BrandingUI (Basic, Advanced, Enterprise)

Getting Started - Important First Steps

Step 1: Log into your BrandingUI Administrative site

- https://*yourclientid*.BrandingUI.com/admin-signin.php
- Use the initial login and password that was sent to you

Step 2: Adjust Company Settings

- Select "Settings" on the top menu bar.
- Fill in required fields ("Business name" and "Business email")
- Select "Details »" to define your Business structure (*Enterprise accounts only*)
- Important options to consider:
  - Logo image for header- Upload a logo to brand your account.
  - URL when user clicks on logo- Enter a web address that the user will be taken to upon selecting the logo (such as a company home page).
  - Editor locale/ Spell check locale- Select the language that the editor will be displayed with and spell check if you choose.
  - Sign-in required- Select the sign-in option you'd like for users (Always/Never/To submit a job).
  - "Advanced" settings related to the editor *(Advanced and Enterprise accounts only)*.
- Determine your "Job Approvals" process (*Advanced and Enterprise accounts only)*
  - Approvers receive emails after a user completes their artwork to decide whether or not the work is ready for production.
  - You can have up to three levels of approval, with up to three approvers at each level.

Step 3: Manage Users

- Select "Users" on the top menu bar.
- There are three ways to add users:
  - Manual- Select "Manually add a new user" at the bottom of the "Your Users" section.
  - User requested- User selects "Request a new account" on the user sign in page (https://*yourclientid*.BrandingUI.com/customer-signin.php).
    - User is added approved by the Admin; or
    - User is automatically added based on "User Account Creation Rules" predefined by the Admin.
  - Use your internal organizational authentication (talk to a PrintUI representative about adding this option)

Step 4: Which Categories

- Determine your users template accessibility by defining which categories they can view.

Step 5: Categorize Templates

- Select "Templates" on the top menu bar.
- Prior to this step be sure to have uploaded at least a few test Templates using the PrintUI Indesign plug-in. Once uploaded, those Templates will appear with the category "None".

Step 6: Navigate the Jobs panel

- Select "Jobs" on the top menu bar.
- Jobs are listed with their status on the far left column.
  - Incomplete= Any started but not submitted artwork.
  - Pending= Awaiting approval or awaiting download
  - Approved= Artwork has been approved
  - Rejected= Artwork has been rejected and should be re-edited
  - Completed= Artwork has been downloaded
- Select "Details" to view download options.

BrandingUI Getting Started - Settings Details

Contact Information

The contact information on this page is very important. If the user needs to contact you for any reason, they will likely use the Contact page to do it. The settings here provide the information they need to do that. In addition, the Business email setting is used as a fallback for some notifications if you leave them empty.

Business Structure *(Enterprise accounts only)*

A number of features of BrandingUI depend on there being a defined business structure. By default, the assumption is that the structure will consist of business units and departments. However, the **In my company** settings let you use different names that make sense for your organization. For example, a university might have colleges and departments.

To add a new business unit, enter a business unit name in the field at the bottom of the page. Also add an abbreviation for the business unit.

Once you have added one or more business units, add a department within each one by entering a department name and its abbreviation.

Once you have added a business unit or department, you may also click on the **Options** button. This allows you to override the global settings found on the Settings and Advanced Settings page on a business unit or department basis. Note, though, that if you also use Template or Form options that they will take precedence over the Business Options.

Options

When you or your users log into your BrandingUI site, they will see your logo at the top of the page. You may upload an image by clicking on the Upload button. Your logo image can be up to 222 pixels wide and up to 78 pixels tall and the image type can be JPEG, PNG, or GIF. You may also specify what happens when a user clicks on that logo by specifying a URL. By default, the value is "/" which means

that it should go to your BrandingUI home page. But you could use a URL to your own web site such as http://xyz.com. (Be sure to include the "http://" part.)

You may control who can get access to your BrandingUI site by using the Signin required option. If you choose the Never option, anyone can select and customize the templates. Choosing the Always option, on the other hand, limits access to the site only to users that you have approved. The To submit a job option allows anyone to select and customize the templates, but jobs can only be submitted for processing if they sign in. You might want to use this option to allow the general public to browse your site, but limit any real jobs to those people with which you have a relationship.

When you give a user a Guest role on the Users page, the guest account will expire after the number of days specified in the Guest account duration option.

Email Notifications

Emails are used to notify your company when certain things happen:

- After an end user clicks on the Request an account link on the Sign In page, and after they enter their user information, an email is sent to the addresses shown for the To approve new accounts option. To approve the account, log in as administrator, select Users at the top of the page, and change the user's status from Disabled to User.
- When a user clicks the Submit button on the Contact page, an email is sent to the addresses shown for the For information requests option. The email contains all of the information supplied by the end user.

  If any of these are blank (i.e. no email addresses specified), the Business email under Contact Information will be used instead.

  Note that it is very important that you use valid email addresses. If you try to use an invalid email address, you will be notified to change it.

  Since emails can sometimes be intercepted by spam checkers, Send a test email to lets you send a test email to see if it can get through. If you have been notified that an email address is not valid, you or your hosting provider may be able to fix it. Once it has been fixed, please use the Send button to send a test email to check that it is now working correctly and to remove it from the "bad email" list. For more information about how to deal with bad emails, click here.

Whenever the status of the user's job changes, you can specify that an email be sent to the person that originally submitted the job by setting Whenever the job status changes under User notifications.

You may also specify how often you get reminder notifications by using the Reminder settings. You may turn reminders off completely, or you can specify how many days to wait as well as the days of the week on which they should be sent. If a reminder is due to be sent on a day that you have skipped, it will instead be sent on the next available day.

Job Approvals *(Advanced and Enterprise accounts only)*

You may either choose to require that jobs go through an approval process, or to just automatically approve new jobs. If you do choose to go through an approval process, an email will be sent to the addresses shown for the Default Approver emails. The email will allow the job to be either approved or rejected. If you have set the Downloads of customized results option to allow end users to download their own customizations this option does not apply.

You can use Jobs require N level(s) of approvals to specify that the job go through several layers of approvals. All required approvals for one level must be given before the next level of approvers get notified. Note that if no email address is specified for a level then the Business email will be used for the approval notification for that level. For each level you can specify how many approvers are required before the job is considered to be approved. Note that you can also specify different approvers for specific templates on the Templates page by clicking the Options button.

If you wish to add a message to the emails sent to the approvers, you can specify one using Message for approver emails.

Once a job has been approved, an email will be sent to the addresses shown for the To complete the job option. The email contains information about the job, including a link that allows them to download their customized results. If you have set the Downloads of customized results option to allow end users to download their own customizations this option does not apply.

When an approver downloads a PDF as part of the approval process, the PDF preset for approvers is used to generate the PDF. You may, for example, want those PDFs to download as quickly as possible by using the Smallest File Size preset. Or, by using the Let approver select PDF preset when downloading option, you can let the approver pick from any of the available presets themselves.

Job Completion

After your end users make customizations to a template, you can control who can download the high-resolution results after they click on the Finished button. Change the Downloads of customized results setting to Only my company if you want to limit downloads to just the people who get email notifications. Or you may allow the end user to download the results themselves, either anonymously or by requiring them to first sign in. However, even in the anonymous case, they'll have to provide their contact information to you so that you can process their job.

You may select FTP after approvals in order to automatically send the final files via FTP. Enter the server, user name, and password for your FTP account. Note that if you select the SSL checkbox, "explicit SSL" will be used (i.e. SSL over port 21). To verify that everything is set up properly, click on the TEST button.

You may select Via the Internet after approvals in order to automatically send the final files using an HTTP POST. Enter the POST URL for the destination server, including any desired query parameters. Note, however, that a "c=<your client ID>" query parameter will automatically be added to the URL at the time of the transmission. If your destination server supports HTTPS, be sure to prefix the POST URL with "https://". To verify that everything is set up properly, click on the TEST button.

You must specify which PDF preset will be used when the final PDF is downloaded.

After your end users finish customizing a template and click on the Finished button, and if you have set the Downloads of customized results option to "Only my company," an email will be sent to the addresses shown for When jobs are submitted. The email contains information about the job, including a link that allows them to download their customized results.

In some cases you may want to use the Also allow user to download final results checkbox to both process the final results as well as let the originating user download them.

If you have used InDesign's liquid layout feature to allow all elements of your templates to be scaled, you may select the Use liquid layout option for Output scaling. Note, though, that you must have specified that every object on every page in every template be scalable in order for this setting to work. If only some of your templates are scalable, please go to the Templates page and click on the Options button next to the ones that are scalable.

Advanced Settings *(Advanced and Enterprise accounts only)*

Gallery Settings

While end users are making their customizations using the PrintUI web application, they can add or change images by using PrintUI's Gallery feature.

- The Gallery Connector URL specifies the address to a PrintUI gallery connector that runs on your servers. It is used to expose your images to end users so that they can select and use them during their customization session. See the PrintUI Gallery development documentation for more information.
- The Gallery qualifiers XML is optional and used to pass an arbitrary set of key/value pairs to your connector. You might use a qualifier, for example, to supply one set of images to one template, but a different set of images to another template. See the PrintUI Gallery development documentation for more information. BrandingUI also supports special tokens that are substituted at run-time:
  - Use $T if you want PrintUI to substitute the template name.
  - Use $U if you want PrintUI to substitute the end user's email address. (If the user has not signed in, it will be blank.)
  - Use $ID if you want PrintUI to substitute the end user's ID. (If the user has not signed in, it will be blank.)
- For example, you might use <qualifier><key>template</key><value>$T</value></qualifier> for the template qualifier.
- Set Allow user to upload images if you want end users to be able to upload images from their own computer.
- Set Show social sites like Facebook if you want the end users to be able to select images from their own Facebook, Flickr, or Picasa accounts.
- Set Allow image filtering if you have a gallery that can filter it's results based on the frame name and keywords specified in the PrintUI tagging panel in InDesign.

Gallery Settings for Backgrounds

If your template is designed to use an image as a replaceable background for a page, you can use a gallery to show new background images to the user. These settings are similar to those used for the Gallery Settings above but would normally point to a different connector URL that is more appropriate for background images.

PrintUI Web Application Options

These options give you control over the customization experience that your end users have when they are working with your templates in the PrintUI web application. The default settings allow end users to have quite a bit of freedom in the things they can change. However, you may want to more rigidly control the look and feel of the design by restricting what they can change.

For example, you may want to disable their ability to add new images or new text, which would restrict them to just changing the existing images and text in the template. Or you may want to restrict them to using the color palette specified in the document instead of letting them also pick from generic colors.

- Show the "Add Image" button Specifies whether to show the Add Image button.
- Show the "Add Rectangle" button Specifies whether to show the Add Rectangle button.
- Show the "Add Text" button Specifies whether to show the Add Text button.
- Resize behavior for new text frames Specifies the resizing behavior of new text frames added to the app while editing. Text frames that resize will fit themselves to the text in width, height, or both.
- Width of new text frames Specifies the initial width of text frames added to the canvas. Default is "200".
- Height of new text frames Specifies the initial height of text frames added to the canvas. Default is "30".
- Add drag handles to expandable text frames Allows auto-expand text frames to be scaled by dragging the corners and sides.
- Show the "Preview" button Specifies whether to show the Preview button. Clicking this button shows a JPEG of the page as rendered by the InDesign Server.
- Show the "Start Over" button Specifies whether to show the Start Over button. Clicking this button completely resets the template and erases all of the user's edits.
- Show the "Full Screen" button Specifies whether to show the full screen button or not. Clicking this button fills the screen with the editor.
- Zoom to fill screen Specifies whether the template entirely fills the application area. When the value is NO, it will open at "actual size".
- Show the text palette when editing text Specifies whether to show the text palette when editing text. Turning this off prevents users from changing fonts and other text styling.
- Initially show all edit fields Specifies whether the Edit buttons on editable items show when a template loads. The Edit buttons show by default to make editing more discoverable and are shown until the user hovers over an editable item.

- Colors to show in color picker Specifies whether to show generic colors in the color picker. When the value is No, only colors defined in the template can be applied.
- Select colors with eye dropper Specifies whether color can be changed by using an eyedropper to pick up colors from anywhere while editing.
- Allow typing a color value Specifies whether a hexadecimal color value can be entered by the user to specify a color.
- Show non print layers Specifies whether to show the non-printing foreground and background layers while editing. When the value is YES both non-printing layers show. Foreground means only the foreground shows. Likewise for the background layers.
- Preview non print layers Specifies whether to include the non-printing foreground and background layers when requesting a JPEG preview from InDesign Server. When the value is YES both non-printing layers show. Foreground means only the foreground shows. Likewise for background layers.
- Allow pages to be added or removed Specifies whether pages can be added and removed and whether the content can be changed by applying a new master page.
- Allow pages to be moved Specifies whether pages can be reordered by dragging the page thumbnails.
- Percent opacity of items that extend off page Specifies how transparent objects should look when they extend beyond the page bounds. The opacity ranges from 0 to 100.
- Show styles or fonts in text palette Specifies whether to show fonts or styles on the text palette. When using styles, only text styles defined in the template can be used to change text attributes.
- Show undo labels Specifies whether to show "Undo" and "Redo" within the undo and redo buttons. When the value is NO, the labels are shown as a tool tip.
- Show full size images Specifies whether placed images are shown at the full defined dimensions, or at relative size to the page.
- Limit image resize Specifies whether images added by the user should be checked to make sure they meet the minimum resolution.
- Minimum image resolution when resizing Specifies the minimum resolution to use when resizing images. The image will be scaled down if the resolution drops below the specified amount.
- Finished label button The text that should be shown on the "finished" button in the editor.
- Preview label for email HTML The text that should be shown in the editor's Preview button dropdown menu to request a preview of how the output will look in an email. Leave it blank to disable it from appearing in the dropdown.
- Preview label for site HTML The text that should be shown in the editor's Preview button dropdown menu to request a preview of how the output will look in a web site. Leave it blank to disable it from appearing in the dropdown.

- Auto save interval (seconds) How often the editor should automatically save the changes made by the user. Note that frequent saving can affect performance for the user.

Other Options

The Allow resizing setting allows you to specify whether your users can specify a new page size for any template at the time they select one from their Home page. However, in order for a template to be resizable, you must use liquid layout in InDesign to mark all objects in the template as scalable. In addition, all objects in the background layer must be unlocked. Once you specify When user selects template you will see that you can also specify a minimum and maximum percentage by which the template can be resized. Be sure that any images that you put in your resizable templates have sufficient resolution for the maximum percentage. Note that you can also specify this setting on a template-by-template basis on the Template Options page.

The PDF preset option allows you to specify which preset should be used by InDesign Server when it creates your final PDF. You may use any of the built-in presets, or you may upload your own preset.

The Resolution for JPEG/PNG downloads option allows you to specify the maximum vertical or horizontal resolution (in pixels) that should be used by InDesign Server when it creates your final JPEG or PNG. Note that setting this value to zero will use the template's default resolution.

Use Add category to downloads to add the template's category and subcategory to the file names for downloads of PDFs and other file types for a job.

When end users finish customizing a template, they see either a page where they can download their results or a page with a form that they use to submit their job. The Submission instructions option allows you to customize the instructions to your end users on that submission page.

PrintUI Versus BrandingUI Users

This might be a bit confusing, but there are actually two separate types of user accounts in the BrandingUI world. There are those that PrintUI manages that are used for uploading, testing, and managing templates; and there are those that you manage yourself that are used to log into your BrandingUI site. You would typically use PrintUI user accounts for your designers and BrandingUI user accounts for those that use this site. Each BrandingUI site has its own separate list of users. So if you happen to run more than one BrandingUI site, each will have its own list of users. The reason why we have two types of accounts is to give you complete control over your BrandingUI users and to prevent a user from accidentally (or maliciously) changing or deleting templates.

When you first started your BrandingUI subscription, you were given a special PrintUI account with a login and password for uploading and managing templates. It just so happens that you can use those same credentials to log into your BrandingUI site as an administrator.

Note that it is not necessary for a designer to have BrandingUI credentials at all. In other words, you could have one or more designers that upload and manage your templates but they cannot log into BrandingUI unless you let them by adding them to the Users page. Also note that you cannot add a user to BrandingUI that will allow them to upload or manage templates. You will have to do that through PrintUI by going to admin.w2p-tools.com and clicking on the Request a new account link.

Your Users

This is a list users that have been specifically approved or disabled from accessing your site. You may assign the users to various roles:

- Someone with the User role is able to sign in as an end user to select and customize a template. Note, though, that if you have the Signin required option on the Settings page set to Never, any end user can also access your site in a User role.
- Administrator users are able to log into these administration pages to manage this BrandingUI site.
- Guest users temporarily have a User role until their account expires after the number of days specified on the Settings page.
- Disabled users are blocked from signing in. Note that when a user requests a new account on the Sign In page, they are initially set to Disabled. It is up to you to change their role as appropriate.

Your users can also have more than one role. For example, their role could be both Administrator & User.

If end users request a new account on the Sign In page, an email will be sent notifying you of the request. You may also create a new user account manually by clicking on the Manually add a new user link.

If you would like to see how your BrandingUI site appears to a specific end user, click on the View As button next to the user.

Note that if emails to your users bounce or if they are reported as being abused, the user's account will automatically be disabled and you will be notified.

User Account Creation Rules

Normally when end users request a new account on the Sign In page, an email will be sent notifying you of the request. You must then sign in as administrator and change their status from Disabled to whatever is appropriate. However, you can also use these Account Creation Rules to automatically approve new account requests if the requestor's email contains a certain string. The Userrole is used for automatically approved accounts.

Note, however, that if anyone requests an account that is not covered by these rules, you will still receive a notification email.

Example 1

Let's say that you have locked down access to your BrandingUI site by requiring end users to sign in. Let's also say that IBM is one of your clients and that you would like anyone from IBM to be able to sign in without delay. By setting the Signin Contains field to @ibm.com, anyone who requests a new account on the Sign In page will automatically be approved as a User. In addition, you could use the Which Categories settings to specify that email addresses containing @ibm.com are only to see the templates that you have created specifically for IBM.

Example 2

Let's say that you have a specific list of people that you'd like to automatically approve. You can enter each of their email addresses in the Signin Contains fields so that only those people are automatically approved. Perhaps you would like to limit automatic approvals to only two email addresses: george@ibm.com and mary@xyz.com. You would create two rules, one for George and one for Mary, that contain their entire email address.

Example 3

Let's say that you want anyone to be able to use your site but you want to be able to capture information about them before allowing them to access the site. You can create a rule with just @ (the "at" sign) in the Signin Contains field. Since every email address contains the "at" sign, all accounts will automatically be approved, but you will be able to see their account information in the Your Users section of this page.

Which Categories

These settings control which template categories to expose to which users based on their signin email address. You can choose to greatly restrict what to show to specific classes of users, or, at the other extreme, to show them everything. Note that any users that you do not explicitly specify are covered by the No Match settings.

Before changing these settings, you must have first assigned your templates to whatever categories you want your end users to see when they come to your BrandingUI site. You can do that by clicking on the Templates link at the top of the page.

Note that if there is a match against multiple criteria that only one of the sources and categories will be used. In other words, there is no effort to merge multiple matches. Also, the criteria are not evaluated in the order shown on the page, but instead or evaluated in the order in which they appear in a database.

Example 1

Let's say that IBM is one of your clients and you have different templates set up for the Marketing Department than you do for the Sales Department. You have put the Marketing templates into a category called IBM Marketing. Similarly, you have put the Sales templates into a category that you called IBM Sales. Let's also say that there are only two users that are allowed to customize the Marketing templates--mary@ibm.com and john@ibm.com. But you want to let anyone from IBM to be able to customize the Sales templates. Your settings might look something like this:

Which Categories

Restrict which template categories to show the user once they sign in.

Signin Contains	1st	Source	Category	
mary@ibm.com	X	yourcompany	IBM Marketing	REMOVE ▶
john@ibm.com	X	yourcompany	IBM Marketing	REMOVE ▶
@ibm.com	X	yourcompany	IBM Sales	REMOVE ▶
Anything Else	X	easyprintui	General	CHANGE ▶
				ADD ▶

The "1st" column indicates which category to show when the user first signs in.

Example 2

Let's say that you let any end user access your site without signing in by setting Signin required on the Settings page to Never. You want to show them the general templates that come with BrandingUI as well as some special templates that you have put into the Special category. You would like to show them the special templates first. Your settings might look something like this:
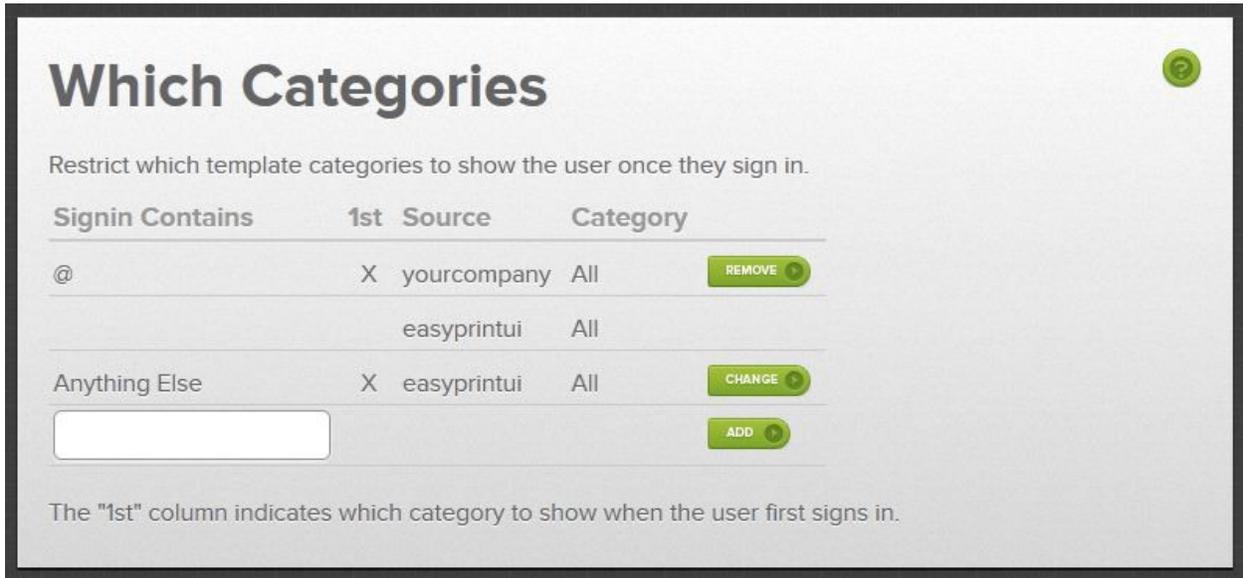
Which Categories

Restrict which template categories to show the user once they sign in.

Signin Contains	1st	Source	Category	
Anything Else	X	yourcompany	Special	CHANGE ▶
		easyprintui	General	
				ADD ▶

The "1st" column indicates which category to show when the user first signs in.

Example 3

Let's say that you have lots of templates in several categories, but you only want to show them to any end users that take the time to sign in. For everyone who doesn't sign in, you'd like to show just the general templates that come with BrandingUI. Your settings might look something like this:

Templates

This is a list of all the templates that you have uploaded using the PrintUI plugin for InDesign. It does not show any of the general templates supplied by BrandingUI. If you have many templates, it can be useful to use the search field to narrow down the ones of interest.

You must assign your templates to categories in order for them to appear to end users. In other words, any template that shows None as the category, will not be shown. Templates may be assigned to one or more categories and subcategories by clicking on the Change button. You may use arbitrary names for your categories and subcategories except that you may not use commas or underbars.

This example uses categories of Business Cards and Stationary Sets and subcategories of Bold, Elegant, and Plain:

To get information related to creating and uploading templates, go to https://printui.com/BrandingUI-info.php and sign in using your PrintUI credentials--the ones you would use to upload templates using the PrintUI InDesign plugin. Note that your PrintUI credentials are not necessarily the same as your BrandingUI credentials.

(Advanced and Enterprise accounts only)

You may also override many settings on a template-by-template basis so that you can better control the end-user experience . Click on the Options button to see which options you can specify for a specific template. If the Options button has black text, it means that some options have already been specified for that particular template.

Jobs

This is a list of all your currently active jobs. It does not show jobs that have been deleted or that have expired. Jobs typically expire after one year and are automatically removed from the list. You can specify a date range for the jobs or search for jobs. If you specify both, the search applies only to jobs within the date range.

If any field is too large, it is truncated and an ellipsis (...) is added. Hovering over truncated fields will show the entire item. You may also hover over the template name to see a thumbnail image of the customized job.

Job statistics for your account are located at the bottom of the page. You may also download a CSV file that is compatible with Excel to get a list of all your jobs, including any that have expired or that have been deleted.