OK**]. The Location text box is populated with the file location.
5. Select [**OK**] to exit the Save File List dialog.

To submit a file list

1. In the Workflow Submission Client Get Files area, browse to the location of the saved file list.
2. Select the appropriate file list, identified by an .xfl file extension.
3. Continue with step 2 of the [Submitting a job](#) procedure.

Limitations for Save File List

Repository files that have been saved in a Xerox File List (.xfl) can be successfully loaded only if the Workflow Submission Client application has not been closed since the file list was first created. Once the Workflow Submission Client application is closed, the temporary repository files are removed. If you re-launch the application and load the file list, an error message will display for each of the removed repository files.

Submitting Zip files

Zip files can be submitted only via a hot folder.

Submitting VI Containers (.vpc)

VI Container files (.vpc) can be submitted via Workflow Submission Client only to workflows containing Review, Print, Save, Convert and Impose. Jobs submitted to workflows with processes other than these will fail.

Submitting a file with saved job ticket information for reprinting

The [**Save the job ticket**] option in the Save Settings dialog allows you to save the job ticket (XPIF) information with the PDF file for reprinting purposes. To reprint via Workflow Submission Client, submit *only the saved PDF file* to the reprint workflow. Process Manager automatically picks up the associated job ticket and applies it to all print nodes in the workflow.

For more information about the [**Save the job ticket**] option, refer to the topic “Saving a job ticket with the PDF for reprinting” in the Workflow Builder section.

Submitting QuarkXPress files (.qxd, .qxp)

QuarkXPress files (.qxd, .qxp) can be submitted via Workflow Submission Client only to workflows containing a Convert process. QuarkXPress files must be manually converted to PDFs before they can be processed in a workflow. To do this, you must:

- Set up a QuarkXPress working directory in the Convert Settings. Files are held in the directory until they are manually converted.
- Set up an e-mail notification address in the Convert Settings. This allows you to send an e-mail message to indicate that a QuarkXPress document is waiting to be converted to PDF. A message are sent for each QuarkXPress document processed.

For more information see, “Configuring Convert settings” in Workflow Builder.

About submitting RDOs

The FreeFlow document type, RDO, stands for Raster Document Object. It is an electronic document that is made up of images. An RDO can contain several different types of images: TIFF, JPEG, and Adobe PDF. Images can be black and white, grayscale, or color.

Identifying the parts of an RDO

An RDO is a compound object (an object having many parts), but FreeFlow sees an RDO as a single document. The two main parts of an RDO are the RDO file and the .CON directory. The RDO part of the file contains all the information about how to organize the images in the document to produce the desired output, or appearance. The .CON directory part of the file contains all the images of the document. Each TIFF, JPEG, Adobe PDF, and file is stored as an individual file in the .CON directory.

When you open Windows Explorer and look for your documents, you see both parts of the RDO. For a document named Family, you see a file named Family.rdo and a directory named Family.con. In File Manager, you can view only the RDO. FreeFlow treats the parts of the RDO as a single document.

Submitting RDOs



RDOs are submitted to a workflow via Workflow Submission Client, the same way that you submit any job to a workflow:

1. Locate the file on a local disk or document repository.
2. Select a workflow.
3. Submit the job.

To submit an RDO and produce a PDF

To submit an RDO and produce a PDF, the RDO must be submitted to a workflow in which Convert is the first step.

To submit an RDO and produce an RDO (RDO reprint)

RDOs previously set up with the necessary job parameters in Makeready can be submitted to Process Manager for reprinting. Minor changes can be made to the job ticket—for example, the copy count.

You can submit an RDO reprint to a workflow that contains any combination of Save, Print, and Review. Review is available only to pause, approve, fail, change copy counts, and print a proof. You will not be able to view the RDO using [**View Document**]; the RDO ticket can be viewed via [**Settings**]. This is possible only if you have a Print node.



NOTE 1: *The RDO embedded job ticket is used to print the job unless “Always use these settings” is selected in the Print node settings.*

NOTE 2: *If “Always use these settings” is selected, the Print node settings are used and the RDO embedded job ticket is ignored.*

RDO limitations

Successful submission of linked RDOs (an RDO containing a link to another RDO) and set labeling RDOs via Workflow Submission Client or hot folders cannot be assured.

Remote Workflow Submission Client

Process Manager can support multiple remote instances of Workflow Submission Client. This allows you to submit files by logging in to any workstation or server in your print shop that has the Remote Workflow Submission Client software installed. The following file types are supported:

- If only Adobe Reader is installed on the client system, only PDF file types can be submitted remotely via the Add Windows File, Add Repository File, or Add Cabinet File (for legacy Document Library) options. This also applies if Adobe Reader is not installed.
- If Adobe Acrobat is installed on the client system, then all supported file types can be submitted.

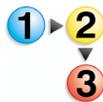
Process Manager supports a maximum of 8 instances of Remote Workflow Submission Client, not including the client on the FreeFlow Process Manager server.



NOTE: *Ensure that the Process Manager server is selected in the text box of the remote client login screen.*

Accessing Workflow Builder from Workflow Submission Client

During the job submission process, you may need to create new workflows in Workflow Builder if none exist that meet the needs of the job.



To access Workflow Builder from Workflow Submission Client:

1. In Workflow Submission Client, select [**Edit: Workflow Builder**].
2. The Workflow Builder login dialog may or may not display, depending on group membership. See [Logging in to Workflow Submission Client](#). If required, log in to Workflow Builder.
3. Select [**File: New**].
4. Create a new workflow.
5. Save the workflow.
6. Enable the workflow.
7. Exit Workflow Builder.

4. Workflow Job Manager

Xerox FreeFlow Workflow Job Manager allows you to view and manage active and completed jobs in the system.

About Workflow Job Manager

Use Workflow Job Manager to perform tasks at the job level:

- View job details and status.
- Review and edit jobs in Adobe Acrobat.
- Edit process settings.
- Print hardcopy proofs.
- Identify faulted jobs.
- Resubmit jobs.
- Approve, fail, pause, or delete jobs.
- Generate, view, and export reports.
- Set up repository credentials.
- Launch Workflow Submission Client, Workflow Builder, Printer Registration, and FreeFlow Administration Tool.
- Review and configure incoming third-party jobs from Management Information Systems (MIS).
- Perform selected tasks remotely from a workstation or server with Remote Workflow Job Manager Client installed.

Logging into Workflow Job Manager

Process Manager user accounts are created and managed using the Windows Local Users and Groups functionality in the Computer Management application. During install, Xerox FreeFlow Process Manager Administrators and Xerox FreeFlowProcess Manager Operators groups are created. Your administrator then populates these groups with users. Permissions to launch applications are based on group membership.

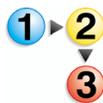


NOTE: *If you are not a member of an authorizing group, contact your administrator. If you forget your username and password, notify your administrator.*

To log in to the Workflow Job Manager application

A login screen may or may not display, depending on group membership and server location.

If you enter the incorrect username or password, you receive an incorrect username or password error message. You can then enter your correct username and password.



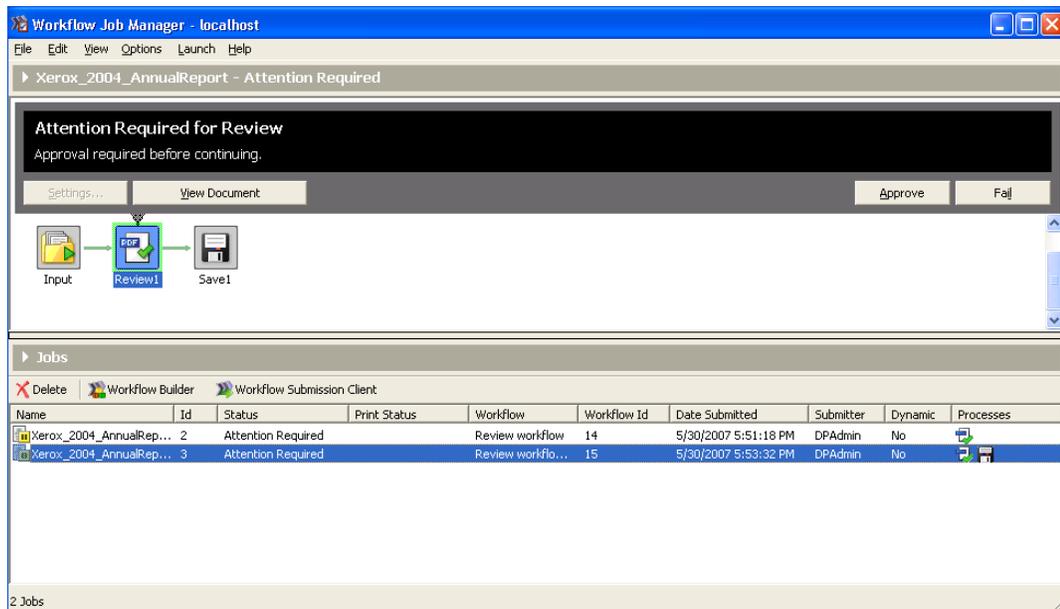
1. Select **[Start: Programs: Xerox FreeFlow Software: FreeFlow Process Manager: Workflow Job Manager]** from the Windows desktop. The Login dialog opens.
2. In the User name text box, enter your user name.
3. In the Password text box, enter your password.
4. The Domain text box is populated with the domain of the currently logged in user, or the last domain entered in the login form. Confirm that the proper domain name appears.
5. Enter the appropriate Process Manager server name in the Server text box.
6. Select **[OK]**. The main window opens.
7. If during login to a remote client you enter the incorrect username or password, an incorrect username or password error message displays. Enter your correct username and password.

The Workflow Job Manager main window

The Workflow Job Manager window provides an overview of all jobs and their current status in the system. You can view all jobs in the system, including active and completed jobs.

Two major areas comprise the Workflow Job Manager main window: the Status area and the Jobs area.

Status Area



Jobs Area

The Status area

The upper portion of the Workflow Job Manager window displays the detailed status of a job selected in the Jobs area.



The status area reflects the status of the selected job and the selected workflow node. The buttons that display vary, based on the selected workflow and node. The status area displays the name of the job and includes the following elements:

- **Process status text:** Displays the name and status of a selected workflow process—for example, “Passed in Convert.” Includes an instructive statement—for example, “You may edit settings and resubmit to this node.”
- **Selected process arrow:** An arrow connects the currently selected process to the status area.
- **Process buttons:** The available buttons display for the selected process—for example **View Document** and **Approve**.
- **Progress bar:** Indicates the status of an in-progress automated process.



NOTE: *When submitting multiple files for conversion, the progress bar shows the conversion progress on a per file basis. For each file, the progress bar moves to 50% to indicate that the file is processing, and then to 100% when processing is complete.*

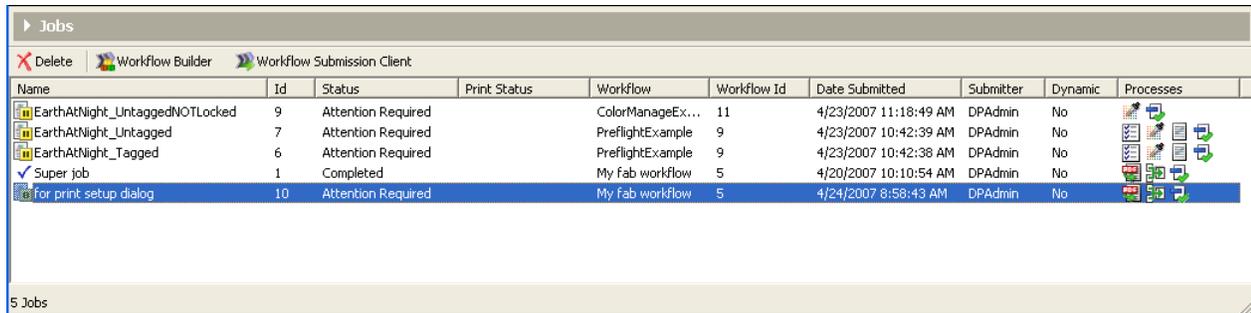
- **Workflow:** Graphically represents the workflow of the selected job.
 - **Active process:** A green highlight indicates the currently active process; green arrows link the processes.
 - **Completed process:** A blue check mark indicates a completed process.
 - **Selected process:** A blue background indicates a selected process; an arrow connects the selected node to the message area. Selecting a process displays the **Settings** button, if available, and allows you to access the settings dialog.
 - **Process Settings:** You can position the mouse cursor over a process to view the setting in a tool tip.
 - **Input settings:** In Workflow Job Manager, you can open the Input settings dialog and view a list of the original input files for the selected job. Input files can also be viewed via the tool tip.



NOTE: *The workflow process steps cannot be dragged and dropped in this graphical view.*

The Jobs area

The lower portion of the Workflow Job Manager window lists all jobs, active and completed, currently in the system.



The screenshot shows a window titled 'Jobs' with a toolbar at the top containing 'Delete', 'Workflow Builder', and 'Workflow Submission Client'. Below the toolbar is a table with the following columns: Name, Id, Status, Print Status, Workflow, Workflow Id, Date Submitted, Submitter, Dynamic, and Processes. The table contains five rows of job data.

| Name | Id | Status | Print Status | Workflow | Workflow Id | Date Submitted | Submitter | Dynamic | Processes |
|--------------------------------|----|--------------------|--------------|------------------|-------------|-----------------------|-----------|---------|-----------|
| EarthAtNight_UntaggedNOTLocked | 9 | Attention Required | | ColorManageEx... | 11 | 4/23/2007 11:18:49 AM | DPAdmin | No | |
| EarthAtNight_Untagged | 7 | Attention Required | | PreflightExample | 9 | 4/23/2007 10:42:39 AM | DPAdmin | No | |
| EarthAtNight_Tagged | 6 | Attention Required | | PreflightExample | 9 | 4/23/2007 10:42:38 AM | DPAdmin | No | |
| Super job | 1 | Completed | | My fab workflow | 5 | 4/20/2007 10:10:54 AM | DPAdmin | No | |
| for print setup dialog | 10 | Attention Required | | My fab workflow | 5 | 4/24/2007 8:58:43 AM | DPAdmin | No | |

5 Jobs

- Each row lists a job and the job details.
- The toolbar allows you to launch Workflow Submission Client, or delete a job, or launch Workflow Builder.

The Jobs area columns

Each row in the Workflow Job Manager Jobs area contains the following information about a job:

Table 4-1. Jobs area columns

| Column | Description |
|----------------|--|
| Name | Lists the names of the current jobs. |
| Id | Displays the Job Id number. |
| Status | Lists the current status of each job. |
| Print Status | Shows the status of print jobs submitted through Process Manager. Available for IPP printers only. |
| Workflow | Lists the names of the workflow used. |
| Workflow Id | Lists the system-generated workflow Id. |
| Date Submitted | Lists the time and date the job was submitted. |
| Submitter | Lists the job submitter's user name from login. For hot folders, defaults to the administrator. |
| Dynamic | Indicates (Yes, No) whether the workflow is dynamic. |
| Processes | Displays a small graphical representation of the workflows. |

Additional features allow you to:

- Sort the jobs list by the items in any column by selecting the column heading. For example, to sort the table alphabetically by workflow, select the Workflow column heading.
- View a context menu for a listed job by right-clicking the job.
- Make multiple selections from the list using **<Control + Shift>**.

Print Status descriptions

The following sample print statuses might be displayed in Workflow Job Manager area Print Status column. For a complete list, consult your printer documentation.

Table 4-2. Print Status descriptions

| Status | Description |
|---------------------|--|
| Active | The job is in process or in a printing state. |
| Pending | The job is ready and is waiting to be processed at the system. |
| Paused | The job is paused because of a printer or job execution problem. |
| Printing | The job is printing. |
| Processing | The job is being processed. |
| Rejected | The job was rejected by the system while it was being received. |
| Save completed | The job was saved successfully. |
| Waiting for printer | The job has completed processing and is waiting for the printer. |
| Waiting for save | The job has completed processing and is being saved |

Workflow Job Manager menus

The Workflow Job Manager menu bar provides commands for managing jobs.

Commands can also be accessed by right-clicking a job to display the context menu. Menu items that are not available are grayed out.

See also:

[The File menu](#)

[The Edit menu](#)

[The View menu](#)

[The Options menu](#)

[The Launch Menu](#)

[The Help menu](#)

The File menu

The File menu contains the following options:

Table 4-3. Workflow Job Manager File menu

| File Menu Option | Description |
|------------------|--|
| Exit | Closes the Workflow Job Manager application. |

The Edit menu

The Edit menu contains the following options:

Table 4-4. Workflow Job Manager Edit menu.

| Edit Menu Option | Description |
|-------------------|--|
| Settings... | Displays the settings dialog for the selected process. |
| View Document | <p>Allows you to preview the current state of the document in the Review step or in prior steps and to interactively edit the document in Adobe Acrobat.</p> <p>In remote Workflow Job Manager, if Adobe Reader is installed, you can view, but not edit, PDF files. If Adobe Acrobat is installed, you can view and edit PDF files.</p> |
| Preflight Results | Opens Adobe Acrobat with any PDF files generated from preflight processes completed for that job. |
| Print Results | Opens the Print Results dialog for each instance of a production print process in the workflow that has completed submission of the document to the printer. Print status is available only from IPP printers. |
| Pause | Pauses the job and allows a user to review. Available if a job is processing and not failed. |
| Resume | Allows the workflow to continue to the next steps. Available if a job is paused. |
| Approve/ | Allows a job to continue in the workflow. Changes to Resume. Available if a job is at a review step. |
| Fail | The job goes to the failed status. Available if a job is at a review step or is paused. Changes to Delete. |
| Resubmit | Resumes the workflow at the currently selected process; uses the changed process settings. Appears in place of Approve and Fail buttons when a process step is selected while the workflow is at a Review step. |
| Delete | Deletes the job. |
| Find... | Opens the Find dialog, which allows you to locate a process node in a workflow. |

The View menu

The View menu contains the following options:

Table 4-5. Workflow Job Manager View menu

| View Menu Option | Description |
|-----------------------------|--|
| Show/Hide Process Tool Tips | Show: Allows you to view process settings via tool tips in the graphical workflow display by positioning the mouse pointer over a workflow process. Hide: Disables the tool tips. |
| Workflow Icons | Small Icons: Displays small icons. Medium Icons: Displays mid-sized icons. Large Icons: Default; displays large icons. |

The Options menu

The Options menu contains the following options:

Table 4-6. Workflow Job Manager Options menu

| Options Menu Option | Description |
|---------------------------------|---|
| Reports... | Opens the reports dialog, in which you can select, define, view, and export reports. |
| Repository Credentials Setup... | Opens a dialog that allows the current user to enter a Username and Password for the active repository. |

The Launch Menu

The Launch menu contains the following options:

Table 4-7. Workflow Job Manager Launch menu

| Launch Menu Option | Description |
|------------------------------|--|
| Workflow Builder | Launches Workflow Builder. |
| Workflow Submission Client | Launches Workflow Submission Client. |
| Printer Registration | Launches Printer Registration. |
| FreeFlow Administration Tool | Launches FreeFlow Administration Tool. |

The Help menu

The Help menu contains the following options:

Table 4-8. Workflow Job Manager Help menu

| Help Menu Option | Description |
|-------------------------------|--|
| Help Topics... | Displays the Help application to allow you to list the Help topics for Workflow Job Manager. |
| About Workflow Job Manager... | Displays program and copyright information for Workflow Job Manager. |

Workflow Job Manager toolbar

The Workflow Job Manager toolbar provides commands for managing jobs.

The Jobs toolbar

The Jobs toolbar includes the following options:

Table 4-9. Jobs toolbar

| | | |
|----------------------------|--|---|
| Workflow Submission Client |  Workflow Submission Client | Launches Workflow Submission Client; available if there is at least one enabled workflow on the system. |
| Delete |  Delete | Deletes the selected job with all intermediate files. Saved workflows are not deleted. |
| Workflow Builder |  Workflow Builder | Launches Workflow Builder |

Managing Jobs

This section contains the activities available within Workflow Job Manager, including checking job, process, and workflow status; editing documents; editing workflow settings for specific jobs; approving or deleting jobs; viewing print results; or opening Workflow Submission Client to start a new job.

Checking the status of a job

When you choose to view the details of individual jobs, details are displayed in the status area at the top of the screen and include:

- **Graphical display:** Depicts the workflow process steps. A “+” in the workflow indicates a process branch that was created due to a failed process. Click “+” to open the branch; click “-” to close the branch.
- **Progress bar:** Shows the progress of the current process.

To check the status of a specific job



1. In Workflow Job Manager, select a job from the Jobs list. The progress bar and workflow display in the status area.
2. Review the information in the status area.
3. Repeat step 1 to view the details of another job.

Creating reports

The reports feature allows you to set up, generate, view and export various customized reports. The reports can include audit trail data, such as status and information about each job processed; as well as accounting data, such as processing time and number of impressions. You can also manage accounting data for past deleted jobs.

Reports can be viewed in Workflow Job Manager, or can be exported to the following formats:

- CSV comma delimited (*.csv)
- XML (*.xml)

The report function is also available via Remote Workflow Job Manager Client.

You can set up and generate the following reports:

Table 4-10. Report categories and types

| Report Category | Report Type |
|------------------|--|
| Job reports | Full job report Job totals daily Job totals monthly Job totals yearly |
| Workflow reports | Full workflow report Single workflow daily Single workflow monthly Single workflow yearly All workflows daily All workflows monthly All workflows yearly |
| Process reports | Single job All jobs Process results daily Process results monthly Process results yearly |
| Print results | Print results report |
| System counters | Counters daily Counters monthly Counters yearly |

The Reports dialog allows you to select a report type and define the report parameters. It provides access to dialogs that allow you to view or export a report, and purge data for past jobs. Dialog options, which vary depending on the selected report, include:

Workflow name: Allows you to enter the workflow name.

Workflow Id: Allows you to enter the workflow Id.

Job name: Displays for reports that require an exact job name; allows you to enter the job name.

Job Id: Allows you to enter the job Id.

Category: Allows you to select a report category. Report options for the category are displayed in the Report type field.

Type: Options depend on the report category selection.

Start date: Allows you to select a start date for inclusion of data in a report.

End date: Allows you to select an end date for inclusion of data in a report.

All dates: Allows you select the use of all available data in terms of dates for report generation

Attributes to include: Includes the appropriate data/column options for the selected report type.



NOTE 1: *Processing time is displayed in seconds.*

NOTE 2: *“Impressions” refers to the number of sides of paper printed. Data is available only at the time of print. If an IPP connection is not available at the time the report is requested, the number of impressions is not reported.*

Move Up: Allows you to shift the selected data fields up in the list; moves the data column to the left in the report.

Move down: Allows you to shift the selected data fields in the list; moves the data column to the left in the report.

Select all: When selected, places a check beside all of the attributes listed. Automatically clears if you deselect any attribute.

Sort attribute: Available if at least one report attribute is selected. Allows you to sort a report by the selected attribute in ascending or descending order.

Purge: Opens the Purge dialog, which allows you to remove accounting data for deleted jobs.

View: Generates a report and displays a report for viewing.

Export...: Opens the Export dialog.

Close: Closes the Reports dialog.

To create a report



1. In Workflow Job Manager, select [**Options: Reports...**] to display the Reports dialog.
2. Select the report category and type.
3. If required, enter a Workflow name and/or Workflow Id, Job name and/or Job Id in the appropriate text fields. The displayed fields vary depending on the selected report type.



NOTE: You can also enter a wildcard for the workflow or job name, for example, *reprint.

4. Select a Start date from the drop box.
 - Type the day or year; or
 - Highlight the month, day, or year, and use the up/down arrows to select the desired option.
5. Select an End date from the drop box.



NOTE: Only data for jobs occurring in the date range will be included.

6. In the Attributes to include window, scroll as needed, and select the individual attributes or select Select all to include all attributes. Attributes vary, based on the job type.
7. To define the position of the data in the report columns:
 - a. Select the attribute, and select Move Up to move the data column to the left in the report.
 - b. Select the attribute, and select Move Down to move the data column to the right in the report.

8. To generate the report sorted by a specific column, in the Sort attribute window:
 - a. Select an attribute.
 - b. Select the desired data display sequence: Ascending to display from lowest to highest; Descending to display from highest to lowest.
9. Continue selecting report options, or select [**Close**] to close the dialog.

See also:

[Viewing a report](#)

[Exporting a report](#)

[Purging report data](#)

Viewing a report

Once you set up the report parameters in the Reports dialog, you can select **[View]** to generate the configured report and view the report data. Report features include:

- The report name in the window title.
- A column for each report attribute selected in the Reports dialog. Columns can be repositioned by dragging and dropping.

To view a report



1. In Workflow Job Manager, select **[Options: Reports...]** to display the Reports dialog. Set up the desired report.
2. Select **[View]** to generate and display the report.
3. (Optional) If you need to modify the report setup, click the Reports dialog to bring it to the foreground, make the necessary changes, and then select **[View]** to generate and view the modified report.
4. To view multiple reports side-by-side, leave the current report open, click the Reports dialog to bring it to the foreground, make new report selections, and then select **[View]**. Repeat as needed.



NOTE: *To print, save, or archive the report, it must be exported.*

5. Close the report(s).
6. Select **[Close]** to exit the Reports dialog

See also:

[Creating reports](#)

[Exporting a report](#)

[Purging report data](#)

Exporting a report

Once you set up the parameters in the Reports dialog, you can export the report data.



NOTE: *You can load report data into an application such as Microsoft Excel, and then produce customized reports by combining reports.*

Select [**Export**] to display the Export dialog, which includes the following options:

File name: Allows you to enter the file name for the export file.

Location: Displays the directory selected by using the Browse common dialog that will receive the exported report.

Browse: Opens a Browse for Folder dialog. Allows you to select a file location.

Format: Allows you to select the file type to export the report.

Encoding: Available for CSV format only. Allows you to select the encoding type.

OK: Closes the window and exports the report.

Cancel: Discards changes and closes window.

To export a report

1. In Workflow Job Manager, select [**Options: Reports...**] to display the Reports dialog. Set up the desired report. You may want to view the report before exporting it.
2. Select [**Export**] to display the Export dialog.
3. In the file name text field, enter a name for the export file.
4. To select a file location, select [**Browse**].
5. In the Browse For Folder dialog, do one of the following:
 - Select the desired folder, and select [**OK**]; or
 - Select [**Make New Folder**], name the folder, and select [**OK**].

6. In the Format drop box, select the desired format. Options include:
 - CSV comma delimited (*.csv), for database support such as Microsoft Access and Microsoft Excel.
 - XML (*.xml), a current method for data exchange used, for example, by database management systems and for VIPP printing.
7. In the Encoding drop box, select the encoding type for exporting the report. Options include:
 - Unicode (UTF-8), which can be used internationally to support Arabic, Hebrew, and other languages.
 - ANSI, which is compatible with older systems.
8. Select **[OK]** to close the window and export the report.



NOTE: *The CSV file might display using the icon of an associated spreadsheet program.*

See also:

[Creating reports](#)

[Viewing a report](#)

[Purging report data](#)

Purging report data

To help manage the database size, accounting data from deleted jobs can be removed from the database.



NOTE: *Deleting jobs from the Workflow Job Manager window should not be confused with the Purge function.*

Select **[Purge]** in the Reports dialog to display the Purge dialog, which includes the following options:

Never: Never removes accounting data.

Now: Removes data for deleted jobs upon clicking **[OK]**.

Older than: Purges the records older than the specified value. If selected, the default is 365 days.

OK: Performs one of the following, and then closes the dialog:

- If Now is selected: Purges the accounting data for deleted jobs.
- If Older than n days is selected and unchanged: Continues on the fixed rate, checking and purging the accounting data for deleted jobs on a daily basis.
- If the number of days is changed: Restarts the duration count before purging.

Cancel: Closes the dialog and disregards any changes made in the dialog.

To purge report data

1. In Workflow Job Manager, select [**Options: Reports...**] to display the Reports dialog.
2. Select a report.
3. Select [**Purge**].
4. Select one of the following:
 - Never: To never remove accounting data.
 - Now: To remove data when you select [**OK**].
 - Older than [n] day(s): To daily purge records older than the value specified in the days spinner box.
5. Select [**OK**] to process your selection and close the dialog.

See also:

[Creating reports](#)

[Viewing a report](#)

[Exporting a report](#)

Viewing and editing a document in Adobe Acrobat

The View Document function is available whenever a PDF job is at a Review step or is paused.

It allows you to open the PDF file in Adobe Acrobat, preview its current state and, if necessary, edit the document.



NOTE: *You cannot change the file submission or the selected workflow, but you can access the other settings if you are allowed to change settings.*

The following options are available:

Approve/Resume: When selected, the job continues in the workflow.

Fail: When selected, the job fails.

To view and edit a job in Adobe Acrobat



1. In Workflow Job Manager, select a job that displays Attention Required for Review, or that lists a status of Paused or Review in the Jobs list.

2. Select from the following:

- At the Review or paused step, select [**View Document**]. Adobe Acrobat displays the PDF document.
- Select a step that precedes the Review step. Select [**View Document**] to open Adobe Acrobat and display a PDF document for the step.



NOTE 1: *If a document from an earlier step is edited, the changes do not affect the later document unless the job is resubmitted before the place where the document was edited.*

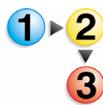
NOTE 2: *Optional selection methods: You can also right-click a step and select [**View Document**] from the context menu, or select a step and select [**Edit: View Document**].*

3. If necessary, modify the document using the Adobe Acrobat features.
4. If necessary, save the document.
5. Exit Adobe Acrobat.

Viewing preflight results

A Preflight process step must be completed for a job in order to select this option.

To view preflight results



1. In Workflow Job Manager, select a job from the Jobs list.
2. Select a Preflight node, and then select from the following:
 - Right click the node and select [**Preflight Results**] from the context menu.
 - Select [**Edit: Preflight Results**].
 - Select the [**Preflight Results**] button.
3. Adobe Acrobat displays the results for the selected Preflight node.
4. Exit Adobe Acrobat.

Viewing print results

Use the Print Results dialog to obtain information about documents submitted to IPP printers. The dialog updates periodically to display up-to-date information about each instance of a production print process in a workflow, including printer name, queue name, job name, job status, job ID, time, print quantity, finishing type, collation, and output.

To view print results



1. In Workflow Job Manager, select a job from the Jobs list.
2. Select a Print step, then select from the following:
 - Right-click the node, and select [**Print Results**] from the context menu.
 - Select [**Edit: Print Results**].
 - Select a Print step, and then select the [**Print Results**] button.
3. Review the print results for the selected Print node.
4. Exit the Print Results dialog.

Modifying workflow settings

Settings...: Available if a job is at a Review step or paused and a configurable process step is selected in the workflow. It provides access to the workflow process settings.

Resubmit: Available if a job is paused at a Review step and a previous process step is selected. When selected, it reprocesses the workflow at the step that is currently selected.



NOTE 1: *During the resubmit operation, if there is interaction with a repository, the RMS credentials of the current user (the user running Workflow Job Manager) are used. If the current user of Workflow Job Manager does not have proper RMS credentials saved, the job will fail during resubmit.*

NOTE 2: *If a job is in a Review state prior to the installation of the Unlimited User Conversion, when you resubmit the job after the Unlimited User Conversion is installed, the files remain at low resolution.*

To modify workflow settings



1. In Workflow Job Manager, select a job that is at a Review step or is paused.
2. Select a workflow process step.
3. Select **[Settings]**. If the process is not configurable, **[Settings]** is grayed out.
4. Make the desired changes.
5. Select **[OK]**.

Pausing a job

You can pause a job if it is processing and not in a failed status.

The following options are available for a paused job:

View document: Opens the PDF file in Adobe Acrobat; allows you to review and edit the document.

Settings...: Available if a job is at a Review step or paused and a configurable process step is selected in the workflow. It provides access to the workflow process settings.

Resume: When selected, the job continues in the workflow.

Fail: When selected, the job fails.

To pause a job

-   1. In Workflow Job Manager, select a job from the Jobs list. The job must be processing.
-  2. Select [**Pause**].



NOTE: *The job pauses after the current process is done processing.*

Approving a job at a Review step

A job can be approved if it is at a Review step.

The following options are available for a job awaiting approval:

View document: Opens the PDF file in Adobe Acrobat; allows you to review and edit the document.

Settings...: Available during the Review process step. Provides access to the workflow process settings.

Copies: Available when a selected job is at the Review step. If the job's workflow contains a Print step after the Review step, it opens the Copies dialog.

Print Proof: Available when a selected job is at a Review step, only if the workflow contains a Print step following the Review step. Allows you to print a high resolution proof of the PDF file processed to that point, on the next available Print step in the workflow.

Approve: Available during the Review process step. When selected, the job continues in the workflow.

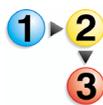
Fail: When selected, the job fails.

See also:

[Modifying the copy count](#)

[Printing a hardcopy proof](#)

To approve a job at a Review step



1. In Workflow Job Manager, select a job that displays Attention Required for Review, or that lists a status of Paused or Review in the Jobs list.
2. Select **[Approve]**.

Failing a job

You can fail a job if it is paused or at a Review step. The following option is available for a failed job:

Delete: Deletes the job and all intermediate files. The workflow is not deleted.

To fail a job



1. In Workflow Job Manager, select a job that displays Attention Required for Review, or that lists a status of Paused or Review in the Jobs list.
2. Select [**Fail**].
3. The status of the job becomes Failed.

Deleting a job

This process deletes the job and all intermediate files. The workflow is not deleted.

To delete a job



1. In Workflow Job Manager, select a job from the Jobs list.
2. In the Jobs toolbar, select [**Delete**].
3. Select [**Yes**] to confirm.

Modifying the copy count

The [**Copies...**] option is available when a selected job is at the Review step. If the job's workflow contains a Print step after the Review step, it opens the Copies dialog, in which the following options are available:

- **Quantity (original document)**: Allows you to change the number of copies to print, from 1-9999999, for all Print steps that follow the Review step in the workflow branch. Represents the quantity of the document as submitted via an XPIF, JDF or manifest value (order jacket file field for Quantity). If the copy count dialog is opened from a Review node prior to the copy count being modified by a multi-up repeated Imposition node, only this option displays.
- **Quantity (imposed document)**: Allows you to modify the imposed copy count. If the Copy Count dialog is opened from a Review node after the copy count is modified by a multi-up repeated Imposition node, this option is available and the **Quantity (original document)** cannot be modified. **Quantity (imposed document)** is available when you:
 - Process the job through a Xerox imposition node (not PREPS) that is multi-up repeated.
 - Enable the Copy Count Divisor feature via [**Workflow Builder: Processes: right-click Impose: Settings...**]. This feature enables the system to adjust the copy count to maintain the original quantity intent for workflows that contain multiple-up impositions.
 - Submit a job with a job ticket quantity intent.
 - Use Print nodes that do **not** have “Always use these settings” selected.
- **OK**: Sets the copy counts of Print steps following the current Review step to the specified number.

During the Review task, if both **Quantity (original document)** and **Quantity (imposed document)** are available for a Print node, the value displayed in the Print node Quantity setting is the **Quantity (imposed document)** value.

For more information about the copy count divisor, see the topic “To enable the copy count divisor.”

To modify the copy count



NOTE: *The job must have a Print step following a Review step.*



1. In Workflow Job Manager, select a job from the Jobs list. The job must be at a Review step.
2. Select **[Copies...]**.
3. In the **[Quantity (original document)]** section, set the number of copies to print.
4. In the **[Quantity (imposed document)]** section, set the quantity of the imposed document to print. See description, above, for a list of availability criteria.
5. Select **[OK]**.

Printing a hardcopy proof

A hard proof allows you to review a hardcopy of the job before printing a full production run.

The [**Print Proof**] option is available when a selected job is at a Review step. It uses the job ticket settings, with a copy count of one, to print a high resolution proof of the PDF file processed up to that point on the next available Print step in the workflow.



NOTE: [**Print Proof**] is only available if the workflow contains a Print step following the Review step.

Printer status and results for print proof jobs are not available in the Process Manager reports. However, you can obtain the job information in the production printer Job Manager.

To print a hardcopy proof

1. In Workflow Job Manager, select a job from the Jobs list. The job must be stopped at the Review step.
2. Select [**Print Proof**] to print a single copy. Obtain and review the proof.



NOTE: A “Proof sent to printer” message displays when the “Print Proof” button is selected and the document is successfully sent to the printer.

A “Proof failed to print” message displays when you select [**Print Proof**] and the document is sent to the printer but fails to print.

3. If appropriate, select [**Approve**] to print the entire job.

Adding a recipient to a Notify step with no recipient address specified

If the **[Enter recipient address during job processing]** option is selected during configuration of the Notification Settings, the job runs until it reaches the Notify step. It then pauses and displays the following message:

“Attention Required for Notify. Please add recipients to the notify settings and resume the job.”

The following options are available for the job when you select a Notify step with no recipient addresses specified:

View Document: Opens the PDF file in Adobe Acrobat; allows you to review and edit the document.

Settings: Opens the Notification Settings dialog and allows you to enter recipient addresses.

Resume: Continues processing the job. Is grayed out if no recipients are specified, and the submitter did not check the “Allow job to continue even if no notification is sent” check box.

Fail: Fails the job.

To add a recipient to a Notify step with no recipient address specified

1. In Workflow Job Manager, select a job from the Jobs list with Incomplete Settings in the Status column.



NOTE: *The job must have a Notify step following a Review step.*

2. Select **[Settings]**.
3. Select from the following in the Notification settings dialog:
 - Enter the recipient email address.
 - Select **[Allow job to continue even if no notification is sent]** to prevent the job from failing if email notification is not sent due to the lack of a recipient address or other failure.
4. Select **[OK]**.
5. Select **[Resume]**.

Viewing Web Services Job Instructions

Web Services job instructions can be viewed via a URL link by selecting [**View Job Instructions**]. This option is available when a selected Web Services job is in a Review, paused, or Incomplete Notify Settings state.

To view Web Services job instructions

1. In Workflow Job Manager, select a Web Services job from the Jobs list.
2. Select [**View Job Instructions**]. The system default web browser opens to the WebServices-supplied URL for the selected job.

Remote Workflow Job Manager Client

Process Manager can support multiple remote instances of Workflow Job Manager. This allows you to manage jobs by logging in to any workstation or server in your print shop that has the Remote Workflow Job Manager Client software installed.

Process Manager supports a maximum of 8 instances of Remote Workflow Job Manager Client, not including the client on the FreeFlow Process Manager server.



NOTE: *Ensure that the Process Manager server is selected in the text box of the remote client login screen.*

Using the View Document function

To use the View Document function when a job is stopped at the Review task, Adobe Acrobat or Adobe Reader must be installed. Otherwise, the function is disabled.

If Adobe Reader is installed:

- You can use the View Document function to view PDF files.
- You cannot edit PDF files.

If Adobe Acrobat is installed, you can use the View Document function to:

- View PDF files
- Edit PDF files

Functions not available in Remote Workflow Job Manager Client

The following administrative functions are not available or are disabled in Remote Workflow Job Manager Client:

- Preflight setup
- SMTP setup
- Proxy setup
- Hot folder setup
- External process setup
- Process status modifications
- Printer polling interval
- The launch of Workflow Builder from Job Manager

Job In Use dialog

When using Remote Workflow Job Manager Client, only one remote client at a time can modify a job. If another user attempts to edit or review documents associated with a job that is being edited or reviewed, the system locks the job and the Job in Use Dialog displays. This prevents other clients from accessing the job. Dialog options include:

Unlock: Available only on the server installation of Workflow Job Manager. Brings up the Unlock Confirmation dialog.

Cancel: Returns the user to Workflow Job Manager; does not open the job or the PDF associated with the job.

OK: Appears only on the remote version of Job Manager. The remote user cannot access or unlock the job. The user must wait for the other user to finish or for the administrator to override the lock from the local server.

Unlock Confirmation dialog

The Unlock Confirmation dialog displays when a user selects [**Unlock**] in the Job in Use dialog. Dialog options include:

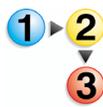
Yes: Closes the dialog. The file is unlocked, potentially nullifying any changes made by the user who originally had the file or job open. The selected file or job opens.

No: Closes the dialog and the Job In Use dialog.

Accessing Workflow Builder from Workflow Job Manager

You might need to access Workflow Builder to create or modify a workflow, or to configure process step settings.

To access Workflow Builder from Workflow Job Manager



1. In Workflow Job Manager, select [**Launch: Workflow Builder**]. The Workflow Builder login displays.
2. Log in to Workflow Builder.
3. Select [**File: New**].
4. Create a workflow.
5. Save the workflow.
6. Enable the workflow.
7. Exit Workflow Builder.

Accessing Workflow Submission Client from Workflow Job Manager

If you need to create and/or submit a new job while in Job Manager, you can access Workflow Submission Client via the Jobs toolbar.

To create and/or submit a new job



1. In Workflow Job Manager, select [**Workflow Submission Client**] in the Jobs toolbar. The Workflow Submission Client login is displayed.
2. Log in to Workflow Submission Client.
3. Select a file for submission.
4. Select a Workflow.
5. Specify the job requirements.
6. Select [**Submit**].
7. Exit Workflow Submission Client.

Managing jobs from third party management information systems (MIS)

Third party management information systems (MIS) can submit jobs directly to Process Manager. For incoming jobs that do not include all the necessary processing information, the operator might have to complete the job setup by assigning and configuring a workflow and/or selecting the workflow submission files.

Incoming third party jobs that require additional configuration display the following elements:

- A paused job icon in the Name column
- “Attention Required” in the Status column
- Instructional text, for example: “Please configure this job and select **Approve** to begin processing.”

The topics in the following sections cover the dialogs and procedures involved in configuring incoming third party MIS jobs:

See also:

[Assigning and configuring a workflow for an incoming third party job](#)

[Selecting files for an incoming third party job](#)

[Viewing the JDF file for an incoming third party job](#)

[Viewing the job instructions for an incoming third party job](#)

Assigning and configuring a workflow for an incoming third party job

On occasion, incoming jobs do not have the information necessary for processing, and you will need to assign a workflow.

Choose a workflow...: This option allows you to select a workflow from the drop box.

To assign and configure a workflow for an incoming third party job



1. In Workflow Job Manager, from the Jobs list, select a job with “Attention Required” in the Status column.
2. Choose a workflow from the **Choose a workflow...** drop box.

NOTE: *When you select a workflow, the JDF job intents are matched as closely as possible to the workflow settings. If the settings are locked or not available, the workflow defaults are applied.*

3. To configure process settings for the workflow, select a workflow step and select [**Settings...**].
4. Make the desired changes and select [**OK**].
5. Continue configuring the job if files have not been selected, or select [**Approve**] to release the job for processing.



NOTE: *[Approve] is available if a workflow has been assigned and files have been selected. If [Approve] is grayed out, you must complete the job configuration.*

See also:

[Managing jobs from third party management information systems \(MIS\)](#)

Selecting files for an incoming third party job

On occasion, incoming jobs do not have the information necessary for processing, and you will need to select files for a workflow.

Select Files...: This option opens a common file dialog for selecting input files. If files have been selected, they are listed beneath the button instead of the default statement: “No files are currently associated with this job”.

To select files for an incoming third party job



1. In Workflow Job Manager, from the Jobs list, select a job with “Attention Required” in the Status column.

2. Select [**Select Files...**].

NOTE: *If files have been selected previously, they are listed beneath the button.*

3. In the Open dialog, select the files to add to the job, and then select [**Open**].



NOTE: *The same file types that are supported in Workflow Submission Client are available.*

4. Continue configuring the job if a workflow has not been assigned, or select [**Approve**] to release the job for processing.



NOTE: *[Approve] is available if a workflow has been assigned and files have been selected. If [Approve] is grayed out, you must complete the job configuration.*

See also:

[Managing jobs from third party management information systems \(MIS\)](#)

Viewing the JDF file for an incoming third party job

On occasion, incoming third party jobs do not have the information necessary for processing, and you will need to review the JDF file submitted with the job.

View JDF: This option is available if a JDF file was submitted with the job. It opens the JDF file in a separate window.

To view the JDF file for an incoming third party job



1. In Workflow Job Manager, from the Jobs list, select a job with “Attention Required” in the Status column.
2. Select **[View JDF]** to display the JDF file in a separate dialog. If desired, keep the window open while you configure the job in other dialogs, and then close the window.

See also:

[Managing jobs from third party management information systems \(MIS\)](#)

Viewing the job instructions for an incoming third party job

On occasion, incoming third party jobs do not have the information necessary for processing, and you will need to review the job instructions submitted with the job.

View Job Instructions: This option is available if a job instructions file was submitted with the job. It opens the file with Adobe Reader in a separate window.

To view the job instructions for an incoming third party job



1. In Workflow Job Manager, from the Jobs list, select a job with “Attention Required” in the Status column.
2. Select [**View Job Instructions**] to display the job instructions in a separate dialog. If desired, keep the window open while you configure the job in other dialogs, and then close the window.

See also:

[Managing jobs from third party management information systems \(MIS\)](#)

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