Adaptive Print Studio 1.2

User Manual

Editing Documents with Sitecore Adaptive Print Studio Center

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Chapter 1

Introduction

The Adaptive Print Studio (APS) User Manual is designed to give APS users the information they need to perform their day to day tasks in APS. This manual is primarily aimed to introduce new users to the tools APS contains. It explains the basics for those users who work with the APS tools.

This document contains:

- **Chapter 1 - Introduction**

  This chapter is a description of the content, aims and the intended audience of this manual.

- **Chapter 2 - Print Studio Center**

  An introduction to the central Adaptive Print Studio application from which you can start the other applications.

- **Chapter 3 - Managing Content in Media Manager**

  Step by step instructions for managing folders, files and images in the Media Manager.

- **Chapter 4 - Managing Documents in Print Studio Explorer**

  Step by step instructions for managing projects, documents and pages in Print Studio Explorer.

- **Chapter 5 - Managing Documents in Print Studio Editor**

  Step by step instructions for editing document pages for printing, using centrally stored contents of the Sitecore CMS.

- **Chapter 6 - Handling Workflows**

  Step by step instructions for working with workflows in both the Media Manager and Print Studio Explorer.

Chapter 2

Print Studio Center

The Print Studio Center is the central Adaptive Print Studio application. After you are logged in Print Studio Center you can start the other applications.
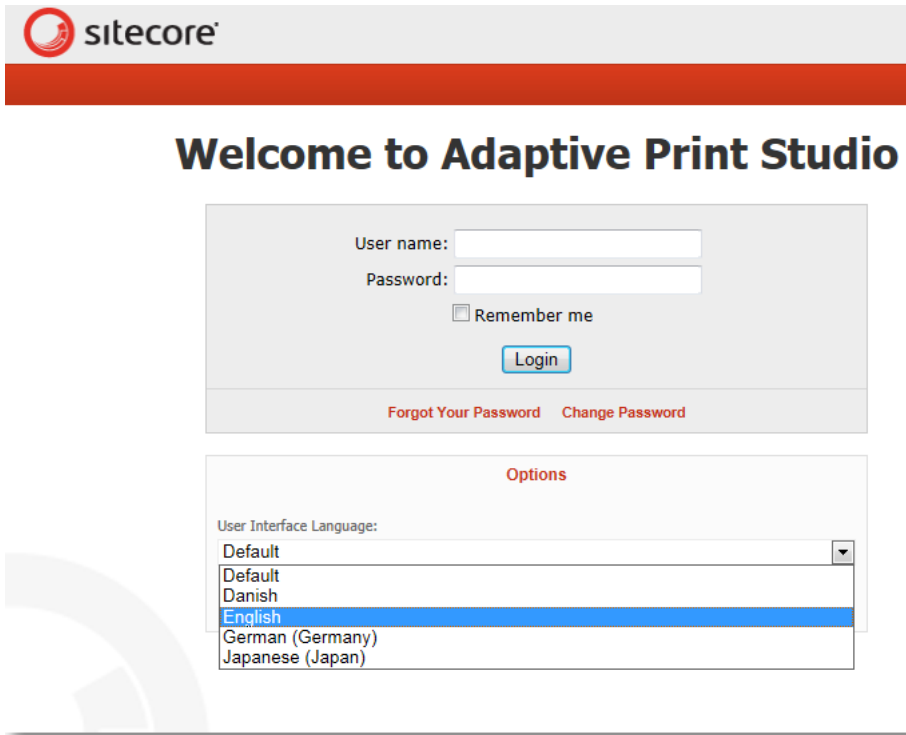
This chapter contains the following sections:

- Logging in

- Print Studio Center

2.1   Logging in

You must log in to APS before you can edit any of the content. To log in to APS:

1. Ask your system administrator for the (web) address and user data. Start the Print Studio Center with the provided (web) address in the browser. The login page appears:

2. Enter your user name and password. Select the Language In the User Interface Language drop-down box. Click **Login**. The software starts loading in the browser and when ready, the Print Studio Center is shown.

2.2 Print Studio Center

The Print Studio Center desktop shows the available applications and the name of the logged-in user. The full name of the logged-in user (and the user name between brackets) is shown in the top right corner. Next to the user name you find the **Log off** button.
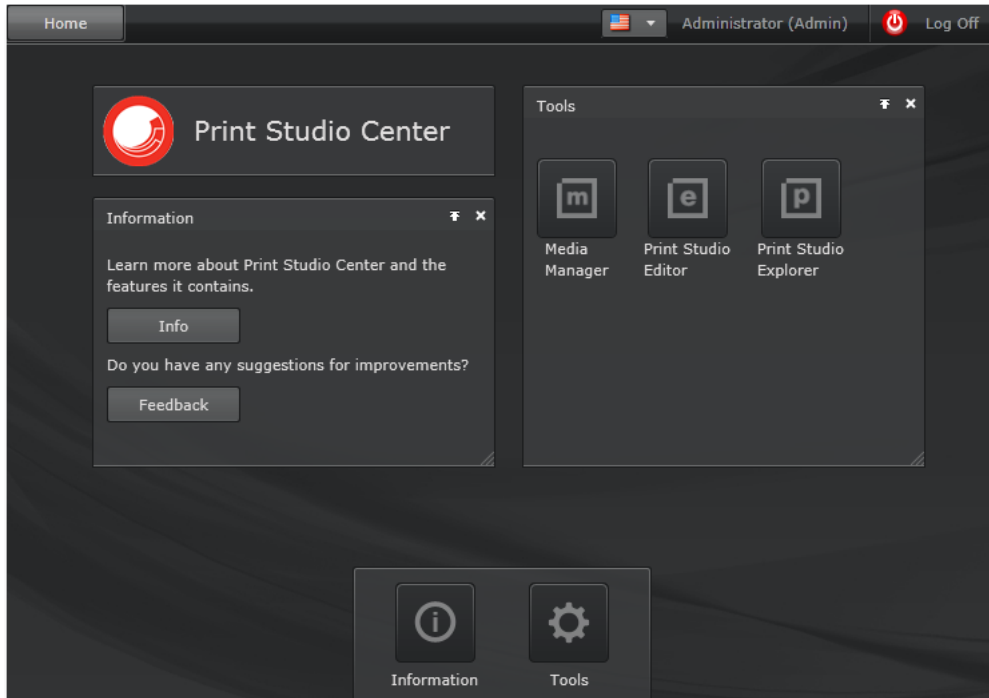
When you open an application, a tab is added in the bar at the top of the desktop. To move between applications, click the tab of the application that you want to use. Click **Home** to go to the Print Studio Desktop.
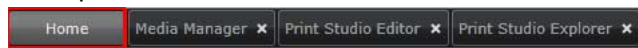
Note

If you close APS without logging out, you may cause problems for other users. According to the number of licenses available, only a certain number of users can be logged in at the same time. Other users may not be able to log in before you have logged out.

Information Panel
The **Information** panel contains general information:

- Click **Info** to open, for example, the website of Adaptive Print Studio, where additional information can be found on Adaptive Print Studio Software.

- Click **Feedback** to open the default e-mail application to send feedback.
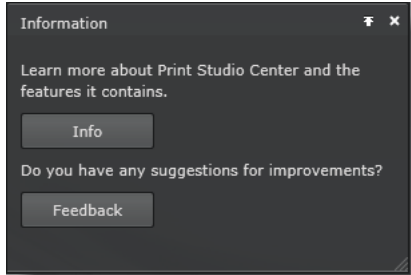
Tools panel
The **Tools panel** displays all available applications. Click the button to start the application.

Chapter 3

Managing Content in Media Manager

This chapter introduces the Media Manager and its functionality. It contains detailed descriptions on how to work with files in the Media Manager. There are descriptions on how to upload, download, and convert files. There are also detailed instructions on how to edit images in the Media Manager.

This chapter contains the following sections:

- The Media Manager

- Creating a Folder Structure in Media Manager

- Uploading Files in Media Manager

- Downloading Files in Media Manager

- Converting Files in Media Manager

- Copying, Cutting, and Pasting Files in Media Manager

- Editing Images in Media Manager

- Searching for Files in Media Manager

- Refreshing the Content Tree in Media Manager

3.1 The Media Manager

The main screen shows the ribbon, the content tree to the left, and selected file information on the right.
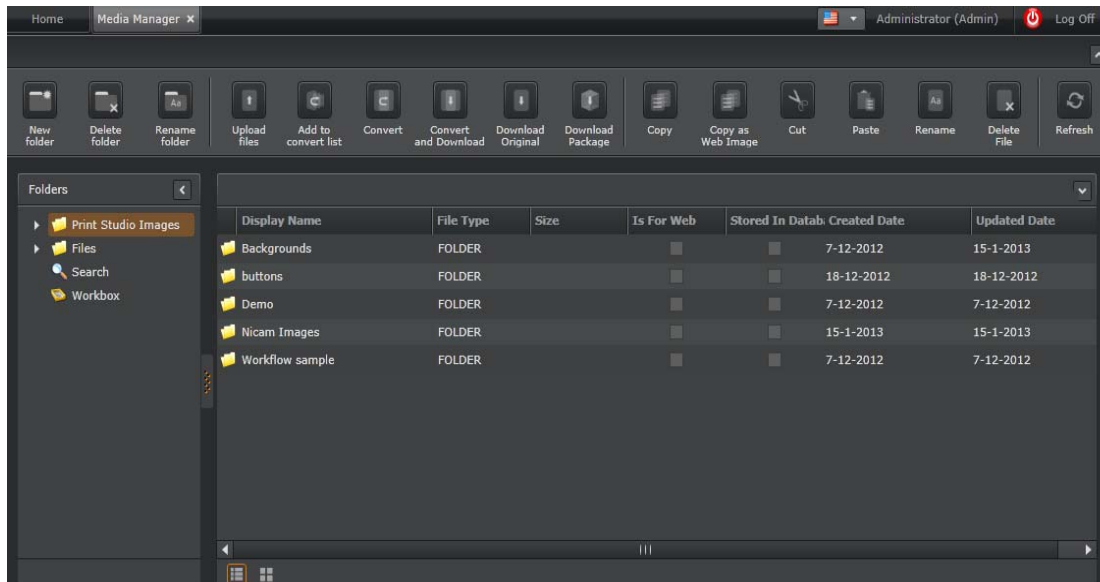
Tip

If you need to see more of the item that you are editing, you can gain some space by expanding the browser interface to full screen mode. To enable full screen mode, press F11.

3.1.1 Language Selection

The Media Manager uploads images and files unversioned and shared. The metadata on the other hand is editable per language. In the Media Manager, the current language is indicated by the flag at the top of the window. To see a list of all the available languages, click the drop-down arrow.You can click the desired language for adding metadata in the top right corner.

Note

Unversioned means that the value of the field is shared across all versions. Shared means that the value of the field is shared across all language versions.

3.1.2 The Ribbon

The commands of the Media Manager ribbon are listed in the following screenshots and lists.

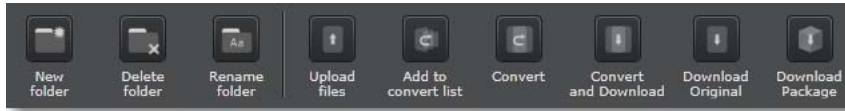| Command	Descriptions
New folder	Create a new folder.
Delete folder	Delete the selected folder from the content tree.
Rename folder	Rename the selected folder in the content tree.
Upload files	Lets you browse your computer and upload media files to the Media Manager.
Add to convert list	Adds files to the conversion list. In the Media Manager, you can convert files from one type to another.
Convert	Start the conversion of the files that are on the convert list.
Convert and Download	Converts and downloads files that are added with their original file.
Download Original	You can apply two options for downloading files from Media Manager: you can download the original file or download the package (contains the original and the converted file).
Download Package	Downloads both the original and the converted file.

The third and fourth group of commands on the ribbon hold the standard commands of copying, pasting, cutting, renaming, deleting, and refreshing.

Command	Descriptions
Copy/Cut/Paste	To copy/cut/paste items from the tree.
Copy as Web image	Copy selected file in tree and prepare it for editing (web).
Rename	Rename item in the tree.
Delete File	Delete item from the tree.
Refresh	Refresh the tree to show the actual situation.

3.1.3 Content Tree Structure

The content tree in the Media Manager lists all items. The APS content trees have a similar structure to the one used in Windows Explorer.
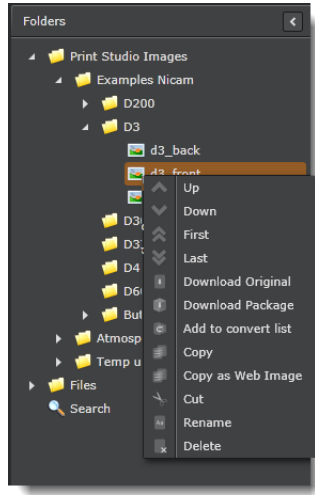
The content tree lists all the folders and files. Right-click an item in the content tree and in the shortcut menu, you can see a list of the commands that you can use on this item.

Tip
Most of the commands in the ribbon are also available in the context menu that appears when you right-click the item in the content tree.

The content tree is shown when you start Media Manager.Toggle between open and collapsed content tree by clicking the arrow.
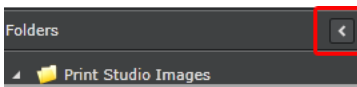
Click the arrow to open the content tree again. To widen or narrow the content tree panel, drag the scroll bar to the right or left.

3.1.4 Field Structure

The file information or thumbnails (depending on the view) are shown in the right side of the screen. When you click a folder in the content tree the thumbnails for that folder are displayed.To change the view:

To change the view:

1. Click **Grid** to view file information per file listed.

Display Name	File Type	Size	Is For Web	Stored In Datab
d200_back	.jpg	0.05 MB		
d200_front	.jpg	0.12 MB		
d200_front_1	.jpg	0.11 MB		
d200_top	.jpg	0.04 MB		

2. Click **Thumbs** to view file information in thumbnails.

d200_back	d200_front	d200_front_1	d200_top
511 x 400	686 x 596	686 x 596	397 x 388
0.05 MB	0.12 MB	0.11 MB	0.04 MB
1/19/2012	1/19/2012	1/19/2012	1/19/2012

3.1.5   Item Name and Display Name

Sitecore distinguishes between item name and display name:

- **Item Name** — name for content items. Sitecore does not support special characters in the item name.
- **Display Name** — alternate descriptive name for content items. If provided the display name overrides the display of the item's name.

Note
Special characters such as ; | * in both item name and display name are not supported.

Display names are useful:

- When working with different languages. The display name allows you to work with language specific display names.
- For situations where the name of a content item is insufficiently descriptive for the developer or content author..

Note
By default, the Adaptive Print Studio Center shows the **display names** of content items.

3.2 Creating a Folder Structure in Media Manager

When system administrators configure the Media Manager, they create a root folder. For example, the *Print Studio Images* folder is the root folder for images, and *Files* is the root folder for all other media files. You can create the folder structure that you need below the root folder. Depending on your access rights (set by administrator), you can create, rename, delete, and reorder folders.

3.2.1 Creating a Folder

To create a folder:

1. Click **New folder**.
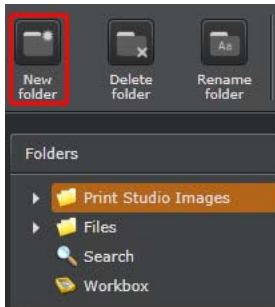
2. In the **Create Folder** dialog box you can enter both the folder name and the display name. When you fill in the display name, this name will be used for the new folder. Using display names can be convenient for example when you work with different languages. Give the folder a suitable name and click **Save**.
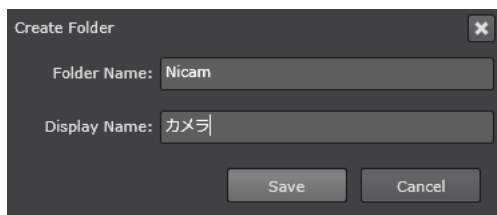
Note
Special characters such as ; | * in both item name and display name are not supported.

3.2.2 Renaming a Folder

To rename a folder:

1. In the content tree, select the folder that you want to rename.

2. Click **Rename folder**.

3. In the **Rename Folder** dialog box, you can change both the folder name and the display name of the folder.

3.2.3 Copying, Cutting, and Pasting Folders

You can cut, past, move, or copy folders to other locations in the content tree. You can use the buttons in the ribbon or use the context menu after right-clicking.
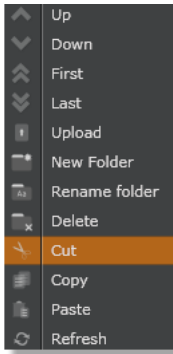
3.2.4 Changing Position of Folders or Files

You can sort folders, child folders, and files to get the required structure in the content tree. The context menu shows four buttons that help you change the position of a folder.

- **Up** — move one position up.
- **Down** — move one position down.
- **First** — move the folder or file to the first position.
- **Last** — move the folder or file to the last position.

To change the position of a folder, navigate to the folder in the content tree:

1. Right-click the folder.
2. Create the structure you need by using the position change item in the context menu.
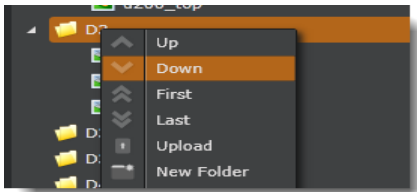
3.3 Uploading Files in Media Manager

You can upload files to folders according to your access rights and the selected processing jobs. The administrator sets these access rights and will prepare the available processing jobs. Depending on the processing jobs created by the administrator, you can upload different kinds of media files. The Media Manager can support the following images and media files:

- Images: `JPG, TIFF, PSD,` and `EPS`.

- Media files: `.doc, .docx, .zip, .exe, .indd, .html, .xml, .swf, .wmf, .wma.,` and `.avi, .mp3, .pdf, .wmv`.

When you upload files to the Media Manager, you must select the files that you want to upload and decide whether or not you want to add the metadata for each file. You must also decide whether or not you want to overwrite any existing files and what processing job you want to use.
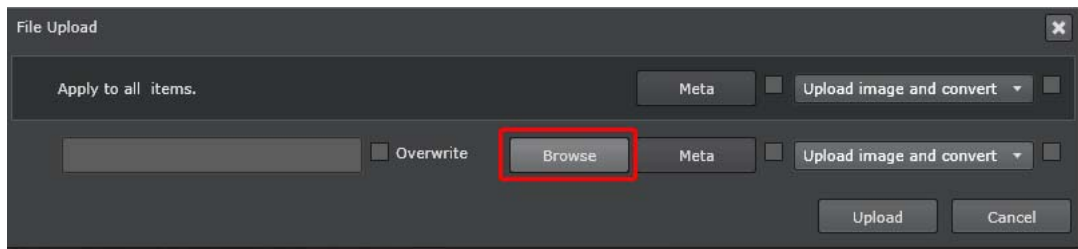
To select the files that you want to upload:

1. In the content tree, click the folder from the content tree to which the files must be uploaded.

2. Click **Upload files** to make the **File Upload** dialog box appear.

3. Click **Browse** to select the file you want upload, click the required file and click **Open**.

4. The selected file is added to the **File Upload** dialog box. You can repeat this procedure to add more files to the **File Upload** dialog box.

Note

The maximum number of files per upload batch is fifteen by default. You will receive a warning message when you are about to exceed the maximum number of files set by your administrator.

Before you upload the media file(s) by clicking **Upload**, you can make several choices in the **File Upload** dialog box.

Adding Metadata

In APS you can add specific information for files that makes revision and tracing easy. One benefit of using metadata is the association of each file with data in a series of fields that are relevant to your situation. You can keep track of creation date, revision date, the name of the person revising the object, and so on. Another benefit is that metadata facilitates search and retrieval.
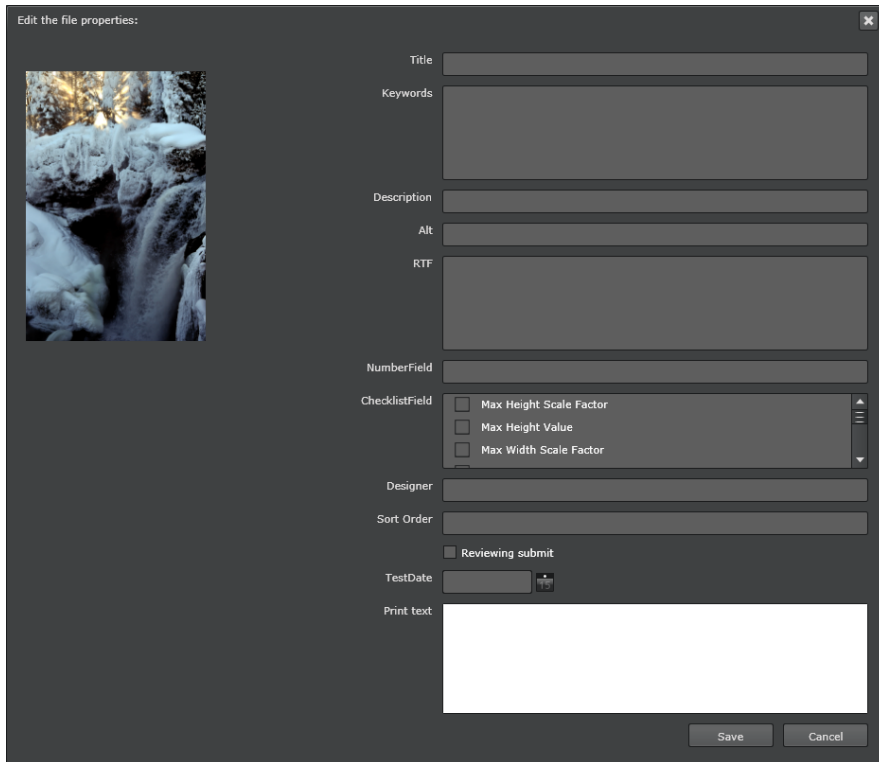
1. To add metadata to all the files, select the **Apply to all items** Meta check box:
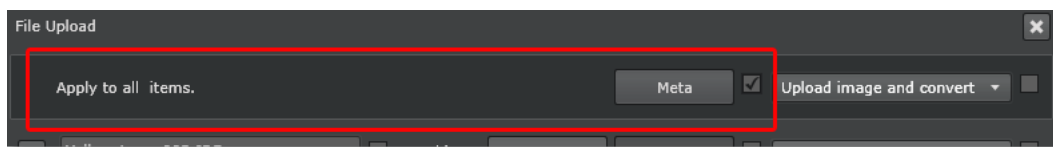
2. To add metadata per file, select the check box for the specific files:

3. After you have selected the fields that you want to add metadata to, click **Meta** and in the dialog box enter the information for the image(s) in the content field.

Selecting Processing Job

The Media Manager uses so-called processing jobs for uploading, converting, and downloading files. Processing jobs are lists created in branches containing actions that are processed when you upload, download, or convert one or more files. The administrator creates the different processing jobs that are available for uploading files.

To select the processing job:

1. Select the check box to the right to see all the jobs that are available. When you select a processing job, the ToolTip shows which files are allowed for uploading and which actions are
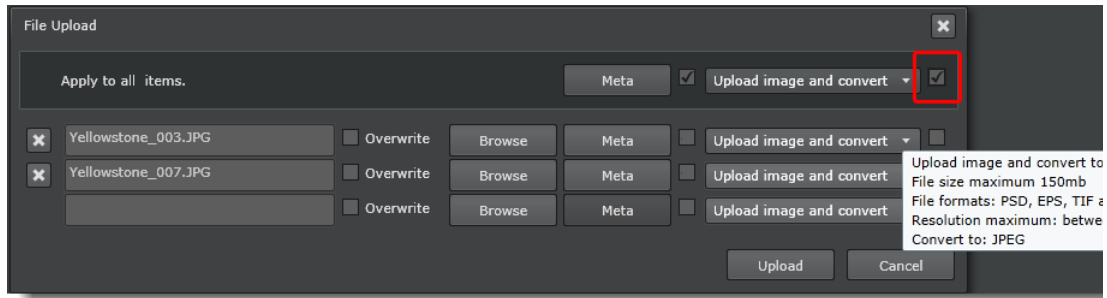
processed.

Note
If you do not select a processing job, the first available on the list is selected.

Setting Overwrite Option

If you want to upload a file with the same name, you must decide whether to rename the file you are uploading or overwrite the existing file. To automatically rename the file, leave the **Overwrite** check box cleared: the file with a name that already exists in the selected folder will be renamed automatically, with an added _1 (or a higher number) as last part of the name. When an existing file must be overwritten with the new uploaded file, be sure to *select* the Overwrite check box.
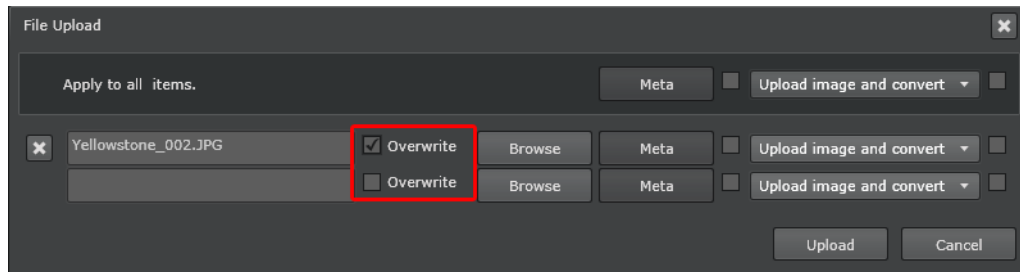
Note
When the file is overwritten, all documents and items with a reference to that file will be updated to the new uploaded file.

1. Click **Upload** to start uploading the files, and a general message appears.
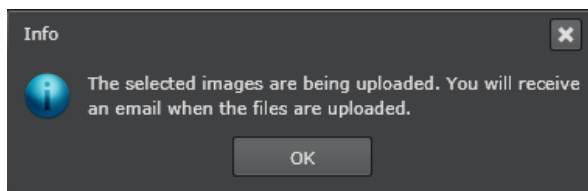
2. When the file is uploaded, an e-mail message is sent with information about the uploading process.

Dear Admin,

The uploading of images is finished. According to the results below images are now available.

Print Studio Image management uploading list:

- File_CMYK200.jpg - Conversion successful!

Note
The system administrator can modify the standard text of e-mail messages.

3.4 Downloading Files in Media Manager

When you download files from the Media Manager, there are two options: you can download the original file or download the package (contains the original and the converted file).

3.4.1 Downloading Original File

To download the original file:

1. In Media Manager, in the content tree, select the file.

2. Click **Download Original** and the **Download Files** dialog box appears.

3. Click the link in the **Download Files** dialog box.
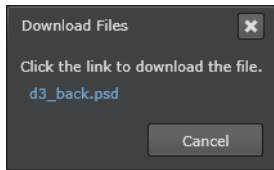
4. Click **Save**.

5. Click the required location to store the file and click **Save**.

3.4.2 Downloading the Original and the Converted file

To download both the original and the converted file:

1. In Media Manager, click the required file in the content tree.

2. Click **Download Package** and the **Download Files** dialog box appears.

3. Click the link in the **Download Files** dialog box.

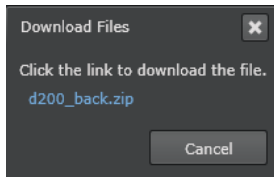4. Click **Save**.

5. Click the required location to store the file in the system and click **Save**.

3.5 Converting Files in Media Manager

In the Media Manager, you can convert files from one file type to another and keep the original at the same time.

To convert a file:

1. Navigate to the file that needs to be converted.

2. Click **Add to convert list**.

3. Repeat this procedure to add more files to the **Convert** list. That can be done from any folder in the content tree.

Note
Only files that have their high resolution originals referenced and stored on the file server can be used for Convert and Download.

Note
The maximum number of files per upload batch is fifteen by default. You will receive a warning message when you are about to exceed the maximum number of files set by your administrator.

4. Click the folder were the new converted files must be stored.

5. Click **Convert**, and the **Convert** dialog box with the added files is shown.
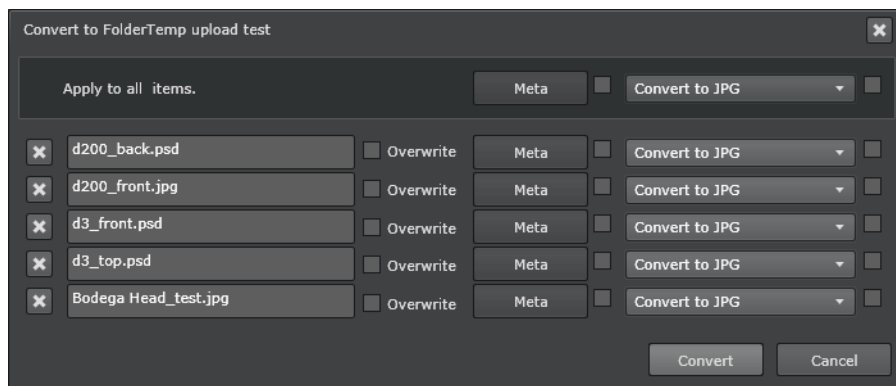
6. Click **Delete from list** to remove a file from the list.
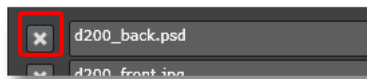
7. You can add metadata for all files or different data for each file. Select the **Apply to all items** Meta check box next the **Meta** button or select the Meta check box per file.

8. To add metadata (information) for files, select the appropriate check box and click **Meta**.

9. Enter the information in the dialog box that appears (the following screenshot shows the dialog box that appears when you choose to add meta data for separate files) and click **Save**.

Note
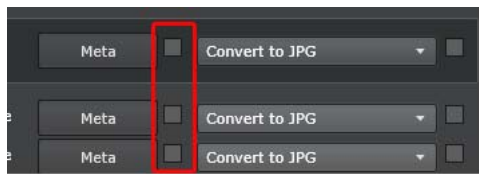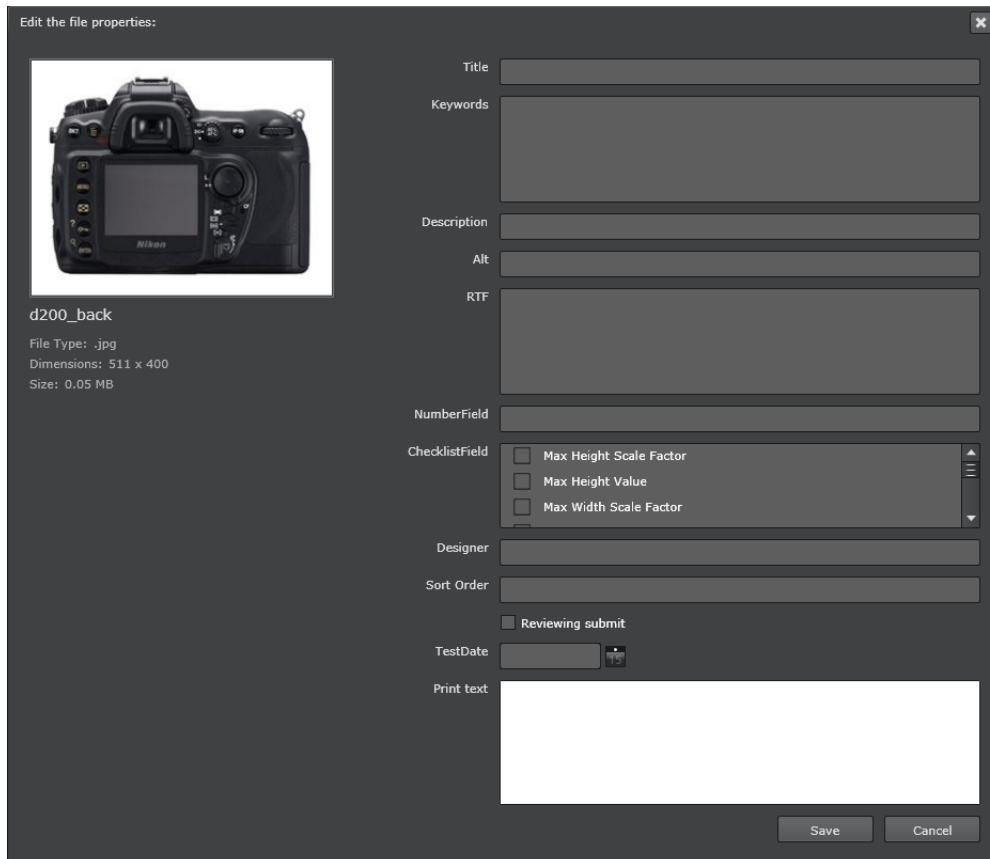If you choose to apply the metadata to all the items, no thumbnails are shown in the dialog box.

10. After you clicked **Save**, you will return in the **Convert To** dialog box. Click the appropriate processing job for the files that you want to convert. Again, this can be done for each separate file or for all files in the convert to dialog box. The following screenshot shows the Convert to JPG processing job selected for all items.
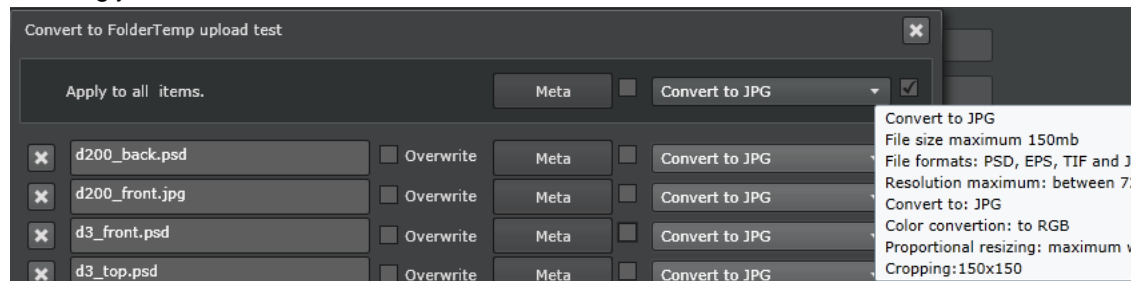
If you enable the processing jobs list and hover over a processing job, a ToolTip that contains the details of the specific processing job appears: the file types that are allowed for conversion and the converting actions that are processed. In the following example, the items on the conversion list of file type PSD, EPS, TIFF, and JPG with a resolution set between 72 to 300 dpi are

converted to JPG files, using RGB colors, are proportionally resized to a maximum width of 350 pixels and cropped to 150 by 150 pixels.

```
Convert to JPG
File size maximum 150mb
File formats: PSD, EPS, TIF and JPG
Resolution maximum: between 72-300 dpi/ppi
Convert to: JPG
Color convertion: to RGB
Proportional resizing: maximum width 350 pixels
Cropping:150x150
```

11. After you select a processing job, click **Convert** to start converting the files. A general message appears.
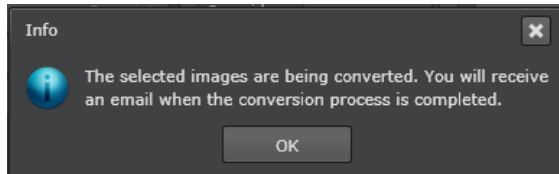
When the conversion is finished, an e-mail message is sent with information about the conversion process.

Dear Admin,

The uploading of images is finished. According to the results below images are now available.

Print Studio Image management uploading list:

- 000011552.jpg - Conversion successful!
- 000011552_1.jpg - Conversion successful!
- 000011553.jpg - Conversion successful!
- 217643_1.jpg - Conversion successful!

Note
Your administrator can modify the text in the e-mail messages.

3.5.1 Converting and Downloading Files

You can convert and download files in the Media Manager.

To convert and download a file:

1. In the Media Manager, in the content tree, select the file that you want to convert or download from the content tree.

2. Click **Add to convert list**.

3. Repeat this procedure to add more files.

Note
Only files that have their high resolution originals referenced and stored on the file server can be used for Convert/Convert and Download.
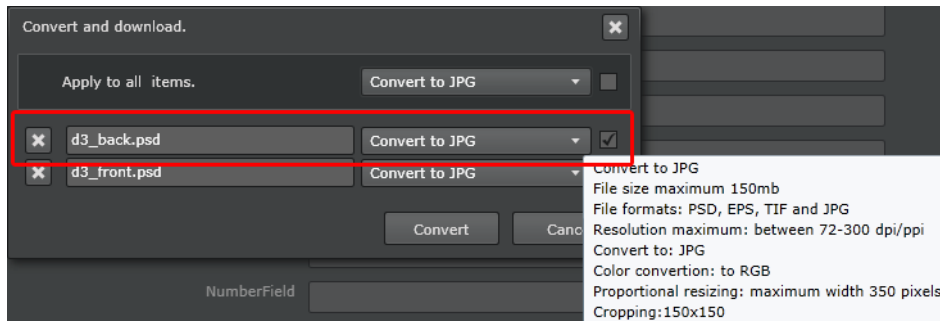
Note
The maximum number of files per upload batch is fifteen by default. You will receive a warning message when you are about to exceed the maximum number of files set by your administrator.

4. Click **Convert and Download**, and the **Convert and Download** dialog box with the added files is shown.
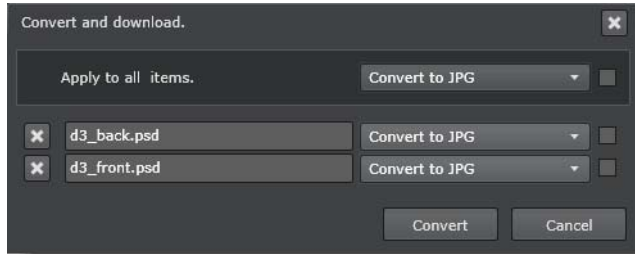
5. Click **Delete from list** to remove a file from the list.

6. Click the processing list for all items or per item.
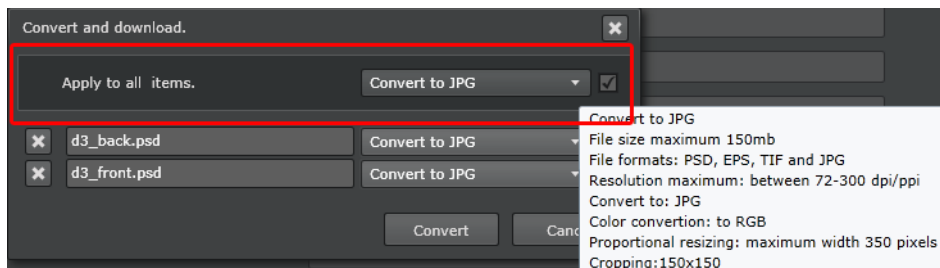
Note
When you click a processing job or when you point the mouse at it in the selection field, the ToolTip shows which files are allowed for conversion and which actions are processed.

Note
When you have not selected a processing job (in the right of the screen) standard, the first available list is selected. According to the converting actions from this list, the files are converted.

7. Click **Convert** to start converting of the files, and a general message is shown.
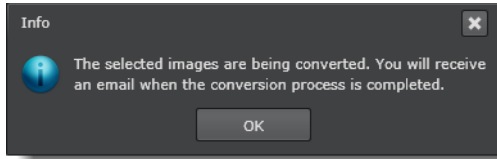
8. When the conversion is finished, an e-mail message is sent with information about the conversion process. You can download the ".zip" file with the use of the link in the e-mail message. The .zip file contains the converted files.

Note
Text in e-mail messages can be modified in Sitecore by your system administrator.

3.6 Copying, Cutting, and Pasting Files in Media Manager

You can move or copy uploaded files to other folders in the content tree. The following image shows the buttons to use for this.
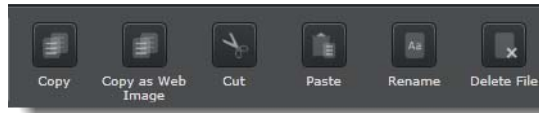
Command	Description
Copy/Cut/Paste/ Rename/	Copy/cut/paste/rename the selected file in the content tree.
Copy as web image	Copy selected file in content tree and prepare it for editing (web).
Delete File	Cut selected file in content tree.
Paste	Paste copied or cut file into selected folder.

3.6.1 Copying an Item to another Location

To copy and paste items, locate the item that you want to copy in the content tree:

1. Click **Copy**.

2. Navigate to the location that you want to copy the item to (if this location is the same folder, the file is renamed automatically). Click **Paste**.

3. The file is pasted into the selected folder and renamed with an added _1 (or a higher number) as last part of the name) when the filename already exist in the selected folder.

3.6.2 Copying as Web Image to another Location

To copy and paste web images, locate the item that you want to copy in the content tree:

1. Click **Copy as Web Image**.

2. Navigate to the location that you want to copy the item to (if this location is the same folder, the file is renamed automatically). Click **Paste**.

3. The file is pasted into the selected folder and renamed with an added _1 (or a higher number) as last part of the name when the filename already exist in the selected folder.

3.6.3 Cutting an Item and Pasting to another Location

To cut files and paste, locate the item that you want to cut in the content tree:

1. Click **Cut**.

2. Click the destination folder into which the cut file must be pasted (can not be the folder from which it was cut. If that is the case, the action will be cancelled automatically). Click **Paste**.

3. The file is pasted into the selected folder and renamed with an added _1 (or a higher number) as last part of the name) when the filename already exist in the selected folder.

3.7 Editing Images in Media Manager

3.7.1 Renaming Images

You can rename uploaded or copied files if you have the appropriate rights.To rename a file:

1. Click the required file from a folder in the content tree.

2. Click **Rename**.

3. The **Rename File** dialog box appears.

4. Change the name and click **Save**.

Note
Special characters such as ; | * in both item name and display name are not supported.

3.7.2 Deleting Images

Content authors must delete items and content from time to time. This is a simple task in the Media Manager.

To delete an item, locate the item that you want to delete in the content tree:

1. Click **Delete File**.

2. The **Delete Items** dialog box is shown. Click **OK**.
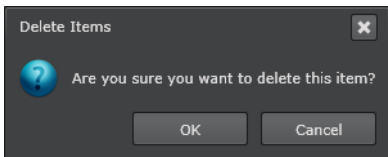
Note
In the configuration, your administrator can enable warning messages that alert you when you delete a file that is also used in other documents or pages.

3.7.3 Editing Web Images

You can edit images appropriate for web use with the **Image editor**. These images are:

- Uploaded web images with specific web processing list. Only images uploaded as type: db (database) can be edited.

- Converted web images with specific converting process list.

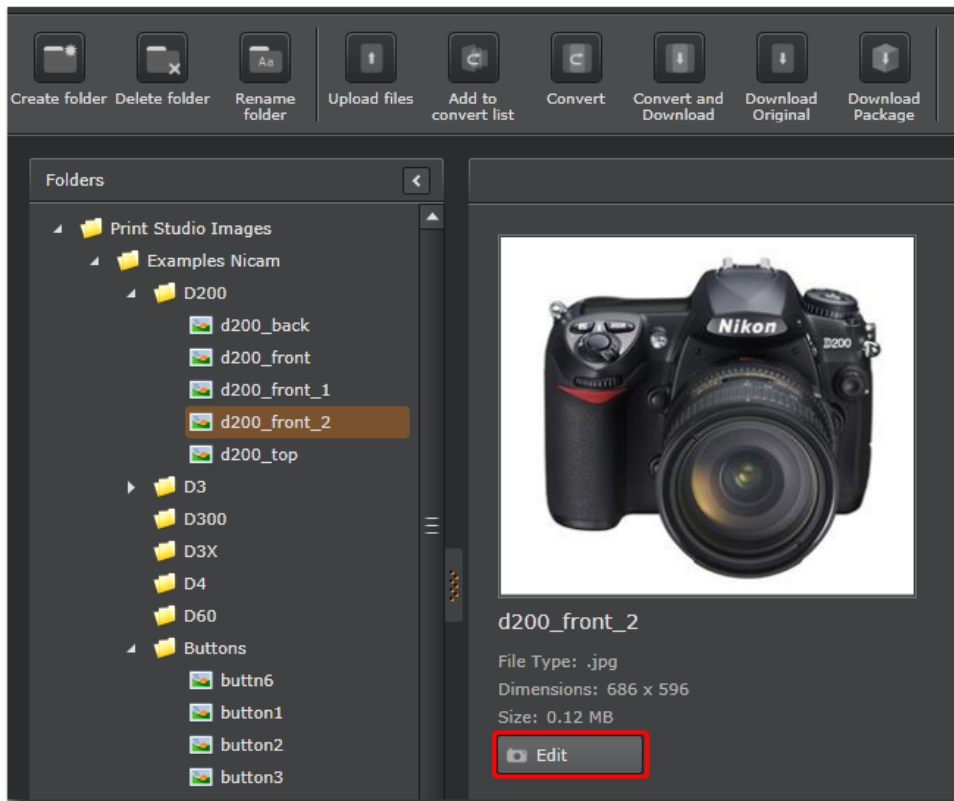- Images copied with **Copy as Web Image** button.

Only the (web) images that are available for editing have the **Edit** button below the thumbnail.

Note
Only images that are uploaded to the database can be edited.

To edit an image:

1. In the content tree, select the image and click **Edit** below the image.

2. Make the appropriate changes in the **Edit Image** dialog box. The following image is an example of an image In the **Edit Image** dialog box and its available tools.

3.8 Searching for Files in Media Manager

There is a search function associated with the content tree. This helps you find files quickly and can be particularly useful for extensive content trees.
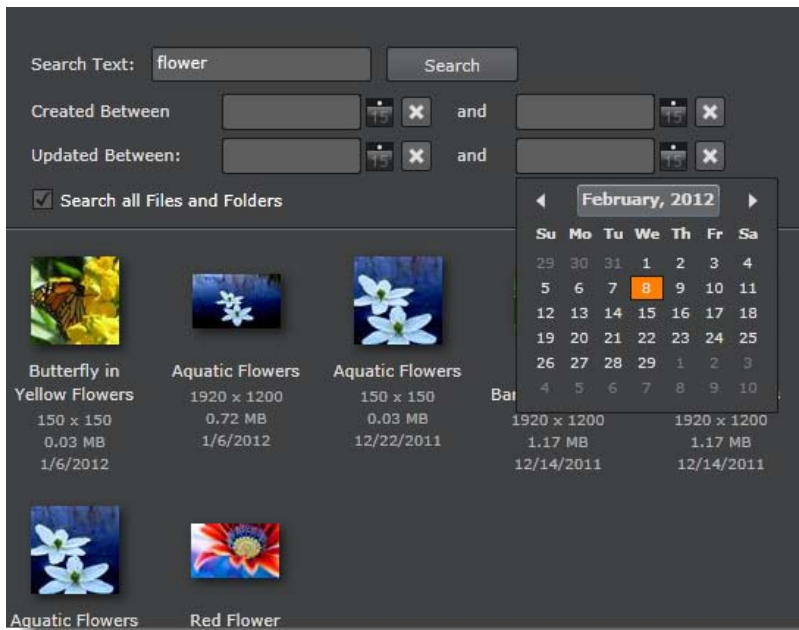
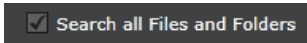To search for a file:

1. Click **Search**.

2. The **Search** panel is shown. Enter the keyword or description to search for. You can refine your search by entering extra criteria. You can search for items for a specific period of time by filling the
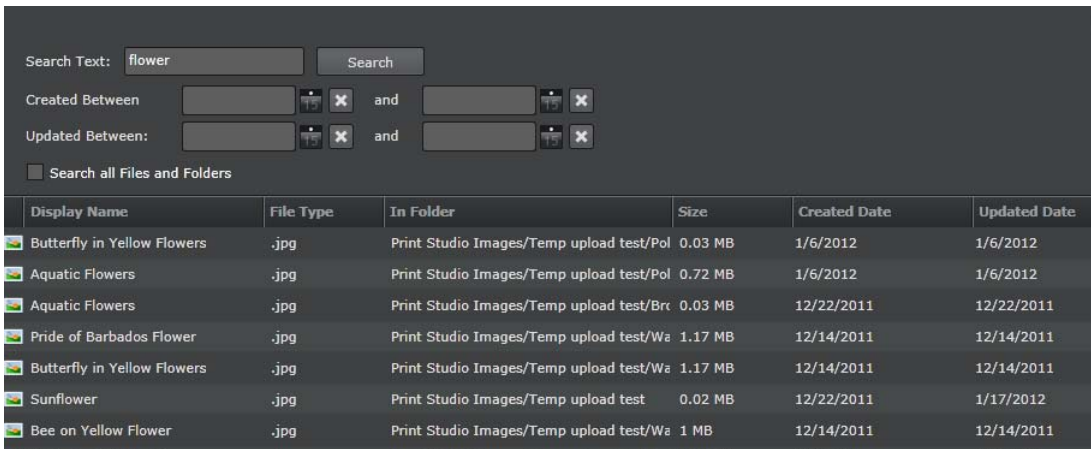
Created Between period or **Updated Between** period.

3. Click **Search**. The **Search all Files and Folders** check box is selected by default. Deselecting the **Search all Files and Folders** check box, makes the search function only search the selected folder in the content tree.

The results are displayed.

Display Name	File Type	In Folder	Size	Created Date	Updated Date
Butterfly in Yellow Flowers	.jpg	Print Studio Images/Temp upload test/Pol	0.03 MB	1/6/2012	1/6/2012
Aquatic Flowers	.jpg	Print Studio Images/Temp upload test/Pol	0.72 MB	1/6/2012	1/6/2012
Aquatic Flowers	.jpg	Print Studio Images/Temp upload test/Brc	0.03 MB	12/22/2011	12/22/2011
Pride of Barbados Flower	.jpg	Print Studio Images/Temp upload test/Wa	1.17 MB	12/14/2011	12/14/2011
Butterfly in Yellow Flowers	.jpg	Print Studio Images/Temp upload test/Wa	1.17 MB	12/14/2011	12/14/2011
Sunflower	.jpg	Print Studio Images/Temp upload test	0.02 MB	12/22/2011	1/17/2012
Bee on Yellow Flower	.jpg	Print Studio Images/Temp upload test/Wa	1 MB	12/14/2011	12/14/2011

3.9   Refreshing the Content Tree in Media Manager

When you change the tree structure, copy files or upload files, it may be necessary to refresh the screen to see the changes that you made.

To refresh the content tree:

1. Click **Refresh** to see the changes that you made.

Chapter 4

Managing Documents in Print Studio Explorer

This chapter describes how to use the Adaptive Print Studio Explorer application. It explains how to manage documents.

This chapter contains the following sections:

- Print Studio Explorer

- Working with Projects in Print Studio Explorer

- Working with Documents in Print Studio Explorer

- Working with Pages in Print Studio Explorer

4.1 Print Studio Explorer

The main screen of the Print Studio Explorer shows the tab **Projects**. The **Projects** tab shows the ribbon with the operating buttons, the tree structure on the left and the operating screen to the right.

Note
Users have access rights assigned and can use specific functionality according to their user and role settings. Contact your system administrator for more information.
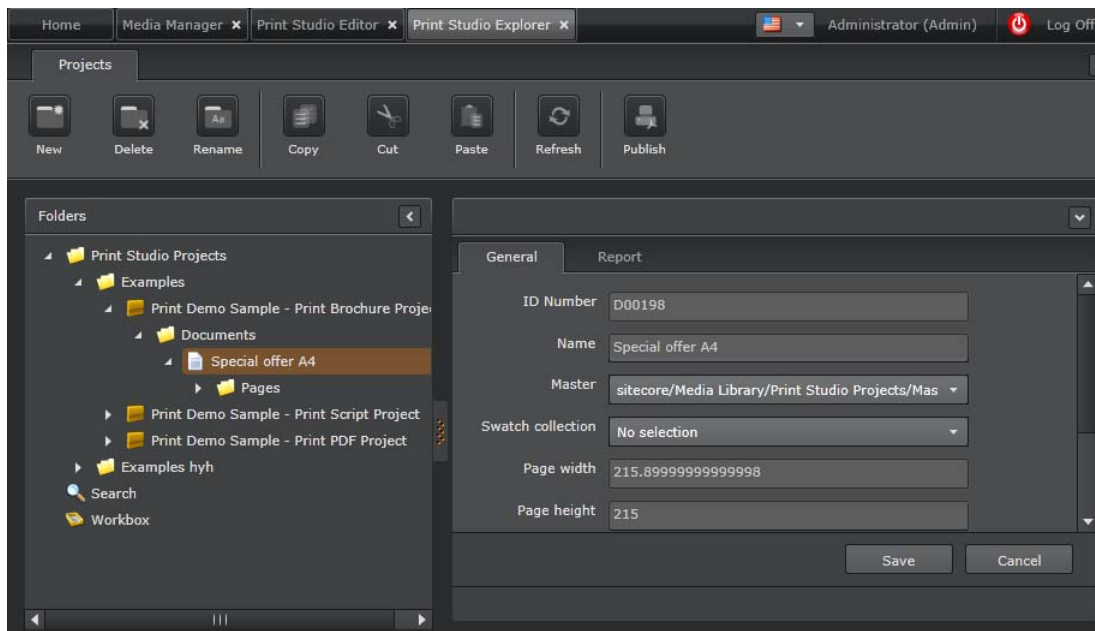
Tip
If you need to see more of the item that you are editing, you can gain some space by expanding the browser interface to full screen mode. To enable full screen mode, press F11.

4.1.1 Language Selection

In APS, you can create multiple language versions of any content item or media item. For example, you could create a page in English and then create other versions in Danish and Dutch. You can click the language of your choice in the top right corner.


4.1.2 The Ribbon

The ribbon gives you access to the operating buttons as shown in the following image. It is divided in different groups.
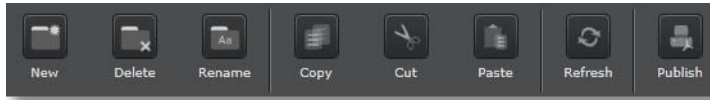
Command	Description
New	Create a new item. Depending on the selected level in the content tree, you can create a relevant item. For example: new project, new document, and new page.
Delete	Delete the selected item from the content tree.
Rename	Rename an item selected in the content tree.
Copy/Cut/Paste	Copy/cut and paste the selected item in content tree.
Refresh	Refresh the data and show the actual situation.
Publish	Generate a PDF or SWF (Flash) from the selected item in the content tree.

4.1.3   Content Tree Structure

The tree structure shows the root folder *Print Studio Projects* and all the projects it contains. You can see and modify the child folders, projects and child items depending on your access rights. You can select items in the content tree to load its properties and settings in the operating screen to the right.
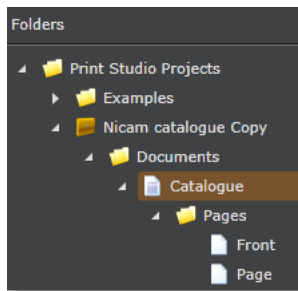

When you select an item in the tree structure, you may click the main bar buttons for functionality, or right-click to use the context menus.
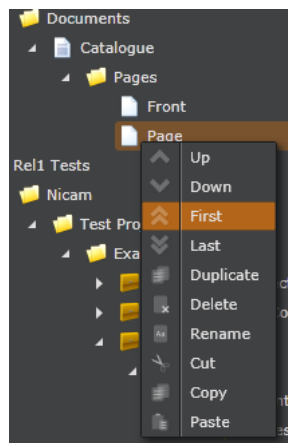
Tree Structure Hide/Show

When you start Print Studio Explorer, the content tree is shown. To hide the content tree, click the arrow once. To make the content tree shown again, click the arrow. To make the content tree wider and/or narrower, click and drag it to the right or left.
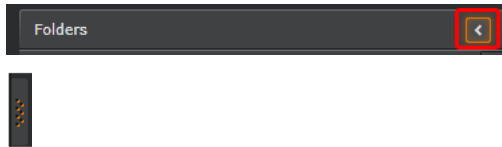
4.1.4 Searching

To activate the **Search** function, click the arrow (see the following image). The search panel gives access to entering and selecting search parameters. You can search using various keywords or by Name, Display name, and ID Number.
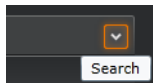
4.2 Working with Projects in Print Studio Explorer

The Print Studio Explorer **Projects** have a structure with base items (project, documents, and pages). You can add child items to these items, for example one or more documents and pages.

The example shows the following items:

- Project with folder documents.
- **Documents** folder containing documents.
- Document item containing the **Pages** folder.
- **Pages** folder containing pages.
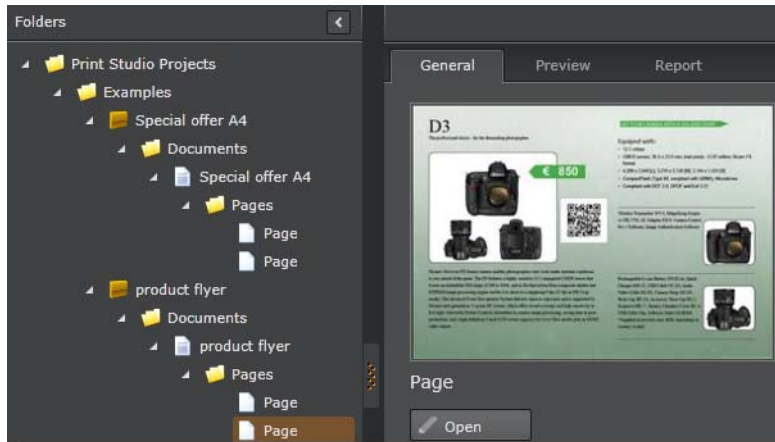
4.2.1 Finding Report Information

You can find report information on three different levels of the project structure: **Project**, **Document**, and **Page**. You find the workflow status in the **Report** tab. Click the image to show the snippets to which the images are referenced.

For example; the project is assigned to a workflow in two stages. The first stage is still in progress, and one image has been used twice in this project.
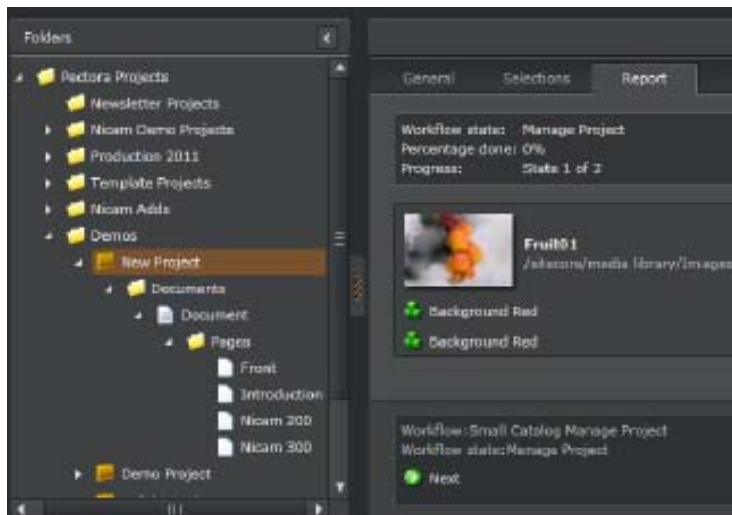
For example: the document is assigned to a workflow in two stages. The second stage has been completed, the documents are 100% complete, and one image has been used twice in this document.
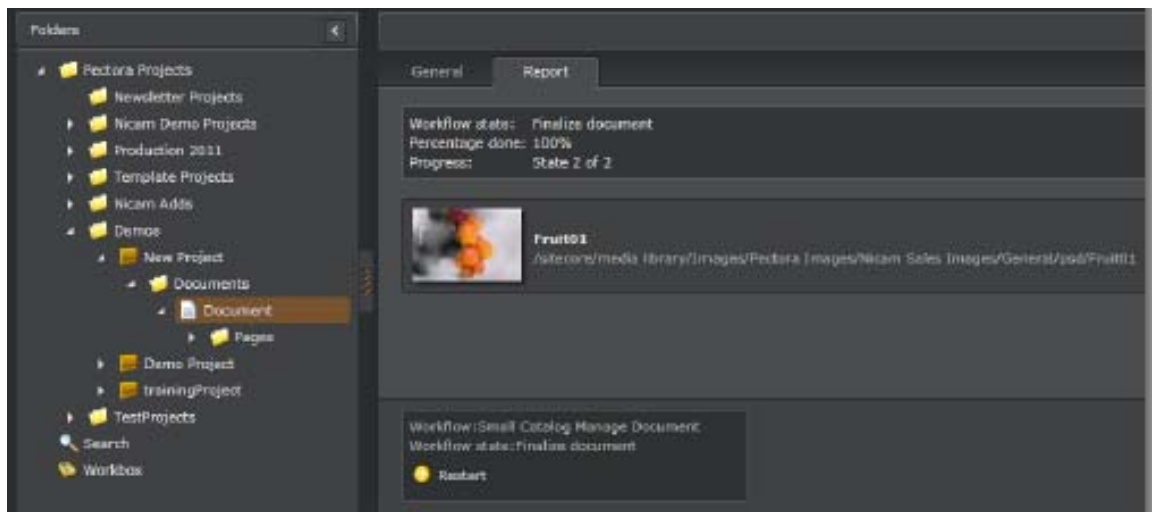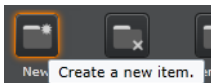

For example: the page is assigned to a workflow in three stages. The second stage is in progress, the page is 33,33% complete, and one image has been used twice on this page.
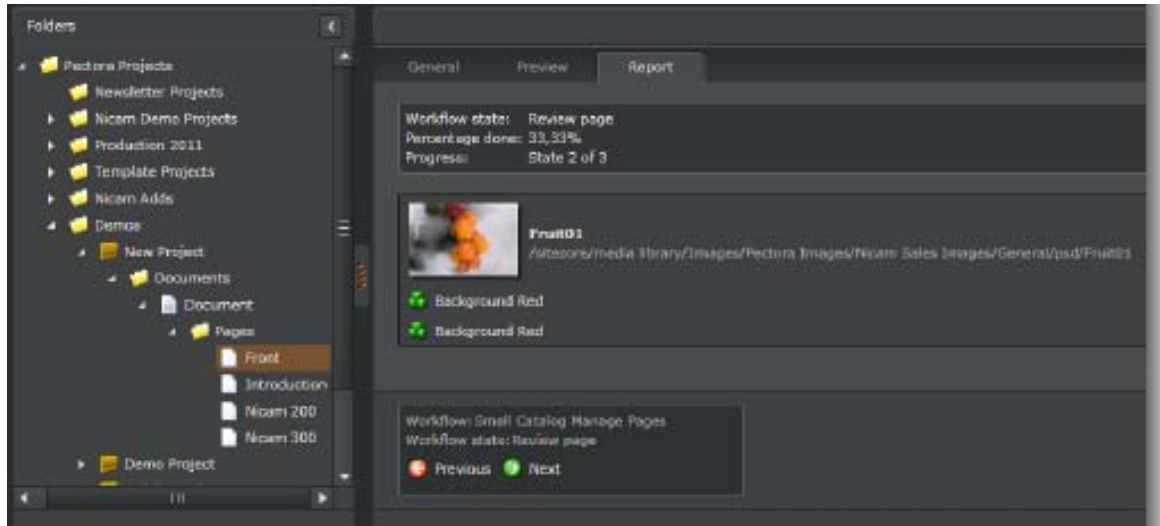
4.2.2   Creating a New Project

To create a new project:

1. Locate the folder to which the new project must be added to, and click **New**.


2. Enter the name of the project in the dialog box and click **Save**. The new project is created, and its properties are shown in the operating screen to the right.

3. Enter the description, start date/due date and the other settings (if necessary) that are required for the project.
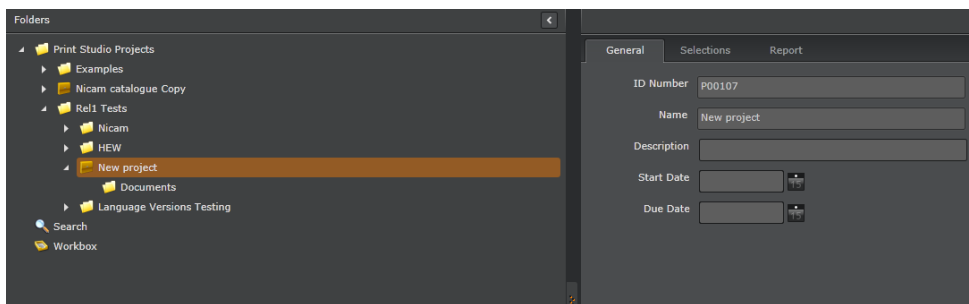
4. On the **Selections** tab, you can prepare the data selections for the creation of pages. Click the **Selections** tab.
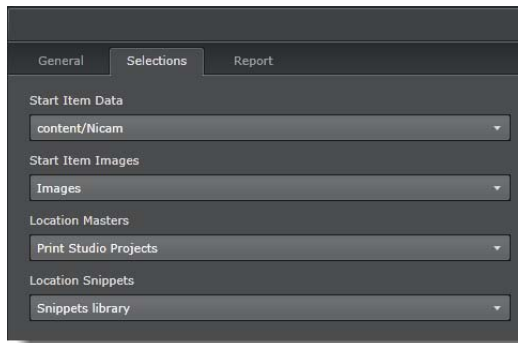
5. Click the following data:

   – **Start item data** — click the start level of the data structure.
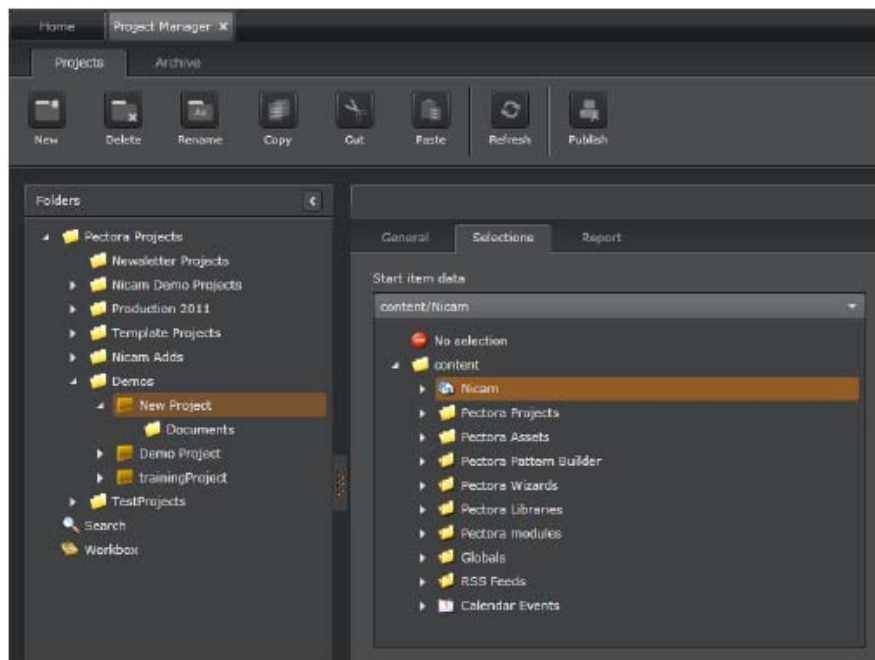
   – **Start item images** — click the start folder of the available images.

   – **Location masters** — click the start folder of the available masters.

   – **Location snippets** — click the start folder of the available snippets.

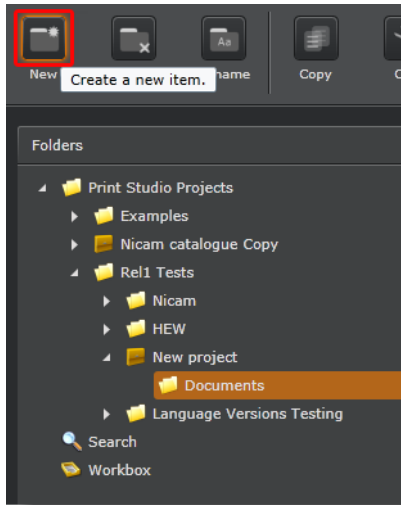6. Click **Save** to confirm your selections.

To edit the project settings:

1. Click the project in the content tree.

2. Modify the settings and save your changes.

4.3   Working with Documents in Print Studio Explorer

To create a document:

1. In Print Studio Explorer, navigate to the folder in which you want to create a new document and click **New**.

2. The **Create Document** dialog box appears. Enter the name of the document and click **Save**.

3. Find the document you added in the content tree. Select the master document in the **Master** field.

4. Select the swatch collection (defined in Sitecore).

5. Enter the start and due date.

6. Add a description, if required.

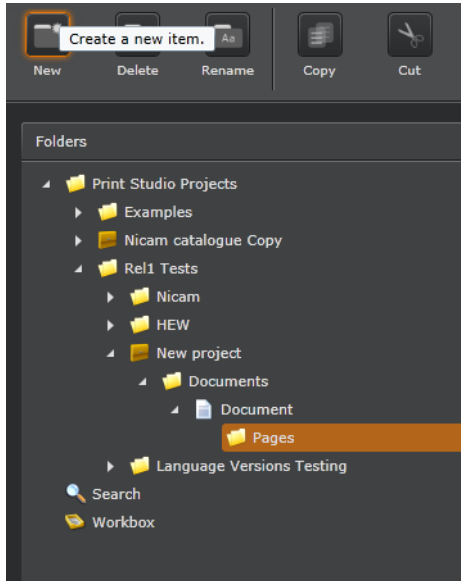7. Click **Save** to confirm the settings.

Note
Special characters such as ; | * in both item name and display name are not supported.

4.4 Working with Pages in Print Studio Explorer

4.4.1 Creating a Page
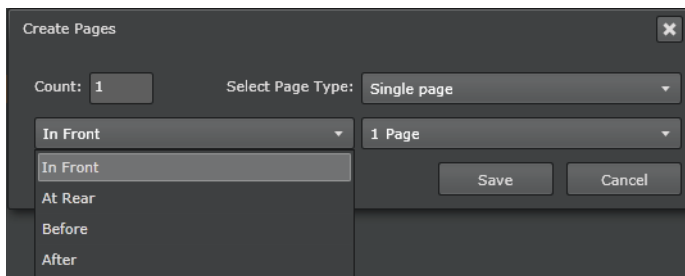
To create one or more pages

1. Click the **Pages** folder in the content tree.

2. Click **New**.

3. In the **Create pages** dialog box you can select the number of pages to add, the required **Page type**, and the position in the content tree where the page(s) need to be added.
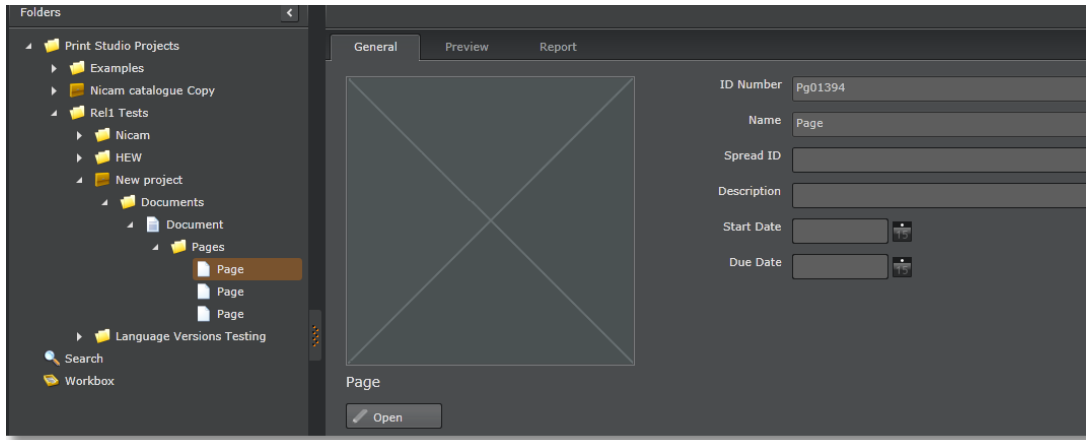
> **Note**
> The page types in **Select type** are branches defined in Sitecore. These branches can be modified in Sitecore.
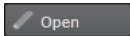

4. Click **Save** to create the page(s).

5. Click the required page(s) in the content tree.

6. Click **Open** to start the **Print Studio Editor** application, and the selected page is presented for editing.
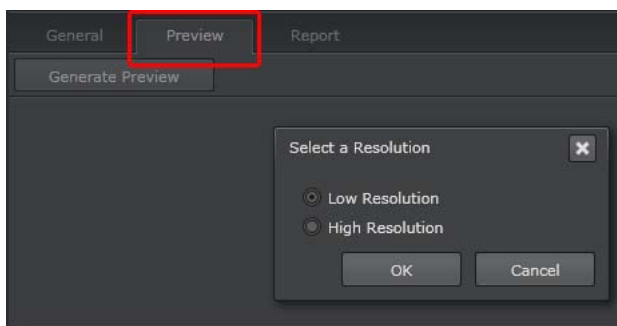

To modify page settings:

1. Click the page item in the content tree structure.

2. Make the appropriate changes in for example the description, start date and due date and click **Save** to confirm.

4.4.2   Previewing Pages

You can preview each page to make sure its formatting is correct.

To preview a page:

1. Click the **Page** item in the content tree.

2. Click the **Preview** tab.

3. Make sure you selected the appropriate language to the top right of the preview tab, if necessary.

4. Click **Generate Preview** and select the preferred resolution. **Low Resolution** will create a preview by referencing low resolution images (low res JPEG). **High Resolution** will create a preview by referencing high resolution images (high res JPEG, PSD, TIFF, or EPS).

5. Clicking **OK** generates the preview and shows the actual page. Use the zoom buttons to zoom in/ out.
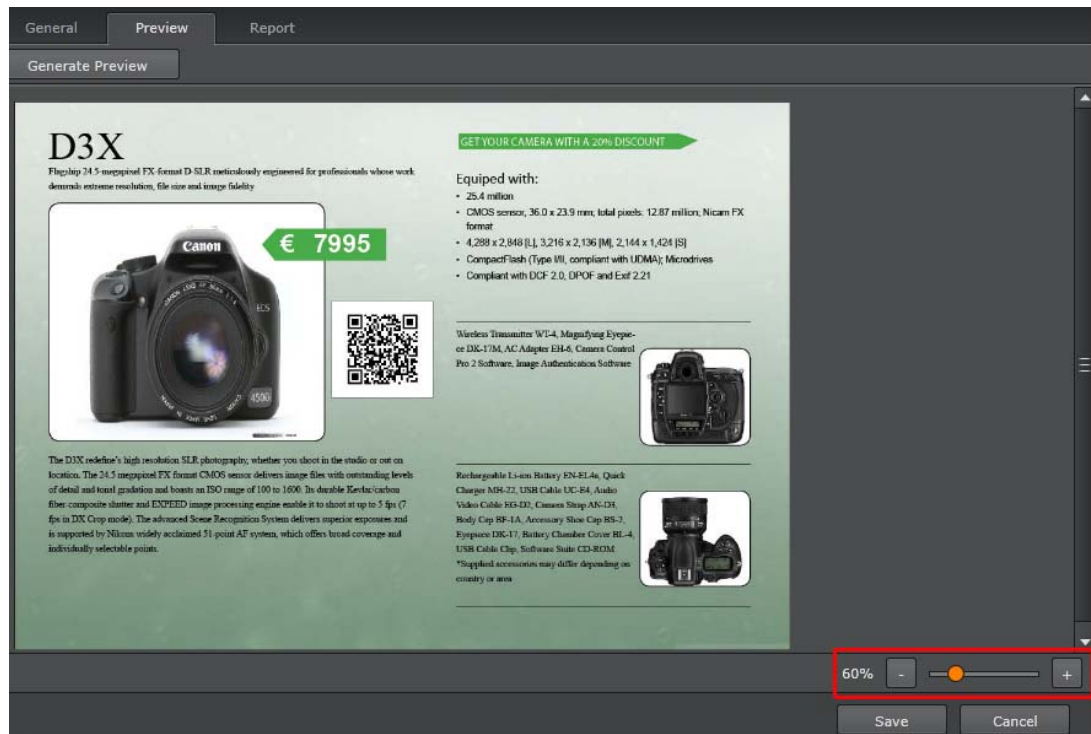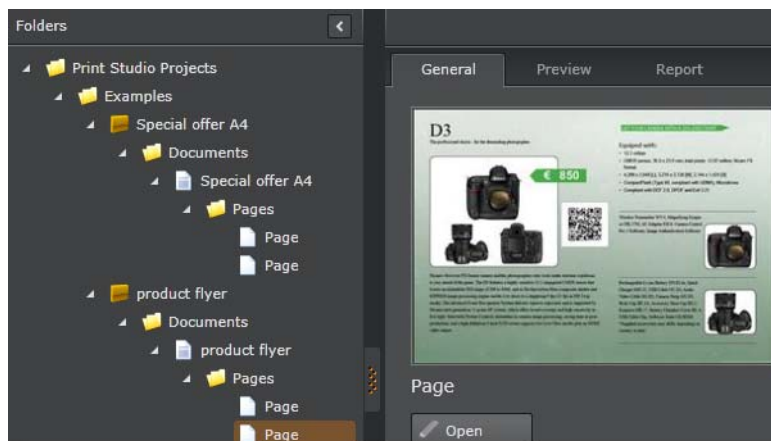

## 4.4.3 Publishing PDF or Flash (.swf)

You can generate a PDF or Flash (.swf) on document level or page level. You can also publish multiple pages by publishing the page folder.

To publish a PDF or Flash:

1. Click the required level (document or page item) in the content tree. In the following example, a page item is selected.

2. Click **Publish** to make the **Publishing workflows** dialog box appear.
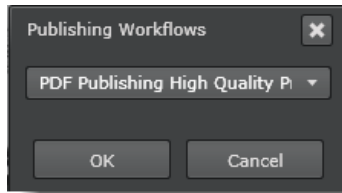
Make sure you have the required language selected for the item that needs to be published.

3. Click the required **Publishing Workflows**. In the example, a PDF of high resolution will be published (means in file high resolution images are used, often used for reviewing a final version of a page).

4. Click **OK** to start the publishing task. When the PDF is created, the user receives an e-mail message with a download link.
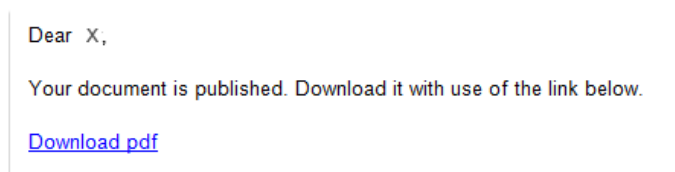
Note
Only saved pages or documents can be published.

Note
Your administrator can customize the content and formatting of the e-mail message.

Chapter 5

Managing Documents in Print Studio Editor

This chapter describes how to use Adaptive **Print Studio Editor** to edit document pages for printing, using centrally stored contents in the Sitecore CMS. This document explains the basics for end-users.

This chapter contains the following sections:

- Print Studio Editor

- Editing Pages in the Print Studio Editor

- Selecting Pages in Print Studio Editor

- Previewing Pages in Print Studio Editor

- Editing Pages in Print Studio Editor

- An Example

- Saving Pages and Documents in Print Studio Editor

- Publishing Pages or Documents in Print Studio Editor

5.1   Print Studio Editor

In Print Studio Editor you can edit pages in documents that are added to Print Studio Projects. The Print Studio Editor user can open the available pages or documents and add or change the objects on a page according to the user's access rights.

Adaptive Print Studio Projects are stored in Sitecore items. You can create Adaptive Print Studio Projects by using the Print Studio Explorer application and Adobe InDesign through the Adaptive Print Studio IDConnector.This is the task of a designer.

The main screen of Print Studio Editor shows the ribbon, the tool panels, and small bar buttons (bottom left and top right).
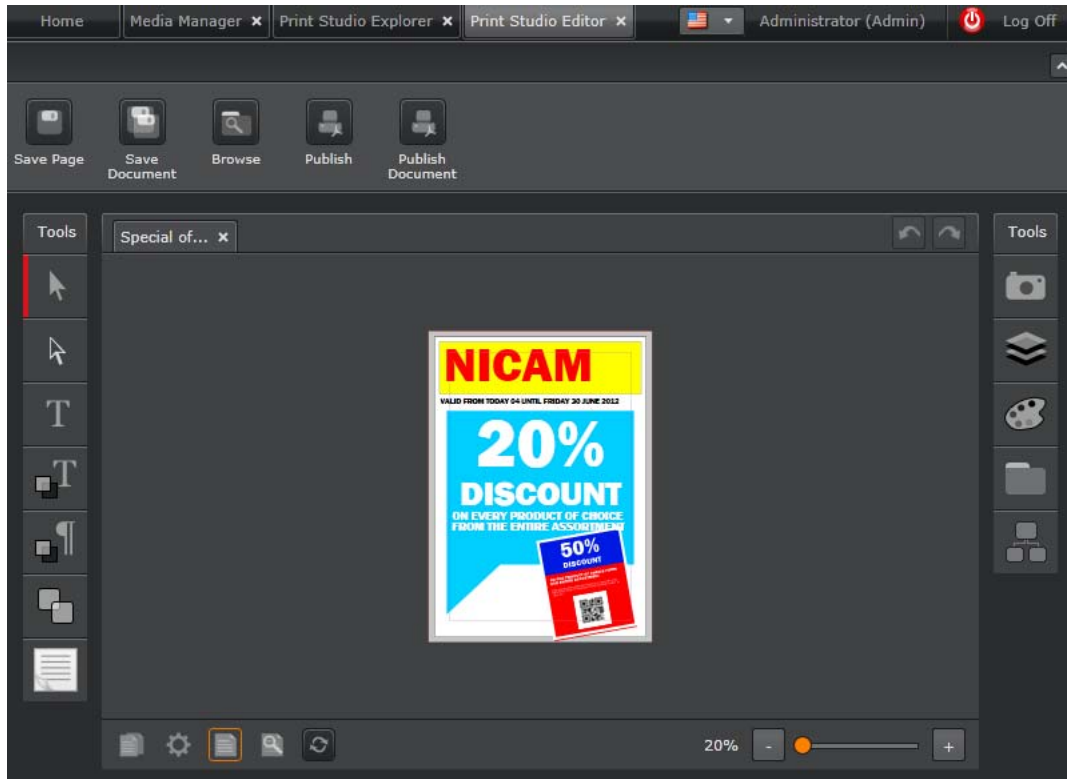

Tip
Use key **F11** or click the **Full screen** button (top right) to expand the **Print Studio Editor** browser interface to full screen.

Note
Functionality (buttons and functions) is available to users according to their access rights (users or user roles). Ask your system administrator for more information.

5.1.1 The Ribbon

The ribbon gives access to the operating buttons **Save Page, Save Document**, **Browse**, **Publish**, and **Publish Document**.
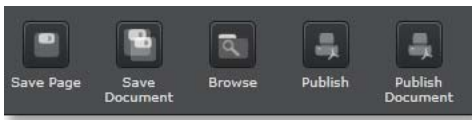
5.1.2 The Tool Panels

You can use the Tools panels in Print Studio Editor to create and modify your content items.

Command	Description
Select an object	Allows you to select text and image frames, and work with an object using its bounding box.
Select an image	Allows you to select the image inside a frame.
Edit text in the document	Allows you to edit text in the document.
Text Styles	Allows you to apply text styles bold, italics, font size, and underline.
Paragraph Styles	Allows you to apply paragraph styles to text.
Open the image alignment panel	You use the Alignment panel to align an image within its image frame.
Make a note	Allows you to add a note to a page for future reference.
Open the image library	Allows you to replace an image by another image from the Image Library.
Open the layers list	Allows you to lock/unlock and hide/show layers.
Open the swatches list	Allows you to apply swatches to text, images, and drawing objects.
Open the libraries list	Allows you to select a library and reuse items.
Open the page structure panel	Allows you to see the page structure to select or delete item/snippet.

5.1.3 Language Selection

In APS, you can create multiple language versions of any content item. For example, you could create a page in English and then create other versions in Danish and Dutch. You can click the language of your choice in the top right corner.The language selection box shows the available languages.

Click the desired language in the top right corner to load the opened pages in the Page editor in that language. Reloading a page in a different language causes all current unsaved changes to be lost.

5.1.4 Zooming In or Out

In **Design** or **Preview** mode the standard view is in 100% zoom value. To get a more detailed view or overview of the entire page, change the zoom percentage with the zoom bar on the bottom right bar.

5.2 Editing Pages in the Print Studio Editor

When you want to review or edit pages, first click the Print Studio Project from the **Project** browser.

To select a Print Studio Project:

1. Click **Browse** and find the Print Studio Project in the **Page Browser**.

2. Click the page that you need. The page is selected in the content tree and a large thumb is shown.
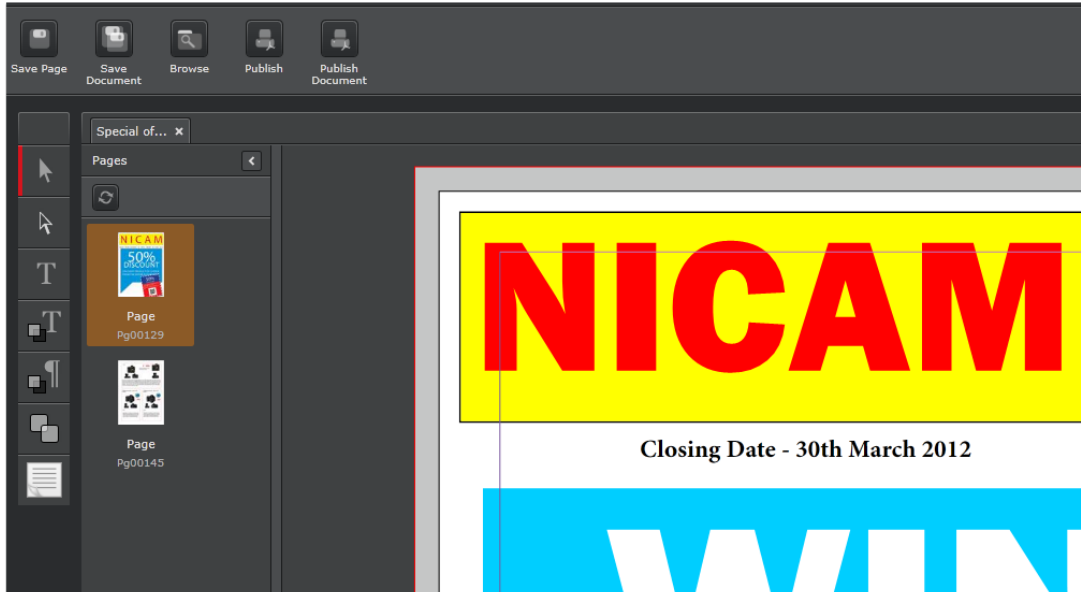
3. Click **Open**.
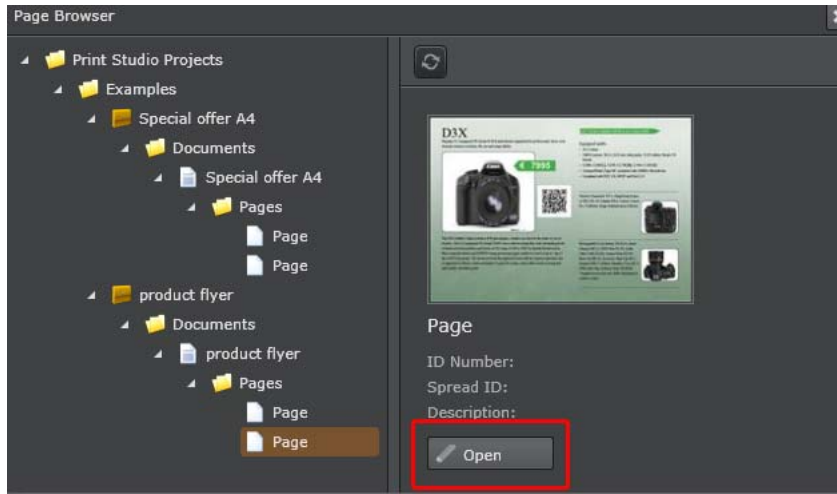
> **Note**
> Adaptive Print Studio Projects can be created in different languages. Make sure to select the required language version.

5.3 Selecting Pages in Print Studio Editor

To select a page:

1. When you open a page, it appears in thumb in the **Page thumb** browser. Click the thumb to open the page.

When page thumbs are shown with a lock on top, it means the user can only review the page according to access rights (Read only).

5.3.1   Page Properties Panel

In the **Page properties** panel you can you can review or modify properties of the currently opened Page.

Wit

h the **Page properties** panel selected, you can modify the page settings or have tools temporarily available.

The following table shows its commands and descriptions.

Command	Description
Snap	The Snap setting enables and disables snap to grid. When selected, the grid you set seems magnetic.
Show grid	When selected the grid appears. The grid allows you to design your layout according to regular proportions.
Show guides	When selected the guides can help to align objects and paths.
Grid column width	Sets the width of the grid columns.
Grid row height	Sets the height of the grid rows.
Width	The width of the currently selected frame.
Height	The height of the currently selected frame.
X	The X value for a selected frame on a page.
Y	The Y value for a selected frame on a page.
Angle	The rotating value for a selected frame on a page.
Snap strength	The snap strength defines the value for the "pull on" grid lines when an object approaches.
Show margins	When selected the page margins are shown.
Margin inside	The value for the inside margin on a page.
Margin outside	The value for the outside margin on a page.
Margin top	The value for the top margin on a page.
Margin bottom	The value for the bottom side margin on a page.

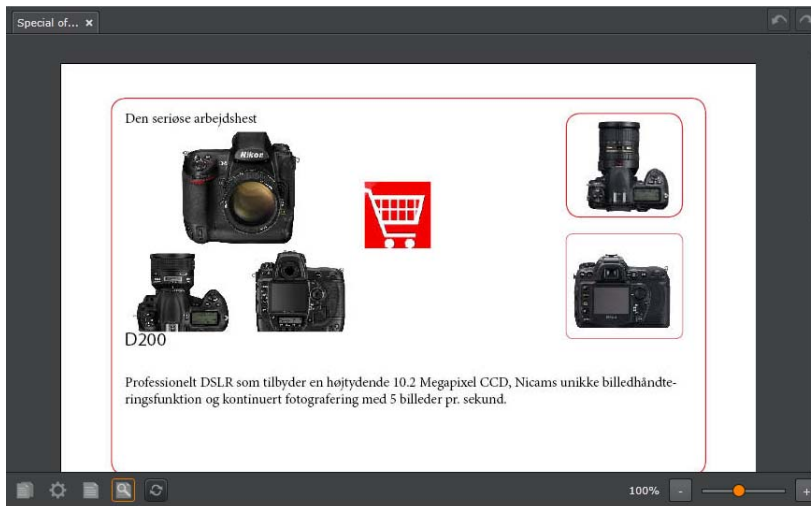## 5.4   Previewing Pages in Print Studio Editor

When you finished editing all items you can see how these new items will look on the page in a page preview.

To preview a page:

1. Click **Page Preview** to create a detailed preview.

2. Choose to see a preview that uses either low or high resolution images.
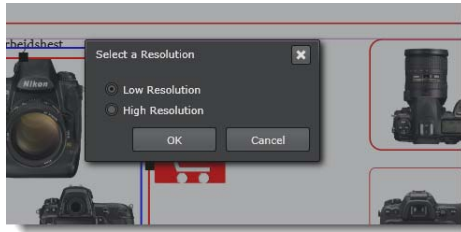
    The preview shows the exact output of the PDF or Flash file.

3. Click **Refresh** on the bottom bar, to create a new preview.

5.5 Editing Pages in Print Studio Editor

You can edit pages in **Page Design** mode. **Page Design** gives you access to all available tools on the palettes and to the objects on the page.

The pages of a document can contain different types of text. You can only edit text of type *Print Text* in the layout text objects. All other text types can be edited in the Sitecore CMS and are displayed as **Read only** in the layout text objects.

5.5.1 Editing Text

The pages can contain several Adaptive Print Studio text objects. You can modify the contents (text) of the text objects by use of the **Edit text** button.

To edit text:

1. Click the text item that you want to change.

2. Click **Edit Text** and edit the text.
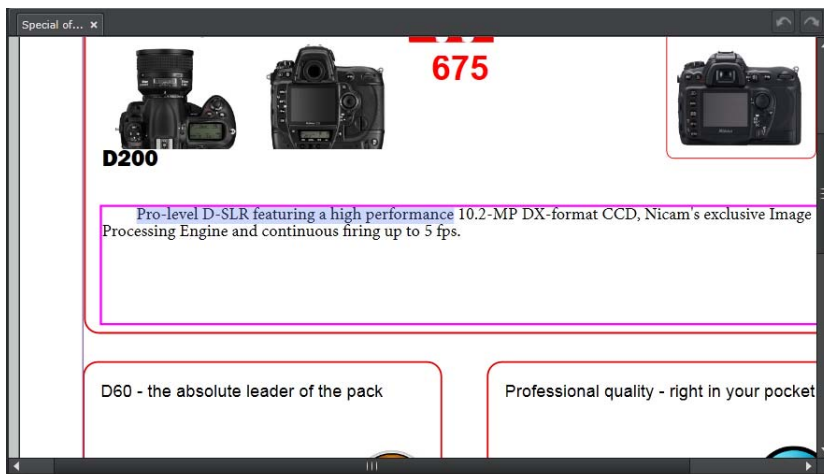
3. Click **Save Page**.

4. Click **Undo** or **Redo** to move one or more steps back or forward.

> **Note**
> The **Undo**/**Redo** function is active when the page is open.When you click a different page or close the document, the **Undo**/**Redo** steps are not available.

Pages in a document can contain several paragraph styles. Paragraph styles contain formatting properties (font, size, color, and so on) that can be applied to paragraphs. A paragraph is a text part with a start and an end that is marked by ENTER (enter/return key).

You can apply text styles to text parts within a paragraph. Text styles contain formatting properties (choices are: bold, italics, underline and font size). The text style can be applied to one character, one or more words, or an entire paragraph.
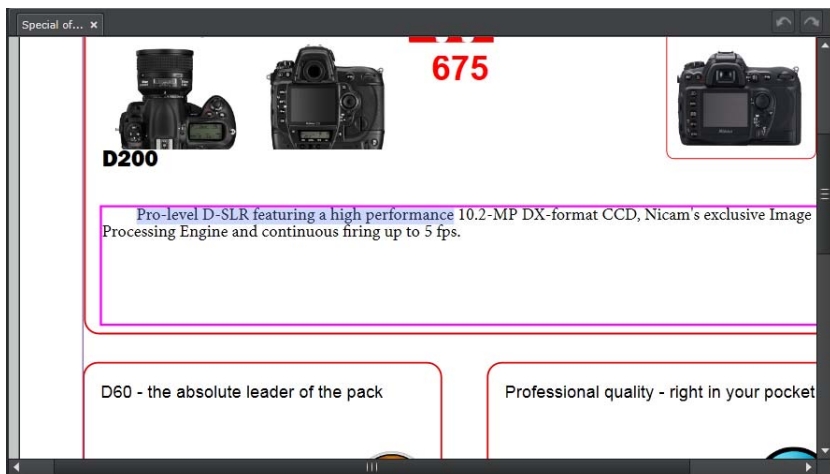
To apply a paragraph style:

1. Open a document and click the paragraph that needs a different paragraph style.

2. Click **Paragraph styles**.
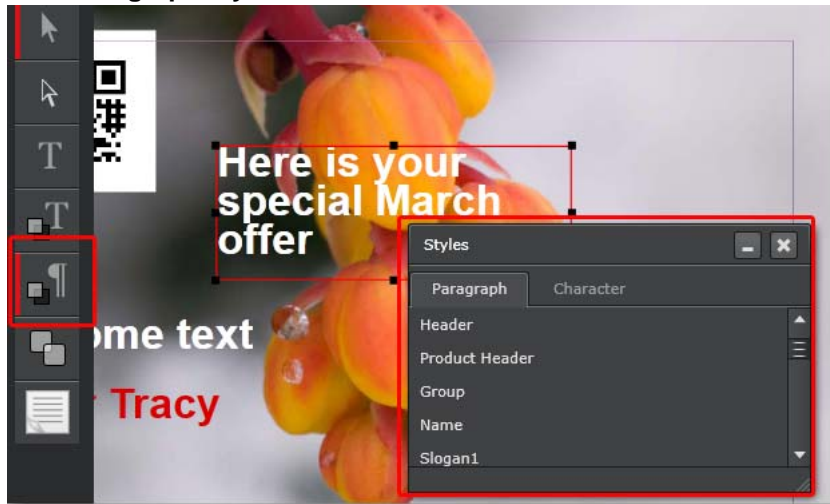
3. Click the appropriate style in the list to apply it to the selected paragraph.

To apply a text style:

1. Open a page and select the text that needs a different text style.

2. Click **Text styles**.

3. The **Text styles** tool panel appears. It contains **Bold**, **Italic**, **Underlined**, and **Font size** value selectors.

4. Click a style in the list to apply the style to the selection.

5.5.2 Editing Objects

Pages can contain several objects. Use **Select an object** to modify the object.

To edit an object:

1. Click **Select an object**.

2. Click the object in the screen and modify it.

   – You can for example *move* the objects. All objects on a document page can be moved freely (that is, if you have the appropriate access rights - ask your system administrator for assistance, if required).

   – You can *scale* the object. All objects on a document page can be scaled freely (that is, if you have the appropriate access rights - ask your system administrator for assistance, if required).
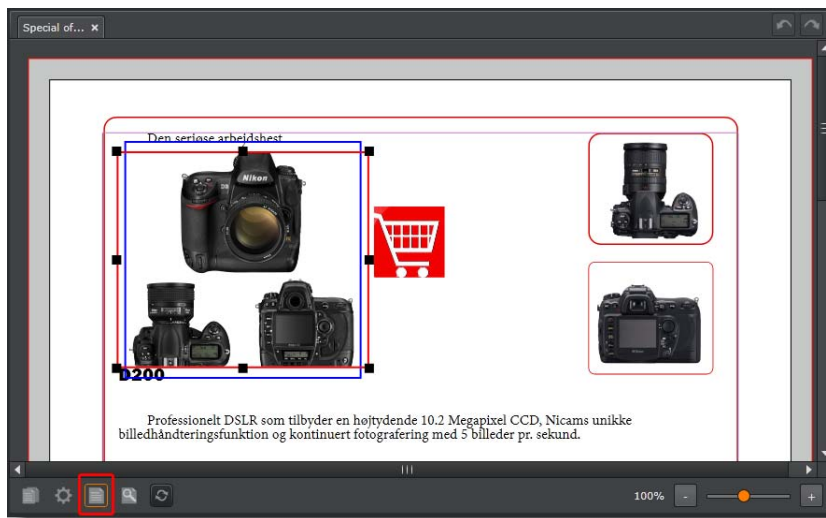
3. Use **Undo** or **Redo** to move one or more steps back or forward.

5.5.3 Editing Image Frames

The pages can contain images that are included in **Image frames**. These image objects can be modified with the use of the **Select an object** button.

To edit an image frames:

1. Click **Select an object**.

2. Click the image and modify it.
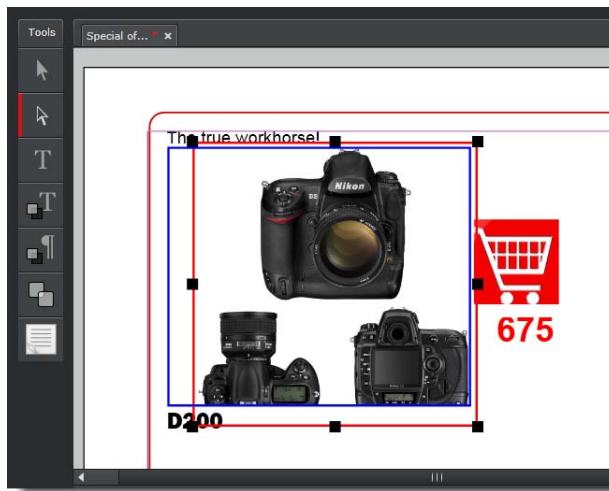
Note
To scale proportionally, hold down SHIFT as you drag a corner (anchor) point.

3. Use **Undo** or **Redo** to move one or more steps back or forward.

5.5.4 Aligning Images

The pages can contain **Image frame** including images. Each **Image frame** can contain one image.

To align an image:

1. Click **Image alignment**.

2. Click the image that needs alignment.
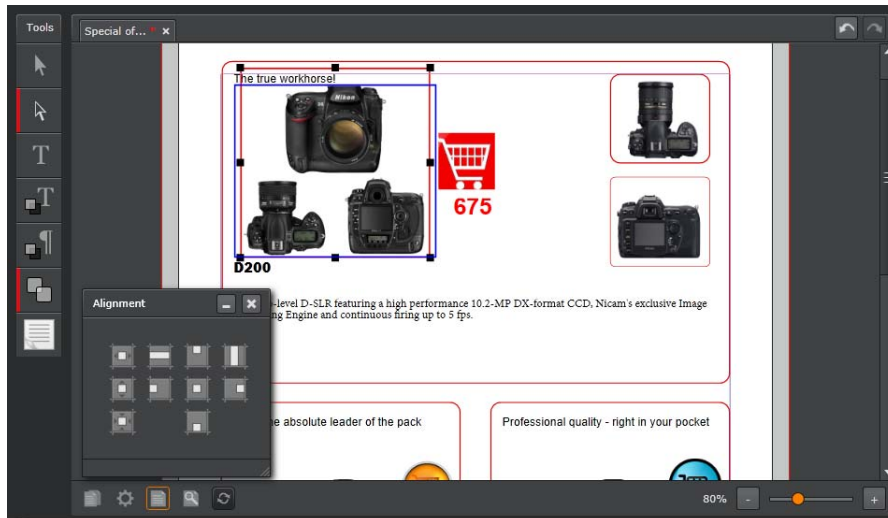
3. Click the appropriate option in the **Alignment** toolbox. Move the mouse over the button to display its function.
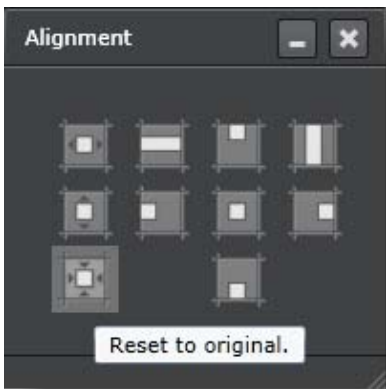
4. Use **Undo** or **Redo** to move one or more steps back or forward.

5.5.5 Using Images of the Image Library

An **Image object** on a page contains an image. An image can be replaced by another image from the **Image Library** that becomes available when you click **Image Library**.

To add an image to the image library:

1. Click the image object to be replaced.
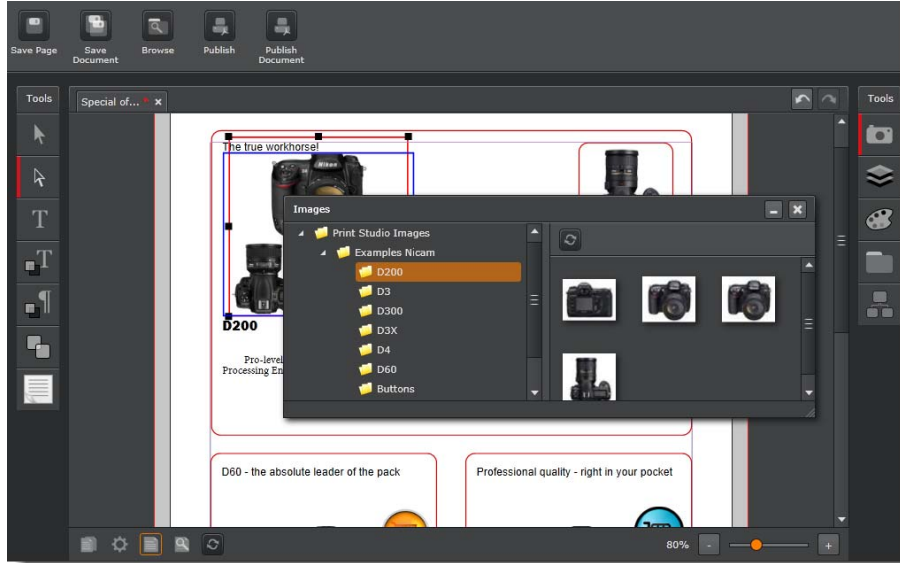
2. Click **Image Library**.
3. Click the required image from the **Image Library** toolbox.
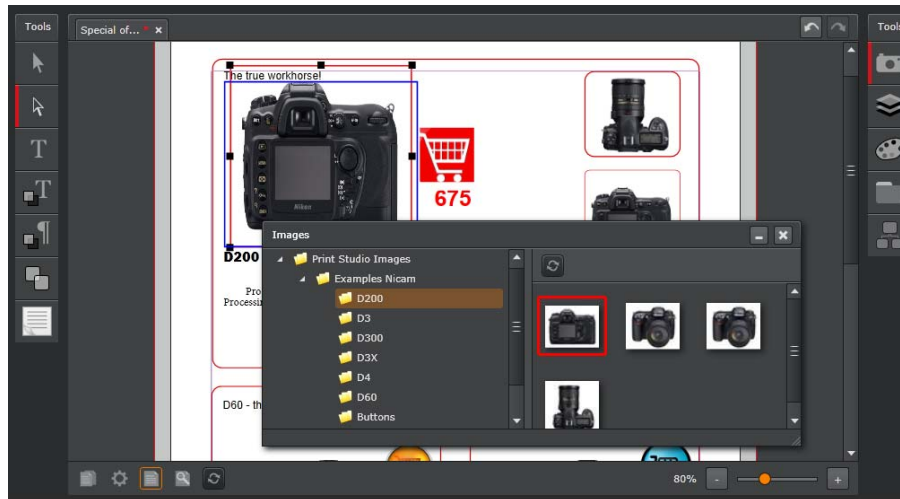
4. Use the **Image alignment** tools to change the image position, if required.
5. Use **Undo** or **Redo** to move one or more steps back or forward.

Note
Images that are marked "Is for web" are not displayed in the image library.

5.5.6 Locking and Unlocking Layers

Pages in documents can contain several layers. The layers can be either locked or unlocked and hidden or shown.

To unlock or lock a layer:

1. Open a document.
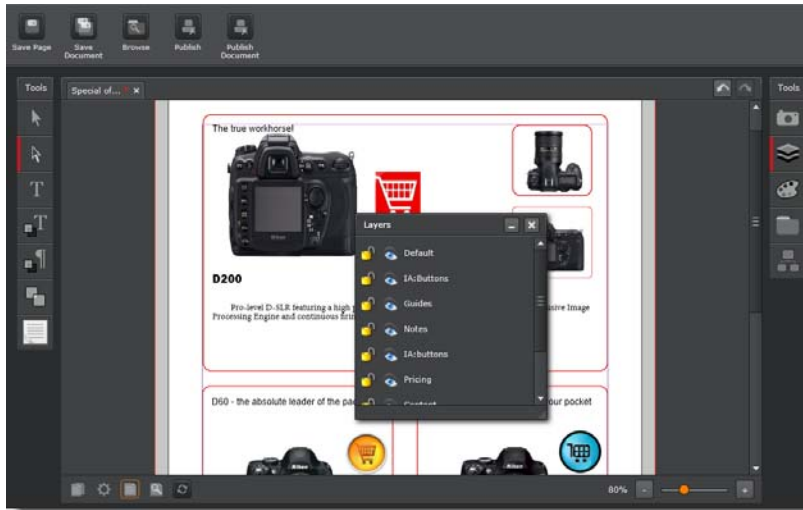
2. Click **Layers** to make the **Layers** tool panel appear.

3. In the list, layers **Pricing** and **Background** are locked.

   In this case, all the prices and background objects are added to the layers Pricing and Background. This means that none of the prices or background objects can be changed or replaced when the layer is locked.

4. Click **Lock** to change to **Unlocked** , and make modification of all objects possible.

   In this case, all the text objects added to the Adaptive Print Studio Project are located in layer 2. This means that all text objects can be changed and/or replaced when the layer stays unlocked.

To hide or show a layer:

1. Click the **Hide/Show** to change to . All objects in the layer are hidden.

2. Click the **Hide/Show** again to change to . All objects in the layer are displayed again.

5.5.7 Applying Swatches to an Object

Swatches are predefined colors. In Print Studio Editor, you can apply swatches to text, images, rectangles, and geometrical shape objects as the fill color.

To apply a swatch to an object:

1. Open a document.
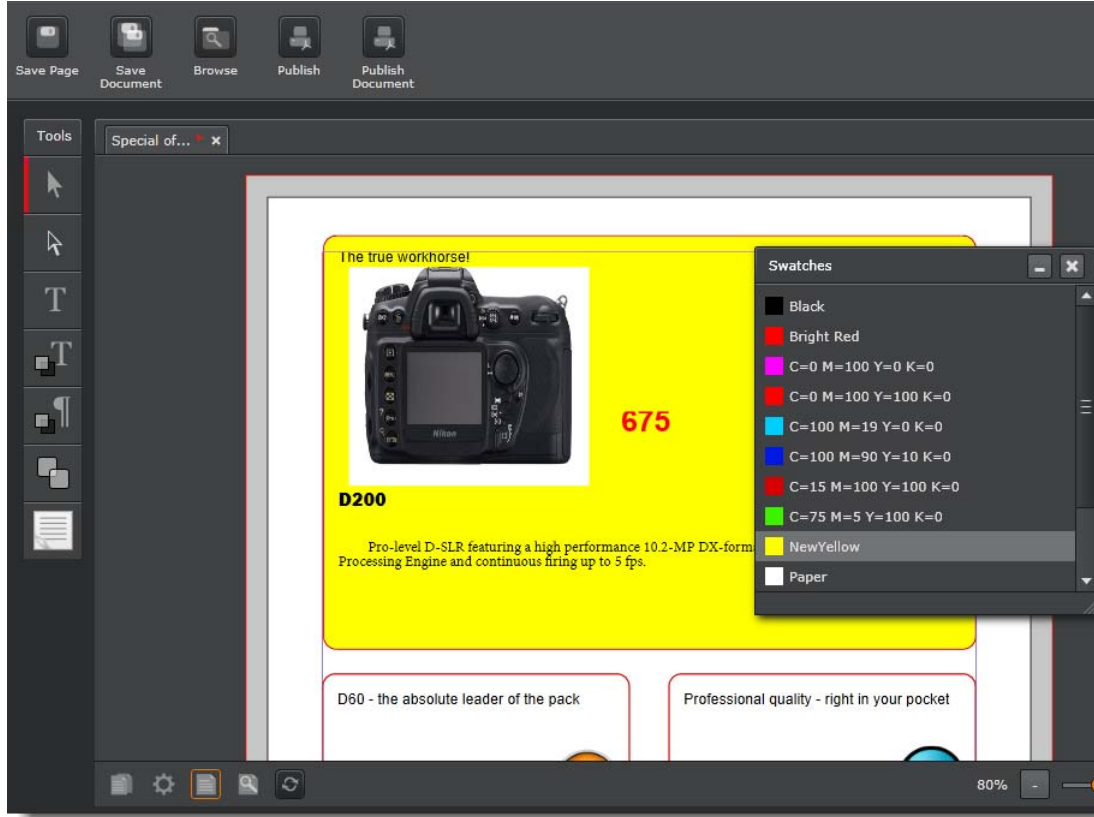
2. Click the object to fill with a swatch (color).

3. Click **Swatch** to open the Swatches panel.

4. Click the required swatch in the list.

5. Use **Undo** or **Redo** to move one or more steps back or forward.


5.5.8   Working with Libraries

You can select several libraries for Print Studio Editor. Libraries contain selections of **Content items** and page **Layout snippets** centrally stored in the Sitecore CMS. Content library root is the start item data that you can select in the project. Snippets library root is the location of snippets that you can select in the project.

To make libraries available in Print Studio Editor:

1. Click **Library**.

2. The library panel shows the available libraries for **Content** and **Layout snippets** object.
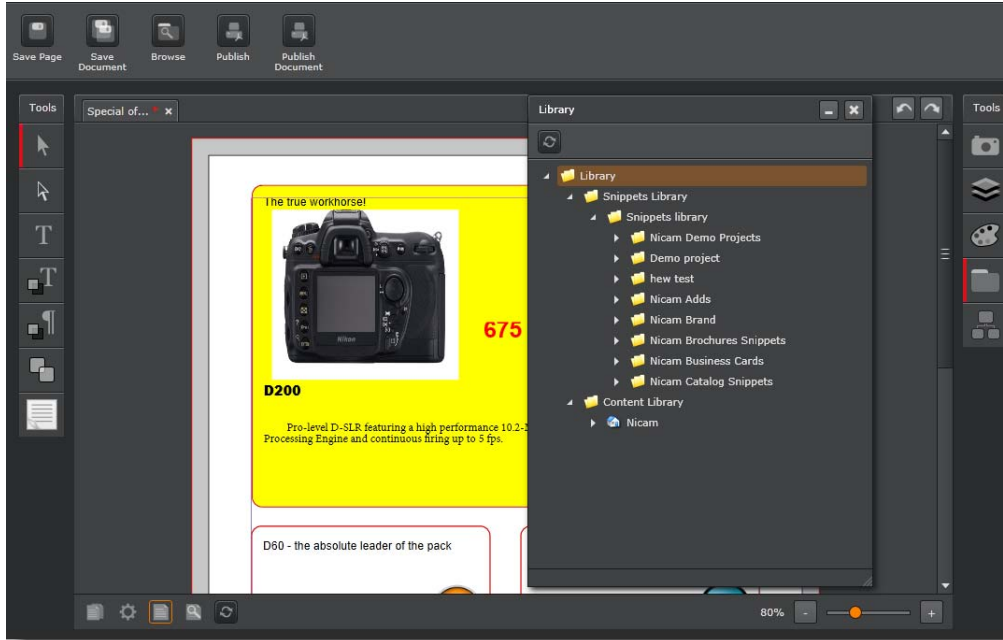
5.5.9 Working with Page Structure

You can select the page structure in **Print Studio Editor**. The Page structure contains for example one or more **Layout snippets** with **Content items** assigned to it.

To have the **Page structure** panel available:

1. Click **Page structure**.

2. The following screenshot is an example of a page with added **Layout snippets**.
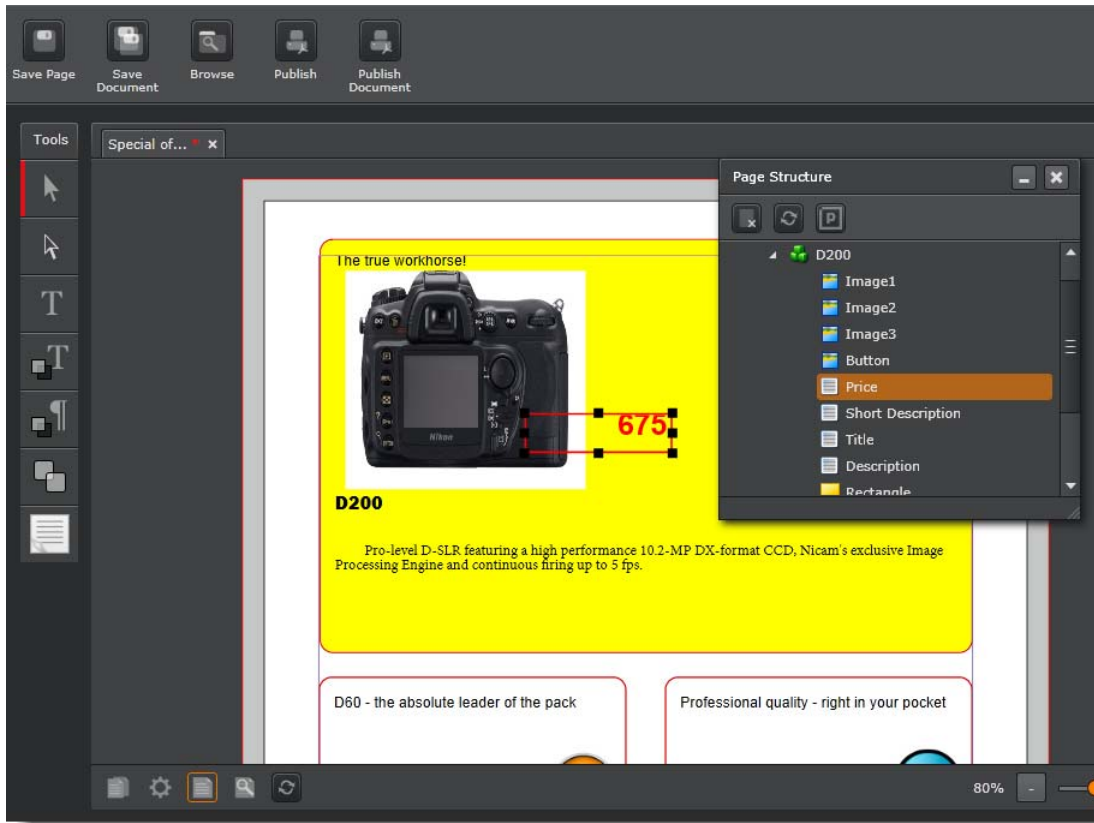
5.5.10 Using QR Code images

Pages can contain QR Code images (special images created in Sitecore CMS) that are included in **Image objects**. To select these image objects use **Select an object**.

The QR Code image is automatically generated from a field value and included in an **Image object**.

To edit a QR Code image:

1. Click **Edit image**.

2. Click the image and modify.
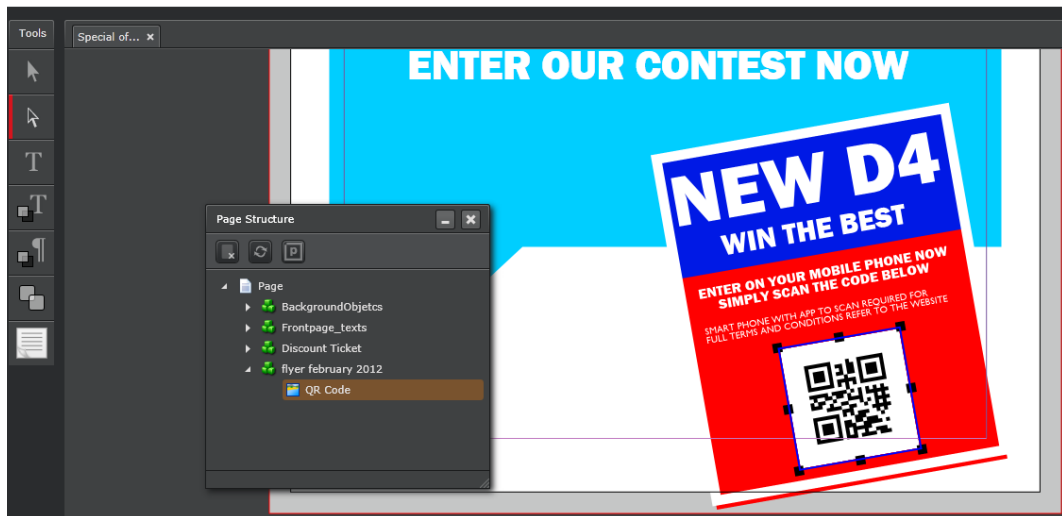
3. The QR Code color can be changed with the swatches from the **Swatches List.**
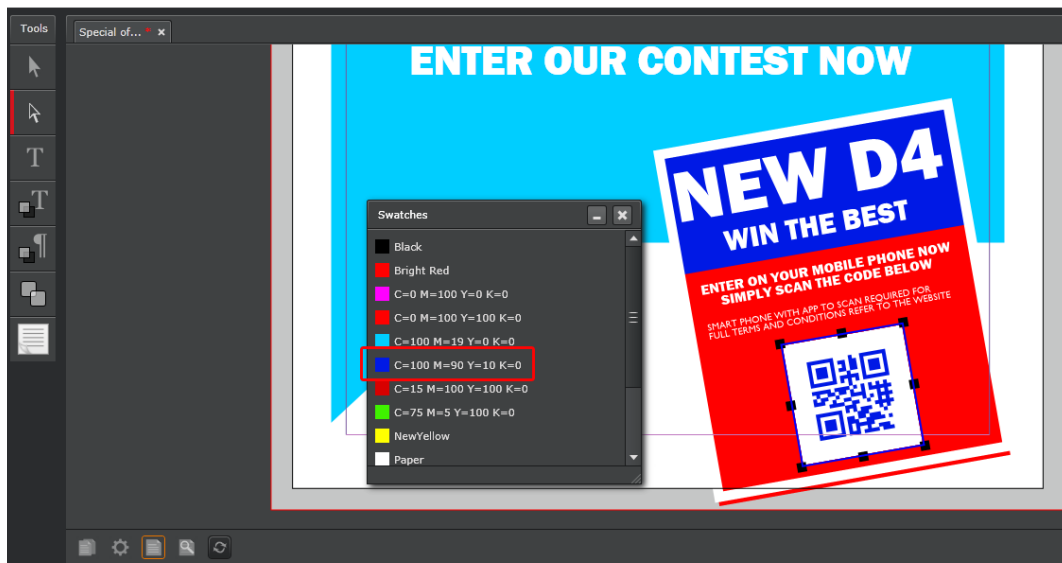
4. Use **Undo** or **Redo** to move one or more steps back or forward.

5.6 An Example

In Print Studio Editor you can edit pages in documents that are added to Adaptive Print Studio Projects. The Print Studio Editor users can open the available pages of documents and add or change the objects on a page according to their access rights.

The following example describes how to add **Layout snippets** to a page and assign **Content items** in three steps.

Step 1

Open the appropriate page in **Print Studio Editor**. You can view the thumb of an empty page on the left. The page contains guides that are useful for positioning the **Layout snippet**. This page is intended for a maximum of four equal size snippets.
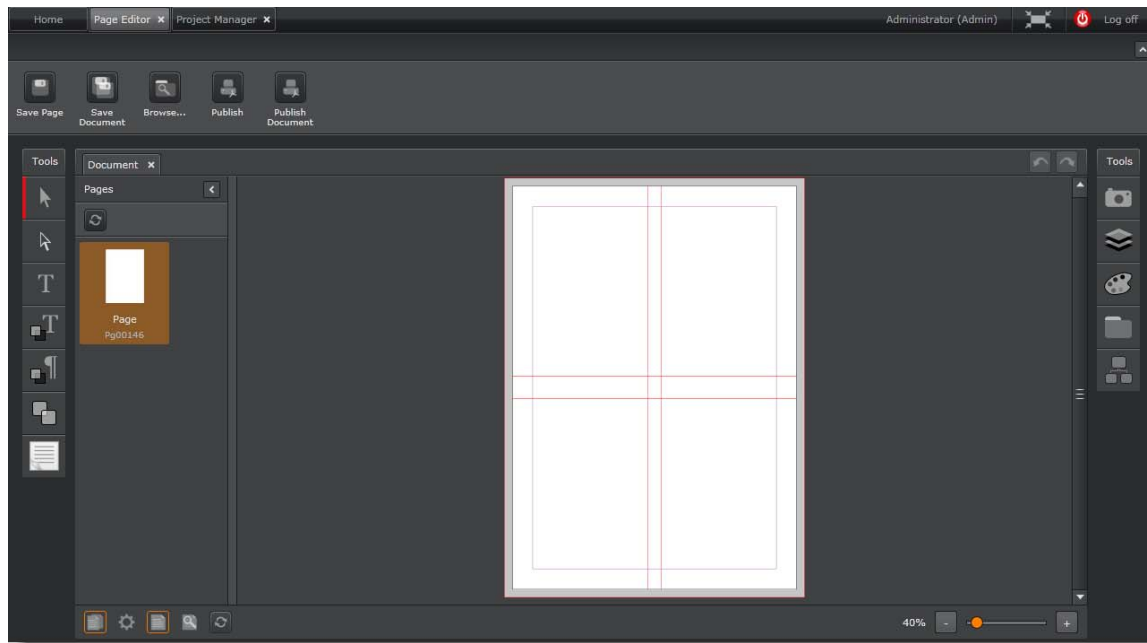
The following example shows the four positions that are available on the page.
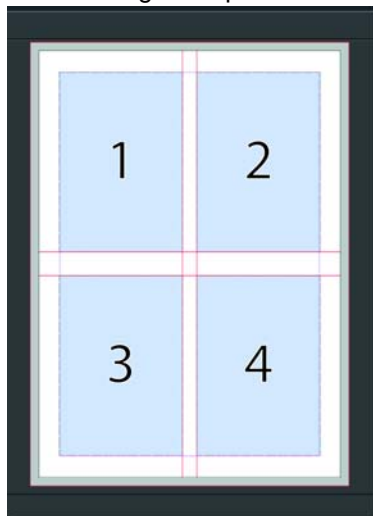
The **Properties** panel shows the corresponding layout values in millimeters. Select the **Show grid** check box to have a more detailed view to position a **Layout snippet**.
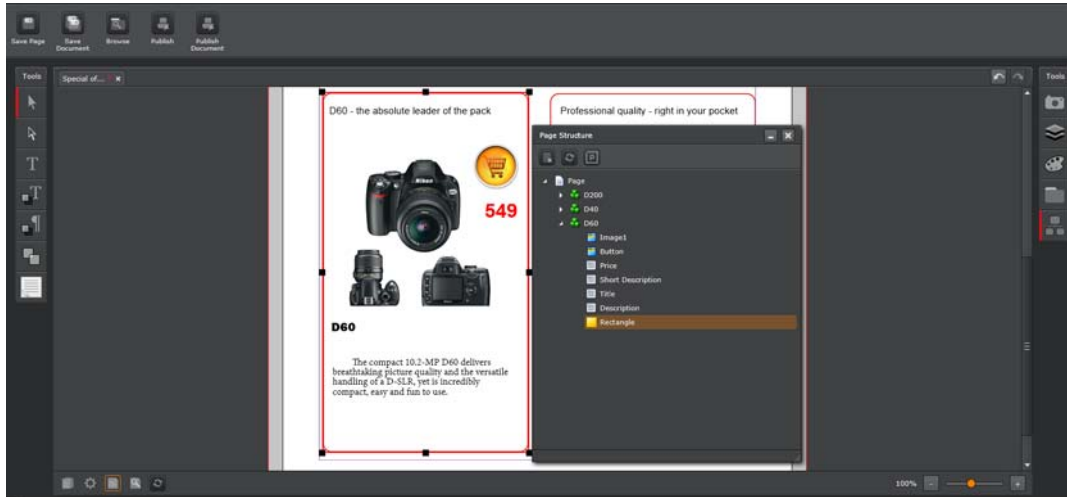
Step 2
Open the **Library** panel, click the required snippet to display a thumb of the snippet.
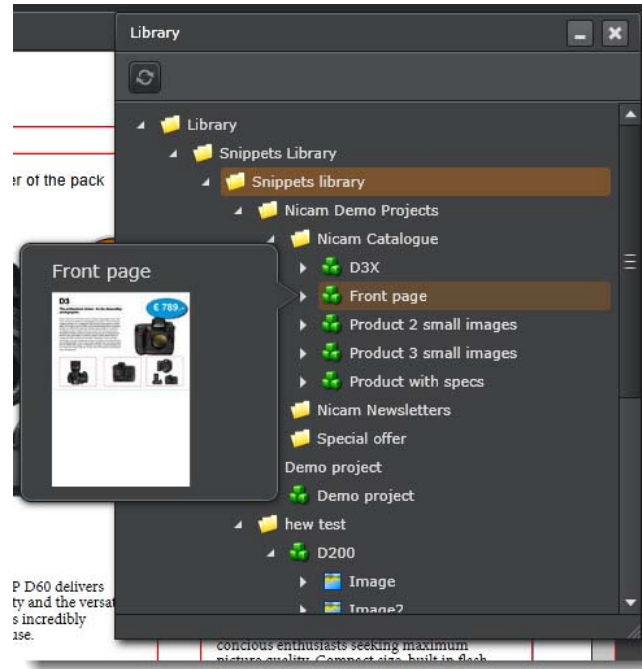
Drag and drop the first **Layout snippet** onto the page. The **Layout snippet** is placed on the page.
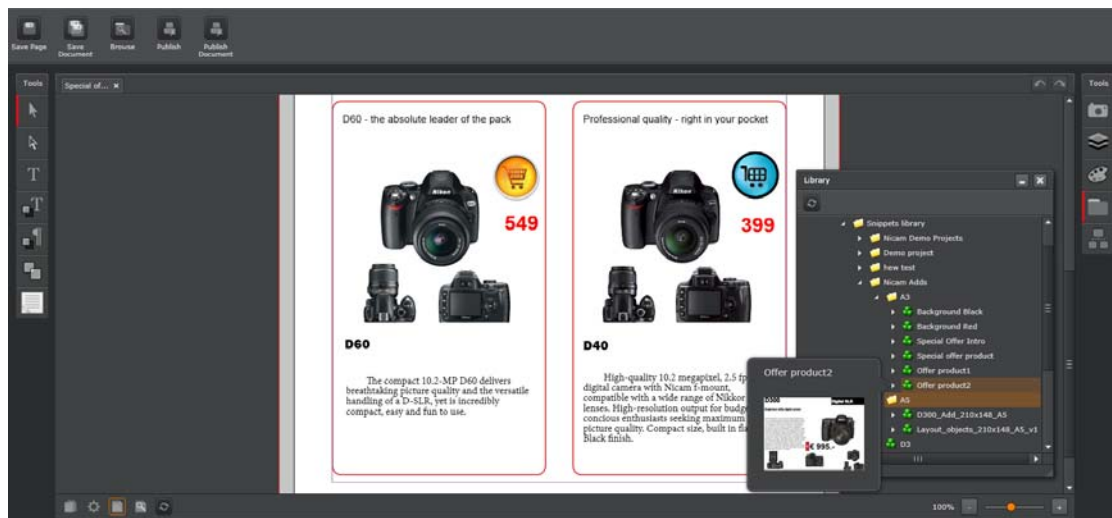
You can select the **Layout snippet** in the **Page structure** panel, and position it on the page.
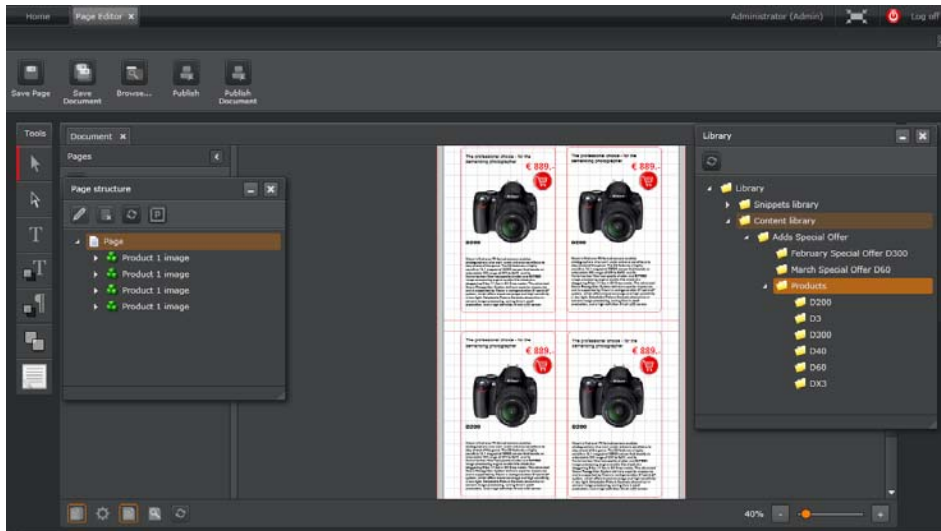
Repeat the same procedure until you positioned all **Layout snippets**.

Step 3

To finish the page, assign **Content items** to the **Layout snippets**.
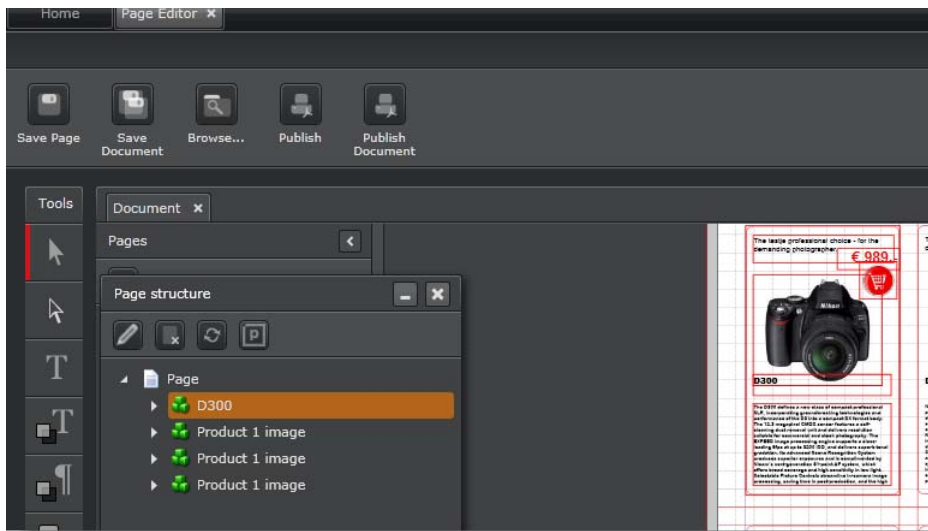
Open the **Page structure** panel, that shows all **Layout snippets** on the page. Open the **Library** panel to click the required **Content items**.
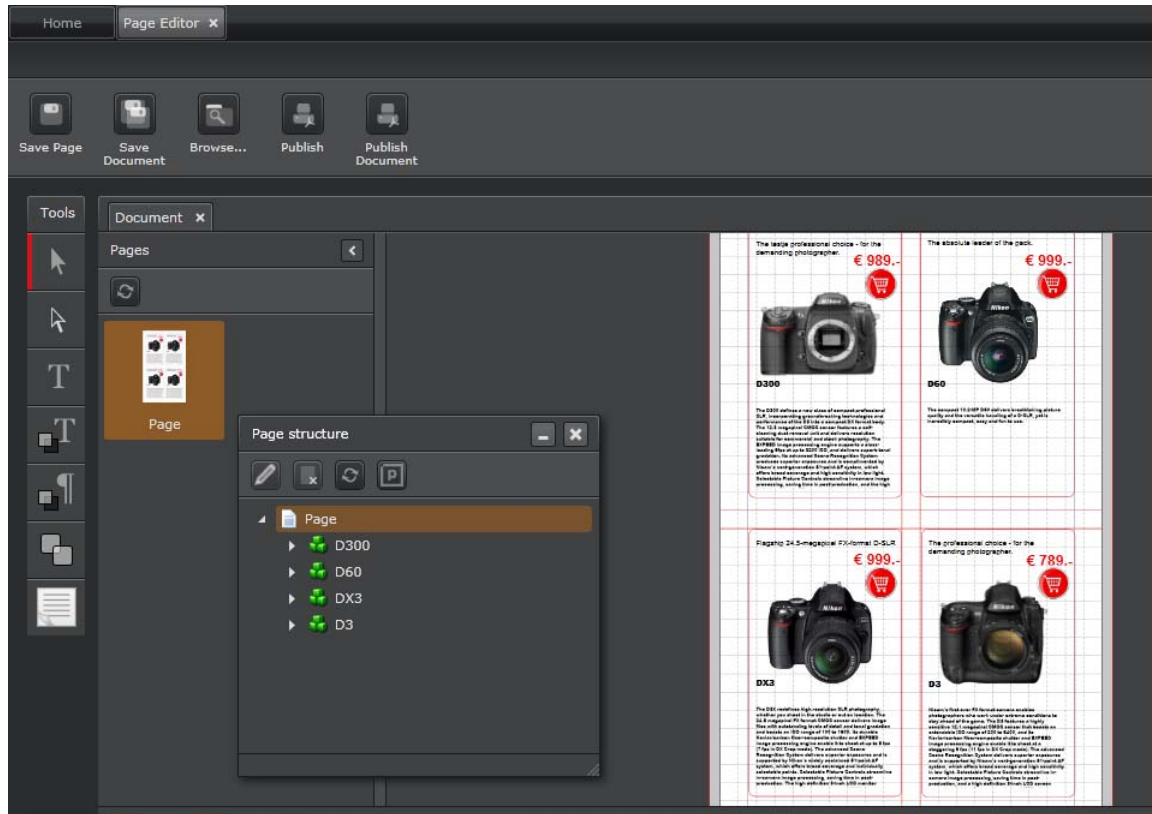

Drag and drop the required **Content item** to the selected **Layout snippet** on the **Page structure** panel.
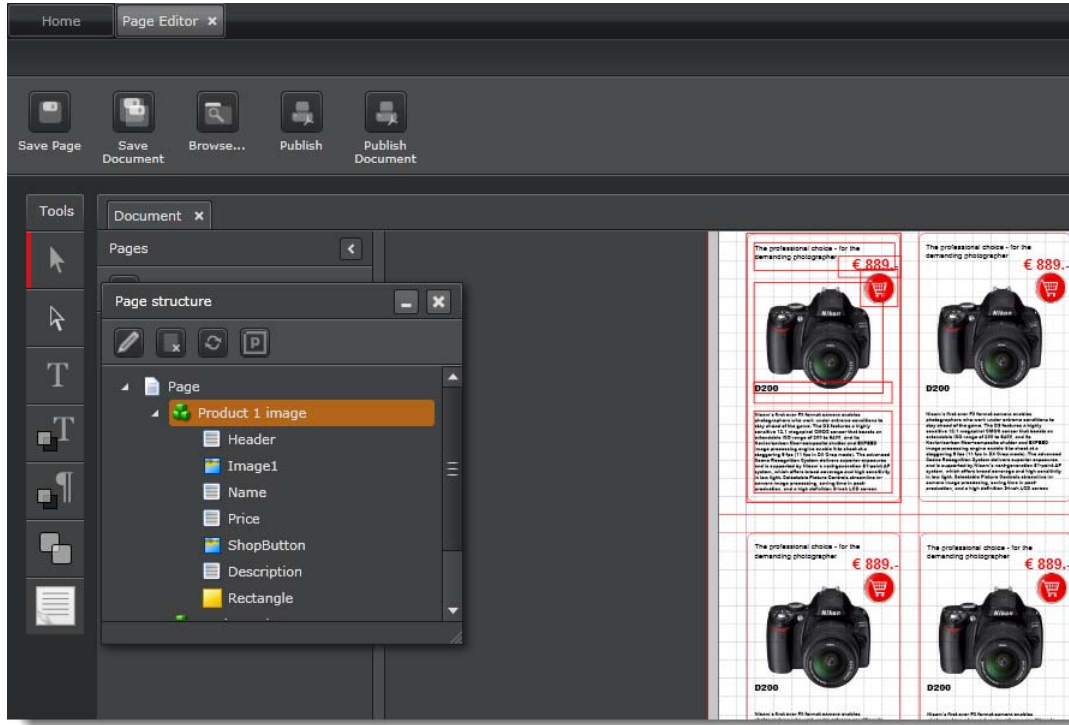
The **Layout snippet** in the first position is refreshed immediately and shows the content of the assigned **Content item**.

See the result in the following screenshot:

5.7 Saving Pages and Documents in Print Studio Editor

The **Print Studio Editor** main bar contains two buttons for saving: **Save Page** and **Save Document**.


To save a page:

1. Click the required page with the thumb in the **Pages** panel.

2. Edit the page (if required).

3. Click **Save Page**.

To save a document:

1. Open the required document.

2. Edit the pages (if required).

3. Click **Save Document**.

## 5.8   Publishing Pages or Documents in Print Studio Editor

The **Print Studio Editor** main bar contains two buttons for publishing: **Publish** and **Publish Document**.
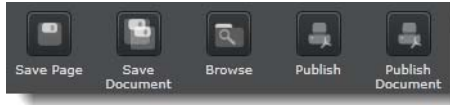

Adaptive Print Studio **Print Studio Editor** supports two publishing formats: PDF (.pdf) and Flash (.swf). The actual publishing settings are configured in Sitecore and according to that, various publishing options become available in the **Publishing Workflow** dialog box when you click **Publish** or **Publish Document**.

To publish a page:

1. Click the page thumb in the **Pages** panel.

2. Click **Publish**, and the **Publishing Workflows** dialog box appears.
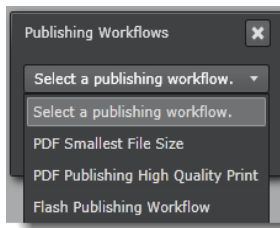
3. Choose the required publishing workflow. In the example above, a low resolution PDF will be published (this option is often used to review a draft version of a page; a small file size that uses low resolution images).

4. Click **OK** to start the publishing task. A confirmation message displays. When the PDF is created, you will receive an e-mail message with a download link.
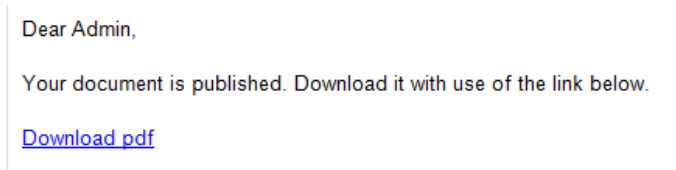
Note
Only pages and documents that are saved can be published.

Note
The administrator can customize content and format of the e-mail message.

Chapter 6

Handling Workflows

This chapter describes how to handle workflow commands. This chapter contains the following sections:

- Handling Workflow in Media Manager

- Handling Workflow in Print Studio Explorer

6.1 Handling Workflow in Media Manager

CMS administrators can create Workflows in APS to ensure that items move through a predefined set of workflow states before they are published. This way, content is reviewed and approved by the appropriate people before publication

Depending on the language that you select in the top-right corner of the screen, the Workbox field will show the appropriate tasks for you. The Administrator can define different workflows with different states and commands.
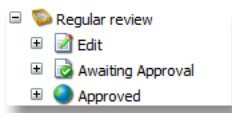

Note
Only workflow tasks assigned in the selected language will appear in the workbox.

Push the Item Through the Workflow

In the following example you see how a workflow called "Regular review" with three different states is applied to task of uploading images. The three states are: edit, awaiting approval, and approved.
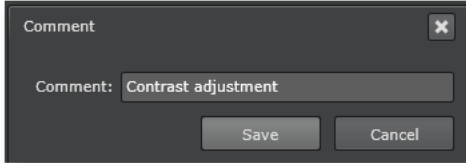

In the Workbox field you can see the items that need some work. In this case, two images are in the *edit* state and one is in the *awaiting approval* state. For example, if you want to edit the Jellyfish image, simply click the image name.

If you click the image name you will go to the appropriate folder. In the bottom-left of the image field you find the assigned Workflow command. In the example, the image in the edit stage can be pushed forward in the Workflow by submitting the image.
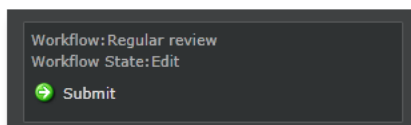
After you click the command (in this case **Submit**), you can enter a comment to inform the person who handles the next state in the workflow. The comment is sent to the person responsible in an e-mail message.
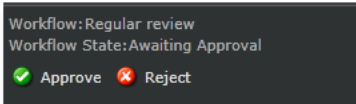

Note
Your administrator needs to configure e-mail settings in the workflow to make e-mail functionality work.

Click **Save** to push the item forward in the workflow, in this case to the *Awaiting Approval* state. You can see this in the following screenshot of the **Workbox** field

Click the image name to navigate to the image field in the appropriate folder. In this case, click **Approve** and **Save** after you have entered a comment. This will remove the item from the workflow. When you click **Reject**, enter a comment and click **Save**, the workflow status is back to *edit* and the comment is sent in an e-mail message to the person responsible.

6.2 Handling Workflow in Print Studio Explorer

Depending on the language you selected in the top-right corner of the screen, the Workbox field will show the appropriate tasks for you. The administrator can define different workflows with different states and commands.
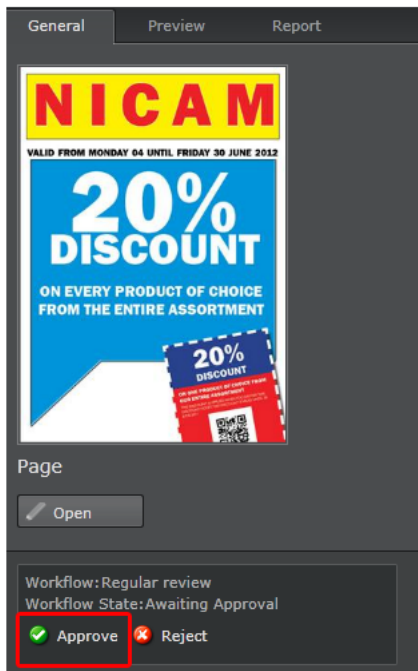
Note
Only workflow tasks assigned in the selected language will appear in the workbox.
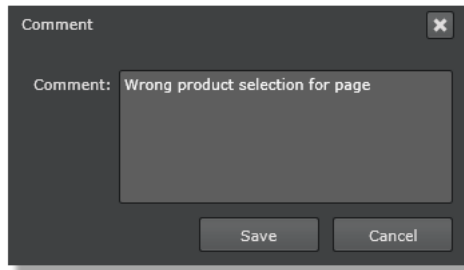
Push the Item Through the Workflow

In the following example you see how a workflow called "Regular review" is applied to the task of publishing pages. The three states are: edit, awaiting approval, and approved.

Number	Display N	In Folder	Workflow	Workflow State
Pg00129	Page	Print Studio Projects/Example	Regular review	Edit
Pg00129	Page	Print Studio Projects/Example	Regular review	Awaiting Approval
Pg00145	Page	Print Studio Projects/Example	Regular review	Awaiting Approval

Select the page that you want to handle in the content tree. In the bottom-left of the general page field you find the assigned Workflow command. In the example, the image in the Awaiting Approval state can be pushed forward in the Workflow by clicking Approve.

After you click the command (in this case **Approve**), you can enter a comment to inform the person who handles the next state in the workflow. The comment is sent to the person responsible in an e-mail message.

Note
Your administrator needs to configure e-mail settings in the workflow to make e-mail functionality work.