enfocus CONNECT 2019

User Guide

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enfocus

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1. Understanding Enfocus Connect

This section explains the basics of Enfocus Connect: what it is, what it is used for and what the difference is between the different Connect versions (YOU and ALL). Read this part if you are new to Enfocus Connect.

Note: You can also have a look at the product videos on the Enfocus website: *https://www.enfocus.com/en/support/product-videos*

1.1. About Enfocus Connect

Enfocus Connect is a tool that allows you to create small applications (called *Connectors*) that perform a variety of predefined tasks such as:

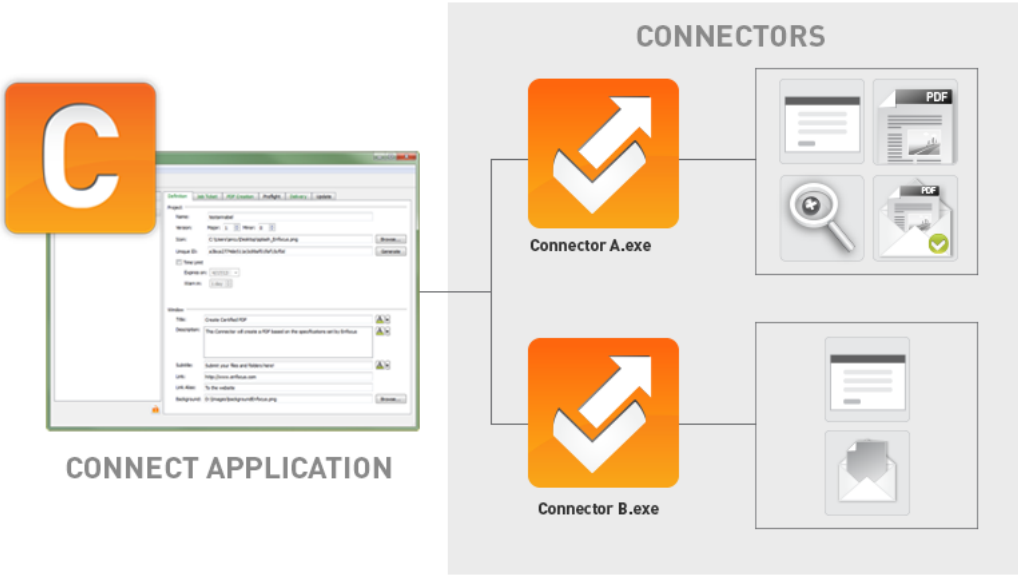
- Create PDFs
- Verify (preflight) PDFs
- Correct common PDF problems
- Collect and deliver Job Ticket information
- Deliver any file type to a remote server

Any combination of the functions listed above can be defined within a Connector, but it depends on the version of Enfocus Connect (YOU or ALL) which features are available (see *Connect YOU versus Connect ALL* on page 6).

Examples

You could create one Connector to create and verify PDF files from InDesign, and another Connector that just delivers all file types to a specific FTP site. Or, you might create one Connector to deliver your newspaper ads to printer A, and another to deliver your magazine ads to printer B.

The image below is an example of the Connect application used to create two Connectors: Connector A includes the functionality to collect Job Tickets and create/preflight PDFs, whereas Connector B only allows to collect Job Tickets. Both Connectors are configured to deliver files to the same printer.



Note: Keep in mind that most of the time you will work with the *Connectors*. You only need the Connect application to create them. Once your Connectors are fine, you don't need to use the Connect application anymore.

What you will do most:

With...	You will...
The Connect Application	Define Connectors and generate them: • *Create Connectors* • *Set the Connector properties* • *Generate the actual Connectors*
The Connectors	Process files by submitting them to the Connectors: • *Drag and drop files on the Connectors* • *Print to Connectors by a Virtual Printer* • *Export to Connectors from an CS/CC application*

1.2. Connect YOU versus Connect ALL

Two versions of Enfocus Connect exist: Connect You and Connect ALL.

Both versions of Connect are **based on the same application** with some differences in features and how the Connectors work.

Connect YOU

Connect YOU is meant for individual users. Connectors created with Connect YOU will only run on a single workstation and cannot be distributed or shared.

Connect YOU includes all the basic functionality to create Connectors with Job Tickets, PDF creation, PDF preflight, and file delivery.

Connect ALL
Connect ALL is meant for organizations that want to distribute Connectors to internal or external users. It includes functionality for branding Connectors, Job Tickets, PDF creation, PDF preflight, file delivery and updating Connectors remotely.

Feature comparison

The following matrix summarizes the main differences between the two Enfocus Connect versions.

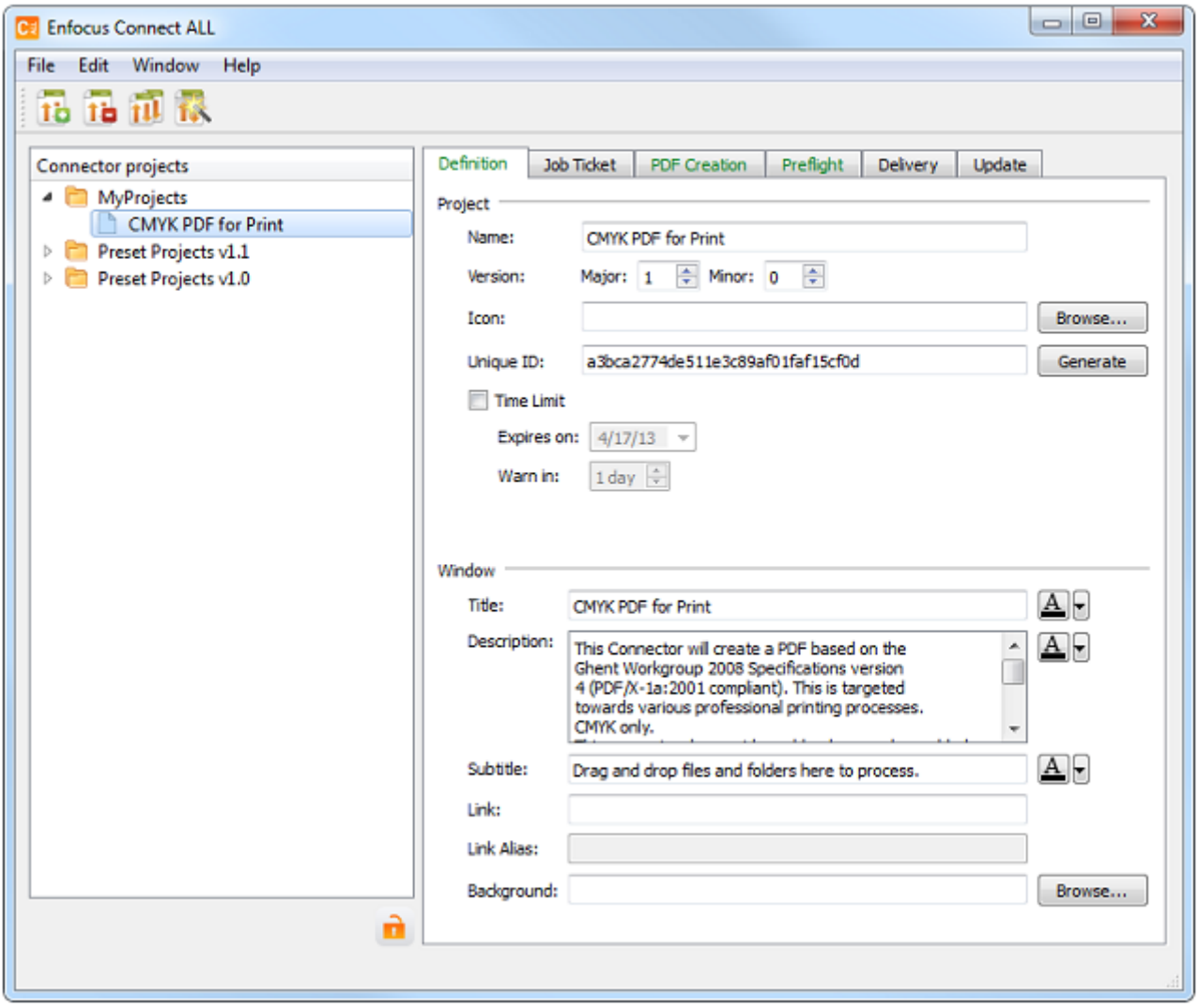
Features	**Connect YOU**	**Connect ALL**
Primary use	Personal use	Distributed
Automated creation, preflight and correction of PDF files	X	X
Electronic Job Ticket (i.e. possibility to collect job information)	X	X
Remote file delivery	X	X
Unlimited distribution of Connectors	-	X
Automatic updating of Connectors	-	X

1.3. Working with Enfocus Connect and Connectors

Configuration in the Enfocus Connect application

Connectors are defined and created in Enfocus Connect YOU or Connect ALL.

When you start the application, you will see a list of Connector definitions (called *Connector Projects*) at the left hand side. When you select a Project, you'll see the corresponding properties in the tabs on the right hand side. If the tab title is green, the properties for this tab have been enabled.



To create a Connector, you have to:

1. Create a new Connector Project or select an existing one.
2. If new, review the properties of each function tab to ensure the correct settings.
3. Create the Connector.

This results in a file (.exe or .app), which you can save on your computer, for example on your desktop.

Note:

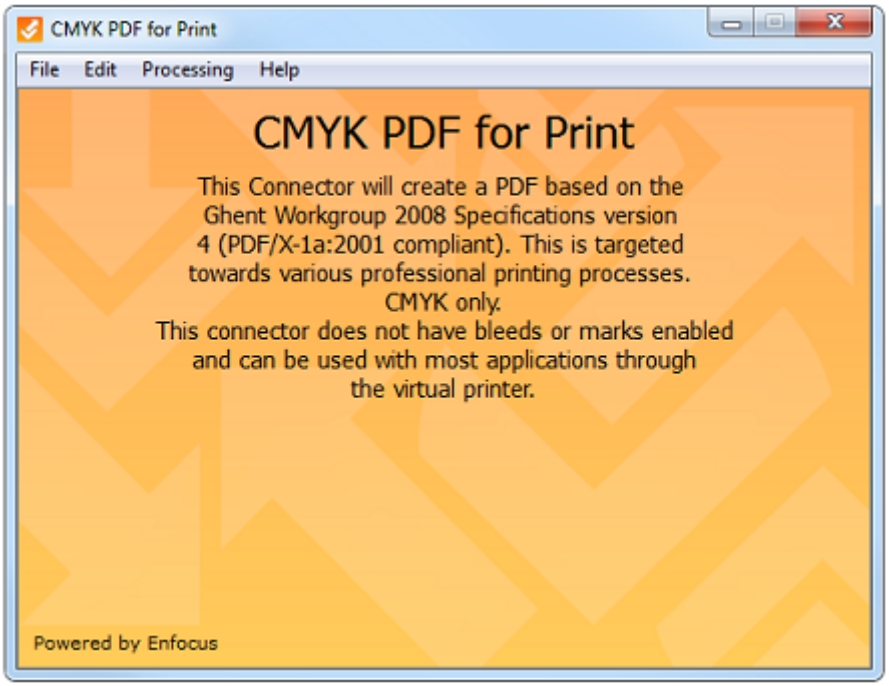
- If you are using Connect YOU, only one application file (.exe or .app) is generated, depending on the operating system used to create the Connector.
- If you are using Connect ALL, two application files are generated; one for Windows and one for Mac OSX. Mac OSX Connectors generated on Windows PCs will be automatically compressed as a .ZIP file, to ensure the application package is retained between platforms. Depending on your Connector settings, two more applications may be generated, e.g. remote_<Connector name>.exe and remote_<Connector name>.app (compressed as a .ZIP file). These are small versions of the Connector

that are designed to be easily distributed and will download and install the full Connector when launched for the first time.

Using Connectors

Once the Connector is created, you can test it to see if it works as expected.

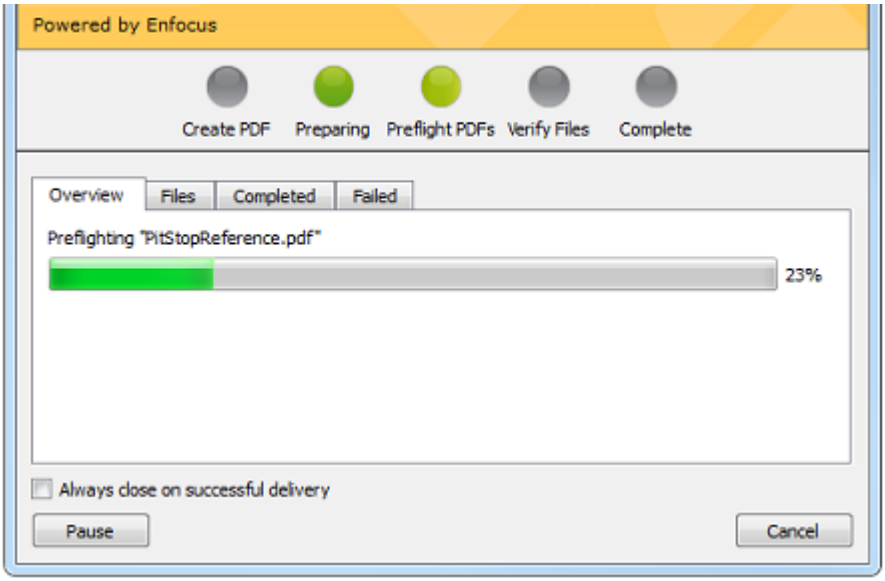
You can simply launch the Connector by double-clicking the .exe (on Windows) or .app (on Mac).



If the Connector has a Virtual Printer, or Plug-in download is enabled, you will be prompted to install these options the first time the Connector is launched. If a local directory is selected for delivery, you will be prompted to configure this the first time a file is submitted to the Connector.

To use the Connector, you have to:

1. Submit one or more files. You can:
   - Drag and drop files on the Connector,
   - Print files to the Connector Virtual Printer, or
   - Export files from the Creative Suite/Cloud Plug-in.
2. Depending on the properties of the Connector, one or more dialogs may pop up, asking you to enter additional information (credentials for the delivery server, job-related details).
3. You'll be able to follow up on the progress, indicated in the bottom part of the Connector main window (see screenshot). If the Connector is configured to preflight and verify PDF files, the Preflight results are shown and you'll have the opportunity to check the Preflight Report.



4. Depending on the properties of the Connector, the processed file is delivered automatically or you're asked to save it locally (if local file save is enabled).

Note: This is a high-level overview. Detailed instructions are available in Working with Enfocus Connect: *Configuring and creating a Connector* on page 27 and *Using Connectors* on page 113.

1.3.1. Connector properties

Connectors are standalone applications (.exe or .app) that perform the functions predefined in Enfocus Connect YOU or Connect ALL.

Depending on the chosen Enfocus version, you can configure the following:

	YOU	ALL
Look and feel of the Connector		
The name of the Connector	X	X
The icon for the Connector	X	X
The Connector background	-	X
Add a custom URL link	-	X
Add custom text instructions to your Connector background	X	X
Job Tickets		
Enable optional Job Tickets	X	X
Create and edit custom Job Ticket entries	X	X
PDF creation		
Enable PDF creation	X	X

	YOU	ALL
Enable PDF creation settings to be used	X	X
Enable Plug-in options for bleed, marks and printing spreads	X	X
Enable local file saving of new PDF files	X	X
Customize file naming based on variables	X	X
Support custom PPD files (for use with the Virtual Printer)	X	X
Preflight		
Enable PDF Preflight and correction	X	X
Choose the preferred Style for your Report	-	X
Delivery		
Enable remote delivery	X	X
Enable HTTP(S) Response System	X	X
Update		
Enable automatic updating	-	X
Enable remote download	-	X

2. Installing and activating Enfocus Connect

This section explains the installation and activation of Enfocus Connect.

2.1. Before you start the installation

System requirements

You can find the system requirements on the Enfocus website *http://www.enfocus.com*.

Direct links:

- Connect YOU : *http://www.enfocus.com/en/products/connect-you/system-requirements*
- Connect ALL : *http://www.enfocus.com/en/products/connect-all/system-requirements*

Procedure

The procedure consists of the following steps:

1. *Install the application*, by running the Enfocus Connect installer.
2. *Activate the application*. You can activate a trial version, or a permanent license by entering a valid license key.

Note:

- You can activate Enfocus Connect online or offline.
- You need an Enfocus ID.
- If you've never installed an Enfocus product before, and you want to activate Connect *offline*, you have to initialize the application first! See *Initializing Enfocus Connect (offline)* on page 18.

2.2. Installing Enfocus Connect

Note: You need administrator rights to install and license Enfocus Connect.

To install Enfocus Connect

1. Use the link you received from Enfocus to download Enfocus Connect.
2. Locate and double-click the Enfocus Connect installer.
3. If you're running the installer on Mac, you may get a warning that the installer cannot be opened because Apple cannot check it for malicious software. This message is expected. We cannot run the notarization process that Apple requires from app creators, because this would prevent Connect from creating custom Connectors. To be able to run the installer anyway, you have two options:

   Option 1:

a. Right-click (or Ctrl-click) the installer.
b. Click **Open**.

Option 2:

a. Go to **System Preferences** > > **Security & Privacy** > **General**.
A message at the bottom of the screen states that the .pkg file was blocked because it is not from an identified developer.
b. Click **Open anyway**.

4. Follow the onscreen installation instructions.

Once installed, you have to activate Enfocus Connect.

2.3. Activating Enfocus Connect

After installing Enfocus Connect, you can activate it from the **About Enfocus Connect** window. This window pops up automatically when using Enfocus Connect for the first time.

You have two options:

- If you want to try the application before you buy it, you can activate a trial version. This version remains active for 15 days (Connect YOU) or 30 days (Connect ALL).
- If you have purchased the application, you should activate your permanent license.

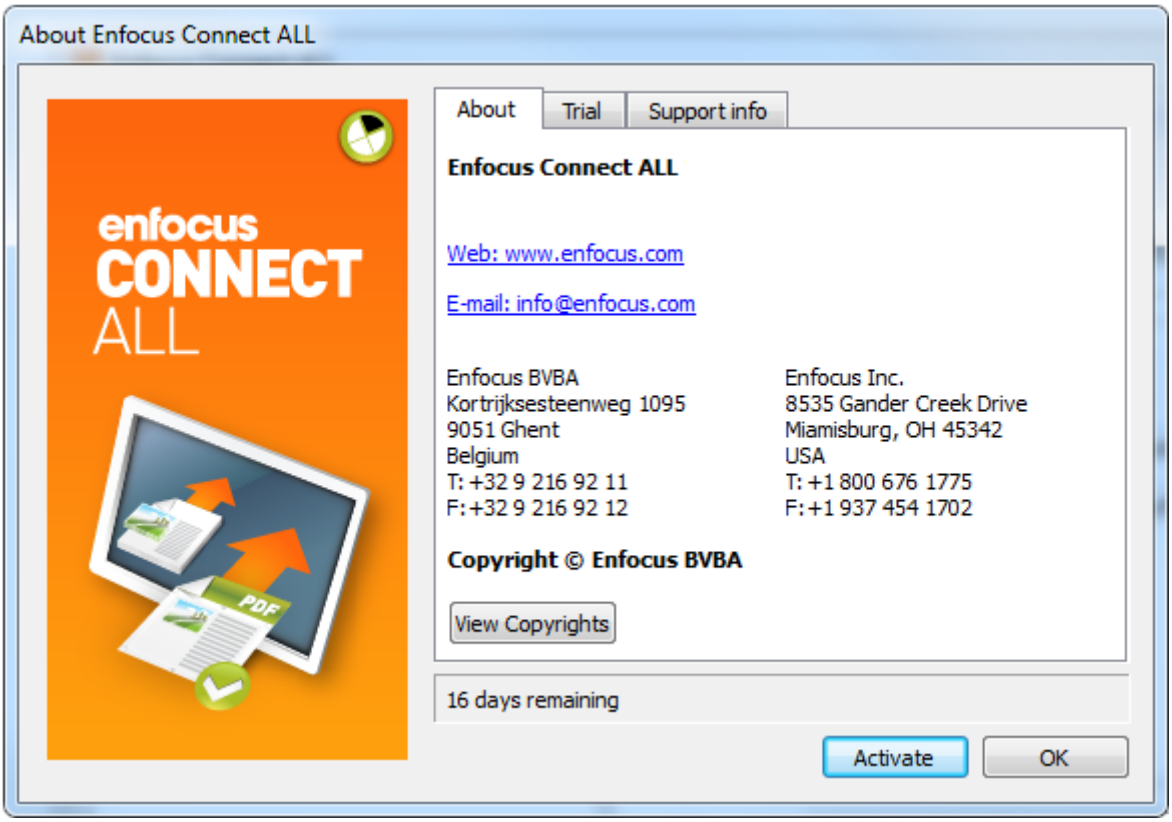
There are two methods to activate Enfocus Connect (for both trial and permant versions):

- If you installed Enfocus Connect on a computer without internet access, refer to the topics about offline activation (*Activating a trial version (offline method)* on page 15 and *Activating Enfocus Connect (offline method)* on page 17).
- If you installed Enfocus Connect on a computer with internet access, refer to the topics about online activation (*Activating a trial version (online method)* on page 14 and *Activating Enfocus Connect (online method)* on page 16).

2.3.1. The About Enfocus Connect window

The **About Enfocus Connect** window opens automatically when using Enfocus Connect for the first time. This window shows you information about the software and allows you to either start a trial or activate your copy of Enfocus Connect.

Note that you can also access this window, by selecting **Help** > **About Enfocus Connect YOU/ALL** (on Windows) or **Enfocus Connect YOU/ALL** > **About Enfocus Connect YOU/ALL**.



The About tab

This tab shows the version of your software, contact information for Enfocus and allows you to view the copyrights (click the **View Copyrights** button).

The Trial tab

This tab allows you to start a trial or activate your software and will show your license information after activation.

The Support info tab

This tab shows information about your system. If you encounter a problem with the software, you should communicate this information to Enfocus support.

To copy and paste the support information, use the **Copy to Clipboard** button first, then paste the information in a text file or the body of an e-mail.

2.3.2. Activating a trial version (online method)

A trial version is a fully functional version of the application that only operates for a limited number of days (15 days for Connect YOU, 30 days for Connect ALL).

Note: The Enfocus Connect trial version does not allow you to use Connectors on a system other than the one that generated them. This means you can only use

Connectors on the computer with your Enfocus Connect installation. If you would like to evaluate a Connector to distribute, please contact *your local Enfocus reseller*.

This procedure describes how to activate a trial version on a computer *with internet access*.

To activate a trial version

1. Start Enfocus Connect.
   The **About Enfocus Connect** window is opened automatically.
2. Click the **Activate Trial** button.
   The **Enfocus Software Activation** window is opened.
3. Make sure the **Off-Line Mode** checkbox is cleared.
4. Enter your Enfocus ID and password.

   If you don't have an Enfocus ID yet, click the **Create Enfocus ID** link. After completing the form, you will receive an e-mail with an account name and password.

   The **Activate x day trial version** checkbox is selected automatically.
5. Click **Activate**.
6. Click **Close**.
7. Click **OK**.

2.3.3. Activating a trial version (offline method)

A trial version is a fully functional version of the application that only operates for a limited number of days (15 days for Connect YOU, 30 days for Connect ALL).

Note: The Enfocus Connect trial version does not allow you to use Connectors on a system other than the one that generated them. This means you can only use Connectors on the computer with your Enfocus Connect installation. If you would like to evaluate a Connector to distribute, please contact *your local Enfocus reseller*.

This procedure describes how to activate a trial version on a computer *without internet access*.

Prerequisites:

- You need an additional computer with internet access to communicate with the Enfocus web server.
- You need an Enfocus ID. To create an Enfocus ID (on a computer with internet access), go to *http://my.enfocus.com/user/register* and follow the on-screen instructions. After completing the form, you will receive an e-mail with an account name and password.
- If it is the first time you're activating an Enfocus product on this computer, you will have to initialize the application first. See: *Initializing Enfocus Connect (offline)* on page 18.

How it works:

Activating Enfocus Connect offline consists of three steps:

1. Create an activation request on the computer on which you installed Enfocus Connect.
2. Save this file on another computer with internet access and upload it to the Enfocus activation website. Enfocus will check this request file, and provide you with a response file.
3. Upload the response file to the computer on which you installed Enfocus Connect.

Each of these steps is explained below.

To activate a trial version

1. On the computer on which you installed Enfocus Connect:
   a. Start Enfocus Connect.
      The **About Enfocus Connect** window is opened automatically.
   b. Click **Start Trial**.
      The **Enfocus Software Activation** window is opened.
   c. Make sure the **Off-Line Mode** checkbox is checked.
   d. Enter your Enfocus ID and password.
   e. Click **Activate**.
   f. In the Off-Line Activation dialog, click **Save** and save the activation request file requestactivate.xml on your local computer.
2. On a computer with internet access:
   a. Make requestactivate.xml available.

      Tip: You can copy requestactivate.xml to a USB stick, and connect the USB stick to your online system.

   b. Go to *http://www.enfocus.com/products/activation?lang=en*
   c. Upload requestactivate.xml, and click **Continue**.
   d. Fill in your account password, and click **Continue**.
   e. Click **Continue** to confirm.
      The Enfocus web server creates a file: response.xml.
   f. Download the file.
3. On the computer on which you installed Enfocus Connect:
   a. Make response.xml available on this computer.
   b. In the Off-Line Activation dialog (see step 1g), in the right part, click **Load** and upload response.xml.
   c. Click **Activate**.
      You have activated a trial version of Enfocus Connect.
   d. Click **Close**.

2.3.4. Activating Enfocus Connect (online method)

This procedure describes how to activate Enfocus Connect on a computer *with internet access*.

Prerequisites:

- You need a valid product license key (provided by your reseller, directly from Enfocus or within your product box). Typically the license key is provided as an HTML file.
- If you're using a firewall, make sure to allow Enfocus Connect to communicate with *https://licensingservices.esko.com* using ports 80 and 443.

To activate Enfocus Connect

1. Start Enfocus Connect.
   The **About Enfocus Connect** window is opened automatically.

2. Click the **Activate** button.
   The **Enfocus Software Activation** window appears.
3. Make sure the **Off-Line Mode** checkbox is cleared.
4. Enter your Enfocus ID and password.

   If you don't have an Enfocus ID yet, click the **Create Enfocus ID** link. After completing the form, you will receive an e-mail with an account name and password.
5. To supply your product license key, do one of the following:
   - Enter the product key in the text area.
   - Drop the product key file into the text area.
   - Click **Browse** to select the product file from a location on your local system.
6. Click the **Activate** button.
   The activation wizard will then confirm your account information and register your license key.
7. Click **Close**.
8. Click **OK**.

2.3.5. Activating Enfocus Connect (offline method)

This procedure describes how to activate Enfocus Connect on a computer *without internet access*.

Prerequisites:

- You need an additional computer with internet access to communicate with the Enfocus web server.
- You need a valid product license key (provided by your reseller, directly from Enfocus or within your product box). Typically the license key is provided as an HTML file.
- You need an Enfocus ID. To create an Enfocus ID (on a computer with internet access), go to *http://my.enfocus.com/user/register* and follow the on-screen instructions. After completing the form, you will receive an e-mail with an account name and password.
- If it is the first time you're activating an Enfocus product on a particular computer, you will have to initialize the application first. See *Initializing Enfocus Connect (offline)* on page 18.

How it works:

Activating Enfocus Connect offline consists of three steps:

1. Create an activation request on the computer on which you installed Enfocus Connect.
2. Save this file on another computer with internet access and upload it to the Enfocus activation website. Enfocus will check your licenses and, if the license is valid, provide you with a response file.
3. Upload the response file to the computer on which you installed Enfocus Connect.

Each of these steps is explained below.

To activate Enfocus Connect

1. On the computer on which you installed Enfocus Connect:
   a. Start Enfocus Connect.
      The **About Enfocus Connect** window is opened automatically.

b. Click **Activate**.
   The **Enfocus Software Activation** window is opened.
c. Make sure the **Off-Line Mode** checkbox is checked.
d. Enter your Enfocus ID and password.
e. Enter your product key by doing one of the following:
   - Type or copy-paste your product key in the Product key field.
   - Browse to your product key license file or drag it to the Product key field.
f. Click **Activate**.
g. In the Off-Line Activation dialog, click **Save** and save the activation request file requestactivate.xml on your local computer.

2. On a computer with internet access:
   a. Make requestactivate.xml available.

   Tip: You can copy requestactivate.xml to a USB stick, and connect the USB stick to your online system.

   b. Go to *http://www.enfocus.com/products/activation?lang=en*
   c. Upload requestactivate.xml, and click **Continue**.
   d. Fill in your account password, and click **Continue**.
   e. Click **Continue** to confirm.
      The Enfocus web server creates a file: response.xml.
   f. Download the file.

3. On the computer on which you installed Enfocus Connect:
   a. Make response.xml available on this computer.
   b. In the Off-Line Activation dialog (see step 1g), in the right part, click **Load** and upload response.xml.
   c. Click **Activate**.
      You have activated Enfocus Connect.
   d. Click **Close**.

2.3.5.1. Initializing Enfocus Connect (offline)

This procedure describes how to initialize Enfocus Connect. Note that this is only required:

- If it is the first time you're using an Enfocus product on a particular computer.
- If you want to activate Enfocus Connect offline, i.e. on a computer *without internet access*. In case of online activation, initialization is done automatically in the background.

Prerequisites:

- You need an additional computer with internet access to communicate with the Enfocus web server.
- You need an Enfocus activation account. To create an activation account (on a computer with internet access), go to *http://www.enfocus.com/products/activation/createaccount?lang=en* and follow the on-screen instructions. After completing the form, you will receive an e-mail with an account name and password.

How it works:

Initializing Enfocus Connect consists of three steps:

1. Create an initialization request on the computer on which you installed Enfocus Connect.
2. Save this file on another computer with internet access and upload it to the Enfocus activation website. Enfocus will check your licenses and, if the license is valid, provide you with a response file.
3. Upload the response file to the computer on which you installed Enfocus Connect.

Each of these steps is explained below.

To initialize Enfocus Connect

1. On the computer on which you installed Enfocus Connect:
   a. Start Enfocus Connect.
      The **About Enfocus Connect** window is opened automatically.
   b. Click **Activate**.
      The **Enfocus Software Activation** window is opened.
   c. Make sure the **Off-Line Mode** checkbox is checked.
   d. Enter your Enfocus account name and password.
   e. Select **Activate 30 day trial version** or **Activate a product key** as required.
   f. If you have a product key, enter your product key by doing one of the following:
      - Type or copy-paste your product key in the Product key field.
      - Browse to your product key license file or drag it to the Product key field.
   g. Click **Activate**.
   h. In the Off-Line Initialization dialog, click **Save** and save the activation request file requestinitialize.xml on your local computer.

2. On a computer with internet access:
   a. Make requestinitialize.xml available.

      Tip: You can copy requestinitialize.xml to a USB stick, and connect the USB stick to your online system.

   b. Go to *http://www.enfocus.com/products/activation?lang=en*
   c. Select **Offline System Initialization**, and click **Continue**.
   d. Upload requestinitialize.xml, and click **Continue**.
      The Enfocus web server creates a file: response.xml.
   e. Download the file.

3. On the computer on which you installed Enfocus Connect:
   a. Make response.xml available on this computer.
   b. In the Off-line Initialize dialog (see step 1h), in the right part, click **Load** and upload response.xml.
   c. Click **Initialize**.
      You have initialized Enfocus Connect.

Once you have initialized Enfocus Connect, the Off-Line Activation dialog appears. You can immediately go on with step 1g (download requestactivate.xml) of *the offline activation procedure.*

2.4. Managing your Enfocus licenses

Once you have installed Enfocus Connect, you can manage your Enfocus Connect license (and other licenses if applicable) from within the application. You can for example check the status of your other Enfocus licenses, deactivate or repair your Enfocus Connect license, export license information, and so on.

2.4.1. Repairing licenses

Licenses are tied to identifying characteristics of the hardware inside your computer. **Licenses may break if you change the hardware significantly** (for example if you add memory, the hard drive crashes, your network card breaks... etc).

If more than three hardware elements of the computer change simultaneously, the licenses are invalidated and declared broken.

As with activating and deactivating licenses, the repair procedure may be done on-line or off-line.

For on-line license repair, all that is needed is to click the **Repair** button from the **License** tab in the **About Enfocus Connect** window. A status bar will appear while the system communicates with the activation server. After that, a message will appear that the repair completed successfully and that you can now use the product(s) on your computer.

For off-line license repair, it is very similar to off-line deactivation of Enfocus Connect. From the workstation with the broken license you will need to create a Repair request from the **License** tab of the **About Enfocus Connect** window. This file will then need to be moved to a workstation with Internet access and uploaded to *http://www.enfocus.com/activation*. You will then receive back a Repair response file that will need to be loaded into Enfocus Connect to repair the license.

2.4.2. Deactivating licenses

Just as with activating licenses, deactivating licenses can be done both on-line and off-line. You must deactivate a license before moving it to another computer.

For on-line deactivation, all that is needed is to click **Deactivate** button in the **License** tab of the **About Enfocus Connect** window. You will be prompted to export a copy of your license. This is recommended for re-activation later on another workstation.

Note: For offline deactivation, you can select the **Off-Line Mode** checkbox at the top right corner of the **Enfocus Software Activation** dialog box and proceed as instructed in the wizard.

2.4.3. Moving licenses between computers

To move licenses between computers, do the following

1. Deactivate the licenses on the computer that will not use them anymore.
2. Copy the product keys file to the computer that will use the licenses.
3. On the computer acquiring the licenses, activate the licenses using the product keys file.

   See *Activating Enfocus Connect* on page 13.

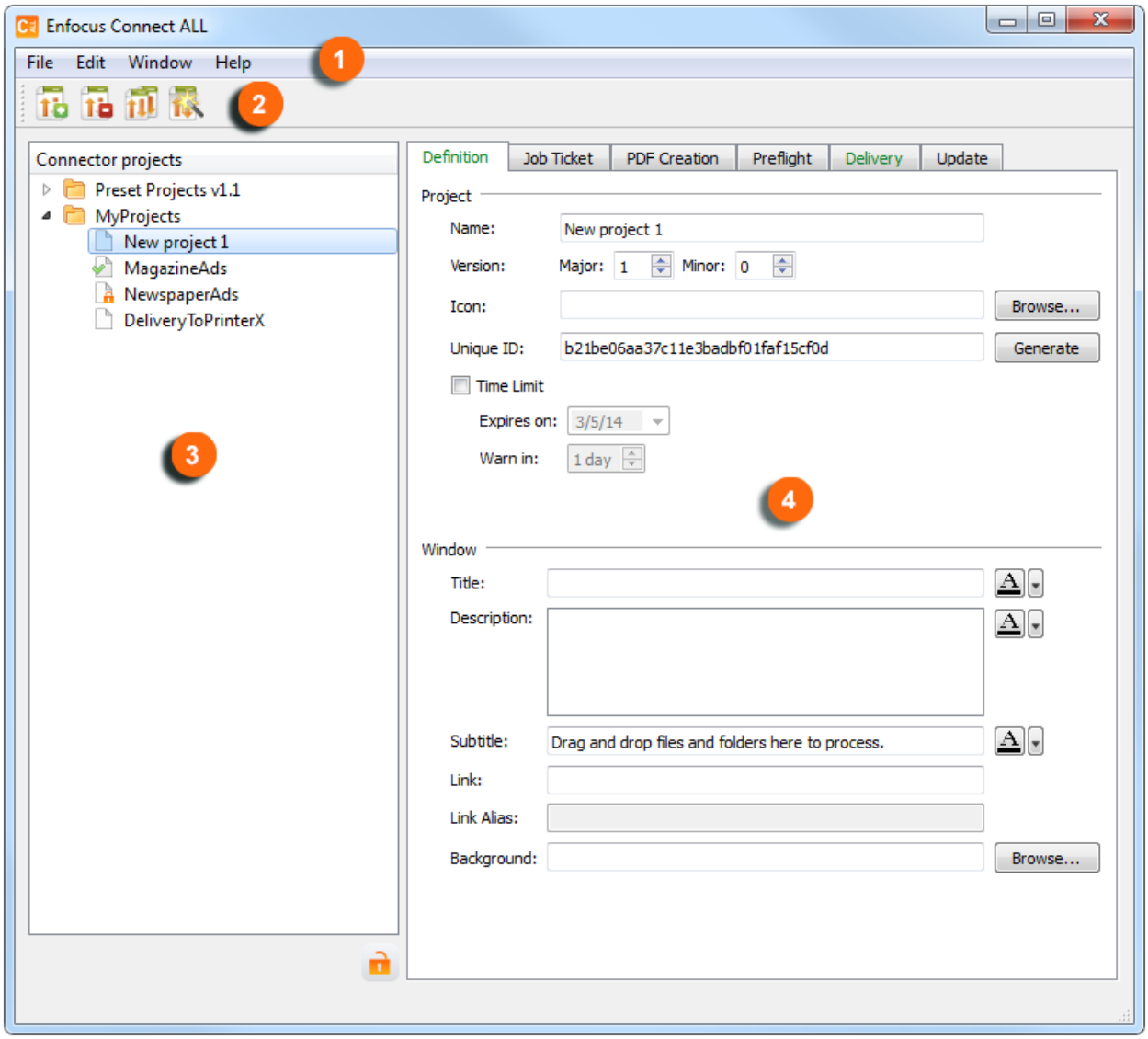
3. Working with the Enfocus Connect application

This section explains all you need to know to be able to work with the **Connect application** for defining and editing Connector Projects and creating Connectors from those Projects. Throughout this section we will point out features that are included in/excluded from the different flavors of Connect (YOU/ALL).

3.1. Workspace overview

The main screen of the application consists of the following screen parts:

1. A **menu bar** at the top of the window
2. A **toolbar** with a number of buttons
3. The **Connector Projects overview**
4. The **Connector properties** pane



The table below gives a brief description of each of these screen parts.

#	Screen part	Description
1	**Menu bar**	The menu bar gives access to the different functions and panes of Enfocus Connect. For some of the main functions, a shortcut, i.e. a button is available in the toolbar.
2	**Toolbar**	The toolbar contains buttons to create, remove or duplicate Connector Projects (i.e. Connector definitions) and to create Connectors (actual applications: .app or .exe). • Creates a new Project. See *Configuring and creating a Connector* on page 27.

#	Screen part	Description
		• Removes the selected Project or Group. See *Removing a Project* on page 32. • Duplicates the selected Project. See *Duplicating a Project* on page 32. • Creates the Connector(s) from the selected Connector Project. See *Creating a Connector* on page 28.
3	The **Connector Projects** list	The Connector Projects list shows all Connector Projects. You can organize your Projects in Groups, for example based on type (Magazine ads versus Newspaper ads), on customer, ... See *Managing Connector Projects* on page 31. Note that a number of predefined projects (Preset Projects) are included in the Enfocus Connect installation. You can use them as they are or customize them to your needs. See *Preset Connector Projects* on page 25. Note the icon below the list of Connector Projects: • Indicates that the selected Connector Project is locked, hence cannot be edited. This avoids that users accidentally change a Connector Project. • Indicates that the selected Connector Project is unlocked an can be edited as required. See *Locking a Project* on page 34. Some Projects may have a small icon in front of them. See *Icons in the Connector Projects list* on page 26.
4	The **Connector properties** pane	The **Connector Properties** pane allows you to set the properties for the Connector Project selected in the list. This pane consists of several *tabs*. The *number* of tabs and the content of each tab depends on the Connect version. For example, the **Definition** tab in Connect YOU displays only three fields (**Name**, **Icon**, **Description**). The *color* of the text on the tabs indicates whether or not the properties for this tab have been configured. Only tabs with *green* titles have been enabled.

#	Screen part	Description
		For an overview, see *The Project Properties pane - Tabs* on page 25.

3.1.1. Preset Connector Projects

The Enfocus Connect installation includes a collection of predefined Connector Projects, for creating different types of PDF files using the Virtual Printer and/or the Connect Plug-ins. These projects include predefined Adobe PDF settings, Action lists and Preflight Profiles to produce the desired output.

You can use these Projects as they are, or you can create your own projects based on such a predefined Project, e.g. by duplicating and modifying it.

Restoring the Preset Projects

If you have deleted your Preset Projects folder and would like to restore them, you can do so using the shortcut Ctrl+Alt+J (Windows) or Cmd+Alt+J (Mac).

3.1.2. The Project Properties pane - Tabs

A Connector Project consists of a set properties, divided into several categories. Each category has its own tab in the **Connector properties** pane. The following table provides an overview of the different tabs and the corresponding properties.

Tab	Properties
Definition	The **Project** properties allow to identify the Connector. This section contains the name of the resulting Connector and the icon for both Mac OS and Windows (*.png). If no icon is set, the default icon is used. The **Window** properties refer to the Connector's main window. In Enfocus Connect ALL, these include the title, a description, a subtitle, a web link and a background image. In Enfocus Connect YOU, only the Description field is available. See *Definition tab* on page 40
Job Ticket	This tab allows to define if a Job Ticket is used, and what Groups, Format and Metadata are used. See *Job Ticket tab* on page 43
PDF Creation	This tab allows to enable PDF creation through Connect Plug-ins and/or a Virtual Printer. You can set a number of additional preferences, e.g. enable local file saving and define file names based on variables. In addition, you can enable Plug-in options for bleed, marks and printing spreads. See *PDF Creation tab* on page 55

Tab	Properties
Preflight	This tab allows you to determine which Preflight Profile should be used to certify the PDF and, optionally, which Action List(s) and Variable Set should be applied. You can set a number of preferences, e.g. request a separate annotation report or allow sign-off on Preflight errors. See *Preflight tab* on page 62
Delivery	This tab contains properties that determine how the file is delivered. Several delivery methods are possible: Enfocus Switch, FTP, sFTP, e-mail ... You can choose one or two Delivery Points. See *Delivery tab* on page 78
Update (not available in Connect YOU)	Properties that determine how the Connectors are updated if a new version of the Connector is available. See *Update tab* on page 96

3.1.3. Icons in the Connector Projects list

The following icons may be shown in the Connector Projects list.

Icon	Meaning
	The Project is locked. See *Locking a Project* on page 34. An unlocked Project does not have an icon.

The following icons only appear for Projects that have the update mechanism enabled. See *About the Automatic Updating Mechanism* on page 97.

The icons reflect the status of the Project on the update server.

Icon	Meaning
	The Project includes a Connector that has been uploaded correctly to the update server. The Connector is up-to-date, i.e. no changes were made to the Project after uploading the Connector.
	The Project has changed, but the changes have not been uploaded to the update server yet.
	The Project includes a Connector that has been uploaded with errors. This may happen if the upload is canceled half way through the process resulting in corrupt files.

Icon	Meaning

3.2. Configuring and creating a Connector

The procedure for configuring and creating a Connector consists of the following steps:

1. Create a Connector Project.See *Creating a Connector Project* on page 27.
2. Configure the properties for the Connector. These properties will be included in the Connector when you create it.
   - For an overview of the properties, see *The Project Properties pane - Tabs* on page 25.
   - For the procedure, see *Setting the Connector properties*.
3. Create the Connector. See *Creating a Connector* on page 28.

3.2.1. Creating a Connector Project

A Connector Project contains all properties of a Connector. Before you can generate the Connector, you must first create a Connector Project (as explained below) and configure its properties (See *Setting the Connector properties*).

You can create a new Project from scratch or based on an existing Connector Project.

Tip: If you create a Project from scratch, you start from an empty Connector Project. However, if you have set an existing Connector Project as default (displayed in italics in the Connector Projects list), the newly created Connector Project will use all settings from this default Project, allowing you to save time in defining the properties. See *Setting a Project as default* on page 32.

To create a new Connector Project, proceed as follows:

1. To start from scratch, do one of the following:
   - In the toolbar, click (Create Project).
   - On the **File** menu, click **New** > **New Project**.
   - In the context menu of the **Connector Projects** list, select **New Project**.

     Note: Projects can be organized in Groups (See *Organizing Projects in Groups* on page 31).
     - To add the new Project to an existing Group, open the context menu of this Group.
     - To insert the new Project after an existing Project in the list, open the context menu of this Project.
2. To create a new Project based on an existing Connector Project:

a. From the **Connector Projects** list, click the Connector Project on which you want to base your new Project.

b. Do one of the following:

- In the toolbar, click (Duplicate Project).
- On the **File** menu, click **Duplicate**.
- In the context menu of the selected Connector Project, click **Duplicate**.

A new Connector Project is created. It appears in the **Connector Projects** list.

Note: You can change the name of the Connector Project by double-clicking it in the **Connector Projects** list, or by changing the text in the **Name** field of the **Definition** tab.

3.2.2. Setting the Connector properties

After creating a new Connector Project, you can set the properties of your Connector in the Connector properties pane. The properties are divided into several categories. Each category has its own tab.

For an overview of the property categories, refer to *The Project Properties pane - Tabs* on page 25.

To set the properties of a Connector

1. In the right part of the application, go through the different tabs, one by one, and decide for each tab whether or not you need the functionality concerned.
   - If you want to make use of a particular functionality, select the **Enable <functionality>** checkbox in the left corner of the tab.
   - If you do NOT want to make use of the functionality concerned, make sure the **Enable <functionality>** checkbox is cleared.

   For more information, refer to "Customizing your Connector".

   The tab titles of enabled tabs will turn green and all options on these tabs will become editable.

2. On the enabled tabs, enter the required details.

   For an overview, refer to "configuring the <name> tab".

   Note: The **Definition** tab is enabled by default; the properties on this tab are optional, but we advise entering at least the name of the Connector.

Once you have set the properties, you can create the Connector.

3.2.3. Creating a Connector

Once you have defined all properties for the Connector, you can create the Connector, i.e. generate the actual application file.

If you're working with Connect YOU, this is only one file (either .exe or .app), for the same Operating System you are running Enfocus Connect on. Connectors created with Connect YOU can only be used on the workstation running the Connect YOU application.

If you're working with Connect ALL, you can actually create two files: one Connector to be used on Windows (.exe), and one for Mac OS (.app). Mac OSX Connectors generated on Windows PCs will be automatically compressed as a .ZIP file, to ensure the application package is retained between platforms. The Connectors can be distributed to an unlimited number of customers.

Note: If you have enabled Remote download, two more files will be generated, e.g. remote_<Connector name>.exe and remote_<Connector name>.app (compressed as a .ZIP file). These are smaller versions of the Connector for easy distribution through communication channels such as e-mail.

To create a Connector

1. Select a Connector Project from the **Connector Projects** list.
2. Do one of the following:
   a. In the toolbar, click the **Create Connectors** button.
   b. On the menu, click **File** > **Create Connector**.
   c. From the context menu of the selected Connector Project, choose **Create Connector**.
3. (**Connect ALL only**; Connect YOU users can skip this step.) In the dialog that pops up, select the preferred option(s) and click **Continue**.

Option	Meaning
Local Connectors: • **MacOS** • **Windows**	Only the selected Connector(s) are generated and saved on your local system, for example only a Connector for use on Windows.
Upload to Update Server	This option is only relevant if you're using the Automatic Updating system (see *About the Automatic Updating Mechanism* on page 97). When selected, the Connectors are uploaded to the update server. The new version replaces any previous versions. **Tip:** We recommend testing the Connector locally, before actually publishing it to the update server and making it available to your customers. Once you have created the Connector, the Update tab will be grayed out (the content cannot be changed anymore) and you will see a green checkmark in the Connector Projects pane. If you need to make changes to the Update server settings, you will need to

Option	Meaning
	duplicate the existing project creating an all new project.
Remember Settings	When selected, the current settings are considered the default ones for this dialog. They will be remembered for all your Connector Projects. For example, if you only need Connectors for Windows, it may be handy to have this option selected by default. **Note:** If you enable or disable a setting in this dialog, the **Remember Settings** option is cleared automatically. The change you made is considered a one time change, unless you make it default, by selecting the **Remember Settings** checkbox again.

4. In case of problems (for example: certain property fields have not been filled out (correctly)), a dialog will pop up, showing all errors and warnings. If warnings or errors are displayed, do one of the following:
   - To fix the issue, click **Cancel**.

     Once you have solved the problem, try creating the Connector again.
   - To ignore the issue (only possible in case of warnings), click **Ignore** and proceed with the next step of this procedure.
5. Define the location for the Connector if required (i.e. if local Connectors are generated).

The Connector is created and can be launched.

Note:

- If you're working with Connect ALL, you need to locate and double-click the Connector, to launch it.
- If you're working with Connect YOU, the Connector will launch automatically in order to install any Plug-in or Virtual Printer support.

Important: Connect ALL users are strongly advised **to notarize their Mac Connectors and sign their Windows Connectors** before distributing them to their customers. That way, their customers are reassured that the Connectors are trustworthy. Refer to the *Notarizing Connect ALL Connectors* documentation and *Signing Connect ALL Connectors* documentation on our website.

3.3. Managing Connector Projects

Your current Connector Projects are displayed in the **Connector projects list**. Connector Projects are stored automatically on your system in the user application support folder for Enfocus Connect. Any modification on a Project is saved immediately.

Note:

You can find the user application folder here:

- /Users/<user>/Library/Application Support/Enfocus/Connect (ALL or YOU) (Mac OS)
- \Users\<user>\AppData\Roaming\Enfocus\Connect (ALL or YOU) (Windows Vista, Windows 7, Windows 8)
- \Documents and Settings\<user>\Application Data\Enfocus\Connect (ALL or YOU) (Windows XP, Windows Server 2003)

You can do the following with your Connector projects:

- *Use Groups to organize your Connector Projects.*
- *Lock* or *unlock Projects.*
- *Remove Projects*
- *Duplicate Projects*
- *Edit Projects*
- *Set a default Project*
- *Export* or *import Projects*

You can also *create a new Project*.

3.3.1. Organizing Projects in Groups

In the **Connector projects** list, you can create **Groups** to organize your Connector Projects.

To organize Projects in Groups

1. To create a new Group, do one of the following:
   - In the toolbar, click the **Create Group** button.
   - On the menu, click **File** > **New** > **New Group**.
   - In the context menu of the **Connector projects** list, click **New Group**.
2. To *rename* a Group, double-click the name and enter the new name.
3. To *add Connector Projects to a Group*, simply drag and drop them on the Group.
4. To *expand* or *collapse* a Group, click the icon in front of the Group:
   - To expand the Group, click .

- To collapse the Group, click

3.3.2. Removing a Project

Note: Locked Projects cannot be removed! See *Locking a Project* on page 34.

To remove a Connector Project

1. In the Connector Projects list, select the Project you want to remove.
2. Do one of the following:
   - In the context-menu of the Connector Projects list, click **Remove**.
   - In the toolbar, click the **Remove** button.
   - On the menu, click **File** > **Remove**.

3.3.3. Duplicating a Project

To duplicate a Connector Project

1. In the Connector Projects list, select the Project you want to duplicate.
2. Do one of the following:
   - In the context-menu of the Connector Projects list, click **Duplicate**.
   - In the toolbar, click the **Duplicate** button.
   - On the menu, click **File** > **Duplicate**.

3.3.4. Editing a Project

To edit a Connector Project:

1. In the Connector Projects list, select the Project you want to edit.
2. Edit the desired properties in the Project Properties pane. See *The Project Properties pane - Tabs* on page 25.

Note:

Enfocus Connect Projects are saved automatically.

3.3.5. Setting a Project as default

If you create a new Project from scratch (see *Creating a Connector Project* on page 27), you start from an empty Connector Project.

By setting an existing Connector Project as default, every newly created Connector Project will use all settings from the default Project, allowing you to save time in defining the Connector Project.

To set a Connector Project as default

1. In the Connector Projects list, select the Project you want to set as default.
2. Do one of the following:
   - In the context-menu of the Connector Projects list, click **Set As Default**.
   - On the menu, click **File** > **Set As Default**.

   The name of the Connector Project will be shown in italics, indicating that this is the default Project.

Note: If you don't want the Project to be the Default anymore, select the Default Project and repeat step 2.

3.3.6. Exporting a Project

Exporting a Connector Project means that you save the Project as an external file with extension .ecp.

You can do this for a number of different reasons, for example:

- To create a backup of the Connector Project.
- To share it with other Connect users.

To export a Connector Project

1. In the Connector Projects list, select the Project you want to export.
2. Do one of the following:
   - In the context-menu of the Connector Projects list, click **Export**.
   - On the menu, click **File** > **Export**.
3. Specify the name and the location where you want to save the Project.
4. Click **Save**.

3.3.7. Importing a Project

Importing a Connector Project means that you import an external file with extension .ecp. This can be a backup of a Project you exported earlier, or a Project you received from another Connect user.

To import a Connector Project

1. Do one of the following:
   - In the context-menu of the **Connector Projects** list, click **Import**.
   - On the menu, click **File** > **Import**.

   The place of your cursor determines where the imported Connector will be placed in the Connector Projects list.

- If you select a Group, the Connector will be added to that Group (at the end).
- If you select a Project, the imported Connector will be placed after the selected Project.

You can afterwards change the order of the Projects, by dragging them to the preferred location.

2. Select the Connector Project to import.

3. Click **Open**.
   The imported Connector Project is shown in the Connector Projects list. If a Connector Project with the same name already exists, the suffix "copy" is added to the Project name, e.g. : *Project1 copy*. The imported Project is unlocked by default; you can immediately edit it as required.

3.3.8. Locking a Project

Locking a Connector Project helps you to avoid accidental changes. Locked Projects cannot be edited or changed, nor removed. All other actions (exporting or importing, duplicating,...) remain possible.

Note: If you import or duplicate a locked Project, the imported or duplicated instance is considered a new and different Project. It is unlocked by default and can be changed as required. The source Project remains untouched and locked.

You can lock Projects one by one, or you can lock all Projects belonging to a particular Group in one go.

To lock a Connector Project

1. To lock one particular Connector Project
   a. In the Connector Projects list, select the Connector Project you want to lock.
   b. Do one of the following:
      - Right-click the selected Connector Project and select **Lock**.
      - Below the Connector Projects list, click .
      - On the **File** menu, click **Lock**.

2. To lock all Connector Projects belonging to a particular Connector Group
   a. In the Connector Projects list, select the Connector Group you want to lock.
      All Projects underneath the selected Group will be locked, i.e. also the Projects in subgroups if any.
   b. Do one of the following:
      - Right-click the selected Connector Group and select **Lock All**.
      - On the **File** menu, click **Lock All**.

In the Connector Projects list, locked projects are preceded by an icon with a small lock: . If you select a locked Connector Project, you will see that the icon beneath the Connector Projects

list has changed to . The fields in the Project Properties pane are grayed out and all settings are disabled. You can however still switch to the different tabs and view the settings as required.

3.3.9. Unlocking a Project

Locked Projects cannot be edited or changed nor removed. You recognize them by the icon in the Connector Projects list, or, when you select a Project, by the icon beneath the Connector Projects list.

Note that you can unlock Projects one by one, or you can unlock all Projects belonging to a particular Group in one go.

To unlock a Connector Project

1. To unlock one particular Connector Project
   a. In the Connector Projects list, select the Connector Project you want to unlock.
   b. Do one of the following:
      - Right-click the selected Connector Project and select **Unlock**.
      - Below the Connector Projects list, click .
      - On the **File** menu, click **Unlock**.
2. To unlock all Connector Projects belonging to a particular Connector Group
   a. In the Connector Projects list, select the Connector Group you want to unlock.

      All Projects underneath the selected Group will be unlocked, i.e. also the Projects in subgroups if any.
   b. Do one of the following:
      - Right-click the selected Connector Group and select **Unlock All**.
      - On the **File** menu, click **Unlock All**.

In the Connector Projects list, unlocked projects are preceded by the following icon (so without a lock): . If you select an unlocked Connector Project, you will see that the icon beneath the Connector Projects list has changed to . You can now edit the Connector Project as required.

3.4. Setting the Connect user preferences

To set the Connect user preferences

1. Select **Edit** > **Preferences**.
2. In the **User preferences** dialog, select the appropriate category:
   - **General**
   - **Validation**
   - **Updates**

The corresponding preferences are shown in the right part of the dialog.

3. Fill in the preferences as required.

   See:

   - *General preferences* on page 36
   - *Validation preferences* on page 36
   - *Update preferences* on page 37

4. Click **OK**.

3.4.1. General preferences

The table below gives an overview of the Connect user preferences in the category **General**.

Preference	Meaning
Language - Viewing language	Language of the user interface. You can choose one of the languages selected during the installation of Connect.
Measurement Units - Default measurement units	Unit of measure that will be used in the Preflight Report, and for bleed and offset in the **Plug-In Settings** subtab of the **PDF Creation** tab.
Proxy - Ignore Proxy	If enabled, when creating Connectors, you can bypass the Proxy settings (if any).

3.4.2. Validation preferences

The table below gives an overview of the Connect user preferences in the category **Validation**. These preferences apply when a Connector Project is validated, i.e. when users try to create the actual Connector. They determine whether or not a Connector can be created despite particular warnings or errors in the Connector Project settings.

Preference	If enabled
Treat errors as warnings	Errors do not block the creation of the Connector. Errors and warnings are treated in the same way. In the message that pops up in case of problems: • There's only one section, *Warnings*, listing both errors and warnings. • The **Ignore** button is activated. You can create the Connector, despite the listed warnings. If disabled (default value), errors cannot be ignored.
Ignore warnings	Warnings are simply ignored. In case of warnings only, no message is displayed, and you can create the Connector right away.

Preference	If enabled
	In case of warnings and errors, the warnings are not shown in the message that pops up to inform you about the errors.
Convert Delivery tab errors to warnings	Errors on the **Delivery** tab are treated in the same way as warnings. In the message that pops up in case of problems: • The errors are listed under *Warnings*. • The **Ignore** button is activated. You can create the Connector, despite the listed warnings.
Convert Preflight tab errors to warnings	Errors in the **Preflight** tab are treated in the same way as warnings. In the message that pops up in case of problems: • The errors are listed under *Warnings*. • The **Ignore** button is activated. You can create the Connector, despite the listed warnings.
Convert Update tab errors to warnings (Connect ALL)	Errors in the **Update** tab are treated in the same way as warnings. In the message that pops up in case of problems: • The errors are listed under *Warnings*. • The **Ignore** button is activated. You can create the Connector, despite the listed warnings.

3.4.3. Recovery preferences (Connect ALL)

This preference determines what happens in case new Connector Projects are imported. For the procedure, refer to *Importing a Project* on page 33.

When **Maintain Unique ID when importing connector projects** is...

- **selected**, the unique ID of the imported Connector Projects remains untouched. This allows you to import your Connector Projects to a new machine and to maintain them as they were before.
- **cleared** (default behavior), imported Connector Projects get a new unique ID.

3.4.4. Update preferences

The table below gives an overview of the Connect user preferences in the category **Updates**.

Enfocus Connect can automatically check at regular intervals whether updates of Connect are available. You can determine how often Connect should check for updates, and how often you want to receive a notification if an update is available.

Preference	Meaning
Updates - Check for updates	Determines how often Connect should check for updates: • **At startup** i.e. every time you start Enfocus Connect. • **Daily**

Preference	Meaning
	• **Weekly** • **Monthly** • **Manually** In this case, no automatic check is done. You can manually check for updates, by selecting **Help** > **Check for updates**.
Updates - When an update is found, notify me	Determines how often you are notified about updates of Connect: • **At startup** i.e. every time you start Enfocus Connect. • **Once a day** • **Once a week** • **Once a month**

4. Customizing a Connector - feature overview

This chapter gives an overview of the many features and customization options of Enfocus Connect.

- A brief explanation of the main features.
- Guidelines on how to enable them.
- Information on how to use them.

4.1. Visual customization

Enfocus Connect enables you to "brand" your Connectors and provide a corporate look and feel.

- As a Connect YOU user, your options are rather limited: you can change the name, the application icon and the description of your Connector.
- As a Connect ALL user, you can in addition change the Connector background, add your own company logo, provide a link to an external web page,....

Configuration

The properties that define the look and feel of a Connector have to be set in the *Definition tab*.

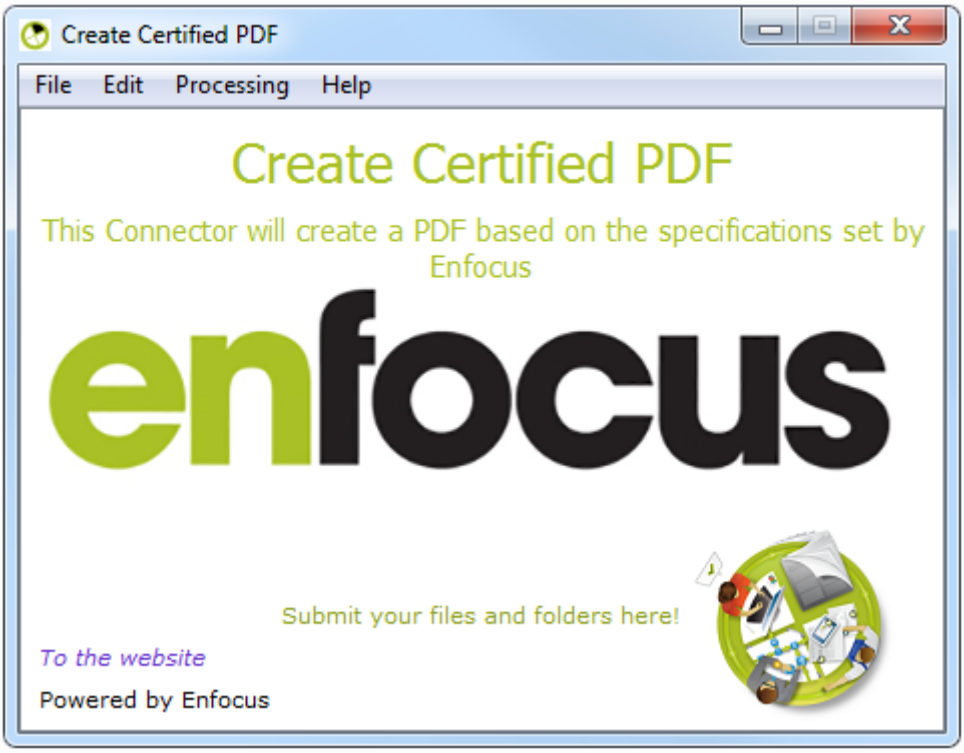
Use

The look and feel of the Connector is determined by the settings in the made in the Definition tab. You can afterwards still make changes, without breaking anything e.g. the update mechanism.

Example (Connect ALL)

Below you can see an example of a customized Connector window:

- A company specific icon in the title bar (also shown in the taskbar of your operating system).
- A meaningful title (*Create Certified PDF*) and description, so users know what the Connector does.
- A customized background referring to the company (displaying the company name and an image).
- Text displayed in green, matching the company color.
- Link to the company website (*To the website*).



4.1.1. Definition tab

The **Definition** tab consists of two sections:

- The properties in the **Project** section help you in identifying your Connector.
- The properties in the **Window** section determine the look of the main window of your Connector.

Note: In Connect YOU, only the properties marked with an asterisk are available!

Property	Meaning
Name*	Name of the Connector. **Note:** Use a meaningful name, e.g. *Create PDF*, *Magazine Ads*, *VirtualPrinter* ... Do not use keywords such as "update", "install" and "setup"; they may cause problems on Windows machines.
Version number (Major and Minor)	Version number used for automatic updating. See *About the Automatic Updating Mechanism* on page 97.
Icon*	Application icon (shown for example when the Connector is placed on the desktop). You can select an icon from your local system. If no icon is specified, the default Enfocus icon is used. The icon should be a *.png file. The best size is 128 by 128 pixels.

Property	Meaning
	Tip: You can use your own company style icons for branding of the Connectors.
Unique ID	The Unique ID is assigned automatically. It is used for automatic updating. See *About the Automatic Updating Mechanism* on page 97.
Time Limit	This property allows you to set an end date for the Connector: **1.** Select the checkbox. **2.** Enter the end date. **3.** Set the **Warn in** value, for example to 2 days. The Connector will then warn its users 2 days up front that it will expire.
Title, **Description***, **Subtitle**	The title, description, and subtitle displayed on the main Connector window. **Note:** To change the color of the text fields, click and choose an alternative color (Connect ALL only). This is useful if you have chosen a dark colored background image for your Connector.
Link	The URL entered here is displayed as a clickable web link on the main Connector window. If the **Link Alias** property is filled out, the user will see this text instead of the URL. **Tip:** You can use this to give the Connector users easy access to your company website, or to a help page for the specific Connector.
Link Alias	Alternative text for the Link, for example "Company website". If no Link Alias is entered, the link URL will be shown.
Background	Background image (*.png) for the Connector main window. Best size for a background image is 460 by 310 pixels. If no image is selected, the default Enfocus background image will be used.

4.2. Job Tickets

You can configure a Connector to ask for additional information, every time a file ("job") is submitted to the Connector. This information (called *Metadata*) is sent along with the processed job (in the background) as an XML, TXT, or CSV file (called *Job Ticket*).

Metadata is often used to store administrative information associated with a job, and to exchange such information between systems.

Examples of information commonly stored as metadata:

- **Customer info:** name, address, contact information.
- **Job info:** date, designer, creation date, etc.

All this information can be used through the production process, for example for cost calculation, tracking, archieving...

Configuration

Job Tickets have to be enabled and configured in the *Job Ticket tab*.

On this tab, you will have to select or create a **Job Ticket Group**, which acts as a template and can be re-used for different Connectors. For example, if you always need the same metadata for customer X, you may create a Job Ticket Group that you can re-use for all Connectors for this customer.

Note: Connect ALL users have additional options to define the look and feel of their basic Job Tickets, and to use custom HTML forms internally or link to hosted forms.

Remark if you are working with Enfocus Switch:

- If you're configuring a Connector that delivers files to a *Switch Submit point* with Metadata enabled, an extra Group is shown, named after the Submit point. It is advised to use this Job Ticket Group, since it contains all metadata the Switch Submit Point requires.
- If you want to use *Switch Metadata* for your Connect Job Tickets, you MUST define the correct Switch Submit Point as your *Primary* Delivery Point under the Delivery tab first. Otherwise the Switch Metadata will not be available in the Job Ticket Group list.
- The Job Tickets obtained from a Switch Submit point *cannot be edited* in Enfocus Connect. Any changes have to be made in Switch.
- In case of dynamic Submit point selection (the user of the Connector chooses the Submit point when submitting a file), the metadata fields are not shown in Connect, but they will be presented to the user after he has chosen a Submit point.

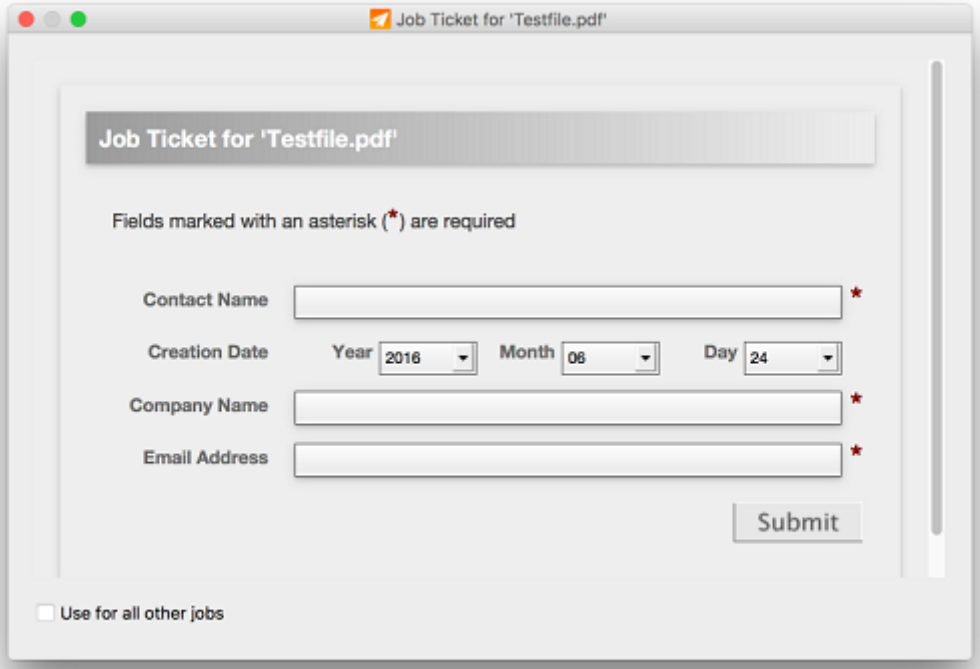
Use

If a file is dropped on a Connector with Job Tickets enabled, a window will pop up, allowing the user to enter all information defined in the Job Ticket tab. The data entered here will be sent along with the submitted file, as a separate Job Ticket file (in the delivery format chosen in Connect).

Example

In the example below, the Job Ticket contains four metadata fields that have to be completed by the user:

- Contact Name
- Creation Date - This field has a default value, filled in automatically, but you can change it as required.
- Company Name
- Email Address



4.2.1. Job Ticket tab

The **Job Ticket** tab allows you to configure Job Tickets. To use this functionality, make sure to select the **Enable Job Tickets** checkbox. The tab title will turn green and the properties on this tab will become editable.

Property	Meaning
Groups	Job Ticket Group to be used for the Connector. A Job Ticket Group acts as a template. You can select a Job Ticket Group from the list, or create one yourself. See *Creating a new Job Ticket Group* on page 45. **Remark if you are working with Enfocus Switch:** If you want to use Switch metadata, you must first select the appropriate Submit point on the Delivery tab and then select the Job Ticket Group named after that Submit point (it will appear in the list). In case of dynamic Submit point selection (the user of the Connector chooses the Submit point when submitting a file), make sure to select the **Switch:Dynamic.... (Read-Only)** Group. The metadata fields are not shown in Connect, but they will be presented to the user after he has chosen a Submit point.
Format (Connect ALL only)	Format of the Job Ticket to be used for display in the Connector.

Property	Meaning
	Note: The option chosen here determines how the **Definition** section below looks. • **Basic**: Default format provided by Connect. If you choose this option, you can edit the Job Ticket definition from within Connect. You can define the metadata fields and the look and feel (to a certain extent). See *Editing a Basic Job Ticket Definition in Connect* on page 47 and *Defining the layout of a Job Ticket in Connect* on page 52. • **Local HTML**: Your own HTML Job Ticket uploaded from a local system. You can upload your HTML file and the corresponding CSS files or images through the **Definition** section below. • **External HTML**: An HTML Job Ticket linked to e.g. a website. Its path or URL can be entered through the **Definition** section below. This option gives you full control over the Job Ticket. You can for example integrate a database, so that the information entered in the Job Ticket is immediately stored in the database. The external HTML site may need basic authentication to access the Job Ticket form. In that case the user will be asked to enter his credentials for the site before he can proceed with the form.
Delivery Format	Format of the Job Ticket to be sent along with the job files. The options are: • Metadata XML (XML format compatible with Switch) • XML (regular XML) • TXT • CSV **Remark:** The name of the Job Ticket file will be the name of the processed job file, with the .xml, .txt or .csv extension.
Definition	Contents of the Job Ticket: • **Connect YOU**: You can create your Job Ticket directly in Connect, using the **Edit** button. See *Editing a Basic Job Ticket Definition in Connect* on page 47. It is not possible to modify the Job Ticket's look and feel. • **Connect ALL**: Contents of this section depends on the chosen **Format** (see higher). See *Editing an HTML Job Ticket Definition* on page 49.
Preview button	This button allows you to see how the Job Ticket will look when it's displayed to a user of the Connector. Note that, when previewing, you can export a Job Ticket file for testing purposes, for setting up Smart Preflight within a Connect workflow or to convert metadata fields in your HTML Job Tickets to variables. See *Previewing your Job Ticket* on page 46.
Include Preflight Results checkbox	If enabled, the following information will be added to the delivered Job Ticket:

Property	Meaning
	• The Preflight status (fail or pass) • The Sign-off status As a consequence, users do not have to open the PDF to know if the file passed Preflight and/or was signed off. **Note:** This option is only available in combination with Connect generated Job Tickets. You will not see this option, if you have selected a Switch Submit point in the **Delivery** tab and a Switch Job Ticket group in the **Job Ticket** tab.
Include File Info checkbox	If enabled, the following information will be added to the delivered Job Ticket: • Document name • Document size (only for job files, in case of folder submission, the value is 0.) This allows you to use the document name and/or size as a variable in a Preflight Profile, after having added it to a Variable Set (See *Setting a Variable from a Job Ticket* on page 74). **Note:** This option is only available in combination with Connect generated Job Tickets. You will not see this option, if you have selected a Switch Submit point in the **Delivery** tab and a Switch Job Ticket group in the **Job Ticket** tab.

4.2.2. Creating a new Job Ticket Group

A Job Ticket Group contains the Metadata Fields and their properties that can be entered in a Job Ticket.

To create a new Job Ticket Group

1. Switch to the **Job Ticket** tab and make sure **Enable Job Tickets** is selected.
2. From the **Groups** list, select **Edit Group list**.
   This will show the list of all Job Ticket Groups.
3. Click .
4. Enter a name for the new (blank) Job Ticket Group.
5. Click **Done**.
   The name of the new Job Ticket is displayed in the Group list.

6. Define the contents and the look and feel of the Job Ticket by completing the fields in the *Job Ticket tab*.

4.2.3. Managing Job Ticket Groups

To manage your Job Ticket Groups in Enfocus Connect

1. Switch to the **Job Ticket** tab and make sure **Enable Job Tickets** is selected.
2. From the **Job Tickets Group** list, select **Edit Group list**.
   This will show the list of all Job Ticket Groups.
3. Do one of the following as required:
   - To add a new (empty) Job Ticket Group, click .
   - To remove a Job Ticket Group, select it and click .

     Note: You can't remove the Default Job Ticket (Read-Only), or the Job Ticket Group from your Switch Submit point.
   - To create a copy of a Job Ticket Group, select it and click > **Duplicate**.
   - To change the name of a Job Ticket Group, select it and click > **Rename** or double-click it.
   - To import or export a Job Ticket Group (XML format), select it and click > **Import** or **Export**.
4. Click **Done**.

4.2.4. Previewing your Job Ticket

Once you have defined your Job Ticket on the Job Ticket tab, you can check if it works as expected.

1. On the Job Ticket tab, click **Preview**.
   The Job Ticket is shown exactly as it will be displayed to the user of the Connector (except for the **Export** button that is only available in the Preview pane).
2. Test your Job Ticket, e.g. enter some values and click the submit button to validate the entered information.

   For more information about the configuration of the submit buttons, see *Editing an HTML Job Ticket Definition* on page 49.
3. Optionally use the **Export** button to make an export of your Ticket. You have three options:

- **Export selected output format**: Exports a sample Job Ticket in the delivery format chosen on the Job Ticket tab. This is useful if your customer needs a copy to review or for downstream integration.

- **Export for Smart Preflight**: Exports a sample Job Ticket in regular XML that you can use to define your Smart Preflight variables. See *Setting a Variable from a Job Ticket* on page 74.

- **Export to Variables**: Exports input fields from your HTML Job Tickets to Connect, so they can be used as variables. This means that input fields defined in your HTML Job Ticket will appear in the Variables dialog in Connect, allowing you to use them in your Connector Project. For example, if your Job Ticket contains a field to capture a reference number, you can use this field as a (Job Ticket) variable and use it in a variable file name. Remember that variables can be used in two places:

  - On the **PDF Creation** tab, as variable file name.

  - On the **Delivery** tab, for email configuration and for HTTP delivery (values for attributes).

  The Variables dialog can be opened through the context menu.

Note that, in case of a multipage Job Ticket, the **Export** button will only become active on the last page. See *Editing an HTML Job Ticket Definition* on page 49.

4.2.5. Editing a Basic Job Ticket Definition in Connect

Note: This topic applies to:

- Connect YOU Job Tickets
- Connect ALL Job Tickets that have the Format set to "Basic". HTML Job Tickets cannot be edited in Connect.

To edit a Job Ticket Definition

1. In the **Job Ticket** tab, at the bottom of the tab, click the **Edit** button.

   If this button is grayed out, you may have selected a read-only Job Ticket from the Job Ticket Groups list.

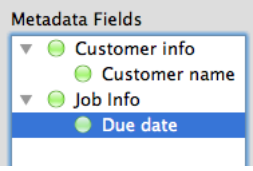
2. Do one of the following:

   - To add a Metadata field, click .
   - To remove a Metadata field, select the Metadata field concerned and click .
   - To change the properties of a Metadata field, select it and change the properties as required.

     For an overview of the properties, see *Job Ticket Metadata properties* on page 48.
   - To change the order of the Metadata fields, select a field and drag it to the preferred place.

- To change dependencies, select a Metadata field and use the arrow buttons to move them up ( ) and down ( ) in the hierarchy. Alternatively, you can drag and drop it.

  If a Metadata field is "child" of another Metadata field, it will only be visible if its "parent" has a specific value. E.g. in the example below, the *Customer name* field will be available only in case the *Customer Info* field is enabled.



3. Click **Save**.
   In the **Job Ticket** tab, you can use the **Preview** button to see your Job Ticket and to try the settings. This is very useful to ensure fields are correct and parent - child relationships work correctly. See *Previewing your Job Ticket* on page 46.

4.2.5.1. Job Ticket Metadata properties

Note: This topic applies to:

- Connect YOU Job Tickets
- Connect ALL Job Tickets that have the Format set to "Basic". HTML Job Tickets cannot be edited in Connect.

The table below lists all the properties that can be configured for Metadata fields in a basic Job Ticket. Metadata properties are accessible from the **Job Ticket** tab. See *Editing a Basic Job Ticket Definition in Connect* on page 47.

Property	Description
Label	The label shown in the Job Ticket, in front of the field.
Description	The description is shown as a tool tip when the user hovers over the label or the data field in the Connector. To enter a short description, select **Inline value**; to enter a paragraph, select **Edit multi-line text**.
Show if parent and **Parent value**	Only available if the Metadata field has a parent. In the dropdown menu, choose how to compare the value of the parent Metadata field to the value set below. The available options depend on the Data type of the Parent. You can e.g. set these options to *Equals Yes* to make the "child" Metadata fields only available if the parent checkbox is enabled.

Property	Description
Data type	The field's data type. This is a dropdown list with the following options: Single-line text, Password, Date, Number, Hours and minutes, No-yes list, Dropdown list.
Data format	Only available when **Data type** is set to single-line text or number. Format the metadata field using a regular expression, or leave empty to not set any special formatting.
Data values and **Ignore duplicates**	Only available when **Data type** is set to *Dropdown list*. Click ..., and enter a list of dropdown items, one per line or separated by a semicolon. The **Ignore duplicates** option defines if a value can be shown twice in the dropdown list.
Default	The default value for the field, i.e. the value that is shown when the ticket is displayed to the user. To leave the field blank, click >, and select **None** from the list; however, date and time (*Hours and minutes*) fields are never left empty; if you choose "None", the user will see the *current* date and time. **Tip:** If you add a date and time field with **Default** set to "None" and **Read-only** to "Yes", you have a time stamp added to your Job Tickets.
Remember last value	If set to **Yes**, the Connector displays the value most-recently entered by the user in this field.
Value is required	If set to **Yes**, the Connector requires that the user enters a non-blank value (relevant only if Data type is string).
Read only	If set to **Yes**, this field cannot be edited.
Display metadata field	If set to **Yes**, this field is displayed in the Job Ticket; if set to **No** it is hidden. You can't hide a field if the value is required.

4.2.6. Editing an HTML Job Ticket Definition

In Connect ALL you can use local or external HTML Job Tickets. This topic gives some information about the format and content of the HTML.

Submit button is mandatory

Any HTML Job Ticket for use with Connect should contain a <form> element and at least one submit button. Submit buttons can be defined by an <input> or a <button> element with the "type" attribute set to "submit", as in the examples below:

```
<input type="Submit" value="Submit Form1" name="submitForm1" />
<button type="submit" name="submitForm" value="SubmitForm">Form Submit</button>
```

A submit button is necessary because Connect uses this information to determine when the session should be closed (i.e. when the form should be submitted and the HTML Job Ticket should be exported).

In the next example, the form contains three input fields (to supply a name, an email address and a messsage) and one submit button ("Send"). When the user of the Connector clicks the **Send** button (after having completed the form), the Job Ticket will be closed and the data entered in the form will be captured by Connect.

```
<form method="post">
<input type="text" name="field1" placeholder="Your Name" />
<input type="email" name="field2" placeholder="Email Address" />
<textarea name="field3" placeholder="Type your Message"></textarea>
<input type="submit" value="Send" name="Send" />             <!-- SUBMIT button --->
</form>
```

Multiple submit buttons

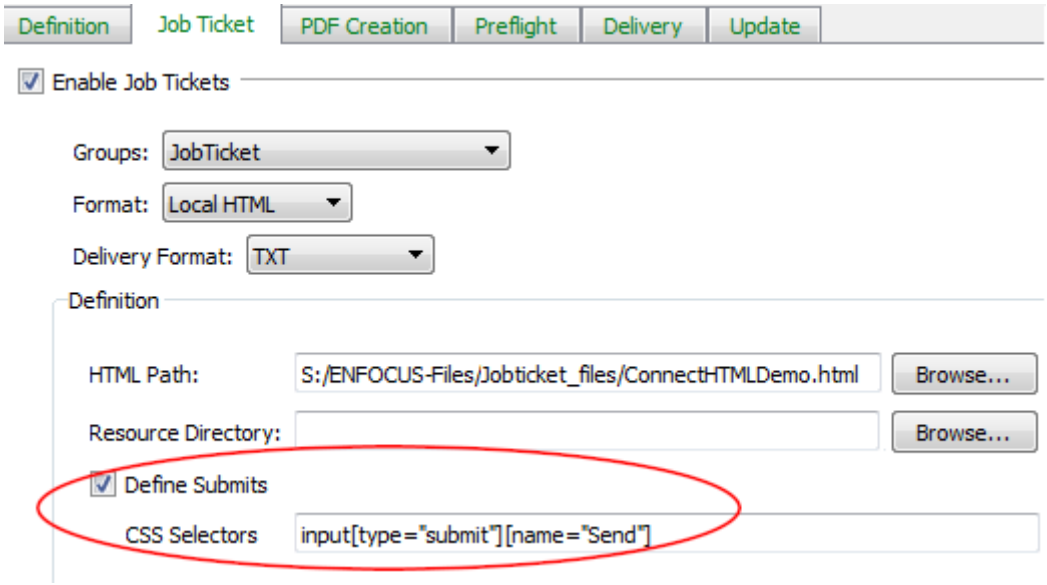
In some cases, you may want the user of the Connector to submit data in multiple steps, resulting in different "submits". For example:

- Users have to submit their credentials to log in (first submission), next they need to see a second screen on which they can enter data and submit it (second submission).
- Users have to enter data (e.g. a job number) that is submitted to the server to be resolved by a database. Next, more information should be entered, so the Job Ticket should not close after the first submission.

Multiple submit buttons are allowed, but in that case, you must select the **Define Submits** checkbox on the Job Ticket tab and indicate which button is the final one (i.e. the one that will close the session). In order to identify this final submit button, you must specify its HTML tag (input or button) and its attribute(s) that uniquely identify it (id, name, class, ...).

The example below shows the required format:

```
tag[attribute1="value1"][attribute2="value2"]
```



Note:

- If no final submit button has been selected, Connect will close the session upon the first button clicked.
- If more than one submit button can be used to close the session, in the **CSS Selectors** field, you should use a semicolon to separate them.

Previewing Job Tickets with multiple submit buttons

When you preview a Job Ticket in Connect, the **Export** button is enabled as soon as Connect identifies a valid and final submit button.

In case of a single submit button, the **Export** button will be active as soon as you preview the Ticket.

In case of multiple submit buttons, each submit button marks the end of a page. Once the data is submitted, the next page is shown. When the final submit button (indicating the end of the form) is reached, the **Export** button is enabled.

Attributes (for use in External HTML Job Tickets)

Connect provides information that can be used for submission with the URL, so the web server can modify the Job ticket form being displayed based on e.g. the language of the user of the Connector.

The attributes are internal to the Connector and should be used as key value pair on the server side to determine the Connector attributes before launching the Job Ticket dialogue for the user to fill in the Job Ticket value. The attributes provide information about the job dropped on the Connector. Avoid using these attributes as variable name.

The following tables gives an overview of the available Job Ticket variables.

Attributes	Description
guid	Unique ID of the Connector as displayed on the Definition tab.
lang	The Connector language. This is not necessarily the system language on the user's computer.

Attributes	Description
username	The system user name.
jobname	The type of input job (pdf, jpg, ps, etc). When different file types are submitted as one job, its value is "composite" and the name is the one defined for the composite job. In case of folder submission, this variable is empty.
jobtype	The type of input job: pdf, jpg, ps, etc. When different file types (e.g. pdf and non-pdf files) are submitted as one job, its value is "composite".
jobpath	The path of the job. When different file types are submitted as one job, this variable is empty.
pdforigin	The origin of the job: • "1" indicates that the PDF is generated from PostScript through normalizer • "-1" indicates that the PDF results from a print
deliverytype	The delivery protocol used (FTP, SFTP, HTTP, HTTPS, Local Folder, SSL) for primary delivery. Note that DropBox delivery currently will return HTTPS and Email will return SSL.

Using metadata fields as variables

In order to use the metadata fields (used in your HTML Job Tickets) as variables in Connect, proceed as follows:

1. Preview your Job Ticket.
2. Click **Export** > **Export to Variables**.
3. Go to the location in Connect where you want to use the metadata field(s) as variable, for example in the **Variable File Name** field on the PDF Creation tab.
4. Click the **Variable** button or select **Variables** from the context menu. You will see the metadata fields in the Variables dialog (preceded by %JT) and you can use them just like the other variables.

4.2.7. Defining the layout of a Job Ticket in Connect

Note: This topic applies to Connect ALL Job Tickets that have the Format set to "Basic". HTML Job Tickets cannot be edited in Connect.

This topic describes how you can define (certain aspects of) the look and feel of the basic Job Tickets you define in Connect. If you don't do this, the standard Connect layout will be used.

To define the layout of a basic Job Ticket

1. Click the **HTML Layout** button at the bottom of the Job Ticket tab.
2. Select the background image that should become the background of your Ticket.

   Supported formats are PNG, GIF and JPEG (not JPEG 2000); recommended size is 460 x 310.
3. Select the stylesheet (*.css) you want to use and the directory where related files (images, etc.) can be found.

CSS is a language used to determine the style and layout of web content. More information can be found on the internet, for example *https://developer.mozilla.org/en-US/Learn/CSS/Introduction_to_CSS* If you leave these fields blank, the default Connect layout will be used.

4. In the **Subtitle** field, enter text you want to add at the top of the Job Ticket, for example "Please complete this Job Ticket".

   The position of the subtitle is fixed, unless you change it with a custom CSS stylesheet.

   If you want to insert the name of the submitted job file, use "%1". For example, "Please complete this Job Ticket for %1".

5. Click **OK**.

6. To view the result (the new layout in combination with the metadata fields chosen earlier), click the **Preview** button. See also *Previewing your Job Ticket* on page 46.

4.3. PDF Creation

You can configure Connectors to create PDFs through third party Plug-ins and/or a Virtual Printer.

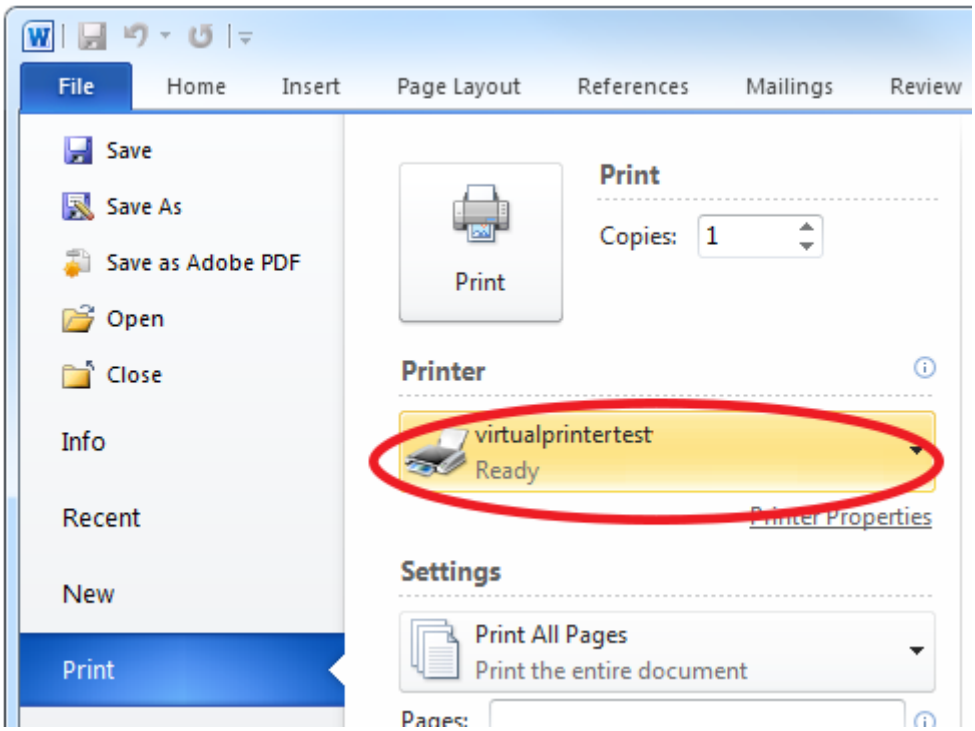
Plug-in Support

If PDF creation is enabled in the Connector properties, the background components to support Creative Suite/Cloud plug-ins are included in the Connector. If the users have installed these plug-ins, they can create PDF files from within Adobe InDesign or Adobe Illustrator and submit them directly into a Connector for additional processing.

This means that users don't have to leave the application they are using to create or design the file they want to submit to the Connector; in the application's **File** menu, they will find an extra option **Export to Connector**.

Virtual Printer

If the **Virtual Printer** is enabled in the Connector properties, users of the Connector can use the print function from any application (e.g. Microsoft Word) to convert their files to PDF and automatically submit them into the Connector. They will find an additional printer (installed the first time the Connector is launched) in the Printer list of their application.



Configuration

This option has to be enabled and configured in the *PDF Creation tab*.

In addition, you can for example:

- Determine which PDF Preset file should be used for the PDF creation.
- Enable Plug-in options for bleed, marks and printing spreads (so this is done automatically, without intervention of the users).
- Enable local file saving of new PDF files (so users can have a local copy).
- Customize the name of the files created and processed by the Connector. To customize the file names, you can use custom text or variables, such as the customer name or the creation date.

Use

Plug-in support:

- During the installation of Connect, you will be able to install the Creative Cloud Plug-ins. Additional plug-ins for the Creative Suite and any updated plug-ins are available directly from the Enfocus website.
- Users of the Connectors who have not installed Enfocus Connect (typically for Connectors created with Connect ALL), can get the supporting Plug-ins from Enfocus or from the supplier of the Connector (allowing the suppliers to maintain control of the Plug-in distribution with external customers). If configured as such, they may receive a notification for downloading and installing the supported Plug-ins when the Connector is launched for the first time. This notification will forward remote users to an Enfocus web page where they are given instructions on downloading, installing and using the Plug-in(s) with their Connector.

Once installed, end users can create PDF files from within the third party application and submit them directly into the Connector. For the full procedure, refer to *Using Connect Plug-ins* on page 59.

Virtual Printer:

- If a Connector containing a Virtual Printer is started for the first time, the Connector will ask to install the Virtual Printer Driver, which contains the PDF settings used for creating PDFs.

Once installed, end users can print from any application directly into the Connector. For the full procedure, refer to *Using a Virtual Printer* on page 60.

4.3.1. PDF Creation tab

The **PDF Creation** tab allows you to configure the settings for creating PDFs through the Virtual Printer, and through the Creative Suite/Cloud Plug-ins for InDesign and Illustrator. To make use of this functionality, make sure to select the **Enable PDF Creation** checkbox. The tab title will turn green and the properties on both subtabs will become editable.

Remarks:

- When the PDF Creation tab is enabled, Connect includes the Adobe Normalizer in the Connector. Connect does not require any additional software to produce PDF files.

  Adobe Normalizer is the same technology and process used by Adobe Distiller resulting in a high quality PDF. However, because the process requires that applications using the print driver create a PostScript file first, some PDF features such as transparencies may not be supported. In applications such as the Adobe Creative Suite, exporting directly to a PDF may support these features. To learn more about this, it's recommended that you consult your layout application's documentation for more information on PDF exporting.

- When the PDF Creation tab is enabled, all items needed to support the Plug-in for the Adobe Creative Suite/Cloud products will be installed, regardless of the other options chosen on this tab.

PDF Settings subtab

Property	Meaning
Printer/PDF Settings Name	This will be the name for the Virtual Printer, and will be used as PDF Settings file name in the Plug-in dropdown in the application (InDesign/Illustrator) that will be used to create the PDF. **Tip:** Use a meaningful name that users of the Connector will recognize, for example *Print to ABC Printer* or *Create Certified PDF*.
Adobe PDF Preset	Adobe PDF Preset to be used by the Virtual Printer. **Note:** Connect comes with a variety of standard PDF Settings files for general users and some that are specifically designed to work with Adobe inDesign (these settings have the IND4 in the name). Be sure to use a PDF Preset that is compatible with the intended use. PDF Presets made for InDesign or Illustrator may not work with other applications printing through a Virtual Printer. Adobe Distiller PDF

Property	Meaning
	Settings files should be used when creating Virtual Printers for general use.
Virtual Printer	When selected, users of the Connector can print directly into the Connector. You can clear this checkbox, if the Connector user only needs support for the Creative Suite/Cloud products. A PPD (Postscript Printer Description) file is a file that describes the fonts, paper sizes, resolution etc. to be used by a printer. If you want to use another PPD file than the default one, you should select the **PPD File** checkbox and upload the file of your choice. This custom PPD file will then be used whenever the Virtual Printer is used to print into the Connector. The custom settings (e.g. changed page size) will be shown in the Print dialog of the application from which the job is printed.
Variable File Name	This option allows you to customize the name of the PDFs generated or processed by the Connector (e.g. to add the customer ID or a project number to the file name). See *Customizing the PDF file names* on page 58. When the **Variable File Name** checkbox is cleared, the file name remains unchanged, i.e. the input file and the output file have the same name.
Local File Saving	When selected, users of the Connectors can save a local copy of the processed file(s) (*after Preflight verification*, if enabled). *The following options are not available in Connect YOU:* * With **Restrict Printing** enabled, users can only *view* the local copy. They cannot print it. * With **Apply Action Lists** enabled, you can apply one or more Action Lists to the high-resolution version of the processed file(s), before saving them locally. You can for example add a banner or a watermark to the processed files, to protect them against improper use. and : Buttons allowing you to add or remove an Action List. and : Buttons allowing you to change the order in which the Action Lists will run. This order can be important, changing the order might lead to different results. For more information, refer to *About Action Lists* on page 70.

Plug-In Settings subtab

The PDF Settings Adjustments options in this section allow you to predefine a number of common settings, such as bleeds, marks and printing spreads. When the user of the Connector will print or export files from within one of the Adobe Creative Suite/Cloud applications (e.g. InDesign or Illustrator) - so through the Plug-in - the selections made here will override the settings in the PDF Settings file.

Note: PDF Settings Adjustments are only supported when using the Creative Suite/ Cloud Plug-ins. These changes will not apply to files printed through a Connector Virtual Printer.

Property	Meaning
Plug-in Download Notification	If selected, users of the Connector will receive a notification for downloading and installing the Plug-ins for InDesign and/or Illustrator. **Note:** This option is not available in Connect YOU.
Include File Package	If selected, users of the Connector will have the **Include File Package** option by default enabled when they export a PDF from InDesign. If **Enable User Control in Plug-in** (next checkbox) is selected, they still have the possibility to disable this option, so to not include the file package. If not selected, the **Include File Package** checkbox is simply not shown. This is also the case for older Connectors created with a version of Connect (13 update 1 or earlier) that do not have this option yet. **Remarks:** • Make sure that Indesign Package files are allowed by the Connector (see the file restrictions on the **Delivery** tab). • If the user makes changes in InDesign and exports the document to the Connector, **even without saving them explicitly**, the changed version is exported. If the user doesn't save the changes after exporting them, the InDesign document on the user's computer will be different from the one that was exported and delivered!
Enable User Control in Plug-in	If enabled, the users of the Connector can change the PDF Adjustments settings, before exporting the PDF through a Connect Plug-in, and without having to create a new PDF Settings file.
All Printer's Marks	If selected, all printer's marks including crop marks, bleed marks, registration marks, color bars, and page information will be added.
Crop	If selected, crop marks will be added. Crop (or trim) marks are thin horizontal and verticular lines that indicate where the page should be trimmed.
Bleed	If selected, bleed marks will be added. Bleed marks are thin lines that define the amount of extra area to be added to the image outside the defined page size. This avoids unwanted white borders around the edges of a printed document.
Registration	If selected, registration marks will be added. Registration marks are marks (e.g. crop marks, plate information) outside the page area. They allow the printer to align the different separations in a color document.

Property	Meaning
Color Bars	If selected, color bars will be added. Color bars are small squares of color representing the CMYK inks and tints of gray (in 10% increments).
Page Information	If selected, the file name, page number, current date and time, and color separation name are printed in the lower-left corner of each sheet of paper.
Weight	Displays the selected weight for the bleed and color marks. **Note:** This setting is only applicable to InDesign.
Offset	Specifies how far from the edge of the page InDesign should draw the printer's marks. **Note:** To avoid drawing printer's marks on a bleed, be sure to enter an Offset value greater than the Bleed value. The default measurement unit is determined by your system's Region and Language settings (under Additional settings - Measurement System). For example, if your measurement system is "U.S", the default unit will be "in" (=inch). You can change the unit under **Edit** > **Preferences** > **General**.
Bleed and **Use Document Bleed Settings**	Specifies whether the Document Bleed settings or another Bleed value (specified in this field) must be used. The default measurement unit for Bleed is determined by your system's Region and Language settings (under Additional settings - Measurement System). For example, if your measurement system is "U.S", the default unit will be "in" (=inch). You can change the unit under **Edit** > **Preferences** > **General**.
Include Slug Area (for Bleed)	If selected, objects are printed using the slug area defined in the Document setup. The slug area is an area outside the printing and bleed area that contains instructions for the printer or job sign-off information.
Print Spreads	If selected, pages are printed together as if they were bound or printed on the same sheet. This option is only applicable to InDesign.

4.3.1.1. Customizing the PDF file names

This topic explains how you can customize the name of the PDFs generated or processed by the Connector you're configuring.

1. On the **PDF Creation** tab, with the **Enable PDF Creation** checkbox enabled, select the **Variable File Name** checkbox.
2. Enter the preferred file name.

   You can enter a fixed string, a variable or a combination of both.

3. To enter a variable:
   a. Click the **Variable** button.

      Alternatively, right-click in the Variable File Name text field and select **Variables** from the context menu.
   b. In the **Use Variable** popup, select the variable you want to use in the file name.

      There are a number of predefined variables, such as: User Company, Current Document Name, User Name, Time, Unique ID, Date and Connector Name. You cannot add your own variables.

      Note: Connect will search for this information in the standard PDF metadata added to the PDF file.

      If Job Tickets are enabled in your Project, the metadata fields used in these Job Tickets can also be used as variables. They are displayed in the second part of the Use Variable dialog and preceded by the characters "JT", for example: %JTCustomer% (= Job Ticket contains a metadata field with label "Customer"). The present value (at the bottom of the dialog) is the default value chosen in the Job Ticket.
   c. Click **Insert**.
   d. To add another variable, repeat the previous steps.

Example of a customized file name: Processed%User Company%%Date% (Variables are enclosed in % signs). At run-time, this will result in a file name such as *Processed_Enfocus_250214.pdf*.

4.3.2. Using Connect Plug-ins

Remember that Connect Plug-ins can only be used if the Connector has been configured to support this feature, i.e. if the **Enable PDF Creation** checkbox in the **PDF Creation** tab has been enabled!

To use an Enfocus Connect Plug-in

1. Open the document that needs to be sent to the Connector in Adobe InDesign or Adobe Illustrator.

2. In InDesign or Illustrator, select **File** > **Export to Connector**.

   Note: This option is only available if the Plug-in for the application was installed.

3. In the **PDF Settings** dropdown, select the PDF Settings Name of the Connector to submit the file to.

   This is the name entered in the **Printer/PDF Settings Name** field in the **PDF Creation** tab.

4. Indicate which **Pages** should be exported:

   - To export the whole document, select **All**.
   - To export only a part of the document, select **Range** and define a page range, e.g. 1-5.

5. If available, enable or disable **Include File Package** as required.

   This setting is only available if **Include File Package** is enabled on the PDF Creation tab (Plug-in Settings subtab). It's enabled by default and can only be turned off by the user if

Enable User Control in Plug-in is selected on the PDF Creation tab. Remember that the latest version of your document is exported to the Connector (even if it is not saved).

6. If available, click ⊟ to expand the **Options** section and select the appropriate settings.

   It depends on the Connector settings whether or not this section is available:

   - If the option **Enable User Control in Plug-in** in the PDF Creation tab is enabled, the **Options** section is available. Users of the Connector can make changes as required.
   - If the option **Enable User Control in Plug-in** in the PDF Creation tab is disabled, users of the Connector cannot change these settings; they won't even see them. The settings defined in the Connector will be used for PDF creation.

7. Click **OK**.

The file will be exported as PDF using the application's "Export" function with the PDF Settings defined in the Connector. By using the "Export" function, additional PDF features can be supported such as transparency. Once the PDF is created in the background by the Plug-in, its submitted directly to the Connector for additional processing such as preflight and delivery.

For more information on which applications are supported by Connect Plug-ins, please visit the Enfocus website.

Note: If you want to remove a PDF Settings name from the **PDF Settings** list in the third party application Plug-in, you can select it in the PDF Settings list, and hold the Alt key. The **OK** button will change to **Remove**. Click it, and the currently selected PDF Settings file will no longer be available in the list.

4.3.3. Using a Virtual Printer

Remember that Connect Virtual Printers can only be used if the Connector has been configured to support this feature, i.e. if the **Enable PDF Creation** and the **Virtual Printer** checkbox in the **PDF Creation** tab have been enabled!

To use a Virtual Printer

1. Open the application you want to use to print the file.
2. Open the file you want to submit to the Connector.
3. Open the Print dialog.
4. From the Printer list, select the name of the Virtual Printer installed for the Connector.

   This is the name entered in the **Printer/PDF Settings Name** field in the **PDF Creation** tab.

5. Click **Print**.
   The Virtual Printer will create a PostScript file, convert it to PDF using Adobe Normalizer, and submit it to the Connector. The Connector main window is opened automatically.

Depending on the Connector settings, the user will be asked to enter additional information or to verify the preflight result.

4.4. Preflight

You can configure a Connector which includes PDF preflight. Preflight allows your PDFs to be checked and corrected based on a particular Enfocus PitStop Preflight Profile and (optionally) on a number of selected Action Lists. This can include a variety of checks and corrections for color, image resolution, font embedding, page structure and more.

Configuration

This option has to be enabled and configured in the *Preflight tab*.

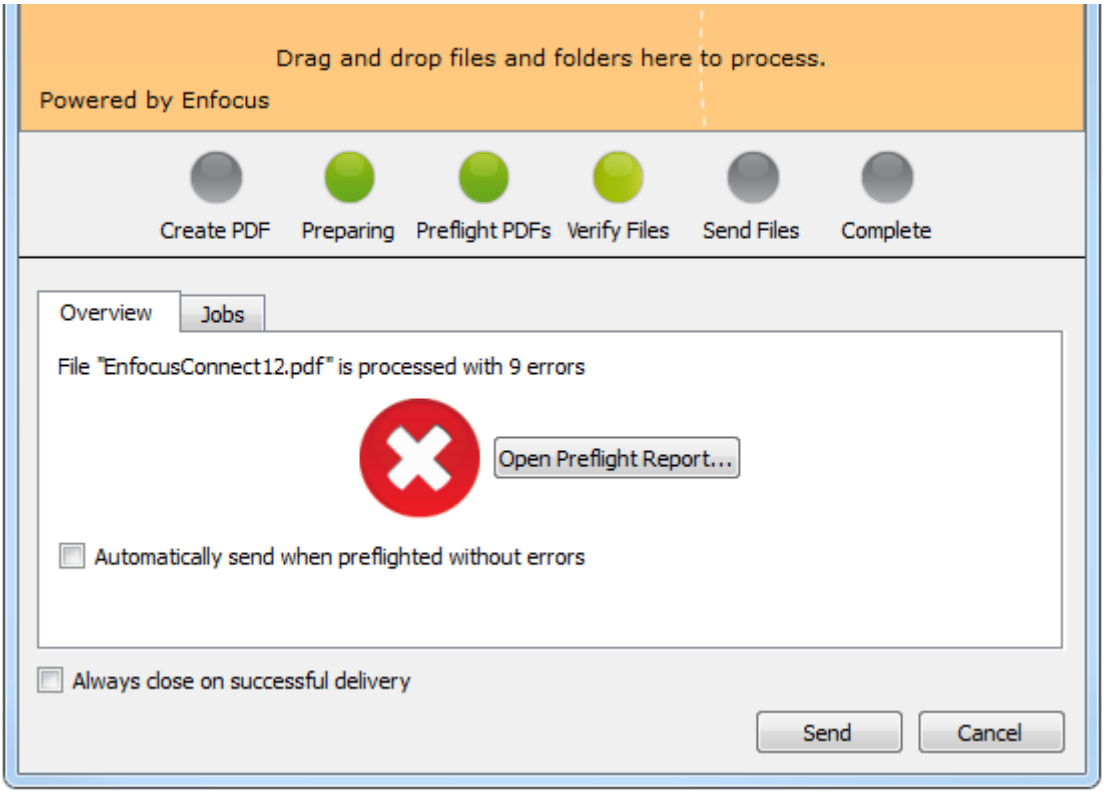
Use

If Preflight is enabled in the Connector, a Preflight Report is created and the users of the Connector are informed about the Preflight results. Depending on the Connector properties:

- All processed files, or only the files that pass preflight are delivered
- Users can sign off on errors (i.e. approve/comment errors allowing the PDF to pass the preflight despite of these errors) when enabled
- A separate annotated Preflight Report (in addition to the embedded one) may be delivered
- ...

Example

The example below shows a Connector for which Preflight verification was enabled. The icon indicates that the submitted PDF file has failed the preflight check. The users of the Connector can view the Preflight Report. They cannot sign off on errors (this hasn't been configured; otherwise there would be a **Sign off** button), but they can deliver the PDF file, although it did not pass preflight, using the **Send** button.



4.4.1. Preflight tab

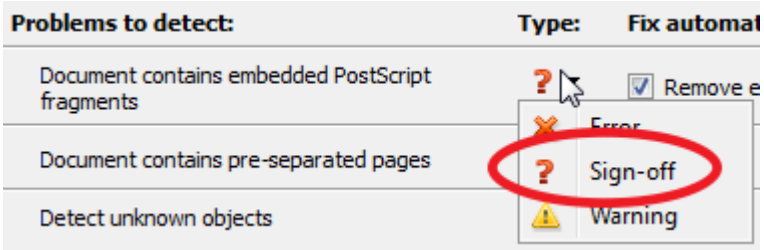
The **Preflight** tab allows you to enable Preflighting and determine the Action List(s) and Preflight Profile to be used for preflighting. To make use of this functionality, make sure to select the **Enable Preflighting** checkbox. The tab title will turn green and the properties on this tab will become editable.

Remarks:

- Connect uses Preflight Profiles and Action Lists from Enfocus PitStop. For more information on editing or creating customer Preflight Profiles or Action lists, please refer to *the PitStop Pro documentation, available on the Enfocus website*. Preflight Profiles, Variable Sets and Action Lists can be edited in Connect through the **Window** menu.

Property	Meaning
Selected Action Lists	An Action List is a series of sequential tasks saved in one file. For example, tasks such as changing color or objects. Using Action Lists, the tasks will be carried out in the defined sequence. For more information, see *About Action Lists* on page 70. The selected Action Lists will be run on the files processed by the Connector.
Selected Preflight Profile	A Preflight Profile is a collection of criteria which a PDF document should meet to be outputworthy. For more information, see *About Preflight Profiles* on page 67.

Property	Meaning
	The selected Preflight Profile will be run on the files files processed by the Connector.
Selected Variable Set	A Variable Set is a group of variables (allowing you to use variable instead of fixed values) that can be used within your Preflight Profiles. For more information on Variable Sets and how to use them, see *About Smart Preflight* on page 72. The selected Variable Set will be used when preflighting files with the Connector.
	Button allowing you to add an Action List, Preflight Profile or Variable Set.
	Button allowing you to remove the selected Action List, Preflight Profile or Variable Set.
	Button allowing you to move the selected Action List one position up or down in the list. The Action Lists will run in the same order as they are displayed in the list. This order can be important, changing the order might lead to different results.
Color Management	When selected, color management is enabled. See *Configuring the properties for color management* on page 65. Color management allows you to define which ICC profiles are used whenever color conversions are made during preflight and correction. This is useful to minimize color differences between devices. If color management is not enabled in the Connector, the generic color conversion from the user's operating system will be used.
Send Preflight Report	When selected, an extra copy of the Preflight Report is delivered with the job file (in addition to the Preflight Report embedded in the PDF). **Note:** The embedded report can be accessed with PitStop Pro or with StatusCheck (a **free** Plug-in for Adobe Reader and Adobe Acrobat). Refer to *About StatusCheck* on page 76. Connect ALL users can select the report style of their choice. See *Report styles (Connect ALL)* on page 66. Note however that, for password protected job files, the *regular* report style is always used, regardless of the report style selected on this tab.
Perform Certified Full Save (No Rollback to Previous Sessions)	When selected (default value), the history information about previous editing sessions is preserved in the Certified PDF document, but it is not possible to revert to a previous state of the document. This option is recommended to reduce the file size of the Certified PDF document. For more information about Certified PDF, refer to *the PitStop Pro documentation, available on the Enfocus website*.

Property	Meaning
Allow Sign-off on Files	When selected, users of the Connector have the possibility to check the errors in the Preflight Report and, if they consider them as less important, sign off on them, i.e. approve them, in such a way that they no longer block Preflight. As a consequence - if there are no other errors left - the preflight status will change to "Pass". **Note:** Sign-off is only possible for checks that are set to "Sign-off" in the used Preflight Profile, as shown in the image below. 
Allow Delivery of PDF Files that do not Pass Preflight	When selected, all PDF files can be delivered, even if the Preflight Report contains errors. When this option is cleared, files with errors must be corrected before they can be delivered. **Note:** This option does not apply to warnings; warnings never stop the Connector from delivering the processed files.
Skip Preflight Verification	When selected, the verification step is skipped. The user of the Connector will not get any notice about the Preflight result, and the job will automatically continue to the next step.
Enable Preflight Identifier in File Names	When selected, the Preflight result is indicated in the file name. This will add "_P" (Pass) or "_F" (Fail) to the end of the file name (before the extension). Files with warnings will be considered passed (so "_P" will added to the file name).
Skip font license checks	Sometimes font license restrictions do not allow the font manipulations that are configured in an Action List or Preflight Profile, for example, the conversion to outlines may be not allowed. If that is the case, the Connector will not perform the conversion and this will trigger an error in the Preflight Report. However, you may have an agreement with the font provider, or you may have checked the license conditions and be sure that the requested manipulation is allowed. In that case, select the **Skip font license checks** checkbox to overrule the font license restrictions. A dialog will pop up. Read it carefully and click **Yes** if you agree. Remember that *you* are responsible for complying with the font license restrictions! In case the **Skip font license checks** checkbox

Property	Meaning
	is selected, the Connector will perform any font license conversion without checking the font licenses.

In the bottom right corner, the PitStop Library version is mentioned. PitStop Library provides the PDF Preflight and Correction functionality integrated in Connect.

4.4.1.1. Configuring the properties for color management

To configure the properties for color management

1. Switch to the **Preflight** tab (with **Enable Preflighting** selected).
2. Select the **Color Management** checkbox and click the **Settings** button.
3. In the Color Management Settings window, do one of the following:
   - To use the same Color management settings for images and other objects, select **Use the same settings for all objects**. The **All Objects** tab is displayed below the radio buttons.
   - To use separate Color Management settings for images and other objects, select **Use other settings for images than for other objects**. The **Images** and **Other Objects** tab appear (instead of the All Objects tab).
4. If you want to use Color Management, enable **Enable color management** and proceed as follows:
   a. In the **Source** area, choose the desired ICC profiles for **Gray**, **RGB**, **CMYK** and **Lab**.

      Note: Optionally enable **The output intent overrides the selected ICC profiles**.

   b. In the **Target** area, enable **Use other ICC profile than source** and choose the desired ICC profiles for **Gray**, **RGB**, **CMYK** and **Lab** in the **Target** area.

      Note: Optionally enable **The output intent overrides the selected ICC profiles**

   c. Choose a rendering intent to remap colors from the **Rendering intent** list.

      You can choose one of the following remapping methods:

      - **Object defined**: Uses the rendering intent of the object itself (as can be seen on the Prepress tab of the Enfocus PitStop Pro Inspector)
      - **Relative colorimetric**: Replaces colors outside of the gamut by colors with the same lightness, but different saturation.
      - **Absolute colorimetric**: Clips colors outside of the gamut to a color on the gamut boundary. Colors which cannot be displayed in the target color gamut will be lost.
      - **Saturation**: Scales all colors to the brightest saturation possible. The saturation (also called chroma) will remain the same, but some colors will appear lighter or darker.

- **Perceptual**: Rescales the original gamut within the gamut of the destination color space, but preserves the relationship between colors.

d. If you have chosen separate color settings for images and other objects (in step1), switch to the **Other Objects** tab and repeat steps a to c.

5. Choose a CMM engine from the **CMM engine** list.

You can choose one of the following:

- **Adobe CMM** (can be downloaded from the Adobe website)
- **System CMM**
- **Little CMS**

6. Select the **Use black point compensation** checkbox as required.

The black point compensation option is a feature of Adobe Photoshop to address color conversion problems caused by differences between the darkest level of black achievable on one device and the darkest level of black achievable on another.

4.4.1.2. Report styles (Connect ALL)

Connect ALL allows you to choose the report layout style that suits your needs.

There are three "annotated" reports (first three in the table below). An annotated report is a combination of the original document and the report. The report information is integrated in the original document as a number of notes and bookmarks, allowing to easily navigate to the errors and warnings, in Acrobat Reader or in a browser, without using any Enfocus software.

The three other report styles (Regular, Minimum, Continuous) do not include a copy of the original document.

Report style	Description
Annotated Report	Report with annotations. The report is a copy of the processed PDF; checks and changes are annotated.
Low Resolution Annotated Report	Report with annotations and with low resolution images, which reduces the file size of the report.
Scaled Low Resolution Annotation Password (max A4)	Report with annotations. The entire document is scaled and has a low resolution. The size of the pages in the report will not exceed the A4 size and the images are also compressed to a smaller size. **Note:** This may be useful if you want to send reports for large format documents through email.
Regular	Report which does NOT include the processed PDF. It contains general file information and an overview of the fixes, failures, warnings, and errors (if any).
Minimum	Regular report with minimal information.

Report style	Description
Continuous	Regular report, but without page breaks between the topics (information about the fixes and general file information, font information, ...) as in the Regular Report. Printed in grayscale.

Note: PitStop Pro provides an extra report style, i.e. the Secured Annotated Report. This is a password protected report that is not editable. This report type is not yet available for PDF files preflighted using a Connector.

Custom report style

It is also possible to use your own, personal report template. If you have such a report template, it will be available in Connect, in the **Send Preflight Report** list on the Preflight tab.

To learn how to design your own report template, refer to the PitStop Report Templates documentation *https://www.enfocus.com/manuals/Extra/CustomReportTemplate/18/home.html*

Location of the customized templates:

- **Windows**: C:\ProgramData\Enfocus Prefs Folder\Report Templates\Custom
- **Mac**: HD/Library/Preferences/Enfocus Prefs Folder/Report Templates/Custom/

4.4.2. About Preflight Profiles

Preflighting is the process of checking a PDF document against various criteria to ensure that the PDF document meets all the requirements for output or publication. Typically, the criteria vary depending on the output or publishing process. A set of criteria matching the requirements of a particular process is called a **Preflight Profile**.

If you want to create an Enfocus Connector that is able to preflight PDF documents, you need to specify the Preflight Profile to be used (See *Preflight tab* on page 62). You can use Preflight Profiles from the standard set installed with Enfocus Connect, download Preflight Profiles from the Enfocus website, or create your own Preflight Profiles.

4.4.2.1. Downloading a Preflight Profile

You can download a Preflight Profile from the Enfocus website.

Proceed as follows:

1. Go to *www.enfocus.com > Support > Preflight Profiles*.
2. Download the desired Preflight Profile and save it on your local system.
3. To use the downloaded Preflight Profile in Enfocus Connect YOU or Connect ALL
   a. In the Preflight tab of your Connector Project, make sure the **Enable Preflighting** checkbox is selected.
   b. In the **Selected Preflight Profile** section, click the button.
   c. Select the **From file** radio button.
   d. Click **Browse** and select the downloaded Preflight Profile (with file extension *.ppp).
   e. Click **OK**.

4.4.2.2. Creating and modifying a Preflight Profile

To create and/or modify a Preflight Profile from within Enfocus Connect

1. Select **Window** > **Show Enfocus Preflight Profile Panel**.

   The **Preflight Profile Panel** appears. Clicking the button shows the available options.

2. Do one of the following:

   - To create a new Preflight Profile from scratch, select > **New** > **New**.
   - To create a new Preflight Profile based on an existing profile, select it and click > **Duplicate** or > **New** > **New From (selected)**.
   - To edit an existing Preflight Profile, double-click it, or choose > **Edit**.

   The Preflight Profile editor appears, allowing to define the settings for the Preflight Profile. See *Defining the settings of a Preflight Profile*.

Defining the settings of a Preflight Profile

Note: This is a short overview of the different steps required to define a Preflight Profile. Detailed information is available on the *PitStop Pro product page of the Enfocus website (under Manuals)*.

To define the settings of a Preflight Profile (either a new or an existing one)

1. Open the **Enfocus Preflight Profile Editor**.

   See *Creating and modifying a Preflight Profile* on page 68

2. In the **SETUP > General** category, check and, if necessary, change the **Preflight Profile Properties**: **Name**, **Author**, **Company** and **Description** of the Preflight Profile.

   a. In the **Permissions** section, you can choose to partially lock the Preflight Profile and set a password for it. You can also choose to allow fixes, sign-off and/or change log fixes, Preflight report and color management settings.

   b. In the **Problem Handling** section, you can decide what you want to do when an error occurs. You can allow fixes, allow sign-off and/or allow changing the log fixes.

   c. In the **Preflight Report** section, along with the preflight details, you can choose to include information on font, color/ color spaces, page box, images, OPI and output intent.

3. In the **SETUP > Color Management** category, you can define your color management settings.

   Furthermore, you can enable or disable all fixes in the Preflight Profile.You can, however, also create a Preflight Profile in which you specify a number of fixes and disable these fixes. You may want to do this if you just want to check PDF documents but not change them now, maybe later.

4. In the **SETUP > Restrictions** category, you can define the Restrictions you need.

Restrictions are a way to limit the scope of your Preflight check; instead of applying all checks to the whole document, you can now for each (set of) checks define on what part of the PDF the check(s) should be run - be it a PDF page box, a certain page or pages, a particular area or specific elements of a PDF, or even different layers within a PDF file. Restrictions are defined by Action Lists with Select Actions only. You can create your own restricting Action Lists, or use pre-defined, ready-to-use restricting Action Lists, installed with PitStop. These restrictions must be imported into the Profile, in order to use them.

5. Under **CHECK ON**, click a category, for example: PDF Standards or Document.
6. Determine whether or not you want to limit (some of) the checks in this category to a particular selection:
   - If the checks should apply to the whole document, make sure **Not restricted** is selected from the list in the top left corner of the tab.
   - If the checks should apply to a particular part of the document, select a restriction from the list in the top left corner of the tab. If you need a restriction that is not in the list, import a new restriction.
7. Select the **Enable checks of <selected restriction>** or the **Enable checks without restriction** checkbox as required. This activates the checks in the left part of the pane. They will no longer be grayed out.
8. Double-click the profile checks you want to add to your Preflight Profile, for example PDF/X Compliancy (in the PDF Standards category) or Binding (in the Document category). For more information about a check, hover your cursor over it. A tooltip with additional information will appear. The enabled checks are available in the right pane.
9. Select how the detected problem should be listed in the Preflight Report: **Warning**, **Sign-off** or **Error**.

   Note: If a problem is set to **Sign-off**, the user can decide to handle the problem as a warning and sign off on it, thus allowing the PDF to pass preflight. See *Verifying the Preflight result* on page 129.

10. Specify how to fix the problem, if necessary.
11. If you want to use dynamic values instead of fixed values, click to enable variable names and select the appropriate variable.
12. If you want to customize the messages that appear in the Preflight Report (for example to use non-technical language), click and change them to your needs.
13. Repeat steps 5 - 12 for each category you wish to check and fix.
14. Under **EXTRA**, you can add Action Lists to the Preflight Profile as required.

15. Click **OK**.

4.4.3. About Action Lists

An Action List is a series of sequential tasks saved in one file. For example, tasks such as changing color or objects. Using Action Lists, the tasks will be carried out in the defined sequence.

If you want to create an Enfocus Connector that executes one or more Action Lists, you need to specify the Action List(s) to be used on the *Preflight tab* on page 62. You can use Action Lists from the standard set installed with Enfocus Connect or download Action Lists from the Enfocus website.

In Enfocus Connect, you can also use an Action List to protect the local copy of the processed files against improper use. Refer to *PDF Creation tab* on page 55 (Apply Action List(s) checkbox).

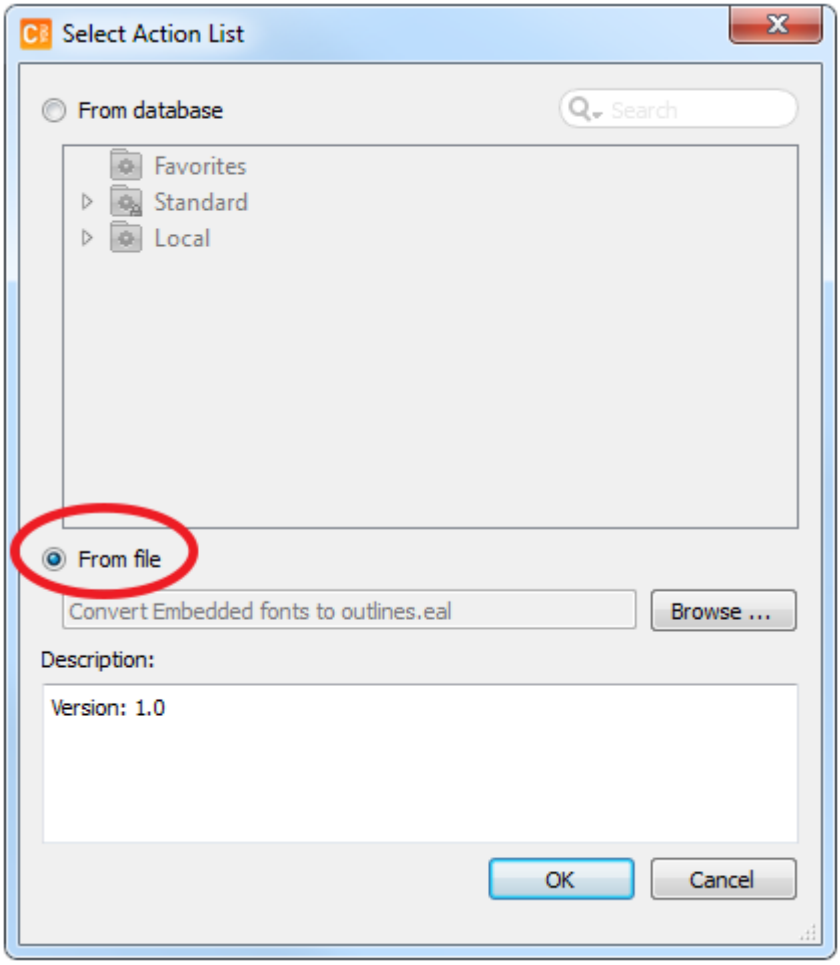
From 13 update 1 onwards, you can create and edit Action Lists directly in Enfocus Connect. You don't need PitStop Pro anymore. Refer to *Creating and modifying an Action List* on page 71.

4.4.3.1. Downloading an Action List

You can download Action Lists from the Enfocus website.

Proceed as follows:

1. Go to *http://www.enfocus.com/en/support/action-lists/*.
2. Download the desired Action List and save it on your local system.
3. To use the downloaded Action List in Enfocus Connect YOU or Connect ALL
   a. In the Preflight tab of your Connector Project, make sure the **Enable Preflighting** checkbox is selected.
   b. In the **Selected Action Lists** section, click the button.
   c. Select the **From file** radio button.
   d. Click **Browse** and select the downloaded Action List (with file extension *.eal).
   e. Click **OK**.



4.4.3.2. Creating and modifying an Action List

To create and/or modify an Action List from within Enfocus Connect

1. Select **Window** > **Show Enfocus Action List Panel**.

   The **Action List Panel** appears. Clicking the button shows the available options.

2. Do one of the following:

   - To create a new Action List from scratch, select > **New** > **New**.
   - To create a new Action List based on an existing Action List, select it and click > **Duplicate** or > **New** > **New From (selected)**.
   - To edit an existing Action List, double-click it, or choose > **Edit**.

   The Action List editor appears, allowing you to define the content of the Action List. See *Designing an Action List* on page 72.

Designing an Action List

Note: This is a short overview of the different steps related to the design of an Action List. Detailed information is available on the *PitStop Pro product page of the Enfocus website (under Manuals)*.

To design an Action List (either a new or an existing one)

1. Open the **Enfocus Action List Editor**.

   See *Creating and modifying an Action List* on page 71.

2. **To add an Action to the Action List**

   a. Click << to expand the left part of the screen.
   An overview of all available Actions is displayed. They are sorted by type and category.

   b. Search for the Action you need and double-click it, to add it to the Action List.

   Note that you can remove Actions as well (by clicking).

3. **To set the attributes of an Action in the Action List**, select the Action concerned and set its properties in the right part of the screen.

   Note that some Actions support the use of variables instead of fixed values. Others allow you to use regular expressions. For more details, refer to the documentation in the PitStop Action Manual.

4. **To change the order of the Actions in the Action List**, use (Move up) and (Move down).

   The order of the Actions can be important; changing it might lead to different results. Note that you can use logical operators (AND, NOT, OR) to define the relation between different Actions as required.

5. **To customize the report messages** triggered by the Actions in the Action List, in the attributes of each Action, click the **Actions** link (in the top right corner) and select **Customize report message**.

   Report messages result from "Check" or "Change" Actions and are shown in the Preflight Report. You can modify the default messages to make them less technical and more user-friendly.

6. To save and close the Action List, click **OK**.

4.4.4. About Smart Preflight

Overview

Smart Preflight is a functionality that unlocks the full potential of a Preflight Profile to be able to check and also fix a PDF file. Without Smart Preflight a user would need to create many different profiles to handle different job types and specifications, however with Smart Preflight this is no longer the case.

Smart Preflight does this by allowing users to define variable values that can overridden at the time of processing or a rule based check can be defined allowing other conditions in a job to affect the outcome for a specific check.

Examples:
Page Size: You can now have one single Preflight Profile that allows you to check for any possible page size. I set a default value that corresponds to my most commonly used size and then if I want to check a different size I simply enter the new size just before running the preflight check.

Number of Separations: A Preflight Profile value can now be adjusted at runtime if you desire so you can accurately check the number of color separations contained in a file. So it does not matter if your job is Black and a Spot Color, or CMYK and two Spot Colors, you can accurately check both files from the same Preflight Profile.

Total Ink Coverage based on Printing Conditions: Total Ink Coverage limits are dependent on several different factors. The paper type I am using plays a significant role as does the printing method or device I am printing on. Therefore it is possible using Smart Preflight for me to get a value for my Total Ink Coverage by entering my paper type (Uncoated stock) and my printing method (Sheetfed Litho) and then having the value for Total Ink Coverage calculated by a Rule Based Variable.

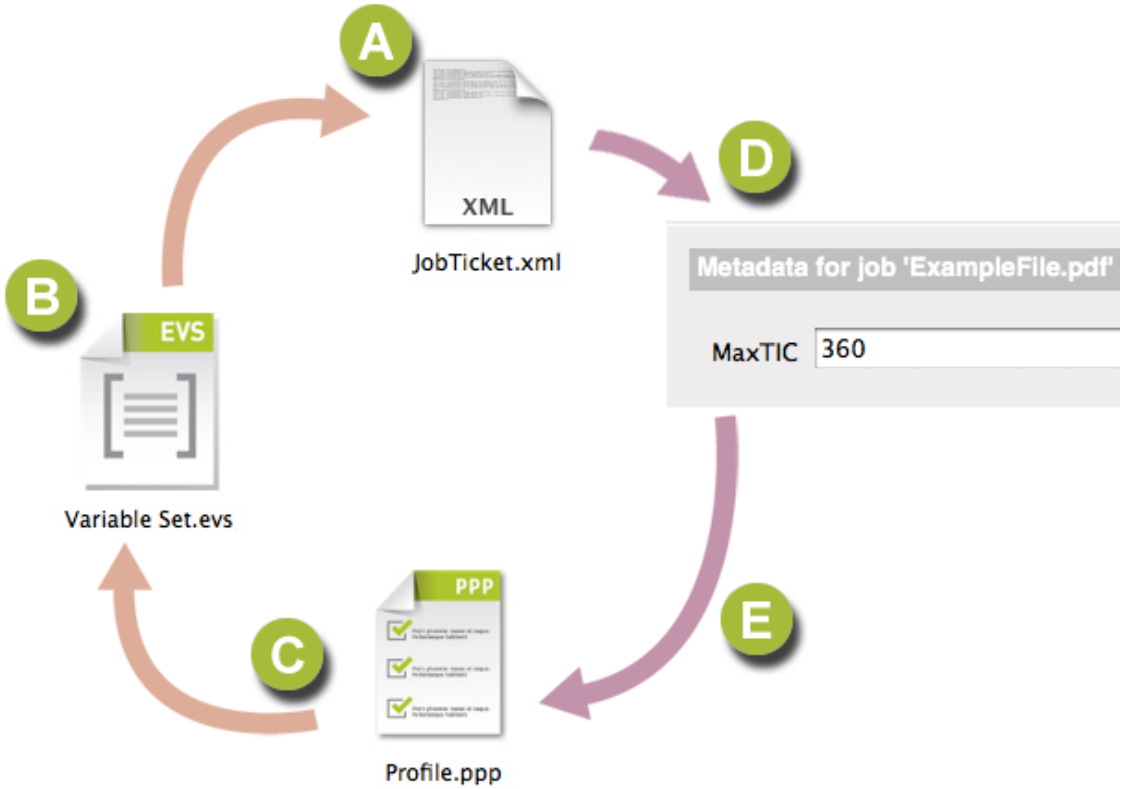
How to get started with Smart Preflight
To begin Smart Preflight, you need a set of variables to use with your Preflight Profiles, these can be defined and saved in a Variable Set. A Variable Set is basically a set of different variables saved within a file format which can be imported and exported. The Variable Set allows variables to be saved, edited and used when required. You can define as many Variable Sets as you need and each Variable Set can contain as many variables as required, however, you can only activate one Variable Set at a time.

Before building a Variable Set, you need to decide which values should have a variable option. An approach is to list common preflight settings that can change from job to job and settings that are often the same. Ones that may change from job to job are good candidates for a variable.

Examples of Common Checks	Examples of checks that can change from job to job
Fonts embedded	Trim page size (H/W)
Security: Printing	Total Ink Coverage
Document contains pre-separated pages	Number of colors defined
Etc...	Etc...

4.4.4.1. Smart Preflight in Connect

When using Smart Preflight in Enfocus Connect, the variables to be used in the Preflight Profile have to be retrieved from a Job Ticket.



To set up SmartPreflight in Enfocus Connect, follow these steps:

1. Create a Job Ticket (if you don't have one yet), and add a Metadata Field for every Variable you want to use (**A**). For example: Metadatafield "MaxTIC". See *Creating a new Job Ticket Group* on page 45

2. Create or open a Variable Set, and define the Variables you want to use in your Smart Preflight, using the "Job Ticket" type (**B**). For example: create a Variable "MaximumInkCoverage", using Job Ticket metadata "MaxTIC". See *Setting a Variable from a Job Ticket* on page 74

3. Use the Variable(s) in your Preflight Profile (**C**). For example: set a warning if Ink Coverage is higher than the variable [MaximumInkCoverage]. See *Creating and modifying a Preflight Profile* on page 68

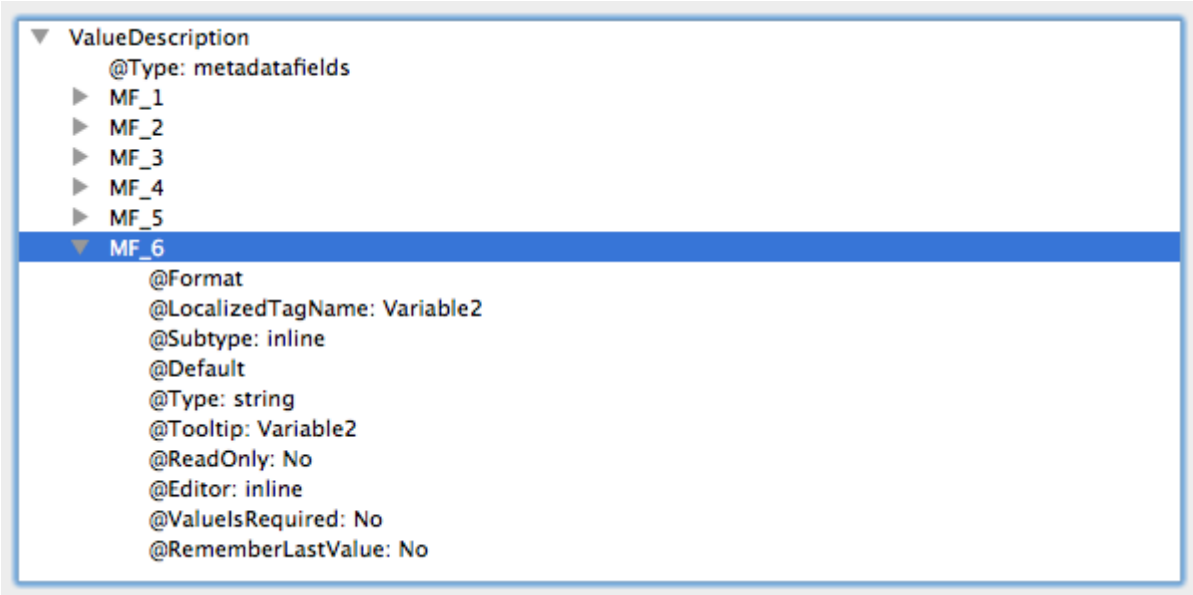
If a file is processed by the Connector, the user will be prompted to enter a value for "MaxTIC" (**D**). During preflight, this value will be used, and if the total ink coverage is higher than this value, a warning will be shown in the Preflight report.

Note: If you have an existing Preflight Profile using variables, you can skip step 3. If you also get the corresponding Variable Set, you can modify the used Variables to a Job Ticket type as described in step 2.

4.4.4.2. Setting a Variable from a Job Ticket

Variables used in a Preflight Profile in Enfocus Connect have to be defined in the Variable Set as "Job Ticket" type. This means all Variables will be retrieved from Metadata Fields in the Job Ticket.

1. Save an example Job Ticket file:
   a. Open the **Job Ticket** tab. See also *Job Ticket tab* on page 43.
   b. Select a Job Ticket from the **Job Ticket Groups** list.
   c. Choose **Basic** Format.
   d. If this hasn't been done yet, create a Metadata Field for every Variable you want to use. See *Editing a Basic Job Ticket Definition in Connect* on page 47
   e. Click the **Preview** button.
   f. In the Preview Job Ticket dialog, click the **Export** button, and choose **Export for Smart Preflight**.
   g. Save the Job Ticket at a convenient location.
2. Open the Variable Set window, by choosing **Window** > **Show Enfocus Variable Set Panel**.
3. Do one of the following:
   - To create a new Variable Set, select **New** > **New** and enter a name and description for the new Variable Set.
   - To edit an existing Variable Set, double-click it.
4. Click the **+** button to add a new Variable, or select one in the list (under Variables) to edit it.
5. Set the **Name**, **User Readable Name** and **Description**.
6. Set the second **Type** dropdown to **Number**, **Length**, **Text** or **Boolean** as desired.
7. Set the first **Type** dropdown to **Job Ticket**.
8. To define the **XPath** based on the Job Ticket
   a. Click **Browse**.
   b. In the **Select XPath from sample file** dialog, click **Browse** and select the **Sample file**, i.e. the Job ticket file (in XML format) you exported in the first step of this procedure.
   c. In the Tree structure representation of the Job Ticket, select the metadata field (MF) you want to use for the selected variable.



   d. Click **OK**.

9. If you want to add more Variables, restart at step 4.

10. Click **Save** to save the Variable Set.

11. Finally, switch to the **Preflight** tab in Connect and in the **Selected Variable Set** part, add the Variable Set you just saved.

The Variable you defined can now be used in a Preflight Profile. For more elaborate information on Smart Preflight, and using Variables in a Preflight Profile, refer to the PitStop Pro documentation. For more information on using Job Tickets to define variables, refer to the PitStop Server documentation. Both can be found here: *http://www.enfocus.com/en/support/manuals*.

4.4.5. About StatusCheck

StatusCheck is a free Plug-in for Adobe Acrobat or Adobe Acrobat Reader. It allows you to instantly check the Certified PDF status of any PDF document opened in Adobe Acrobat. The Certified PDF status indicates whether or not a PDF file has been preflighted successfully.

This section explains how to install and use StatusCheck *to access the Preflight Report embedded in any PDF file, for example in PDF files processed and delivered by a Connector.*

Note: If you have installed PitStop Pro, you do not have to install StatusCheck: the Plug-in is included in the PitStop Pro installation. To learn more about Certified PDF, refer to "Working with Certified PDF documents" in *the PitStop Pro reference guide, available on the Enfocus website*.

4.4.5.1. Downloading and installing StatusCheck

StatusCheck is a *free* Plug-in for Adobe Acrobat or Adobe Acrobat Reader that allows you to see the embedded preflight results within any PDF file processed by the PitStop engine within Connect.

To download and install StatusCheck

1. Go to the StatusCheck product page on the *Enfocus website*.

2. Click the **Download** button.

3. Fill out the registration form.

4. Click **Submit**.
   You will receive an e-mail with a download link.

5. Click the download link in this e-mail and follow the installation instructions.

As StatusCheck is a Plug-in for Adobe Acrobat (Reader), it is started automatically when starting Adobe Acrobat. After installing StatusCheck, you will see an extra menu item, **Certified PDF**, which gives access to the StatusCheck functionalities.

4.4.5.2. Checking the Preflight Report of a PDF file (with StatusCheck)

To check the Preflight Report of a PDF file (with StatusCheck)

1. Open the PDF in Adobe Reader or Adobe Acrobat.
2. From the menu, select **Certified PDF** > **Certified PDF**.
   The **Enfocus Certified PDF Panel** appears.

   The button indicates the Certified PDF status of your PDF document as follows:

Button	Meaning
	The current PDF document is not a Certified PDF document (yet).
	The current PDF document is in a Certified PDF workflow, but was not successfully preflighted and verified, for example because the PDF has been preflighted with errors, or it has been changed since it was last preflighted.
	The current PDF document is a Certified PDF document which was successfully preflighted and verified.

3. In the **Preflight** section, click the **Show Result** button.

   You can see the name of the used Preflight Profile below the button.

   The Enfocus navigator appears. In the **Description** field all errors and warnings (if any) are shown.

To learn more about Certified PDF and the options in the Encofus Certified PDF Panel, refer to "Working with Certified PDF documents" in *the PitStop Pro reference guide, available on the Enfocus website*.

4.5. Delivery options

For each Connector, you can define which files (Job files, Preflight Report, Job Tickets) should be delivered to which location. You can define up to two locations (called "Delivery Points"), and files can be delivered **locally** or **remotely**, i.e. uploaded to (S)FTP, HTTP(S), email or an Enfocus Switch Submit point, Dropbox, ...

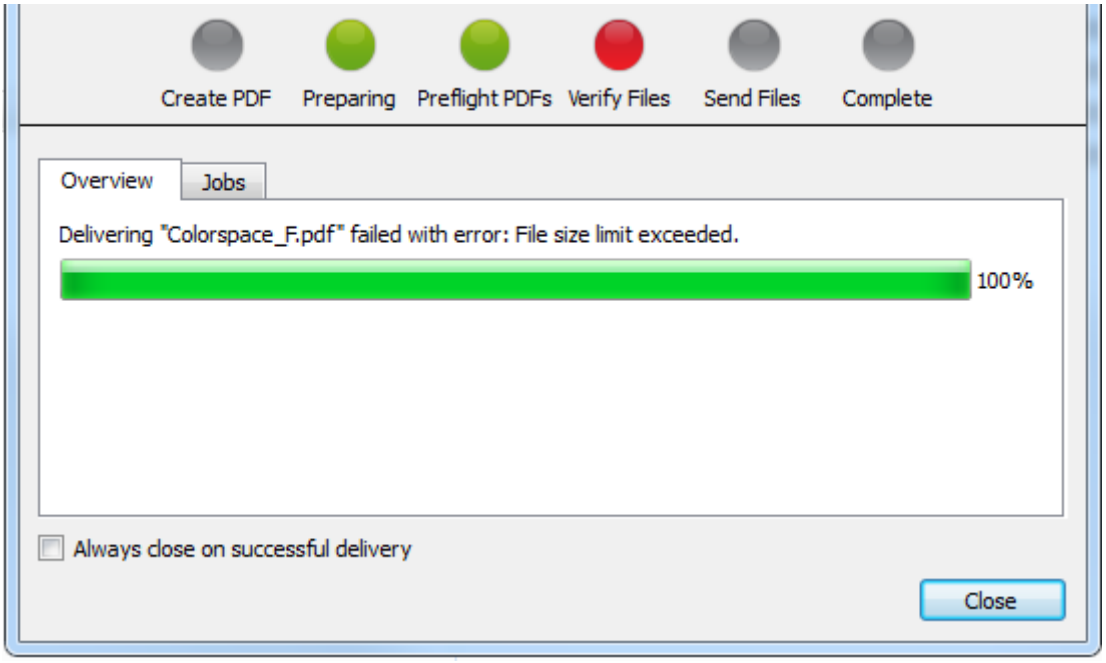
Configuration

You must either enable local saving in the *Preflight tab* or remote delivery in the *Delivery tab*. On the Delivery tab, you will have to select or create **Delivery Points**. For more information, refer to *About Delivery Points* on page 80.

Use

Users of a Connector do not have to worry about file delivery:

- In case of local delivery, they are asked where to put the files, when the Connector is used for the first time.
- In case of remote delivery, depending on the Connector properties, they may be asked for credentials, or informed in case of problems (as in the example below). In case of problems, they have to contact the supplier of the Connector; something may be wrong with the server details, or the file size limit (set by the supplier of the Connector) may be exceeded.



4.5.1. Delivery tab

The **Delivery** tab allows you to configure the settings for the remote delivery of files dropped, printed or exported to the Connector. To make use of this functionality, make sure to select the **Enable Remote Delivery** checkbox. The tab title will turn green and the properties on this tab will become editable. If this checkbox is cleared, the processed files will not be delivered to an external server, but they can still be saved via the **Save as** dialog, if **Local File Saving** is enabled under the **PDF Creation** tab.

Note: As of Connect 13 update 2, you can use variables in delivery paths (FTP, HTTP) and in a couple of other places where it makes sense to use variable context (e.g. a variable email address). To do so, right-click in the text field and select **Variables** from the context menu.

Property	Meaning
Primary Delivery Point	Specifies where and how the files of your choice will be delivered. You can select a Delivery Point Preset from the list, or create one yourself. The details of the selected Delivery Point Preset are shown in the field underneath **Primary Delivery Point**. The *properties* depend on the chosen delivery method. Note that the Primary Delivery Point is mandatory if remote delivery is enabled. For more information, refer to • *About Delivery Points* on page 80 • *Creating a Delivery Point Preset* on page 80 • *Editing a Delivery Point Preset* on page 81 The **Configure** button allows you to change the Delivery Point for this particular Connector Project. The changes made using this button do not change the Delivery Point Preset! For more information, refer to *Modifying a Delivery Point* on page 82.
Secondary Delivery Point	Specifies a second location as required. This Secondary Delivery Point is optional and should be configured in the same way as the Primary Delivery Point. You could for example deliver the job files to one Delivery Point (for example a Dropbox folder) and the Preflight Report to the Secondary Delivery Point (for example an FTP server).
Secondary Delivery Point Delivery Response	Specifies the Delivery Response settings, if you're using the HTTPS response system. This option is only available, if the Primary Delivery Point uses HTTP(S) AND a Secondary Delivery Point is defined. Use the **Configure** button to change the settings as required: • **Response Type**: JSON, XML, TEXT • **Response Tag**: Tag that will be used to determine whether or not the files from the Secondary Delivery Point must be delivered. Refer to *HTTPS response system*.
Allow Non PDF Files	When selected, other file types (not just PDF files) are also accepted. Non-PDF files will not be preflighted before delivery. Use the **Configure** button to define which file types are accepted. Refer to *Defining allowed file types* on page 94. **Note:** If no file types are defined using the Configure button, there are no restrictions and the Connector will accept all types of files.
Send Email Notification	When selected, an email notification is sent every time a file is delivered to the Connector. Use the **Configure** button to configure the

Property	Meaning
	email notification setttings. Refer to *Setting up a notification email* on page 93.

4.5.2. About Delivery Points

A **Delivery Point** specifies where and how files processed by a Connector should be delivered (if remote delivery is enabled).

A Delivery Point includes:

- Information about the delivery method (HTTP, FTP, Switch Submit point ...)
- A number of details required to identify and to access the chosen location (server name, credentials, ..).

Delivery Point Presets are predefined Delivery Points. They act as templates. When configuring a Delivery Point for a Connector Project, you must start from one of these Presets, and modify it for your particular Project.

There are two types of Delivery Point Presets:

- The *default* Delivery Point Presets, provided by Enfocus Connect. There is one Preset per delivery method. These Presets have no values filled in (except for the default port used for the selected delivery method). You cannot re-use any information filled in before.

- The *customized* Delivery Point Presets, i.e. the Delivery Point Presets you create yourself. These Presets usually contain the values you need on a regular basis. You could for example create a preset for an FTP server that contains all the common settings for a connection, and then customize the delivery directory, user name and password on a customer by customer basis when configured in the Delivery tab.

  When configuring a Delivery Point for your Project, you can start from the Delivery Point Preset and only modify the values that need to be changed for this particular Project (e.g. the credentials).

Primary Delivery Point versus Secondary Delivery Point

The Primary Delivery Point is enabled automatically if the **Delivery tab** is enabled. The Secondary Delivery Point is optional. For both Delivery Points, you can choose what files (such as job files, Job Tickets, or Preflight reports) get delivered to each Delivery Point.

Note: When working with Enfocus Switch, Job Tickets are based on the Primary Delivery Point. Refer to *Job Tickets* on page 41.

4.5.3. Creating a Delivery Point Preset

This topic describes how to create a new Delivery Point Preset that can be used in all your Connector Projects.

To create a new Delivery Point Preset

1. Switch to the **Delivery** tab of one of your Connector Projects.

2. Select the **Enable Remote Delivery** checkbox.

3. From the Primary Delivery Point list, select **Edit Preset**.
4. Click .
5. In the **Edit Delivery Point Preset** dialog, enter the details as required.

   The properties that can be modified depend on the Delivery method. For more information, refer to

   - *Delivery method: Dropbox* on page 83
   - *Delivery method: Email* on page 84
   - *Delivery method: Enfocus Switch or Enfocus Switch 2017+* on page 85
   - *Delivery method: FTP or SFTP* on page 87
   - *Delivery method: HTTP or HTTPS* on page 89
   - *Delivery method: Local Folder* on page 92

   Note: These sections assume that you have an understanding of the delivery method you are selecting and the settings required to make a good connection. If not, you should consult your local network administrator.
6. Click **OK**.
7. Click **Done**.
8. To verify your changes, in the **Delivery** tab, select the new Delivery Point Preset and check the properties displayed below the list.

4.5.4. Editing a Delivery Point Preset

This topic describes how to modify an earlier defined Delivery Point Preset.

Note: To use an updated Delivery Point Preset in an earlier defined Project, you must re-select it to have the changes applied to the Project.

To edit a Delivery Point Preset

1. Switch to the **Delivery** tab of one of your Connector Projects.
2. Select the **Enable Remote Delivery** checkbox.
3. From the Primary Delivery Point list, select **Edit Preset**.
4. Select the Delivery Point Preset you want to edit.
5. Select > **Edit**.
6. In the **Edit Delivery Point Preset** dialog, modify the details as required.

   The properties that can be modified depend on the delivery method. For more information, refer to

- *Delivery method: Dropbox* on page 83
- *Delivery method: Email* on page 84
- *Delivery method: Enfocus Switch or Enfocus Switch 2017+* on page 85
- *Delivery method: FTP or SFTP* on page 87
- *Delivery method: HTTP or HTTPS* on page 89
- *Delivery method: Local Folder* on page 92

Note: These sections assume that you have an understanding of the delivery method you are selecting and the settings required to make a good connection. If not, you should consult your local network administrator.

7. Click **OK**.
8. Click **Done**.
9. To verify your changes, in the **Delivery** tab, select the modified Delivery Point Preset and check the properties displayed below the list.

4.5.5. Modifying a Delivery Point

This topic explains how to modify a Delivery Point *of a particular Project*, without changing the Delivery Point Preset.

To modify a Delivery Point

1. Switch to the **Delivery** tab of the Project concerned.
2. Click the **Configure** button of the Delivery Point you want to change.
3. Make the required changes.

   The properties that can be modified depend on the delivery method. For more information, refer to

   - *Delivery method: Dropbox* on page 83
   - *Delivery method: Email* on page 84
   - *Delivery method: Enfocus Switch or Enfocus Switch 2017+* on page 85
   - *Delivery method: FTP or SFTP* on page 87
   - *Delivery method: HTTP or HTTPS* on page 89
   - *Delivery method: Local Folder* on page 92

   Note: These sections assume that you have an understanding of the delivery method you are selecting and the settings required to make a good connection. If not, you should consult your local network administrator.

4. Click **OK**.
5. Click **Done**.
6. To verify your changes, in the **Delivery** tab, check the properties of the modified Delivery Point.

4.5.6. Delivery methods: properties

4.5.6.1. Delivery method: Dropbox

Using Delivery method: Dropbox, you can deliver files to a particular Dropbox directory.

Note: You need to have a Dropbox account.

To configure a Delivery Point to deliver files to Dropbox

1. Open a browser and log into your Dropbox account.

   Note: You must be logged in before configuring Dropbox as a Delivery Point.

2. In Connect, in the dialog to configure the Delivery Point (or Preset), proceed as follows:

   If you're configuring a **Preset**:

   a. In the **Delivery Preset** field, enter a meaningful name for your Delivery Preset, for example `Dropbox-CustomerX`.
   b. From the **Delivery Method** list, select **Dropbox**.

   If you're configuring a **particular Delivery Point** (using the **Configure** button), the Delivery Preset and the Delivery Method are not editable; they are determined by the Preset (selected from the Primary/Secondary Delivery Point list in the Delivery tab).

3. Click **Get Authentication Code...**.
   The Dropbox - Sign in page appears.
4. To allow Connect to access your Dropbox folders and files, click **Allow**.
5. Copy and paste the authentication code into the **Authentication code** field in the Connect dialog.
6. Click **Activate**.
7. To choose the directory for file delivery, click **Browse** and select the appropriate folder (e.g. a dedicated folder for the current Connector).

   Tip: We recommend configuring a Delivery Point Preset per customer. When creating a Connector, you don't have to generate and activate the authentication code anymore. You only have to select the appropriate folder for the current Project.

8. Define a **File size limit** if you want to refuse files above a specific size.

If a file (either an input file or a Job Ticket or Preflight Report) exceeds the limit, a warning will be shown to the user and the file will not be processed by the Connector.

9. Enable **Compress** if you want the files to be compressed before delivery (e.g. to reduce the size).

10. Enable **Use password** to encrypt the compressed file with the password specified in the **Password** field.

11. Clear the checkboxes of the file types you don't want to deliver to the Delivery Point.

    By default, all file types are selected, hence delivered.

    Remember that:

    - *Job Files* refer to the processed input files.
    - *Job Tickets* can only be delivered if the **Job Ticket** tab for the Connector has been enabled.
    - The *Preflight Report* can only be delivered if the option **Send Separate Annotated Preflight Report with PDF** (Connect YOU) or **Send Preflight Report** (Connect ALL) (in the **Preflight** tab) is enabled.

4.5.6.2. Delivery method: Email

Using Delivery method: Email, you can deliver files by sending an email.

Note: Not all email services are supported. Microsoft Exchange Server will work in most cases. Yahoo Mail and Gmail are supported, however they requires SSL.

To configure a Delivery Point to deliver files by email

1. In the dialog to configure the Delivery Point (or Preset), proceed as follows:

   If you're configuring a **Preset**:

   a. In the **Delivery Preset** field, enter a meaningful name for your Delivery Preset, for example `Email-Delivery-CustomerX`.

   b. From the **Delivery Method** list, select **Email**.

   If you're configuring a **particular Delivery Point** (using the **Configure** button), the Delivery Preset and the Delivery Method are not editable; they are determined by the Preset (selected from the Primary/Secondary Delivery Point list in the Delivery tab).

2. Specify the name of the mail **Server** you want to use.

   - For Yahoo, use: `smtp.mail.yahoo.com`
   - For Gmail use: `smtp.gmail.com`

3. Specify the **Port**. The default is 25.

   For Yahoo or Gmail, use port 465.

4. Define the **User** and **Password**

5. Configure the email message (which will include the processed files):

a. Click the **Configure Email Message** button.
b. Enter the **From** and **To** email addresses.

> **Note:** In case of multiple addresses, make sure to separate them with a semicolon (optionally followed by a space), for example **To:** *jane@enfocus.com;frankm@gmail.com*

c. Compose the **Subject** and **Message** text.
d. To add variable information about the job, click the **Insert Variable** button (or right-click in the text field and select **Variables** from the context menu), and select the desired variable. Using variables is possible in the **To** field (using the context menu), as well as in the subject and message text.
e. Click **OK**.

6. Define a **File size limit** if you want to refuse files above a specific size.

> **Tip:** If a file (either an input file or a Job Ticket or Preflight report) exceeds the limit, a warning will be shown to the user and the file will not be processed by the Connector.

7. Enable **Compress** if you want the files to be compressed before delivery (e.g. to reduce the size).

8. Enable **Use password** to encrypt the compressed file with the password specified in the **Password** field.

9. Clear the checkboxes of the file types you don't want to deliver to the Delivery Point.

   By default, all file types are selected, hence delivered.

   Remember that:

   - *Job Files* refer to the processed input files.
   - *Job Tickets* can only be delivered if the **Job Ticket** tab for the Connector has been enabled.
   - The *Preflight Report* can only be delivered if the option **Send Separate Annotated Preflight Report with PDF** (Connect YOU) or **Send Preflight Report** (Connect ALL) (in the **Preflight** tab) is enabled.

4.5.6.3. Delivery method: Enfocus Switch or Enfocus Switch 2017+

Using Delivery method: Enfocus Switch or Enfocus Switch 2017+, you can deliver files directly into an Enfocus Switch Submit point.

> **Note:** Enfocus Switch is an application that allows you to integrate automated Preflight, correction and certification of PDF files into a larger automated workflow. Enfocus Switch is capable of automatically receiving jobs through email, FTP or directly from Enfocus Connect, of sorting and routing jobs based on file type or naming conventions, and of automating a complete range of key professional publishing applications. To find out more about this Enfocus product, go to *https://www.enfocus.com/en/products/switch*.

The following table explains the difference between Enfocus Switch and Enfocus Switch 17+:

Delivery Method	For use with ...
Enfocus Switch	• Switch 13 and lower. • Switch 2017 and higher, with job submission through the legacy SwitchClient desktop application. If you're not sure, check the Switch Preferences: Internal Communication; **Job client type** must be set to **Legacy**.
Enfocus Switch 2017+	• Switch 2017 and higher, with job submission through the Switch Web Portal and the new Switch Web Services (SOAP API). If you're not sure, check the Switch Preferences: Internal Communication; **Job client type** must be set to **Default**.

To configure a Delivery Point to deliver files to a Switch Submit point

1. In the dialog to configure the Delivery Point (or Preset), proceed as follows:

   If you're configuring a **Preset**:

   a. In the **Delivery Preset** field, enter a meaningful name for your Delivery Preset, for example `Switch-Delivery-CustomerX`.

   b. From the **Delivery Method** list, select **Enfocus Switch**.

   If you're configuring a **particular Delivery Point** (using the **Configure** button), the Delivery Preset and the Delivery Method are not editable; they are determined by the Preset (selected from the Primary/Secondary Delivery Point list in the Delivery tab).

2. *(Switch 2017+ only)* Choose the **Protocol** to be used to connect to the Switch Web Portal: HTPP or HTTPS.

3. Specify the **Server** DNS name, including the domain name, for example "SwitchServer.enfocus.com". You can also use the IP address.

4. Specify the **Port** number. By default, this is 51008.

5. In the **Login type** list, select one of the following options:

   - **Ask user and password**: The Connector will ask for a user name and a password to login. You do not need to enter the User and Password fields.
   - **Ask password only**: The Connector will use the user name defined in the **User** field, and ask the user for the password.
   - **Use specified credentials above**: The Connector will use the credentials defined in the **User** and **Password** field.

   Note: In case of dynamic Submit point selection (as explained in the next step), you must choose **Use specified credentials above**. Otherwise, you will get an error when building the Connector.

6. Determine the Submit point.

   A Connector can deliver files to a single pre-defined Submit point, or dynamically allowing the Connector user to select a Submit point when a file is submitted.

   - To allow the user of the Connector to choose a Submit point when submitting a file, clear the **Define Switch Submit point** checkbox. The user will get a dropdown list with all Submit points he has access to (based on his permissions in Switch).

Note: Dynamic Submit point selection is only allowed in a *Primary* Delivery Point.

- To define a particular Submit point (leaving no choice to the user), select the **Define Switch Submit point** checkbox and choose the Submit point of your choice. If your desired Submit point is not listed, click the **Refresh** button to refresh the list.

7. Define a **File size limit** if you want to refuse files above a specific size.

   Tip: If a file (either an input file or a Job Ticket or Preflight report) exceeds the limit, a warning will be shown to the user and the file will not be processed by the Connector.

8. Enable **Compress** if you want the files to be compressed before delivery (e.g. to reduce the size).

9. Enable **Use password** to encrypt the compressed file with the password specified in the **Password** field.

10. Clear the checkboxes of the file types you don't want to deliver to the Delivery Point.

    By default, all file types are selected, hence delivered.

    Remember that:

    - *Job Files* refer to the processed input files.
    - *Job Tickets* can only be delivered if the **Job Ticket** tab for the Connector has been enabled.
    - The *Preflight Report* can only be delivered if the option **Send Separate Annotated Preflight Report with PDF** (Connect YOU) or **Send Preflight Report** (Connect ALL) (in the **Preflight** tab) is enabled.

4.5.6.4. Delivery method: FTP or SFTP

Using Delivery method: FTP or SFTP (Secure FTP), you can deliver files to an FTP server.

To configure a Delivery Point to deliver files to an FTP server

1. In the dialog to configure the Delivery Point (or Preset), proceed as follows:

   If you're configuring a **Preset**:

   a. In the **Delivery Preset** field, enter a meaningful name for your Delivery Preset, for example `FTP-Delivery-CustomerX`.

   b. From the **Delivery Method** list, select **FTP** or **SFTP**.

   If you're configuring a **particular Delivery Point** (using the **Configure** button), the Delivery Preset and the Delivery Method are not editable; they are determined by the Preset (selected from the Primary/Secondary Delivery Point list in the Delivery tab).

2. Specify the **Server** DNS name, including the domain name, for example "ftp.enfocus.com". You can also use the IP address.

3. Specify the **Port**. The default is 21 for **FTP** and 22 for **SFTP**

4. In the **Login type** list, select one of the following options:
   - **Ask user and password**: The Connector will ask for a user name and a password to login. You do not need to enter the User and Password fields.
   - **Ask password only**: The Connector will use the user name defined in the **User** field, and ask the user for the password.
   - **Use specified credentials above**: The Connector will use the credentials defined in the **User** and **Password** field.
5. Define the connect **Timeout** amount in seconds.

   The default value is 30 seconds. Increasing the timeout amount may help in situations where there is a poor connection or the server needs more time to respond to a delivery request.
6. Specify the **Directory** in which the file should be placed. Click the **Browse...** button and select a directory on your system, or enter a directory in the field.

   Note:
   - The **Browse** button can only be used if you entered a valid **User** and **Password**.
   - You can also use variables to specify the directory. To do so, right-click in the text field and select **Variables** from the context menu.
7. Enable **Passive mode**, if you want to use passive mode to connect to the FTP server. This option is not available when using SFTP.
8. Define a **File size limit** if you want to refuse files above a specific size.

   Tip: If a file (either an input file or a Job Ticket or Preflight report) exceeds the limit, a warning will be shown to the user and the file will not be processed by the Connector.
9. Enable **Compress** if you want the files to be compressed before delivery (e.g. to reduce the size).
10. Enable **Use password** to encrypt the compressed file with the password specified in the **Password** field.
11. Clear the checkboxes of the file types you don't want to deliver to the Delivery Point.

    By default, all file types are selected, hence delivered.

    Remember that:
    - *Job Files* refer to the processed input files.
    - *Job Tickets* can only be delivered if the **Job Ticket** tab for the Connector has been enabled.

- The *Preflight Report* can only be delivered if the option **Send Separate Annotated Preflight Report with PDF** (Connect YOU) or **Send Preflight Report** (Connect ALL) (in the **Preflight** tab) is enabled.

4.5.6.5. Delivery method: HTTP or HTTPS

Using Delivery method: HTTP or HTTPS (Secure HTTP), you can deliver files to an HTTP(S) URL, running a server-side script.

The following table explains the difference between HTTP and HTTPS:

Properties	HTTP	HTTPS
URL	begins with http://	begins with https://
Default port	80	443
Operating layer	Application layer	Transport layer
Secured	no	yes
Encryption	no	yes
Certificates	no	yes

Note: As of Connect 12 update 2, it is possible to configure the HTTP(S) server to send back a response to the Connector, whenever a job is delivered. Refer to *The HTTP(S) Response System* on page 110.

To configure a Delivery Point to deliver files to an HTTP(S) URL

1. In the dialog to configure the Delivery Point (or Preset), proceed as follows:

   If you're configuring a **Preset**:

   a. In the **Delivery Preset** field, enter a meaningful name for your Delivery Preset, for example `HTTP(S)-Delivery-CustomerX`.

   b. From the **Delivery Method** list, select **HTTP** or **HTTPS** as required.

   If you're configuring a **particular Delivery Point** (using the **Configure** button), the Delivery Preset and the Delivery Method are not editable; they are determined by the Preset (selected from the Primary/Secondary Delivery Point list in the Delivery tab).

2. Enter the required server configuration details:

   - **Server**: The IP address or host name of the HTTP(S) server, for example: `10.31.178.56` or `enfocus.com`

   - **Port**: The port number configured on the HTTP(S) server, by default 80 for HTTP and 443 for HTTPS.

   - **Auth type**: The authentication theme used by the HTTP(S) server. Currently the following types are supported:

     - **No Authentication**: No user name or password required.

- **Basic Authentication**: The user name and password are sent to the HTTP(S) server as unencrypted base64 encoded text.
- **Digest Authentication**: A hashed form of the password is sent to the HTTP(S) server.
- **OAuth Authentication**: Only the password is sent to the HTTP(S) server as an Bearer token type.
- **NTLM Authentication**: A secure challenge/response mechanism preventing password capture or replay attacks over HTTP is used.

- **User**: User name required to connect to the HTTP(S) server
- **Password**: Password required to connect to the HTTP(S) server
- **Timeout**: Timeout amount in seconds. The default value is 30 seconds. Increasing the timeout amount may help in situations where there is a poor connection or the server needs more time to respond to a delivery request.
- **Path**: Full path to the resource that will attend the server request (for example upload.php). The path is used to specify and/or find the resource requested.

  Note: The path is case-insensitive.

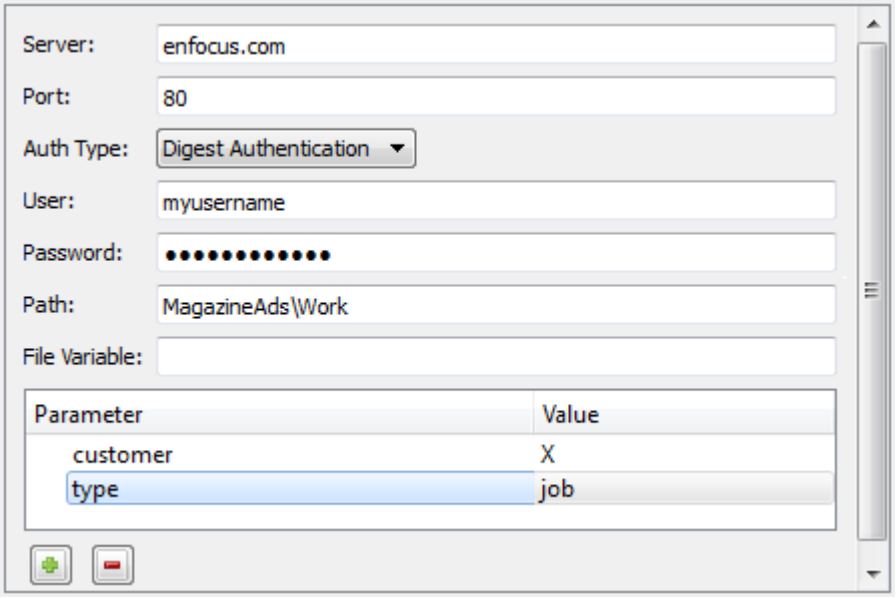
- **File Variable**: The HTTP File variable is used on the HTTP(S) server to route the job submitted by the Connector to the appropriate location. The HTTP File variable needs to be added if the server-side script expects a specific identifier name for a file to succesfully upload.

3. Add the required parameters:
   a. Click .
   b. Enter a Parameter name, for example: `name`
   c. Double-click the **Value** field, to make it editable.
   d. Enter a Value, for example: `customerX`.

      To use variables, right-click in the text field, select **Variables** from the context menu, and select the desired variable.

   Parameters can be part of the query string on URL or GET/POST parameters. You can add as many parameters as you want.

   Example:



The server configuration details in the above example will result in the following URL: **http://enfocus.com/MagazineAds/Works?customer=X&type=jobs**

4. Define a **File size limit** if you want to refuse files above a specific size.

   Tip: If a file (either an input file or a Job Ticket or Preflight report) exceeds the limit, a warning will be shown to the user and the file will not be processed by the Connector.

5. Enable **Compress** if you want the files to be compressed before delivery (e.g. to reduce the size).

6. Enable **Use password** to encrypt the compressed file with the password specified in the **Password** field.

7. Clear the checkboxes of the file types you don't want to deliver to the Delivery Point.

   By default, all file types are selected, hence delivered.

   Remember that:

   - *Job Files* refer to the processed input files.
   - *Job Tickets* can only be delivered if the **Job Ticket** tab for the Connector has been enabled.
   - The *Preflight Report* can only be delivered if the option **Send Separate Annotated Preflight Report with PDF** (Connect YOU) or **Send Preflight Report** (Connect ALL) (in the **Preflight** tab) is enabled.

   The first time when Connectors with HTTP delivery enabled connect to the server, they will get a certificate. Once that certificate is stored in the trusted storage, the Certificate will not be requested again.

Hidden attributes

To organize the delivered files on the HTTP server, you can use the following attributes:

- The *Connector* identity (= the unique ID displayed on the Definition tab) is passed through the 'c_identity' attribute. It refers to the Connector that delivered the job files to the HTTP server.
- The *Job* identity is passed through the 'c_jobid' attribute. It is a unique ID per job, which helps you identify all job files (Preflight Report, Job Ticket, files) associated with a given job.

These attributes are hidden, hence not visible in Connect.

4.5.6.6. Delivery method: Local Folder

Using Delivery method: Local Folder, you can deliver files to a local folder, which is selected by the user of the Connector, the first time he submits files to the Connector.

To configure a Delivery Point to deliver files to a local folder

1. In the dialog to configure the Delivery Point (or Preset), proceed as follows:

   If you're configuring a **Preset**:

   a. In the **Delivery Preset** field, enter a meaningful name for your Delivery Preset, for example `LocalFolder-CustomerX`.

   b. From the **Delivery Method** list, select **Local Folder**.

   If you're configuring a **particular Delivery Point** (using the **Configure** button), the Delivery Preset and the Delivery Method are not editable; they are determined by the Preset (selected from the Primary/Secondary Delivery Point list in the Delivery tab).

   Note: The selection of the destination folder takes place when the Connector created is used. No definition of the delivery folder is required during configuration.

2. Define a **File size limit** if you want to refuse files above a specific size.

   Tip: If a file (either an input file or a Job Ticket or Preflight report) exceeds the limit, a warning will be shown to the user and the file will not be processed by the Connector.

3. Enable **Compress** if you want the files to be compressed before delivery (e.g. to reduce the size).

4. Enable **Use password** to encrypt the compressed file with the password specified in the **Password** field.

5. Clear the checkboxes of the file types you don't want to deliver to the Delivery Point.

   By default, all file types are selected, hence delivered.

   Remember that:

   - *Job Files* refer to the processed input files.
   - *Job Tickets* can only be delivered if the **Job Ticket** tab for the Connector has been enabled.

- The *Preflight Report* can only be delivered if the option **Send Separate Annotated Preflight Report with PDF** (Connect YOU) or **Send Preflight Report** (Connect ALL) (in the **Preflight** tab) is enabled.

4.5.7. Setting up a notification email

If you want to send a notification mail for every file delivered to the Connector, you must enable the **Send Email Notification** option in the **Delivery** tab and configure the notification email as described below.

To set up a notification email

1. Specify the name of the mail **Server** you want to use.
   - For Yahoo, use: `smtp.mail.yahoo.com`
   - For Gmail use: `smtp.gmail.com`

   Note: Not all email services are supported. Microsoft Exchange Server will work in most cases. Yahoo Mail and Gmail are supported, however they require SSL.

2. Specify the **Port**. The default is 25.

   For Yahoo or Gmail, use port 465.

3. Define the **User** and **Password**

4. Enter the **From** and **To** email addresses.

   Note: In case of multiple addresses, make sure to separate them with a semicolon (NOT followed by a space), for example **To:** *annc@enfocus.com;frankm@gmail.com*

5. Compose the **Subject** and **Message** text.

   To add variable information about the job, click the **Insert Variable** button (or right-click in the text field and select **Variables** from the context menu), and select the desired variable.

   There are a number of predefined variables, such as: User Company, Current Document Name, User Name, Time, Unique ID, Date and Connector Name. You cannot add your own variables.

   Note: Connect will search for this information in the standard PDF metadata added to the PDF file.

   If Job Tickets are enabled in your Project, the metadata fields used in these Job Tickets can also be used as variables. They are displayed in the second part of the Use Variable dialog and preceded by the characters "JT", for example: %JTCustomer% (= Job Ticket contains a metadata field with label "Customer"). The present value (at the bottom of the dialog) is the default value chosen in the Job Ticket.

   At run-time, these variables will be replaced with the appropriate values.

6. To test the setup, click the **Send Test Notification** button.
   An example mail is sent to the address(es) mentioned in the **To** field. The variables are not resolved in this email.

7. Click **OK**.

4.5.8. Defining allowed file types

By default, Connectors only accept PDF files. However, you can configure the Connector to accept other file types.

To do so

1. In the Delivery tab, select **Allow Non PDF Files**.
2. Beside **Allow Restrictions**, click **Configure**.
3. In the File Type Restrictions dialog, at the top of the dialog, select the appropriate option:
   - **Exclude (these file types)**: will exclude certain file types, meaning that the Connector will accept all file types, except for the ones you select in this dialog.
   - **Include (these file types)**: will include certain file types, meaning that the Connector will accept only the selected file types.
4. In the left part of the dialog, click the file type you want to select.

   If the file type you need is not in the list, you can add one (that will be available in all your Projects) by clicking the button. The other buttons allow you to remove ( ) or edit ( ) file types. Note that grayed out file types are defaults that cannot be edited or removed. See also *File Type properties* on page 95.
5. Click the arrow button >>.
   The selected files are moved to the right part of the dialog.

   Tip: If you have imported a Project from another user, the right part may contain file types that are not yet in your list of file types (on the left hand side). To be able to use them in your own Connect Projects as well, select them and click **Import**.
6. Repeat step 4 and 5 for all file types you want to allow or disallow.
7. Modify the message if required.

   This message will appear if a file type that is not accepted is submitted to the Connector. You can use **%1** (File Type Extension) or **%2** (Description) to refer to the selected file types. For example, the message "This Connector only accepts %1 files (%2)", could result in "This Connector only accepts doc and xls files (Microsoft Word Document and Microsoft Excel File)". See *File Type properties* on page 95.

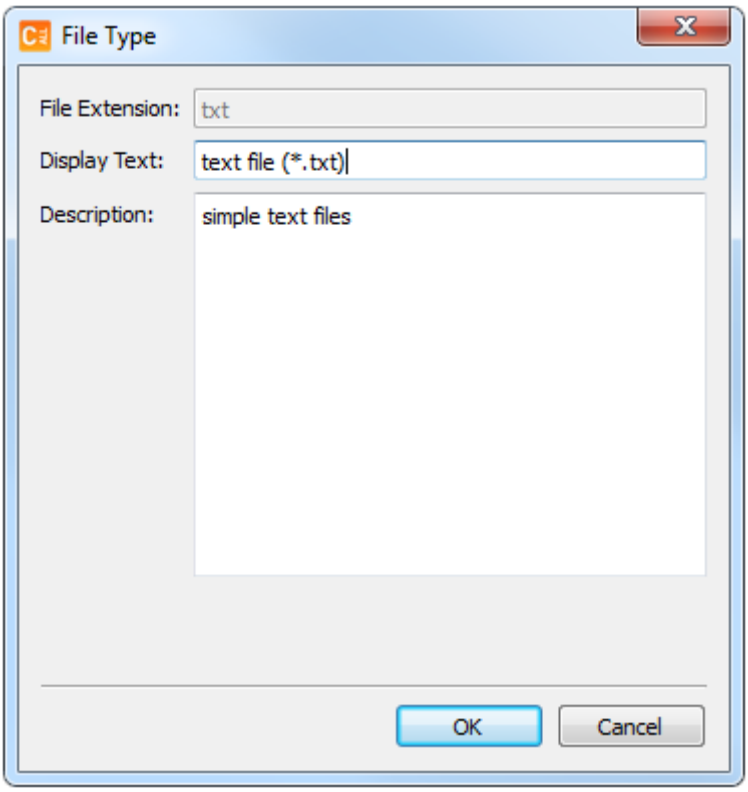
   If more than three file types are selected, only three file types will be mentioned, followed by the string "etc".

If a user submits a non-allowed file, a message will pop up and the file will not be processed. On the Jobs tab of the Connector, the file concerned will be mentioned with the status "Restricted" (in orange).

4.5.9. File Type properties

This topic gives an overview of the properties of the File Types that are available in the File Type Restrictions dialog.

Property	Meaning
File Extension	File type extension (without dot). This field is read-only. The File type extension is used to determine whether or not the Connector accepts the submitted file. If you want to refer to the file extension in the message to warn users of disallowed file types, use %1. (See also step 7 of *Defining allowed file types* on page 94)
Display Text	Text shown in Connect, in the File Type Restrictions dialog.
Description	Text shown as a tooltip in Connect, in the File Type Restrictions dialog. If you want to refer to this field in the message to warn users of disallowed file types, use %2. (See also step 7 of *Defining allowed file types* on page 94)



4.6. Update options (Connect ALL)

You can configure Connectors to be updated automatically when a newer version is available.

How does it work?

When you create the Connector for the first time, it is uploaded to a server (as specified in the Connector Update properties). Afterwards, each time the Connector is launched, it connects to the update server and compares the current version with the version on the update server:

- If the version is the same, the users of the Connector can continue using the Connector.
- If there is a new version, the users will will receive a notice informing them that an update is available and that they can download and install it.

Note:

- The update server can be an FTP, SFTP, HTTP or HTTPS server.
- When using the update server, you can enable the "Remote download" option, which will generate two smaller, more portable versions of the Connectors. For more information, refer to *Remote Download Connectors (Connect ALL)* on page 108.

Configuration

The update function has to be enabled and configured in the *Update tab*.

For more detailed and technical information, refer to *About the Automatic Updating Mechanism* on page 97.

Use

If there is a new version of the Connector, the user will be prompted, including a link to the location where a new version can be downloaded. During the grace period, the user is allowed to continue using the previous version. After the grace period (as defined in the Connector properties), or if the user was using an older version, the Connector will no longer work.

4.6.1. Update tab

The **Update** tab (only available in Connect ALL) allows you to configure the settings for automatically updating the Connector if a newer version is available.

To make use of this functionality, make sure to select the **Enable Update** checkbox. The tab title will turn green and the properties on this tab will become editable.

Property	Meaning
Enable Remote Download	When selected, two additional application files, Remote _<Connector name>.exe (for use on Windows) and Remote _<Connector name>.app (for use on Mac), will be created. These new connectors are about 6-7 MB in file size, making them very portable. Refer to *Remote Download Connectors (Connect ALL)* on page 108.

Property	Meaning
Upload	Specifies how the Connectors will be uploaded to the update server (e.g. the update method and a number of details required to identify and to access the server for uploading and downloading the Connectors). You can select a Preset from the list, or create one yourself. The details of the selected Preset are shown in the field underneath **Upload**. The *properties* depend on the chosen update method (HTTP, HTTPS, FTP, SFTP). **Note:** (S)FTP and HTTP(S) Presets are shared with the Delivery tab Presets. Other Preset types (e.g. email or Dropbox) that are not supported by the Update function are ignored in the Update Tab. For more information, refer to • *About the Automatic Updating Mechanism* on page 97 • *Creating an Update Preset* on page 100 • *Editing an Update Preset* on page 101 The **Configure** button allows you to change the Update details for this particular Connector Project. The changes made using this button do not change the Preset! For more information, refer to *Modifying the details of the update server* on page 101.
Download	Specifies how the Connectors will be downloaded. The download settings are configured in the same way as the upload settings. The entered information is shown in the field underneath **Download**.
Identity	The Identity is an automatically generated unique ID. The value in this field must be unique for the FTP Server. After uploading, this field can not be modified anymore. For more information, refer to *About the Automatic Updating Mechanism* on page 97.
Grace period	When selected, previous versions of the Connector will automatically be disabled after the configured time period (number of days, weeks or months). During this time period, customers will be able to use the previous version of the Connector. After that, only the newest version will work. The configured grace period will only apply to Connectors newer than the selected date. This is by default the creation date of the Connector, but it can be changed as required.

4.6.2. About the Automatic Updating Mechanism

To ensure that all your customers are using the latest version of a Connector, you can use the Automatic Updating Mechanism available in Connect ALL. This mechanism automatically uploads the latest version of your Connector to an update server of your choice (FTP, SFTP, HTTP or HTTPS) and compares it with the version used by your customers.

Note: If you do not want to make use of this feature, just disable the **Enable Update** checkbox in the **Update** tab of the Connector Project.

How it works

1. When configuring the Connector, you enter the settings of the update server you want to use in the **Update** tab:
   - The server address
   - The login credentials for uploading the Connectors
   - The login credentials for the customers
2. When creating the Connector, the Connector will be copied to the (S)FTP/HTTP(S) server, including version information, using the Upload settings (user name and password).
3. If your customer runs the Connector, the Connector will connect to the (S)FTP/HTTP(S) server (using the Download user name and password), and compare its version with the one on the server:
   - If the version is the same, the customer can continue using the Connector.
   - If there is a new version, the customer will be prompted, including a link to the location where a new version can be downloaded. During the grace period, the customer is allowed to continue using the previous version. After the grace period, or if the customer was using an older version, the Connector will no longer work.
   - If the Connector can't reach the server, because it is off-line or missing, a warning is given every 24 hours, but the Connector will continue to work - indefinitely or until the expiration date (as defined in the Update tab).
   - If the Connector Project on the server is missing or incomplete, a warning is given, but the Connector will only continue to work for 24 hours. This allows you to detect and correct the issue, while the customers can continue to use the Connector. If the problem is not fixed within 24 hours, the Connector will shut down and stop working, until the Connector Project on the update server is restored. At that time, the Connectors will update automatically, and continue to work.

     Tip: If you want to shut down Connectors in the field, you can remove the corresponding Connector Project from the update server and not restore it anymore. Users will receive a notification and after 24 hours the Connectors will stop working.

Prerequisites for using the Automatic Updating System for your Connectors

To use the Automatic Updating system, you need:

- An (S)FTP and/or an HTTP(S) server

  Note:
  - The server used for the Update function can be the same as the server used for delivery of files from Connectors. However, it is advised you use a different *directory* for the update function.
  - Upload and download can use different delivery methods, for example upload to FTP and download from HTTP. This works as follows:

- **Upload server:** When creating the Connector, Connect creates a directory with the name specified in the Identity field (see further). The Connector will be uploaded to this folder on the FTP server.

- **Download server:** To be able to check if a new version is available, the HTTP (download) server should have access to this folder. It will try to locate the new Connector using the Identity field and send the requested Connector as a response to Connect.

Note that, regardless of the chosen method, the data entered for the **upload and download server must allow Connect to find the Connector** (identified by the Identity field - see below). The Connector should not necessarily be stored in the same directory: in case of HTTP update, the HTTP server can choose to keep the file on a database or a different physical location on the server. This is not a problem, as long as the upload or download method is able to find the correct path to the Connector.

- A login for Enfocus Connect to *upload* the Connector and version information. This Version upload login needs Read/Write access.
- A login for the Connectors (to check versions, and allow customers to *download* new versions). It is advised to restrict the privileges of this login to "Read only".

Note: When combining job **delivery** to a remote server with the Automatic Update system, it is advised you set user log-in and Read/Write privileges as follows for the different servers:

- Write only privileges for the delivery function (see the Delivery tab).
- Read/Write privileges for the upload function (see the Update tab).
- Read Only privileges for the download function (see the Update tab).

How to configure the Automatic Update system

To make use of this feature, select the **Enable Update** tab in the **Update** tab of your Connector and make sure to enter the required information. The server information (for both uploading and downloading the Connectors) is stored in Presets. There are two types of "Update" Presets:

- The *default* Presets (one per update method), provided by Enfocus Connect have no values filled in. You cannot re-use any information filled in before.
- The *customized* Presets, i.e. the Presets you create yourself. These Presets usually contain the values you need on a regular basis. You could for example create a preset for an FTP server that contains all the common settings for a connection, and then customize the upload directory, user name and password on a customer by customer basis when configured in the Update tab.

Note: Update Presets are used in exactly the same way as Delivery Point Presets. You can even re-use Delivery Point Presets (set up for HTTP(S)/(S)FTP) or use "Update" Presets to configure Delivery Points.

Refer to:

- *Update tab* on page 96

Note: Icons in the Connector Projects list reflect the status of the Project on the update server. See *Icons in the Connector Projects list* on page 26.

The Unique ID and the Identity of a Connector

When creating a new Project, two identifiers are generated automatically:

- A **Unique ID** (displayed in the **Definition** tab), which is globally unique, for example: *a3bb69ef4de511e3ffeaf01faf15cf0d*

  Do not change this Unique ID! There is only one exception: to make an update for a Connector of which you don't have the Project anymore, you will have to create a new Project and change the Unique ID of this new Project to the Unique ID of the old version.

- An **Identity** (displayed in the **Update** tab), which is by default the same as the Unique ID.

  The Identity is used to identify a Connector on the update server. The Identity can be modified (not recommended!), but must be unique for the server.

  Identity is created for backwards compatibility, for example, with PitStop Connect 09 Connectors. 09 Connectors had an Identity which was adjustable by the user. Therefore it was not unique on a global level. The Unique ID was added in version 10 to have a global unique ID and the Identity was only kept for backwards compatibility.

4.6.3. Creating an Update Preset

This topic describes how to create a new Preset for updating Connectors that can be used in all your Connector Projects. Such a Preset contains details about the update method (FTP, SFTP, HTTP, or SHTTP) and a number of details required to identify and to access the server for uploading and downloading Connectors.

Note: Remember that the update mechanism is only available in Connect ALL.

To create a new "Update" Preset

1. Switch to the **Update** tab of one of your Connector Projects.
2. Select the **Enable Update** checkbox.
3. From the Upload list, select **Edit Preset**.
4. Click .
5. In the **Edit Preset** dialog, enter the details as required.

   The properties that can be modified depend on the Update method. For more information, refer to

   - *Update method: HTTP or HTTPS* on page 103
   - *Update method: FTP or SFTP* on page 102

   Note: These sections assume that you have an understanding of the update method you are selecting and the settings required to make a good connection. If not, you should consult your local network administrator.

6. Click **OK**.
7. Click **Done**.

8. To verify your changes, in the **Update** tab, select the new Preset and check the properties displayed below the list.

4.6.4. Editing an Update Preset

This topic describes how to modify an earlier defined Preset for updating Connectors.

Note: To use an updated Preset in an earlier defined Project, you must re-select it to have the changes applied to the Project.

To edit an Update Preset

1. Switch to the **Update** tab of one of your Connector Projects.
2. Select the **Enable Update** checkbox.
3. From the Upload or Download list, select **Edit Preset**.
4. Select the Preset you want to edit.
5. Select > **Edit**.
6. In the **Edit Preset** dialog, modify the details as required.

   The properties that can be modified depend on the update method. For more information, refer to

   - *Update method: HTTP or HTTPS* on page 103
   - *Update method: FTP or SFTP* on page 102

   Note: These sections assume that you have an understanding of the update method you are selecting and the settings required to make a good connection. If not, you should consult your local network administrator.
7. Click **OK**.
8. Click **Done**.
9. To verify your changes, in the **Update** tab, select the modified Preset and check the properties displayed below the list.

4.6.5. Modifying the details of the update server

This topic explains how to modify the details of the update server *of a particular Project*, without changing the Preset.

Note: Creating and changing a Preset is explained earlier, see *Creating an Update Preset* on page 100 and *Editing an Update Preset* on page 101.

To modify the details of the update server *of a particular Project*

1. Switch to the **Update** tab of the Project concerned.

2. Click the **Configure** button of the Upload or Download server you want to change.
3. Make the required changes.

   The properties that can be modified depend on the delivery method. For more information, refer to

   - *Update method: HTTP or HTTPS* on page 103
   - *Update method: FTP or SFTP* on page 102

   Note: These sections assume that you have an understanding of the update method you are selecting and the settings required to make a good connection. If not, you should consult your local network administrator.
4. Click **OK**.
5. Click **Done**.
6. To verify your changes, in the **Update** tab, check the properties of the modified Upload or Download server.

4.6.6. Update methods: properties

4.6.6.1. Update method: FTP or SFTP

To configure the settings of the FTP/SFTP server to be used for updating Connectors

1. In the dialog to configure settings for the update server, proceed as follows:

   If you're configuring a **Preset**:

   a. In the **Preset** field, enter a meaningful name for your Preset, for example `FTP-UPDATE-CustomerX`.

   b. From the **Delivery Method** list, select **FTP** or **SFTP**.

   If you're configuring a **particular update server** (using the **Configure** button), the Preset and the Delivery Method are not editable; they are determined by the Preset (selected from the Upload/Download list in the Update tab).
2. Specify the **Server** DNS name, including the domain name, for example "ftp.enfocus.com". You can also use the IP address.

   Note: We recommend using the update server's DNS alias instead of its IP address. In that way, even if the IP address changes, the link between the update server and the Connector(s) in the field is maintained.
3. Specify the **Port**. The default is 21 for **FTP** and 22 for **SFTP**
4. In the **Login type** list, select one of the following options:

   - **Ask user and password**: The Connector will ask for a user name and a password to login. You do not need to enter the User and Password fields.

- **Ask password only**: The Connector will use the user name defined in the **User** field, and ask the user for the password.
- **Use specified credentials above**: The Connector will use the credentials defined in the **User** and **Password** field.

5. Specify the **Directory** in which the file should be placed. Click the **Browse...** button and select a directory on your system.

   Note: Use the **Connect** to verify the connection to the (S)FTP server.

6. Click **OK**.

4.6.6.2. Update method: HTTP or HTTPS

The following table explains the difference between HTTP and HTTPS:

Properties	HTTP	HTTPS
URL	begins with http://	begins with http**s**://
Default port	80	443
Operating layer	Application layer	Transport layer
Secured	no	yes
Encryption	no	yes
Certificates	no	yes

To configure the settings of the HTTP or HTTPS server to be used for updating Connectors

1. In the dialog to configure settings for the update server, proceed as follows:

   If you're configuring a **Preset**:

   a. In the **Preset** field, enter a meaningful name for your Preset, for example `HTTP(S)-Update-CustomerX`.

   b. From the **Delivery Method** list, select **HTTP** or **HTTPS** as required.

   If you're configuring a **particular update server** (using the **Configure** button), the Preset and the Delivery Method are not editable; they are determined by the Preset (selected from the Upload/Download list in the Update tab).

2. Enter the required server configuration details:

   - **Server**: The IP address or host name of the HTTP(S) server, for example: `10.31.178.56` or `enfocus.com`

     Note: We recommend using the update server's DNS alias instead of its IP address. In that way, even if the IP address changes, the link between the update server and the Connector(s) in the field is maintained.

   - **Port**: The port number configured on the HTTP(S) server, by default 80 for HTTP and 443 for HTTPS.

- **Auth type**: The authentication theme used by the HTTP(S) server. Currently the following types are supported:
  - **No Authentication**: No user name or password required.
  - **Basic Authentication**: The user name and password are sent to the HTTP(S) server as unencrypted base64 encoded text.
  - **Digest Authentication**: A hashed form of the password is sent to the HTTP(S) server.
  - **OAuth Authentication**: Only the password is sent to the HTTP(S) server as an Bearer token type.
  - **NTLM Authentication**: A secure challenge/response mechanism preventing password capture or replay attacks over HTTP is used.
- **User**: User name required to connect to the HTTP(S) server
- **Password**: Password required to connect to the HTTP(S) server
- **Path**: Full path to the resource that will attend the server request (for example upload.php). The path is used to specify and/or find the resource requested.

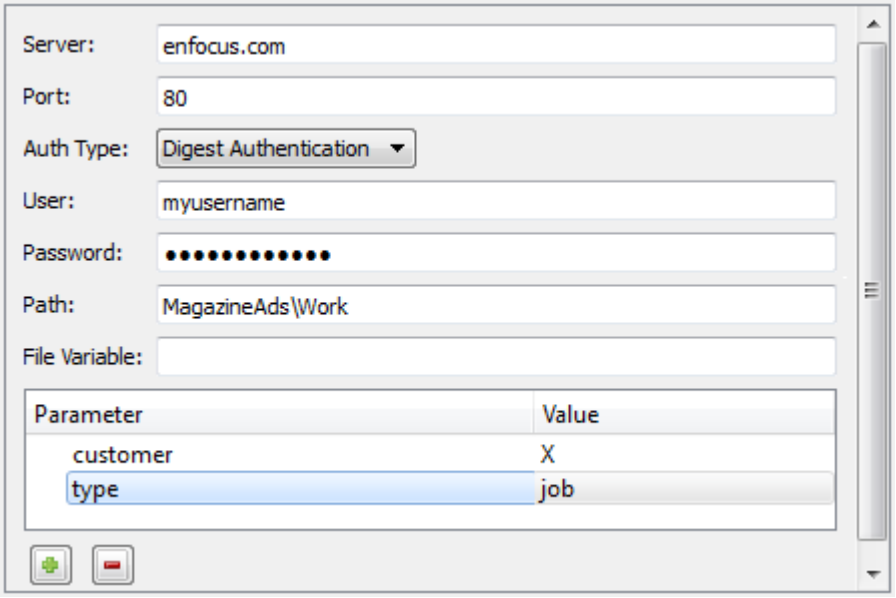
  Note: The path is case-insensitive.

- **File Variable**: The HTTP File variable is used on the HTTP(S) server to route the job submitted by the Connector to the appropriate location. The HTTP File variable needs to be added if the server-side script expects a specific identifier name for a file to succesfully upload.

3. Add the required parameters:
   a. Click .
   b. Enter a Parameter name, for example: `name`
   c. Double-click the **Value** field, to make it editable.
   d. Enter a Value, for example: `customerX`.

   Parameters can be part of the query string on URL or GET/POST parameters. You can add as many parameters as you want.

   Example:



The server configuration details in the above example will result in the following URL: **http://enfocus.com/MagazineAds/Works?customer=X&type=jobs**

The first time when Connectors with HTTP delivery enabled connect to the server, they will get a certificate. Once that certificate is stored in the trusted storage, the Certificate will not be requested again.

4. Click **OK**.

4.6.7. Updating Connectors

If you have made changes to a number of Connectors (with **Enable Update** switched on), you can upload all changed Connectors in one go.

To do so

1. Group all Connectors you want to update. See *Organizing Projects in Groups* on page 31.

   Remember that changed but not uploaded connectors have the following icon in the Connector Projects list:

   Connectors without update mechanism enabled that happen to be in the same Group will remain untouched.

2. Right-click the Group.

3. From the context menu, select **Update Connectors**.
   A dialog pops up, listing all Connectors that will be uploaded. Errors and warnings (if any) are reported for each Connector separately.

4. Click **Continue**.

5. Click **Close**.

The Connectors are uploaded and the icon changes into a green checkmark:

4.6.8. HTTP update - server side

This chapter handles the technical aspects of the HTTP update mechanism and provides you with a sample HTTP Server Side implementation.

4.6.8.1. Identifying the Connector

c_identity

The *Connector* identity (= the unique ID displayed on the Update tab) is passed through the 'c_identity' attribute. It's used to make sure that the updated Connector and the one currently on the HTTP(s) server point to the same Connector (as the name of the Connector may not be unique).

This attribute is hidden, hence not visible in Connect.

Setting the upload and download path

During Connector creation, the upload and download path are checked as well. Unlike FTP(S), the HTTP method can't be used directly to check the upload and download path, because the HTTP server can keep the Connector in a database or in a different physical location on the server; the exact location must be detected via the upload and download URL parameters or the method implemented at server end.

Note that it is possible to use 'c_identity' to redirect the uploaded or downloaded Connector to a folder or to index a database table.

Example of an upload URL:

```
http://www.mycompany.com/connect/upload.php?c_identity=abcd12345...
|<--- server address--->|<- resource path->|<- parameters ...
```

Example of a download URL:

```
http://www.mycompany.com/connect/download.php?c_identity=abcd12345...
|<--- server address--->|<- resource path -->|<- parameters ...
```

Note: The server method upload.php and download.php are usually the same for all Connectors (same HTTP delivery Presets can be used by all Connectors). To find the required Connector, the server needs to use 'c_identity' .

Example

Remember that upload and download can use different delivery methods (see also *About the Automatic Updating Mechanism* on page 97). Following is a use case:

Create a Connect project to upload the Connector to a server using FTP/SFTP. Connect creates a directory named after the specified Identity field (on the Update tab) and uploads the Connector to this folder on the FTP server.

The HTTP server should be able to access the Connector from this directory. The HTTP server locates the new Connector using the identity parameter and sends it to the requested Connector as a response.

4.6.8.2. Sample HTTP Server Side Implementation

PHP web server setting

1. Set up a web server on a workstation.
2. Copy and paste the *upload script* and *download script* as <anyfile name>.php, for example, upload.php and download.php
3. Place the scripts on the web server (e.g. DOCUMENT_ROOT)
4. Create a folder named ***update*** where the upload and download script are located.

Internal testing of the Client

The following site can be used to test HTTP/HTTPS parameters (not for uploading or downloading): *http://httpbin.org/*.

Enabling/disabling the built-in web server on Mac

Mac has an built-in web server, which can be enabled from the command line tool utility. Note that you need administrator rights or root permission.

To enable the web server, open the terminal and run the following command:

```
> sudo launchctl load -w /System/Library/LaunchDaemons/org.apache.httpd.plist
```

To disable the web server, open terminal and run following command:

```
> sudo launchctl unload -w /System/Library/LaunchDaemons/org.apache.httpd.plist
Icon
```

File locations:

- Configuration file: /private/etc/apache2/httpd.conf
- Error log file: /private/var/log/apache2/error_log
- Log file: /private/var/log/apache2/access_log

The web server root path can be changed in the ***httpd.conf*** file.

Web server configuration

- The **file size limit** for uploads on the server should be increased to allow large files, up to 200 MB. Connectors usually are 100 - 200 MB in size.
- Make sure to allow **Read/Write access** on the folder where the Connectors get uploaded.
- Configure the **document root path** in /XAMPP\apache\conf\httpd.conf

4.6.8.3. Sample upload script

```
<?php
ini_set('display_errors',1);
error_reporting(E_ALL);
// Where the file is going to be placed .
$target_path = "update/";
```

```
$ConnectorId = $_POST['c_identity'];
if ( !empty($ConnectorId) )
{
    $target_path = "$target_path$ConnectorId/";
    if (!file_exists($target_path) )
    {
        mkdir( $target_path, 0777, true );
    }
}
/* Add the original filename to our target path. */
$target_path = $target_path . basename( $_FILES['file']['name']);

if(move_uploaded_file($_FILES['file']['tmp_name'], $target_path))
{
    echo "The file ".  basename( $_FILES['file']['name']).
    " has been uploaded";
}
else
{
    echo "There was a problem uploading your file.";
}
?>
```

4.6.8.4. Sample download script

```
<?php
ini_set('display_errors',1);
ini_set('zlib.output_compression', 'Off');
error_reporting(E_ALL);
ob_start();
$path = $_SERVER['DOCUMENT_ROOT']."/update/";
$ConnectorId = $_GET['c_identity'];
if ( !empty($ConnectorId) )
{
    $path = "$path$ConnectorId/";
}
$file = $path.basename($_GET['file']);
if (file_exists($file))
{
 header('Content-Description: File Transfer');
 header('Content-Type: application/octet-stream');
 header('Content-Disposition: attachment; filename=' . urlencode(basename($file)));
 header('Expires: 0');
 header('Cache-Control: must-revalidate, post-check=0, pre-check=0');
 header('Pragma: public');
 header('Content-Length: ' . filesize($file));
 ob_clean();
 flush();
 ob_flush();
if(!readfile($file))
{
     error_log("Read file from download.php failed. Check if its a zero kb file");
}
exit;
}
?>
```

4.7. Remote Download Connectors (Connect ALL)

Remote Download Connectors use the update server to distribute fully functional Connectors to end users. Remote Connectors are small and more portable than full Connectors providing

more deployment options such as e-mail delivery of the Remote Connector or fast downloads from a web site.

4.7.1. Enabling Remote Download

With a valid update server defined, you can add the creation of Remote Connectors by selecting the **Enable Remote Download** checkbox in the Update tab. Once selected, two additional application files, Remote _<Connector name>.exe (for use on Windows) and Remote _<Connector name>.app (for use on Mac), will be created locally and on the update server in the Connector project folder. These new connectors are about 6-7 MB in file size, making them very portable.

4.7.2. Distributing Remote Connectors

Remote Connectors can be distributed like any other Connector. However, due to the smaller size, it opens up the opportunity to distribute them through other communication methods, such as e-mail, because they are below the 10MB enclosure limit imposed by most e-mail servers.

Note on avoiding virus security blocking

Remote Connectors, although very portable, can be seen as a security risk by some e-mail servers or local virus protection software such as Norton 360. This is because they are custom, unsigned applications not contained within a valid installer.

To help avoid Remote Connectors being rejected by e-mail servers, you can compress (.zip) the Remote Connector with password access. This needs to be done outside of Connect using your own compression utility or you can create a simple Connector for your use that just compresses and password protects any file processed. Please note, even when a .exe or .app is saved in a password protected .zip, the ".exe" extension may need to be removed to avoid e-mail server rejection.

In cases where a Remote Connector is rejected or quarantined by local virus protection software, in most cases you can "restore" the quarantined application to use it. This can vary depending on the platform and virus protection software used.

4.7.3. Installing and using Remote Connectors

When the Remote Connectors are distributed and launched on a remote workstation, they will link to the update server and download and install the full Connectors automatically on the desktop of the local workstation. Once the full Connectors are installed, the Remote Connectors can be discarded from the local machine.

Note: The end user will get a single notice that the download is about to begin and that the application will automatically launch when the download is complete. Once they "ok" this message dialog, they will see the download progress in the task bar on Windows, or in the Menu bar on the Mac OS.

4.8. The HTTP(S) Response System

With HTTP(S) as delivery method defined for a Connector, it is possible to have the HTTP(S) server respond with a URL back to the Connector whenever a job is delivered to the server. The URL is opened automatically in the user's default browser and can be:

- A generic page, confirming file receipt
- A custom page, generated by a Web-To-Print server, using job or Job Ticket data to present a "check-out page" or an order summary
- A promotional web page
- ...

Note: This web page is displayed **only once per job**. If a job contains several files (the job itself, Job Tickets, Preflight report files), which are sent separately, the web page will be shown only when the **first** file is received by the HTTP(S) server.

How it works

1. The user submits a job to the Connector.
2. The Connector delivers this job to the HTTP(S) server (based on the Connector settings and using the POST method). All user defined attributes (e.g. file variables, ...) are included in the POST method call.
3. The HTTP(S) server receives the job file(s) and sends back a response (XML, JSON, Simple String Text).
4. The Connector receives this response and opens the corresponding URL in the user's default browser.

Secondary Delivery Point - Delivery Response

This system can also be used to allow or refuse delivery of the processed job files, based on criteria set by the customer who receives the files. For example, if the customer does not want to receive files preflighted with errors, the HTTP(S) server can refuse these files and have the Connector display a warning. This works as follows:

- The Connector delivers the file(s) selected in the Primary Delivery Point (e.g. the Job Ticket) to the HTTP(S) server.
- The HTTP(S) server extracts the required information from the file(s) it receives (e.g. the Preflight status) and sends back a response:
  - If the files selected in the Secondary Delivery Point should be sent as well (e.g. because they are preflighted without errors), the response tag is set to True.
  - If the files should not be sent, the response tag is set to False.
- The Connector processes the response and (based on the value of the response tag) either sends the files or displays a notification.

Note: If the response tag is invalid or missing, it is assumed to be true, and the files will be sent.

How to implement

- Set up the HTTP or HTTPS server in such a way that it returns a response when a Job arrives. You can do this using a scripting language such as PHP or JavaScript.

- Make sure the response is XML, JSON, or a Simple String Text. For more details, refer to *HTTP(S) Response System: Example* on page 111.
- To implement the Delivery Response mechanism, enable and configure the **Secondary Delivery Point Delivery Response** checkbox in the *Delivery tab* on page 78.

4.8.1. HTTP(S) Response System: Example

Example: https://www.enfocus.com/upload_file.php

Item	Description
Description	Uploads a file using POST semantics
URL structure	https://www.enfocus.com/upload_file.php?param1=value1&param2=value2...&**c_identity= 95c2feb0fb8511e3...&c_jobid=ae0982fce864...**
Method	POST
Parameters	**user specified**: User specified parameters as defined in the HTTP(S) delivery method are sent as part of the POST method. **Note:** If the Connector is defined to send along a Job Ticket, we recommend using the Job Ticket parameters. **c_identity**: The Connector identity (shown on the Definition tab) is provided through this attribute. This will help the server in identifying the Connector from which the job is received. **c_jobid**: The unique job ID identifies the job and is sent as part of the http(s) POST method attributes. The job ID is the same for all files (Job files (PDF or non-PDF), Job Tickets, Preflight report) belonging to the same job. Thanks to this ID, the server can generate a unique response per job (and not per job file). Note that different jobs may have the same name, but the job ID will be different.
Return	The response string sent by the HTTP(S) server in response to the POST method used to deliver the files. This can be a JSON string, an XML string or a URL encoded string in the following format: • **JSON:** { "url": "http://www.enfocus.com/en/products" } The key used should be "**url**" (case is ignored). The value of this key should be a valid URL. • **XML:** <url>http://www.enfocus.com/en/products</url> The Connector actually searches for the **URL** tag in the response XML tree structure. It takes the first **URL** tag found anywhere in the response XML tree structure. • **STRING**: http://www.enfocus.com/en/products

Item	Description
	Any valid URL encoded string can be sent as response.

5. Using Connectors

A Connector is a standalone application you create from Connect. A Connector contains all the functionality you define in the Connector Project. This includes capturing Job Tickets, PDF creation, PDF Preflight and delivery of any file to remote servers. Connect ALL allows Connectors to be distributed to internal and external users, whereas Connect YOU produces Connectors that only run on a single workstation.

If you have any questions on the settings of the Enfocus Connector, please contact the supplier of your Connector.

5.1. Using an Enfocus Connector

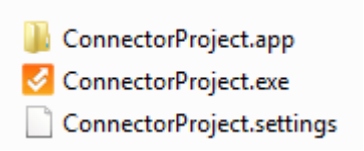
Using a Connector is very easy.

Have a look at the high-level overview below. Note that each of these steps is further explained in detail.

1. Set up your Connector as follows:

- Download (if required) and locate the Connector (.app on Mac or .exe on Windows) on a local hard drive.
- Double-click the Connector application to launch it. If a Virtual Printer or Plug-in support is enabled, you will be prompted to install these services.

See *Setting up an Enfocus Connector* on page 117.



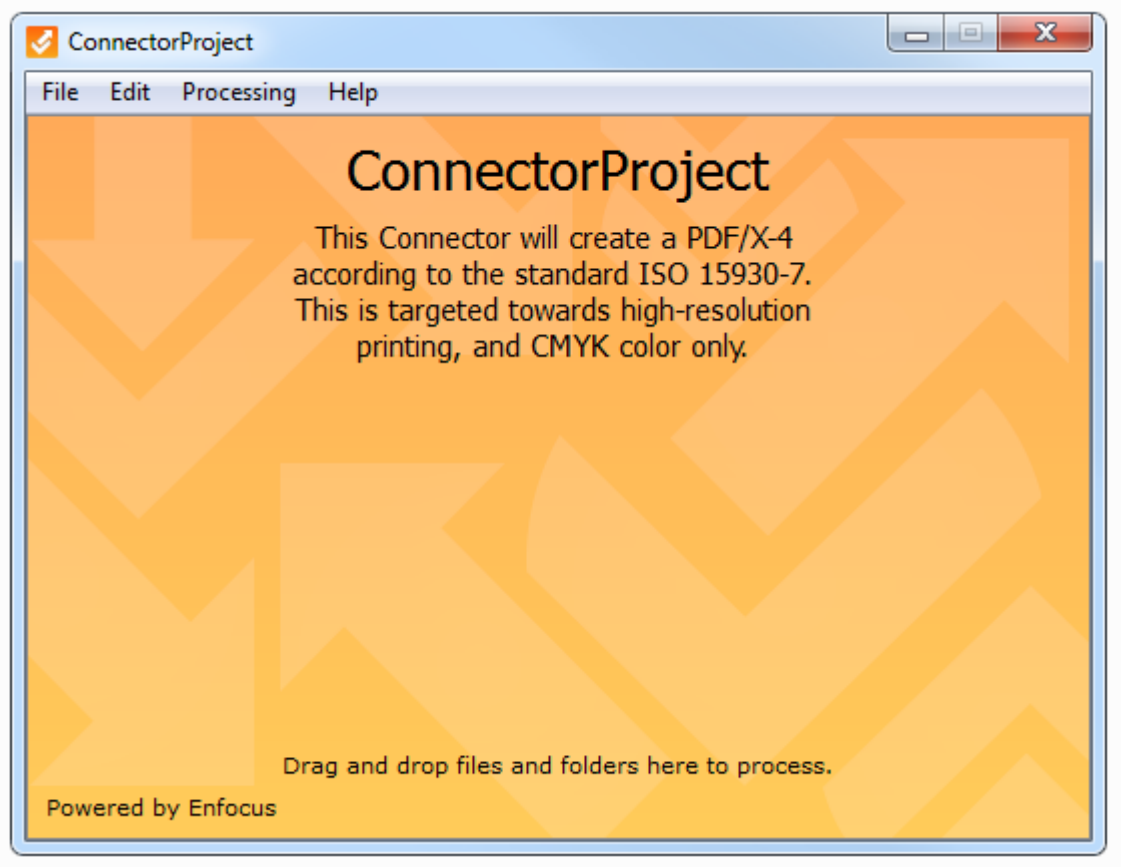
2. Submit one or more files to the Connector:

- Drag and drop files or folders,
- Print (if configured) or
- Export from the Plug-in (if configured)

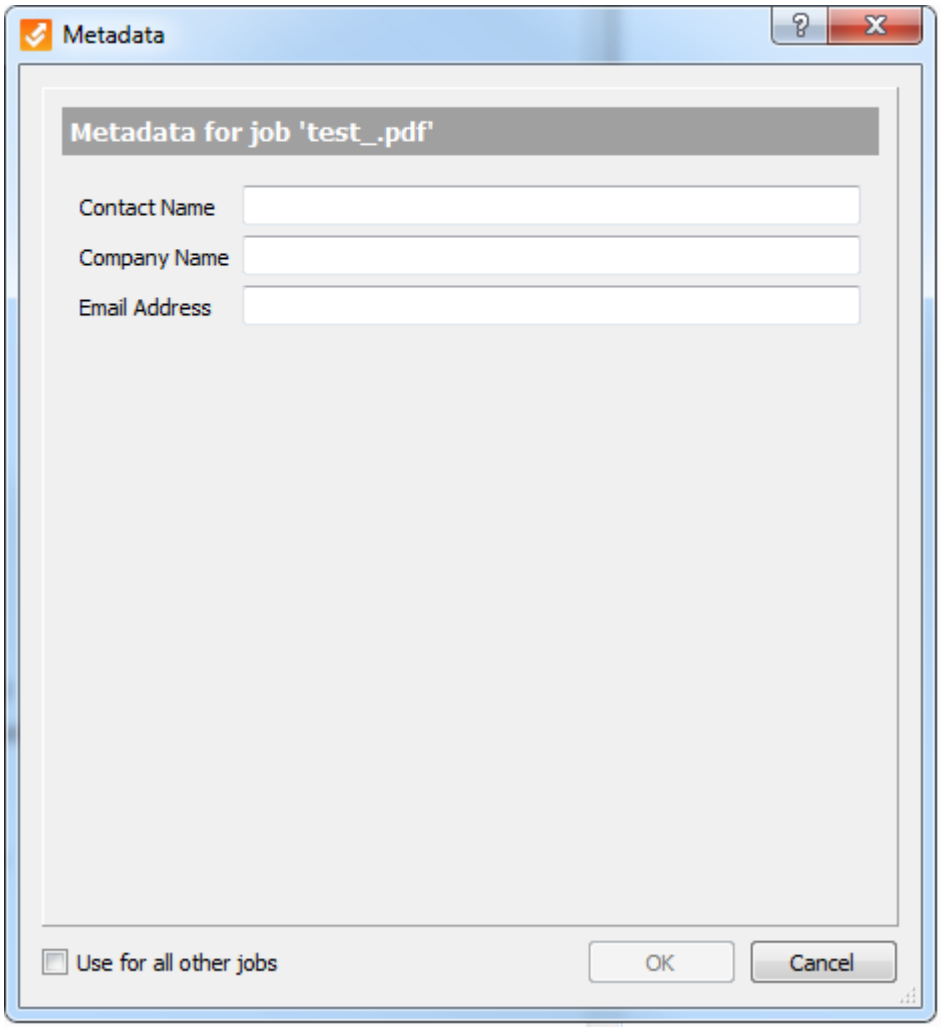
on the Connector application icon or in the Connector window to start processing.

Note: If the Connector has a local directory defined for a Delivery Point you will be prompted to select the destination folder.

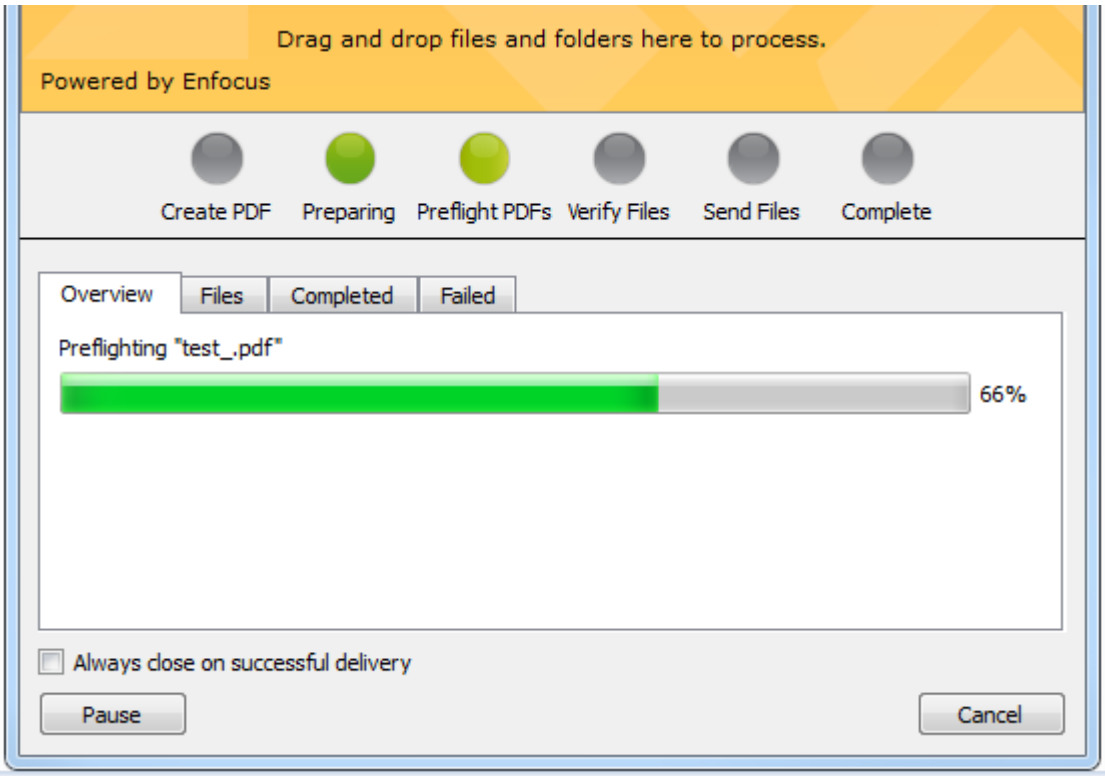
See *Submitting files to an Enfocus Connector* on page 122.



3. Depending on the Connector settings, one or more dialogs may pop up, asking you to enter additional information, such as credentials for delivery to a server, or job-related information (e.g. the name of your company, your email address...see screenshot) The job-related data (*metadata*) is sent along with the processed job (in the background) as an XML, TXT or CSV file, and is called the *Job Ticket*. See *Entering additional information* on page 125.

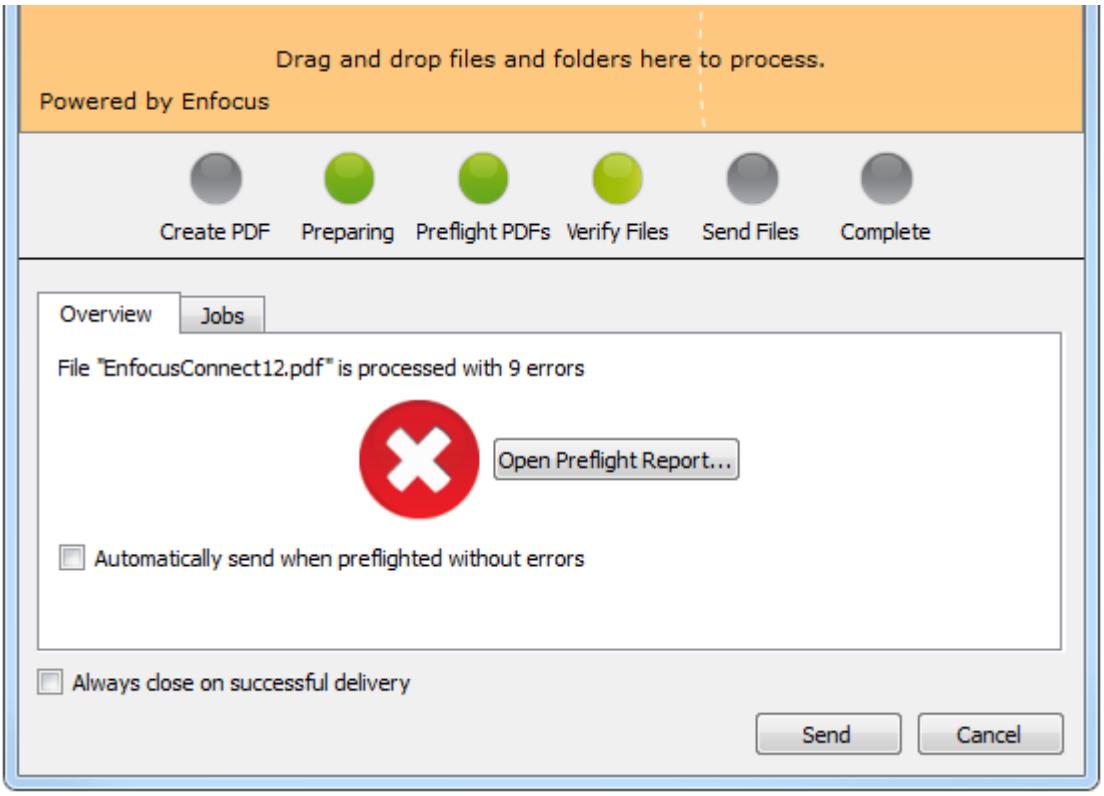


4. Check the file progress in the bottom part of the main Connector window. See *Checking the file progress* on page 127.



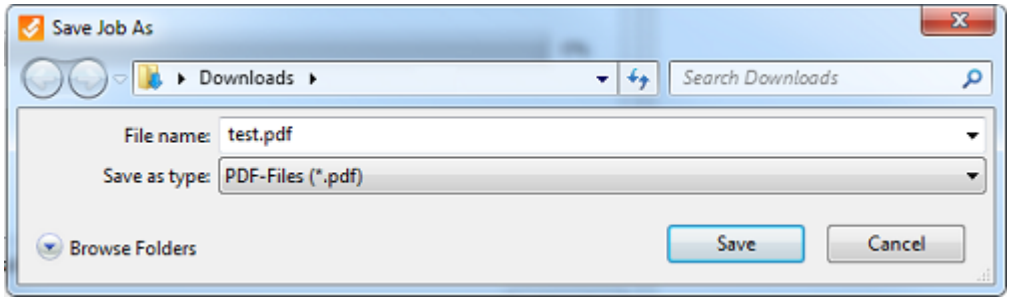
5. If the Connector is configured to preflight and verify PDF files, the Preflight results are shown. You have the opportunity to review the Preflight Report (unless the creator of the Connector has disabled this feature).

   See *Verifying the Preflight result* on page 129.



Depending on the Connector settings, the processed file will be delivered automatically, or you will be asked to save it, if local file saving is enabled. Note that the destination is remembered from the last time the **Save as** button was shown.

The screenshot below shows the dialog that appears if the processed file should be saved locally.



Note: Depending on the Connector settings, it may be not allowed to print the local copy, or it may have a stamp or banner added to it; this is done to protect the file against improper use.

5.1.1. Setting up an Enfocus Connector

To set up your Enfocus Connector

1. Download or create the Enfocus Connector to a desired location on your computer.

   If the Connector is zipped, you should first unzip it. Recommended tools are WinZip or 7-Zip (for Windows) and The Unarchiver (for Mac OS).

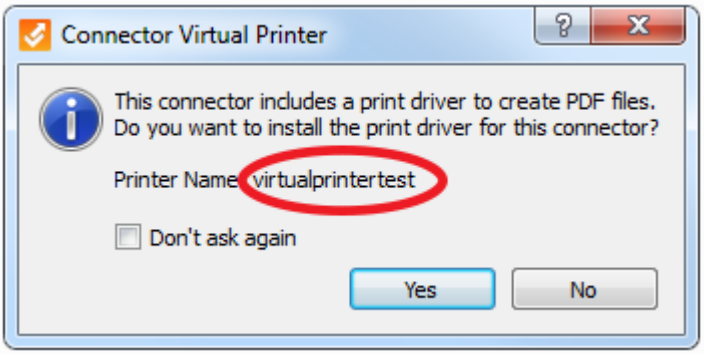
2. Double-click the Enfocus Connector (.exe or .app) to start using it.

   As soon as you have launched the Connector, it is added automatically to a menu Extra (on Mac) or to a menu in the Notification area (on Windows) associated with the Enfocus Printer Processor icon . Refer to *Launching a Connector from the menu bar (Mac) or taskbar (Windows)* on page 120.

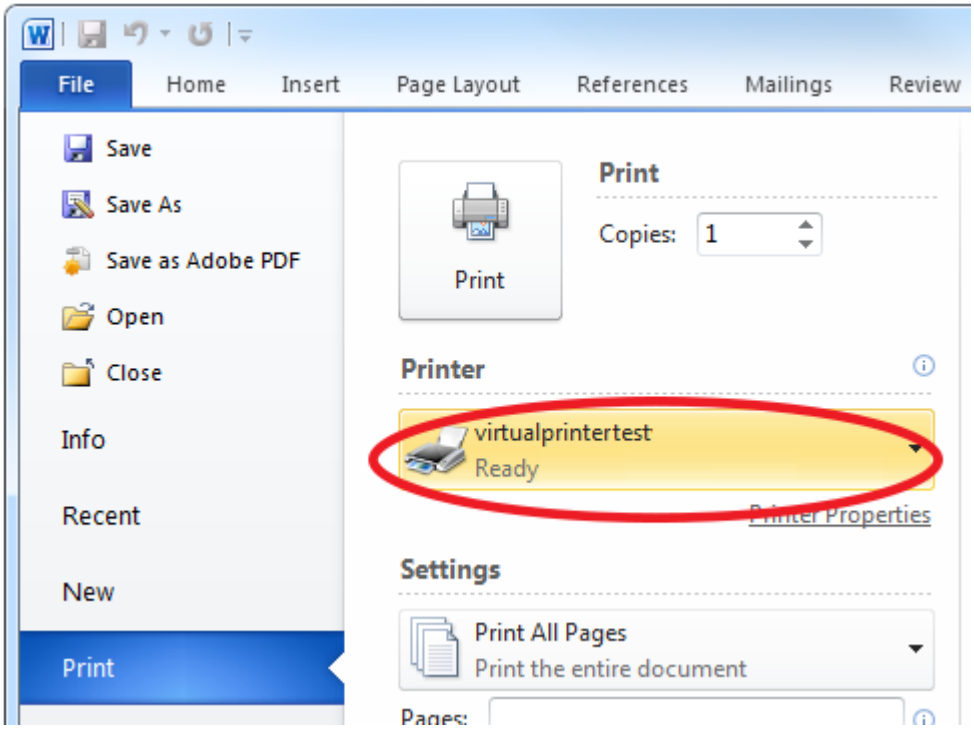
3. If the Connector includes a **Virtual Printer**, the Connector will suggest to install the print driver the first time you launch the Connector. Click **Yes**.

   A Virtual Printer allows you to print files from any application directly into the Connector. If you have installed the print driver included in your Connector, you will find the Connector printer name in the Printer list of any application.

   In the example below, the Printer Name is *virtualprintertest*.



   You will find this name in the Printer list of any of your applications, for example in Microsoft Word.

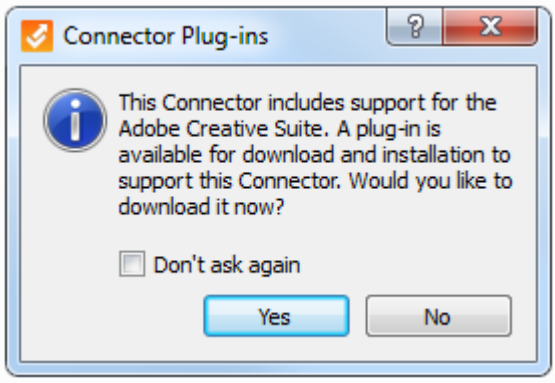


Note:

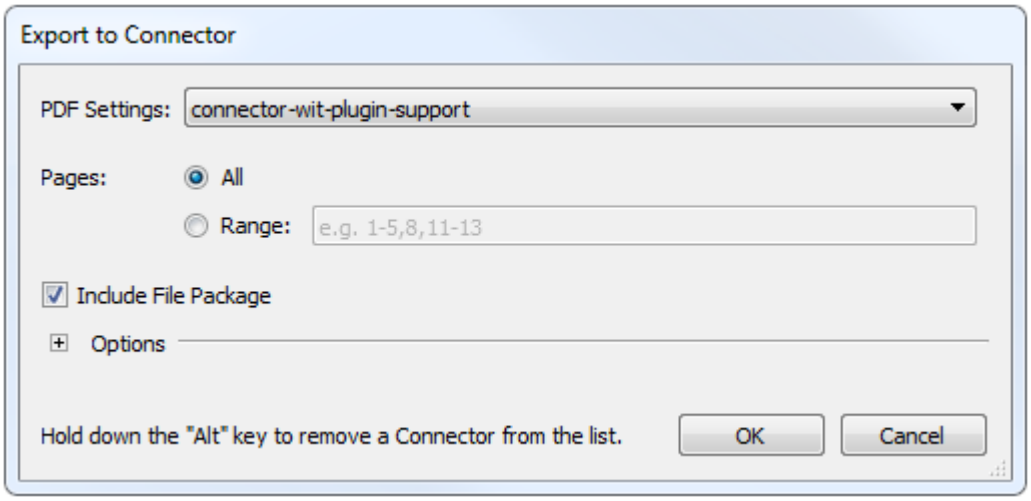
- If a Virtual Printer is installed, Plug-in Support (see next step) is always available, but you may not get a notification for download and installation of the Plug-ins (this depends on the Connector properties).
- To uninstall the Enfocus Connector, simply remove it from your computer. Any Virtual Printers can be removed like any other printer.

4. If the Connector is configured to enable **Plug-in Download**, (and the Plug-ins are not already installed) the Connector will provide a link to a web site with instructions and a list of Plug-ins available for download and installation (this depends on the Connector properties). Click **Yes** and follow the on-screen instructions.

   Plug-in support means that you can create PDF files from within specific third party applications such as Adobe InDesign or Adobe Illustrator, using their internal PDF Export function, and submit them directly into a Connector for additional processing.



For example, if you have installed the Plug-in for InDesign, in InDesign, an extra option will be available in the File menu, i.e. the option **Export to Connector**. When clicking this option, you will see the following dialog.



The Connector is now ready to be used.

5.1.1.1. Launching a Connector from the menu bar (Mac) or taskbar (Windows)

All Connectors launched at least once on your system, are available through the Enfocus Printer Processor icon in the menu bar (Mac) or taskbar (Windows) of your system. As a consequence, you don't have to search for Connectors in different locations on your system; you have them all in one list and they are easily accessible.

Note that even if you remove the Connector from your desktop or computer, it will still remain available through the menu bar or the taskbar.

To launch a Connector from the menu bar/taskbar

1. Right-click the Enfocus Printer Processor icon.

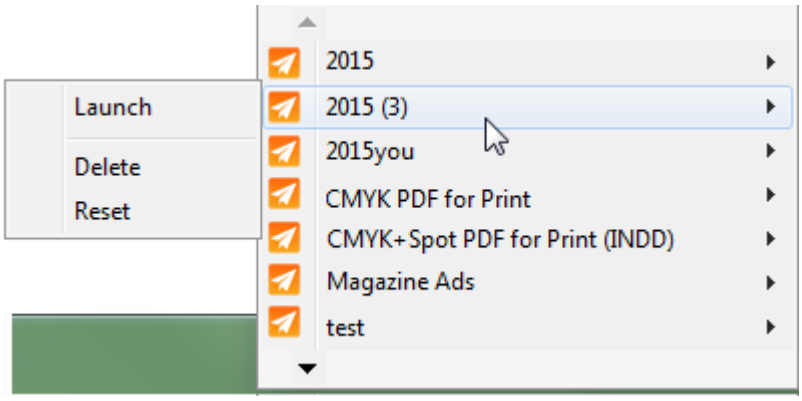
   On Mac, the icon can be found on the right side of the menu bar (at the top of the screen).

On Windows, the icon can be found in the Notification area of the taskbar (at the bottom of the screen). If the icon is not visible, you may have to add it to the taskbar first. See *Adding the Enfocus Printer Processor icon to the taskbar (Windows)* on page 122.

A list with alphabetically sorted Connectors is shown.

2. Click the Connector you want to launch.
3. From the submenu, select **Launch**.
   - This submenu has two other options:
     - **Delete**: Removes the Connector *from the menu* and resets the local Connector. It does not remove the Connector from your system. If the Connector is launched afterwards, it will be added to the menu again.
     - **Reset**: Resets the Connector i.e. the user preferences, the settings cache, the printer and the Plug-ins if any. The Connector will not be removed from the menu.

       Note: If the Connector was *created with an older Connect version (before 13)*, this option will be grayed out. You can reset the Connector, by launching it and selecting **Processing** > **Reset Connector**. Afterwards you will see *a little star preceding the name of the Connector*. This indicates that the Connector cannot be launched anymore through this menu (the Launch option will be grayed out). You first have to relaunch the original Connector.
   - The options are displayed in the system language of the user on condition that the Connect language pack for the language concerned has been installed with the software; otherwise they are displayed in English.



The Connector is launched immediately.

5.1.1.2. Adding the Enfocus Printer Processor icon to the taskbar (Windows)

By default, the Enfocus Printer Processor icon ( ) is shown in the taskbar of your system; however, if this is not the case, you can add it as explained in this procedure.

1. Open the **Control Panel**.
2. Select **Taskbar and Start Menu**.
3. On the Taskbar tab, in the Notification area, click **Customize**.
4. In the list of icons, search for Enfocus Printer Processor and under Behaviors, select **Show icon and notifications**.
5. Click **OK**.

5.1.2. Submitting files to an Enfocus Connector

You can submit files in the following ways:

- Drag and drop files or folders on the Connector icon or into the Connector window. See *Manually submitting files to an Enfocus Connector* on page 122.
- If a Virtual Printer has been installed for the Connector, you can directly print files from another application into the Connector. See *Printing a file into a Connector* on page 123.
- If Plug-in Support is enabled for the Connector (by default the case if PDF creation was enabled), you can export files from within another application and directly submit them into the Connector. See *Submitting a file using Plug-in Support* on page 123.

Note: If Job Ticket delivery has been enabled in the Connector, you can deliver the Job Ticket, without submitting a job. See *Delivering only a Job Ticket* on page 125.

5.1.2.1. Manually submitting files to an Enfocus Connector

Note: You can submit multiple files (PDF or non-PDF) at a time, or even a folder with several files.

To submit files to a Connector

Do one of the following:

- Drag and drop your file(s) and/or folders on the Connector main window, or on the Connector icon.
- In the Connector window, choose **File** > **Drop** and select the file(s) you want to submit.

  To select multiple files, while selecting, hold down the **Ctrl** key.

Note: The creator of a Connector can restrict the Connector to only accepting PDF files. If this restriction has been enabled, you will receive an error message when non-PDF files are submitted.

5.1.2.2. Printing a file into a Connector

If you have installed a Virtual Printer for the Connector (see *Setting up an Enfocus Connector* on page 117), you can print files from any application on your system into the Connector. Files printed will be converted to a PDF according to the specifications defined in the Connector.

This will save you time, because you can directly print the file from the application used to create or design it.

To print a file into a Connector

1. Open the application concerned.
2. Open the file you want to submit to the Connector.
3. Open the Print dialog.
4. From the Printer list, select the name of the Virtual Printer installed for the Connector.
5. Click **Print**.
   The Virtual Printer will create a PostScript file, convert it to PDF using Adobe Normalizer, and submit it to the Connector. The Connector main window is opened automatically.

Depending on the Connector settings, you will be asked to enter additional information or to verify the preflight result.

5.1.2.3. Submitting a file using Plug-in Support

If the Connector includes PDF creation, you can create PDF files from within InDesign or Illustrator (if you have installed the Plug-in), and directly submit them into the Connector. See *Setting up an Enfocus Connector* on page 117.

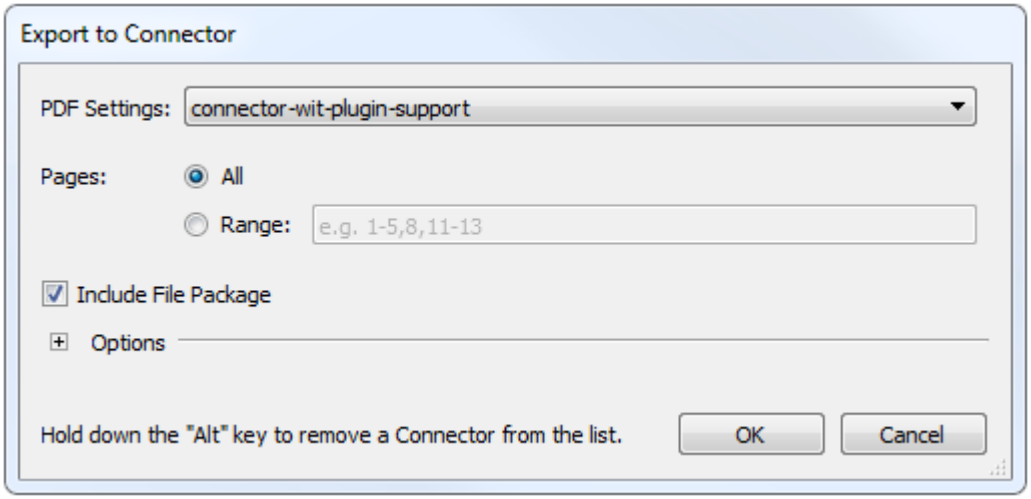
By using the Plug-in with InDesign or Illustrator, Connect will take advantage of the *Export* function allowing special features such as transparency to be supported. In addition, by using the Plug-in, you can enable direct access to settings such as printer marks or bleeds.

To submit a file using Plug-in Support

1. Open the third party application concerned, e.g. Adobe InDesign.
2. Open the document that needs to be sent to the Connector.
3. Select **File** > **Export to Connector**.

   Note: This option is only available if the Plug-in for the third party was installed.

   The **Export to Connector** dialog appears.



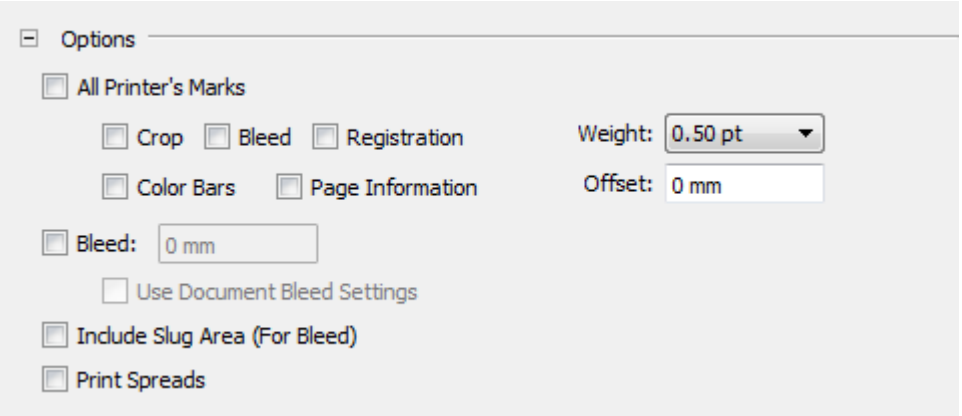
4. In the **PDF Settings** dropdown, select the PDF Settings name of the Connector to submit the file to.

> **Note:** If you want to remove a PDF Settings name from the **PDF Settings** list in the third party application, you can select it in the PDF Settings list, and hold the Alt key. The **OK** button will change to **Remove**. Click it, and the currently selected Settings file will no longer be available in the list.

5. Indicate which **Pages** should be exported:
   - To export the whole document, select **All**.
   - To export only a part of the document, select **Range** and define a page range, e.g. 1-5.
6. If available and not grayed out, enable or disable **Include File Package** as required.

   It depends on the Connector settings whether or not this option is available and can be turned off. Note that, if this option is enabled, the latest version of your document is exported to the Connector (even if it is not saved yet).
7. If available, click ⊟ to expand the **Options** section and select the appropriate settings.

   It depends on the Connector settings whether or not this section is available. If these options are not available, the PDF Settings defined in the Connector are used.



8. Click **OK**.

The file will be exported as PDF using the application's *Export* function. Once the PDF is created in the background by the Plug-in, it is submitted directly to the Connector for additional processing such as preflight and delivery. The Connector main window is opened automatically.

5.1.2.4. Delivering only a Job Ticket

If a Connector has been configured to deliver Job Tickets, you can initiate and deliver the Job Ticket without submitting a job. This is useful to create a new record or modify an existing record in an MIS or other job tracking system; the Connector will send the Job Ticket to a predefined folder or server, where it can be picked up and processed by another database system.

Note: In the Connector properties, a Job Ticket and a Delivery Point that supports delivery of a Job Ticket must be defined to enable Job Ticket only delivery. If the Connector does not support Job Ticket only delivery, the **File** > **Send Job Ticket** option (see step 1 of this procedure) is disabled.

To deliver the Job Ticket

1. In the Connector main window, click **File** > **Send Job Ticket**.

   Note: Alternatively, you can use the shortcut Ctrl+J (Windows) or Cmd+J (Mac).

   The Metadata dialog pops up.

2. Enter the required details.

   Note: To use the same values for all jobs that will be submitted to this Connector, select the **Use for all other jobs** checkbox.

3. Click **OK**.
   A dialog appears, informing you that the Job Ticket was delivered successfully.

4. To close the dialog, click **OK**.

5.1.3. Entering additional information

When submitting files to a Connector, you may be prompted to enter additional information.

The creator of the Connector defined in the settings of the Connector what information is requested, and how. Some information may be required and will stop the Connector if the information is not entered.

You may be prompted for:

1. **File delivery settings**

   If you have submitted multiple files, the Files delivery dialog will pop up.

   Enter the following information:

- Indicate whether or not the files must be processed as separate jobs or as one job.

  If sent as one job (and Job Tickets are enabled in the Connector), you will only get one Job Ticket displayed, whereas if you submit them as separate jobs, you will get a Job Ticket for each file processed.

- If you've chosen to process the files as one job, enter a name for the job.

  If you don't enter a name, the name of the first file in the list is used. The processed files will be compressed into a zip file with this name.

- If you want to have all your files processed as configured in this dialog, select **Always use these settings**.

  Next time the dialog pops up, the chosen setting (separate jobs or one job) will be the default one.

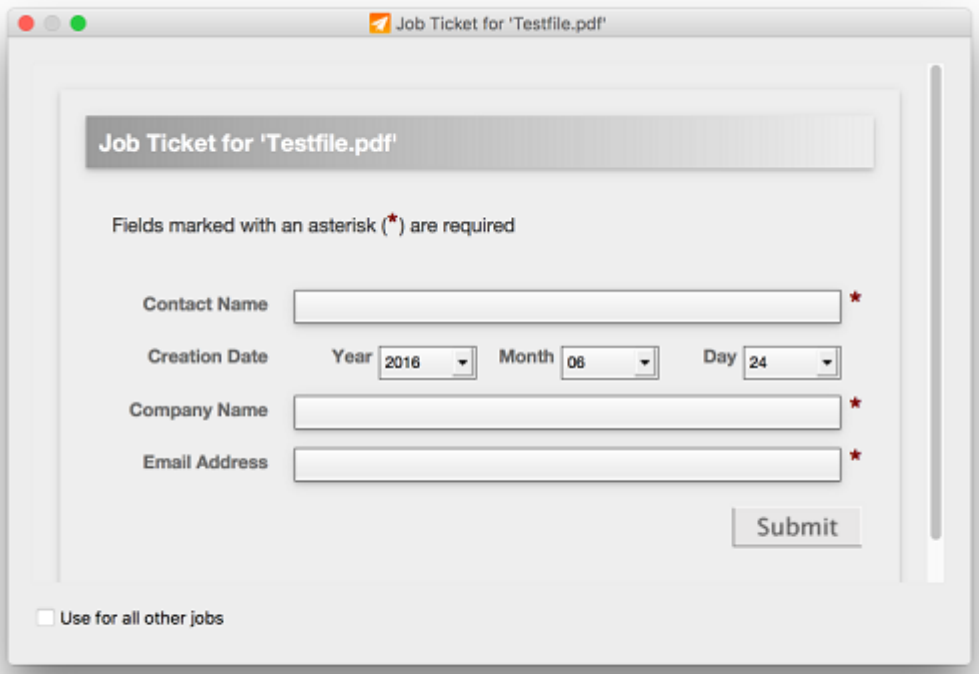
2. **Delivery Settings**

   - If the Connector is configured to deliver files to a local folder, you will be asked to select a Primary (and optionally a Secondary) output folder for the processed files. The chosen folder has to be set only once, i.e. the first time you're submitting files to the Connector. Note that you can afterwards change the settings in the Connector preferences (by selecting **Edit** > **Preferences** > **Folder Delivery**).

   - If the Connector is configured to deliver files to an Enfocus Switch Submit point of your choice, you will be asked to select the appropriate Submit point from a list. The list will display all Submit points you have access to.

3. **Job Tickets** (Metadata). In that case, the Metadata dialog will pop up, allowing to enter additional information about the job. Enter the values as necessary, and click **OK**.

   The content and look and feel of the dialog can be customized by the creator of the Connector, and will vary from what's shown here. If the HTML Job Ticket is linking to an external site, you may be asked to enter your credentials for that site before you can see the content. Issues with the Proxy settings, can be solved via *the Connector preferences* .



Note: To use the same values for all other jobs that will be submitted to this Connector, select the **Use for all other jobs** checkbox.

4. **Log-on information** for file transfer. If the user name and/or password for the delivery server is not defined in the Connector, you will be asked to enter these credentials. If the logon credentials are embedded, you will not be asked.

5.1.4. Checking the file progress

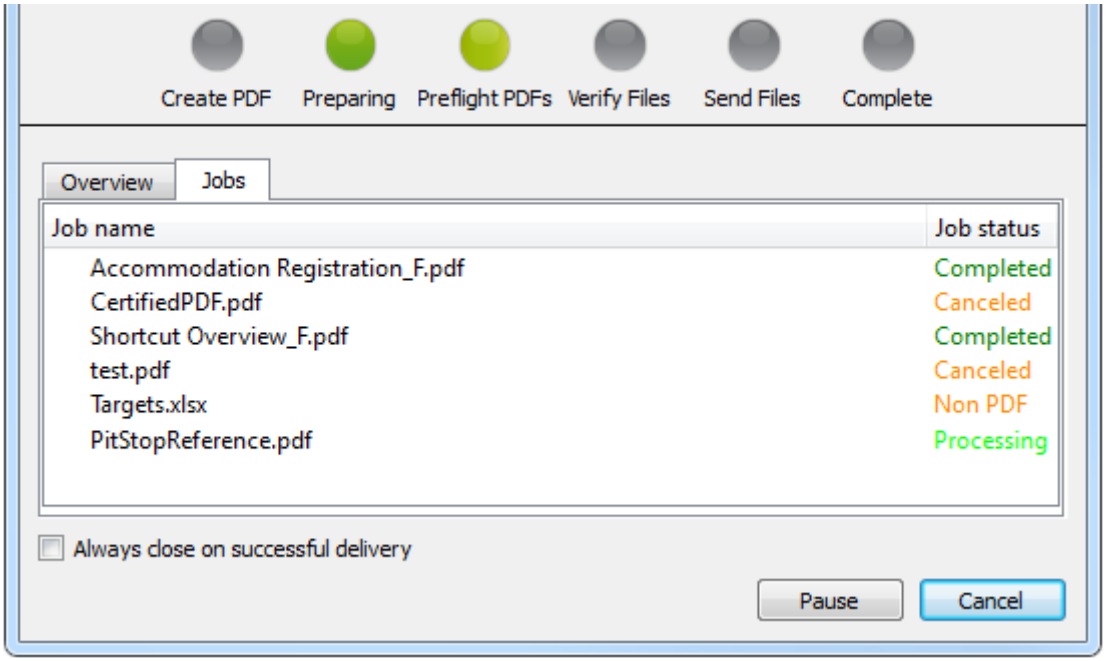
Once you have submitted a file to the Connector, the bottom part of the Connector main window gives information about the file that is being processed:

- The gray/green circles refer to the different steps the files are going through. If a file is being processed, the current step is blinking.
- There are 2 tabs with information about the file(s) being processed:
  - The **Overview** tab shows information on the current step, for example the Preflight information (when applicable), or information about errors.

    Tip: In case of an error, move your mouse over the error to see a tooltip with a clear explanation of what went wrong.

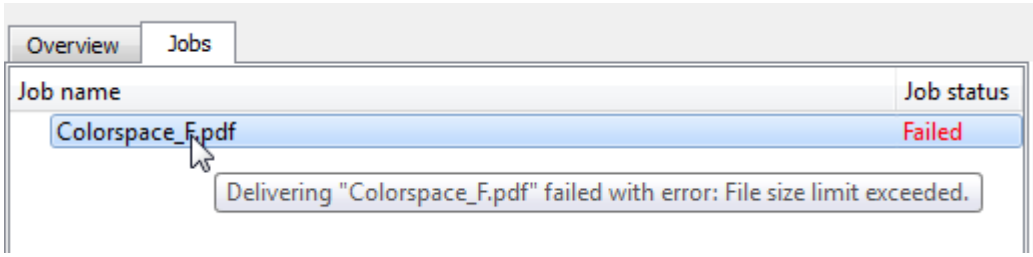
  - The **Jobs** tab shows all active files in the Connector, allong with their status, for example:
    - **Completed** if the jobs were processed and delivered successfully.

- **Canceled** if the job was canceled manually.
- **Restricted** if the submitted file type is not allowed, hence the file has not been processed.
- **Processing** if the job is currently being processed.
- **Failed** if the job could not be processed or delivered for any reason, for example because it exceeds the allowed file size.



- If files are delivered successfully, there is probably no need to check them. If you select the **Always close on successful delivery** checkbox, the Connector window closes automatically after delivering a file. You can also enable or disable this option via the **Processing** menu.
- You can use the **Cancel** button to stop processing active jobs. You will have the choice to cancel the active job only (i.e. the file currently being processed), or all jobs in the queue (i.e. all jobs submitted to the Connector).
- The **Pause** button allows you to stop processing for a couple of minutes. The **Pause** button becomes a **Resume** button. To go on with the job, click **Resume**.

Tip: To learn why a job failed, move your mouse over the name of the job and check the tooltip.



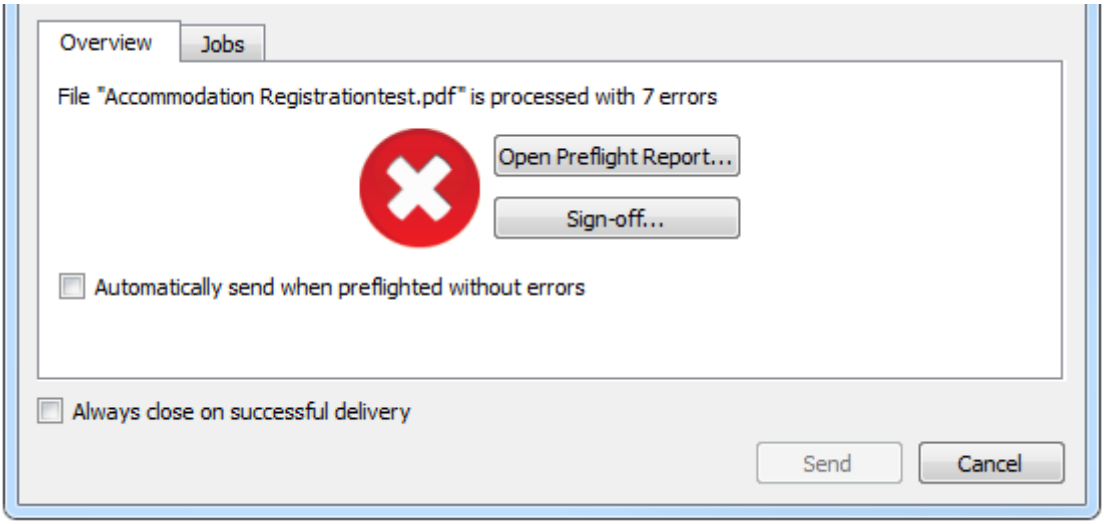
5.1.5. Verifying the Preflight result

If PDF preflight has been enabled for the Connector, the Connector will use the Enfocus PitStop technology to verify settings and other factors of the PDF files being processed. The settings for what is checked are configured by the creator of the Connector and may include over 100 different quality checks.

If Preflight Verification is not enabled, preflight will take place, but the Connector will not pause for user verification.

An icon indicates the Preflight result:

- A green checkmark indicates that the PDF was preflighted successfully.
- An orange checkmark indicates that the PDF was processed with warnings, i.e. small issues.
- A red cross (see screenshot below) indicates that the PDF failed the Preflight check.



- To view the Preflight Report, click the **Open Preflight report** button.
- To sign off on specific errors, click the **Sign Off** button.

Note:

- The **Sign Off** button is only available if it was set in the Preflight Profile, and allowed by the creator of the Connector.
- If you sign off on an error, the error is treated as a warning and it does not block a file from being preflighted successfully. This is a useful feature to allow the document creator to approve an error condition, or communicate additional information for an error.

1. Click the **Sign Off** button. The Sign-off window will open.
2. Click **Sign Off** to sign off on all errors at once. Optionally, provide a reason for the sign-off.
3. Select one or more errors in the list, and click **Sign Off selected** to only sign off on the selected errors. Optionally, provide a reason for the sign-off.

- To skip the *Verify Files* step if the file was preflighted without *errors or warnings*, enable **Automatically send when preflighted without errors**. Note that you can also enable this feature via the **Processing** menu.
- To deliver the files, click the **Send** button.

Note: In case the Connector only allows the delivery of PDF files that passed preflight, the **Send** button will be disabled if the file contains errors (not warnings!). Either sign off on the errors first, or click **Cancel**, correct the errors in the file and submit the file again.

5.2. Setting the Connector preferences (optional)

As a user of an Enfocus Connector, you can also set a number of preferences.

To set the Connector preferences

1. In the Connector main window, select **Edit** > **Preferences**.
2. In the **User preferences** dialog, select the appropriate category:
   - **General**
   - **Network** (to set the timeout option)
   - **Network > Email**
   - **Network > Proxy**
   - **Network > Folder Delivery**

   The corresponding preferences are shown in the right part of the dialog.
3. Fill in the preferences as required.
   See:
   - *Connector preferences - General* on page 130
   - *Connector preferences - Network > Email* on page 131
   - *Connector preferences - Network > Proxy* on page 131
   - *Connector preferences - Network > Folder Delivery* on page 132
4. Click **OK**.

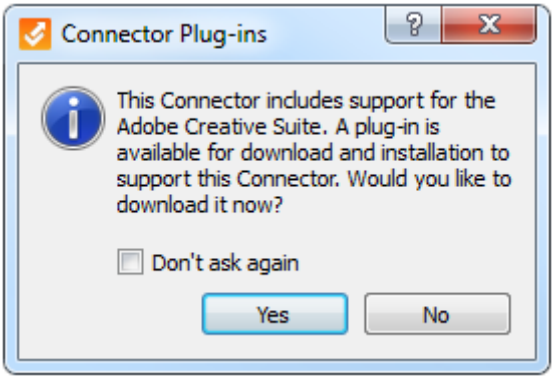
5.2.1. Connector preferences - General

The table below gives an overview of the Connector preferences in the category **General**.

Preference	Meaning
Reset Notifications	This option resets any warnings, such as the message to download a Plug-in or to install a Virtual Printer.

Example

If you have selected **Don't ask again** in the Connector Plug-ins notification, this message won't pop up again, unless you click the **Reset Notifications** button in the Preferences pane.



5.2.2. Connector preferences - Network > Email

The table below gives an overview of the Connector preferences in the category **Email**.

Note: You can only change these preferences if the Connector is configured to deliver files by sending an email (with the processed files attached). You cannot change the preconfigured delivery method; you can only change the preconfigured mail server.

Preference	Meaning
SMTP Server	Name of the mail server
Port	Port of the mail server
Use SSL	If SSL is enabled, the communication with the mail server is secured.
Authentication required	If disabled, no user credentials are required. If enabled, user credentials are required. The Account Name and Password field become active and should be filled in.

Note: Use the **Restore Defaults** button to undo your changes and to return to the settings configured in the Connector.

5.2.3. Connector preferences - Network > Proxy

The table below gives an overview of the Connector preferences in the category **Proxy**.

Note: These preferences are only relevant if the Connector is configured to deliver files via HTTP, HTTPS, SFTP or FTP. They also apply to external HTML Job Tickets; if the connection to an external Job Ticket (on a website) is blocked, you can set up the HTTP Proxy settings through the Connector preferences.

Preference	Meaning
No Proxy	The system Proxy settings are ignored (no Proxy configuration).
Auto-detect Proxy Setting	The Proxy settings are read from the system (default setting).
Manual Proxy Configuration	The Proxy settings are set manually. Enter the required details: • Proxy: IP address of the server • Port: Port number of the server You can only enter details for enabled features (e.g. if FTP delivery is not turned on in the Connector, the FTP Proxy field will be grayed out). These settings will override the system Proxy settings.

5.2.4. Connector preferences - Network > Folder Delivery

The table below gives an overview of the Connector preferences in the category **Folder Delivery**.

Note: These preferences are only relevant if the Connector is configured to deliver files to a local folder. The first time the Connector is launched, you are asked to select an output folder for each configured Delivery Point. The chosen folder(s) are displayed here. You can change them as required.

Preference	Meaning
Primary	Output folder to be used as the Primary Delivery Point.
Secondary	Output folder to be used as the Secondary Delivery Point. If no Secondary Delivery Point was configured, this field will remain grayed out.

5.3. Troubleshooting

You get an error when trying to open the Connector

First check if you have the correct Connector for your operating system: .exe for Windows, .app for Mac OS. If so, contact the supplier of the Connector.

You get one of the following configuration errors when submitting a file:

- **Could not connect to the Enfocus Switch server**
- **Could not connect to the FTP server**
- **Submit point not active anymore**

In all the cases above, the selected Delivery Point is not available or the Connector can not connect to that server. This could be because the server is not available, the internet connection is down, or settings on the server side have changed.

Be sure to check your local internet connection first to ensure the Connector can communicate externally. Otherwise, you may want to wait a short time and try resubmitting the file/job. If the problem persist, contact the supplier of the Connector and state the specific error message you received.

You get an error stating "Password was not filled in or wrong password was given" when submitting a file

Please fill in the correct password and proceed.

The file contains Preflight errors

If you receive a Preflight error, do one of the following:

- Click **Cancel**. Correct the errors in your source file or correct your PDF file using PitStop Pro (see *http://www.enfocus.com/products/pitstop-pro*). Drop the new or corrected file on the Connector.
- Click **Sign-off...** to Sign off on the Preflight error(s), allowing the PDF to pass preflight.
- Click **Continue** to proceed to deliver the file (only possible if authorized by the creator of the Connector).

For more information, visit the Support section of the Enfocus website at *www.enfocus.com*.

Working behind a Firewall - Settings override

In some cases a Connector given to you by an outside vendor may not work behind your firewall, causing the connection to an outside server or sending an e-mail notification to fail. To help protect your network security and fix connection issues caused by a firewall, Proxy settings and e-mail settings can be adjusted within the Connector. See *Setting the Connector preferences (optional)* on page 130.

Still problems?

If none of the mentioned solutions solves your problem, you can try the following:

- Inspect the log file, by selecting **Processing** > **Open log**.
- Reset the log file, by selecting **Processing** > **Clean log**, and try using the Connector again.
- Remove all background files (e.g. installation files for the Plug-ins and Virtual Printer), by selecting **Processing** > **Reset Connector** or (if you're *launching the Connector from the menu bar or taskbar*) by selecting **Reset** from the submenu. This allows the Connector to run in a clean environment. When you relaunch the Connector, you'll be able to re-install any Plug-in and/or Virtual Printer.

If this didn't solve the problem, contact the supplier of your Connector, who may ask you to provide version information or other details about the Connector that can be found in the About panel. To open the About panel, click **Help** > **About**.

6. Need more help?

1. Consult the Enfocus Connect product documentation

Documentation set	Description	How to access?
Enfocus Connect User Guide	Enfocus Connect detailed information and advanced topics This guide describes both Enfocus Connect versions (YOU and ALL).	Go to the Support section on the Enfocus website and (under **Manuals**) choose Connect ALL or Connect YOU. Direct link:*https://www.enfocus.com/en/support/manuals/connect-all-manuals* Alternatively, to open the help from within the application, press **F1** or select **Help** > **Enfocus Connect ALL/ YOU help**.
Enfocus Connector User Guide	Information about using Enfocus Connectors. You can distribute this guide to customers using your Connectors.	Go to the Support section on the Enfocus website and (under **Manuals**) choose Connect ALL or Connect YOU. Direct link:*https://www.enfocus.com/en/support/manuals/connect-all-manuals*
Preflight Profile Library	Overview of Preflight Profiles available for download from the website.	Go to the Support section on the Enfocus website and (under **Downloads**) choose PitStop Preflight Profiles. Direct link: *https://www.enfocus.com/en/support/downloads/pitstop-preflight-profiles*. Alternatively, to open the help from within the application, press **F1** or select **Help** > **Online resources** > **Preflight Profile Library**.
Action List Library	Overview of Action Lists available for download from the website.	Go to the Support section on the Enfocus website and (under **Action Lists**) choose PitStop Action Lists. Direct link: *https://www.enfocus.com/en/support/downloads/pitstop-action-lists*. Alternatively, to open the help from within the application, press **F1** or select **Help** > **Online resources** > **Action List Library**.

2. Consult the Enfocus Connect product videos

Demos, tutorials and webinar recording can be found at *https://www.enfocus.com/en/support/product-videos*

3. Consult the Enfocus Solution Articles

The Enfocus Solution Articles provide answers to frequently asked questions, work-arounds, and tips and tricks.

To access our knowledge base, go to: *https://www.enfocus.com/en/support/known-issues-and-solutions*.

Note: Alternatively, you can access the knowledge base from within the application, by selecting the **Help** > **Solution Articles** menu.

4. Contact your reseller

A list of authorized resellers is available on the Enfocus website (*https://www.enfocus.com/en/resellers*).

5. Contact Enfocus customer support

If you cannot find the answer to your question in the Connect documentation or on the web, create a case through our Support Portal: *https://www.enfocus.com/supportportal*.

7. Third-Party License Information

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