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UltraWare™  
Alto Internet  
Transaction Server  
User Guide





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Alto Internet  
Transaction Server  
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Alto Imaging Technologies, Inc.  
3090 Dauphin Square Connector  
Mobile, AL 36607

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## About this Guide

This guide was developed for those who want to design, plan, implement, support, and use an information management or print-on-demand solution built on the UltraWare™ Application Suite.

This guide assumes knowledge of the fundamentals of the Microsoft Windows family of operating systems including Windows 9x/ME, Windows NT, Windows 2000, and Windows XP

### Conventions Used in this Guide

- **Bold** text indicates:
  - A window, wizard, or dialog title
  - Entries you type, if text is also **Monospace**
- *Italicized* text indicates:
  - A filename
  - Words with special emphasis
- Monospace text indicates:
  - A directory path or Uniform Resource Identifier (URI)
  - Code samples
  - Prompts that may appear on the screen
  - Entries you type, if text is also **Bold**
- An right arrow (➔) separates multiple items within the same step, such as when you use drop-down, cascading, or pop-out menus
- A return arrow (↵) indicates text that has been wrapped to fit the format of this guide, but should be considered a single line of type
- File and folder names appear in Title Caps. Filename extensions appear in all lowercase
- Acronyms appear in all uppercase





## Introducing Alto Internet Transaction Server

Welcome to Alto Internet Transaction Server (AITS). AITS provides an enterprise-level, information management and online printing platform ideal for collaboration and distribution of electronic and hardcopy documents. AITS provides both middleware and front-end applications creating an interface to an information store built on Microsoft SQL Server. AITS allows users to manage content stores through an easy-to-use client or web browser.

AITS leverages Microsoft's ActiveX, and Active Server Page (ASP) technologies giving remote users the ability to view, print, and modify content of virtually any type. AITS pages can easily be merged with an existing company web site running on Microsoft Internet Information Server. Web pages are ready for custom logos and personalized messages. AITS takes advantage of Microsoft Windows NT and Microsoft SQL Server security models to provide user-level access control.

Integration with Microsoft Office applications and other UltraWare applications provides the framework for general content management, sophisticated litigation support, copyright management, medical forms management, and print-on-demand solutions.

AITS is built on the solid UltraWare content management and collaboration suite, continuing to set the standard for easy-to-use, scalable, content neutral information management systems.

### What's New in AITS

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The following new features and enhancements have been added to AITS:

**Automated document conversion.** Convert hundreds of file types on-demand including office, image, graphic, engineering, and legacy file formats.

**Complete online estimating and submission.** Highly configurable job costing gives AITS users instant pricing, previewing, and print submission from their web browser.

**Easier user administration.** Create user and group accounts directly from UltraDoc Explorer using a simple interface. Accounts are created and managed by the UltraDoc Explorer application eliminating the need to create accounts directly through SQL Enterprise Manager. The account owner or

administrator may change account passwords.

**Online account signup.** Users create their own accounts online, (pending administrative approval) further simplifying user administration.

**Document level security.** Assign permissions to user or group accounts at the table or document level. Select Read Only, Read/Write, or Full Control permissions. Built-in groups simplify administration and assignment of common permission.

**Certificate based authentication.** UltraDoc connections are made using a certificate based authentication system. Each client PC maintains a unique certificate allowing future scalability. The UltraDoc Connection Certificate Maker generates ODBC Data Sources automatically.

**More intuitive user interface.** Quickly search, view, and manipulate documents, bundles, and collections from an easy-to-use interface. One-click access to the active document, bundle, or collection makes it simple to organize content into a structured, hierarchical content management system.

## System Requirements

What do you need to run AITS? The information in the following tables will help you select a computer and operating system that meets your needs. AITS performs better with a faster processor, more memory, and fast storage devices.

AITS Server Requirements	
<b>Processor</b>	<ul style="list-style-type: none"> <li>Intel® Pentium™ III 933-megahertz (MHz) or higher processor</li> <li><b>Dual Intel® Xeon™ Processors, 2.4GHz or higher (recommended)</b></li> </ul>
<b>Operating System</b>	<ul style="list-style-type: none"> <li>Windows® Server 2003, Standard Edition (recommended)</li> <li><b>Windows Server 2003, Enterprise Edition (preferred)</b></li> <li>Windows® 2000 Server<sup>1</sup></li> <li>Windows 2000 Advanced Server<sup>1</sup></li> </ul>
<b>Memory<sup>3</sup></b>	<ul style="list-style-type: none"> <li>256 megabytes (MB) of RAM or higher; <b>1 gigabyte (GB) of RAM recommended</b></li> </ul>
<b>Hard Disk<sup>4</sup></b>	<ul style="list-style-type: none"> <li>40 gigabyte (GB) Ultra/ATA 100 7,200 rpm hard drive</li> <li><b>(3) 36 gigabyte (GB) SCSI 10,000 rpm hot-swappable hard drives RAID 5 configuration (recommended)</b></li> </ul>
<b>Drive</b>	<ul style="list-style-type: none"> <li><b>CD-ROM drive; CD-RW or DVD-RW recommended</b></li> </ul>
<b>Display</b>	<ul style="list-style-type: none"> <li>VGA or higher-resolution monitor with AGP/PCI Graphics adapter and 32 MB RAM; <b>19-inch monitor with 4x AGP Graphics Adapter and 64 MB (DDR) SDRAM (recommended)</b></li> </ul>
<b>Networking</b>	<ul style="list-style-type: none"> <li>10/100 Ethernet adapter or higher</li> </ul>
<b>Other Required Software and Devices</b>	<ul style="list-style-type: none"> <li>Microsoft SQL Server™ 7.0 (Service Pack 4); <b>Microsoft SQL Server 2000 (Service Pack 3) or later (recommended)</b></li> <li>Microsoft Internet Explorer version 5.5 SP1 or later</li> <li>Microsoft Internet Information Server (IIS) 5.0 or higher</li> </ul>

AITS Client Requirements	
<b>Processor</b>	<ul style="list-style-type: none"> <li>Intel® Pentium™ 166-megahertz (MHz) or higher processor</li> </ul>
<b>Operating System</b>	<ul style="list-style-type: none"> <li>Windows® 95 or higher<sup>2</sup></li> </ul>
<b>Memory<sup>3</sup></b>	<ul style="list-style-type: none"> <li>8 megabytes (MB) of memory or higher (<b>16 MB recommended</b>)</li> </ul>
<b>Hard Disk<sup>4</sup></b>	<ul style="list-style-type: none"> <li>20 gigabyte (GB) Ultra/ATA 33 5,400 rpm hard drive or higher</li> </ul>
<b>Drive</b>	<ul style="list-style-type: none"> <li>CD-ROM drive</li> </ul>
<b>Display</b>	<ul style="list-style-type: none"> <li>VGA or higher-resolution monitor with AGP/PCI Graphics adapter and 32 MB RAM; <b>19-inch monitor with PCI/AGP Graphics Adapter and 16 MB RAM (recommended)</b></li> </ul>
<b>Networking</b>	<ul style="list-style-type: none"> <li>10/100 Ethernet adapter or higher</li> </ul>
<b>Other Software and Devices</b>	<ul style="list-style-type: none"> <li>Microsoft Internet Explorer version 5.5 SP1 or later</li> </ul>

<sup>1</sup> Windows 2000/XP require .NET Framework

<sup>2</sup> Windows NT® 4.0 and Windows 95 require Active Directory Client Extension (DSClient), Windows Management Instrumentation (WMI), and .NET Framework

<sup>3</sup> Memory requirements are dependent on operating system selection and other factors and could be higher.

<sup>4</sup> Installation requires 40–50 MB of available hard disk space

## Getting Started with AITS

Before you begin, it is important to know some basic facts about the components that make AITS work. The heart of the system is a relational database running on Microsoft SQL Server. Information about every file you access or store is kept in the tables that make up the database. Any type of electronic information can be included in your AITS system; this includes image files, document files like Word or Excel, email messages from Outlook, video, audio, and almost anything else you can imagine.

Applications that can be used as AITS clients include:

- UltraDoc Explorer
- Image Arranger
- UltraPrint
- UltraCopy
- Microsoft Office applications
- Internet Explorer

UltraDoc Explorer (installed with UltraDoc Server and UltraDoc Client) provides content management tools to help you maintain your UltraDoc database.

Image Arranger, UltraPrint, and UltraCopy are other software packages available from Alto Imaging Technologies each providing access to AITS in ways that are specific to their overall purpose.

Using the Microsoft Office applications as clients lets you store files in AITS in their native format.

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**Note**     **Microsoft Office integration requires UltraDoc Client be installed**

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Web based access is available using the Internet Explorer, when installed on a web server running Microsoft Internet Information Server. AITS provides a familiar, easy-to-use interface giving you access to your content from the company intranet or Internet.

The focus of this user guide is on the web based interface to AITS using Microsoft Internet Explorer.

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**Note**     **For more information about using other client applications with AITS see the UltraDoc User Guide.**

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## Accessing AITS

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You must have a user account and password to logon to the AITS system. AITS can be configured to let you create an account, or your system administrator may assign it to you. See New User Signup or ask your system administrator for details.

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**Note** If New User Sign Up does not appear on the logon page, you must be assigned an account by your administrator.

---

1. Start Internet Explorer

**Start → All Programs → Internet Explorer**

**Internet Explorer** opens.

2. Type the Uniform Resource Identifier (URI) for the AITS Home Page into the Address bar:

**`http://www.example.com/altoaits/logon.asp`**

---

**Note** Check with your system administrator for the URI to your AITS server.

---

Click the **Go** button or press **Enter**.

The **Alto Internet Transaction Server** page loads.

3. Type a User name and Password.

Click the **Logon** button.

The **AITS Workspace** appears.

## AITS Workspace Overview

---

After you logon, the AITS workspace (Figure 1) is loaded into the browser window. Most often, the workspace is divided into the following three frames:

- **Control Panel** (top frame)

The Control Panel provides access to all search tools, configuration screens, and data source selection.

Recently used objects are displayed on the upper right. You can quickly switch between **Print Jobs** and **Image Files** by selecting a title from the appropriate drop-down list.

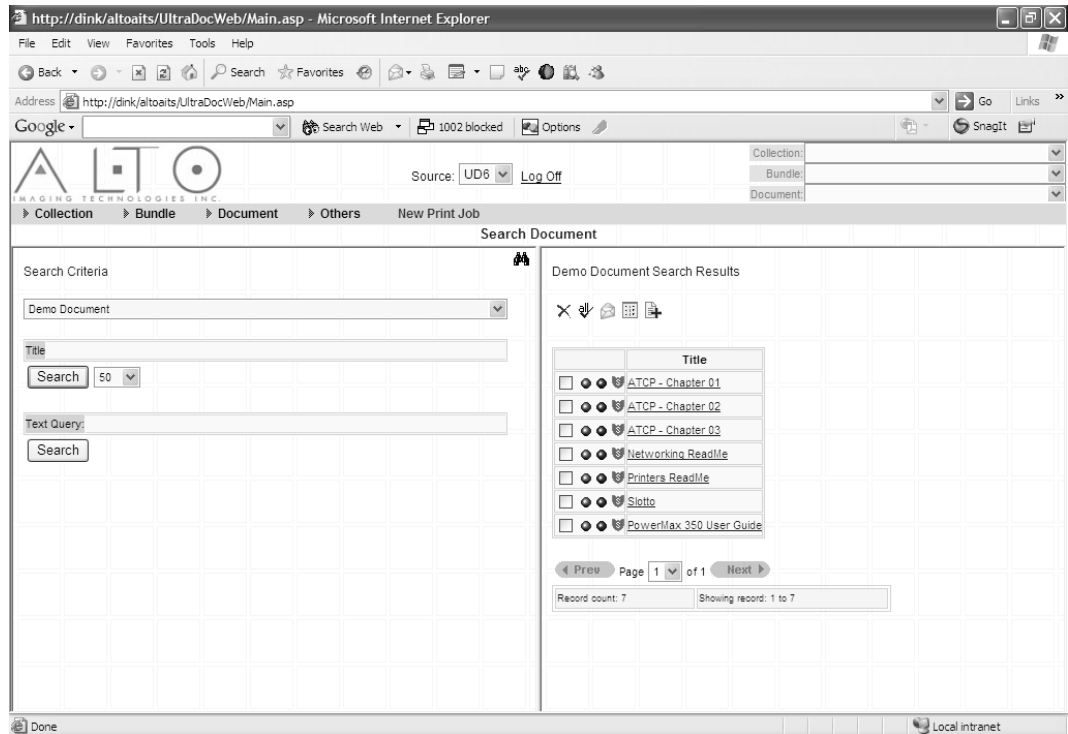
- **Search Criteria** (left frame)

Here you type or select search criteria about a Print Job or Image File, and set the number of results to display. Click Search to begin the query and return a list of matching objects

in the Search Results Frame.

- **Search Results** (right frame)

Results of your search are displayed in this frame. From here, you can perform other tasks like viewing or deleting an Image File, or electronically submitting a Print Job to your organization's print center. You can view your search results in ascending or descending order.



**Figure 1. Search Criteria/Results view in AITS workspace.**

Although the **Control Panel** remains fixed throughout the AITS system, the contents of the other frames may change depending on the current task. Functions provided in other contexts are described below.

- **Print Job Information** (left frame)

After you select a Print Job from a Search Results list or from the Control Panel, information about the print job is displayed in this frame. Here you can view or modify this information.

Other tasks are available through a set of buttons at the bottom of this frame.

- **Image File List** (right frame)

An Image File list is displayed next to Print Job Information.

Each Image File that is linked to the current print job is displayed here.

Some tasks specific to the Image File Library are available from a toolbar at the top of this frame.

- **Image File Information** (left frame)

When you select an Image File from a Search Results list, the Control Panel, or a Print Job Image List, information about the image file is displayed in this frame. Here you can view or modify this information.

- **Image Viewer** (right frame)

Image Files are displayed in the viewer next to the Image File Information frame. The viewer used to display the image file is dependent on the file format currently being viewed. For example, a Microsoft Word document is displayed in the Word viewer, an Adobe PDF document is displayed in the Acrobat viewer, and a TIFF image file is displayed in the AITS TIFF viewer.

## Configuring AITS

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### Organization Information Configuration

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Organization information (Figure 2) includes company name, address, phone number and other contact information, as well as your sales tax rate. Entries here are used to populate remittance fields and calculate sales tax when invoices are generated.

1. Logon to the AITS system.

See [Accessing AITS](#) for help doing this.

2. Move your mouse pointer over **Other** on the AITS menu bar.

Select **Organization Information** from the sub-menu.

3. Type information about your organization into each field.

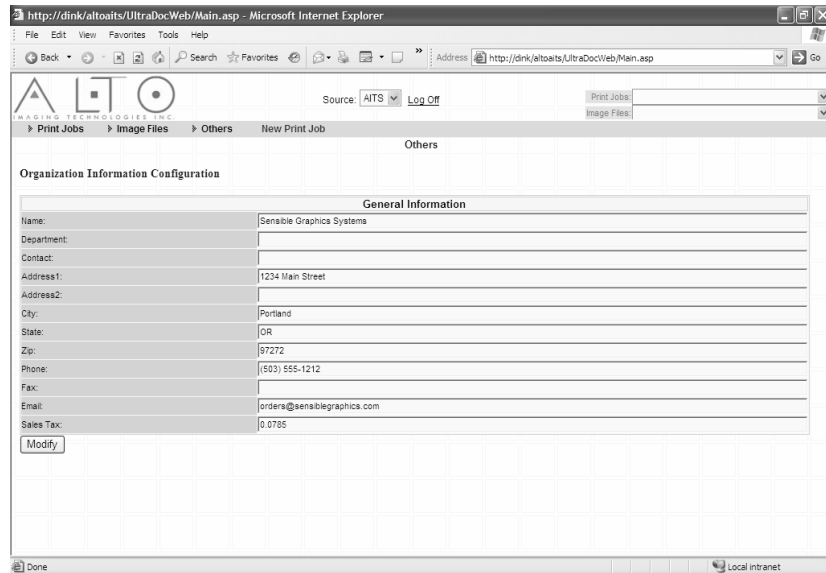
---

**Note** Enter the sales tax rate for your locality as a decimal fraction. For example, if your tax rate is 7.85%, type 0.0785 in the Sales Tax field.

---

4. Click the **Modify** button to save your changes.





**Figure 2. Add Organization Information for use on AITS invoices.**

## **Cost Information Configuration**

---

Costs are defined based on services available from your organization's printing center. These costs are associated with specific services and are used to estimate printing costs during the submission process, and calculate invoices at completion of a print order.

Costs for a variety of services like Binding, Folding, Punching, or Media Type, and several general costs like Mark-up or Shipping can be easily added, deleted, or modified. Changes are instantly reflected on the Job Information form used to submit a print job. Costs are applied on a Per Copy, Per Job, or Per Page basis.

1. Logon to the AITS system.

See [Accessing AITS](#) for help doing this.

2. Move your mouse pointer over **Other** on the AITS menu bar. Select **Cost Info. Config.** from the sub-menu.



**Figure 3. Add cost information for job estimating.**

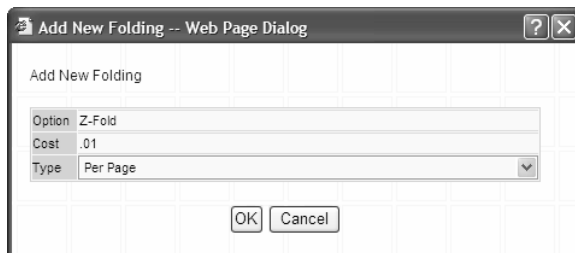
### Add Cost Options

1. Select **Add** from a service category.

The **Add New...** dialog box opens (Figure 4).

2. Type the **Option** name, **Cost**, and select cost **Type** from the drop-down list.

Click the **OK** button.



**Figure 4. Add services, options, and costs used for job estimating.**

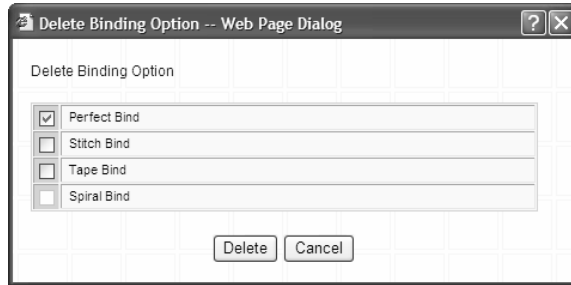
### Note

**Type includes Per Copy, Per Job, and Per Page. Costs set to Per Copy are calculated based on the number of sets, or copies, requested by the submitter. Costs defined as Per Page are calculated on the number of images, or pages submitted. Costs set to Per Job are assessed as a flat fee to the entire job.**

### Delete Cost Options

1. Select **Delete** from a service category.
2. Place a check mark next to each service you want to delete.

Click the **Delete** button.



**Figure 5. Use delete to remove options no longer offered or available.**

---

**Note** Cost options currently used in a print job cannot be deleted.

---

### Modify Cost Options

1. Edit an **Option** name, **Cost**, or select a new **Type** from the drop-down list.

Click the **Modify** button to save your changes.

Name	Add	Delete	Cost	Type
Markup			\$0.02	Per Copy
Packing			\$1.00	Per Job
Shipping			\$5.00	Per Job
Special Charges			\$0.00	Per Copy
				Per Job
				Per Page

**Figure 6. Edit costs or change how the charge for an option is applied.**



## Web-based Printing with AITS

Using AITS to submit files for printing is simple. Here are the steps it takes to create and submit a print job:

1. Select and send your files to the AITS Server.

During this step your files are automatically converted to a print ready format.

2. Preview your print ready documents confirm they have been properly converted.
3. Create a new print job from your print ready files using a simple ***Print Job Settings*** form.

The **Print Job Settings** form lets you select printing options and services offered.

4. Update and preview print job costs.
5. Add the print job to your ***Print Job Queue***.
6. Select and release a print job from your queue.

## Sending Files to AITS

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The first step is to select files from your local computer and upload them to your AITS server. AITS can convert over 300 different file types including Microsoft Office documents, Adobe Portable Document (PDF) files, most image formats, and many others. For a complete list of supported formats see Appendix.

1. Select **New Print Job** on the AITS menu bar.

The **Upload Image Files** form is displayed (Figure 7).

2. Click  (**Add Image Files**) to open the file browser.

Select files to add to your print job.

Click the **Open** button.



The selected files appear in the list.

---

**Note** You can upload multiple files and submit them as a single print job, or submit them as individual print jobs after the conversion process is complete.

---

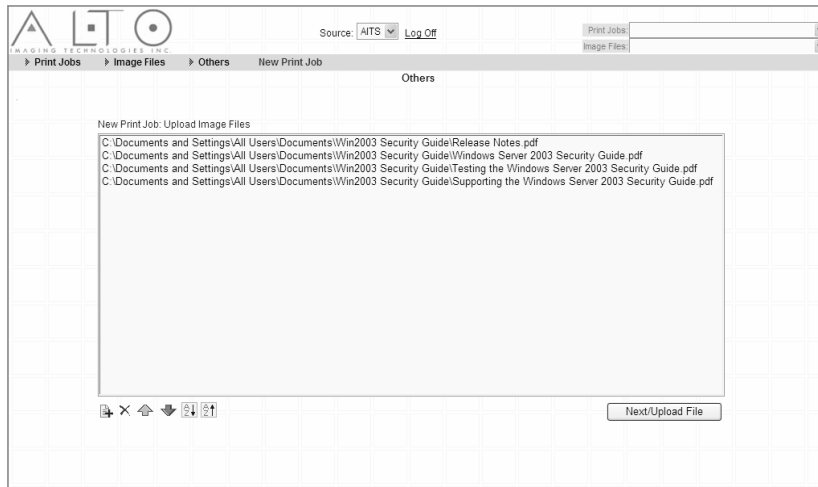
3. Reorder or edit your file list with the following controls:

Use   (**Up** or **Down**) to reorder the files in the list.

Use   (**Ascending** or **Descending**) to sort the files in the

upload list.

Use **X** to remove files from the list.



**Figure 7. Add files to send to AITS for conversion and print submission.**

4. Click **Next/Upload** Files.

Click **OK** to dismiss the Upload confirmation.

---

**Note** If this is the first time AITS has been accessed on your computer, an upload control must be installed. A security warning will appear. Click the **Yes** or **Install** button to accept the installation.

---

Each file is uploaded and the conversion process begins.

## Previewing Print Ready Documents

---

After the upload process is complete, the rendering frame is displayed on the left side of the AITS workspace. The title of each file you submit is listed with a corresponding status. When document conversion is complete, the status is updated and the document *title* appears as a hyperlink.

1. Click the document title link to preview your print ready file.

The print ready document loads in the preview frame on the right side.


---


**Note** If this is the first time AITS has been accessed on your computer, a viewer control must be installed. A security warning will appear. Click the **Yes** or **Install** button to accept the installation.

---

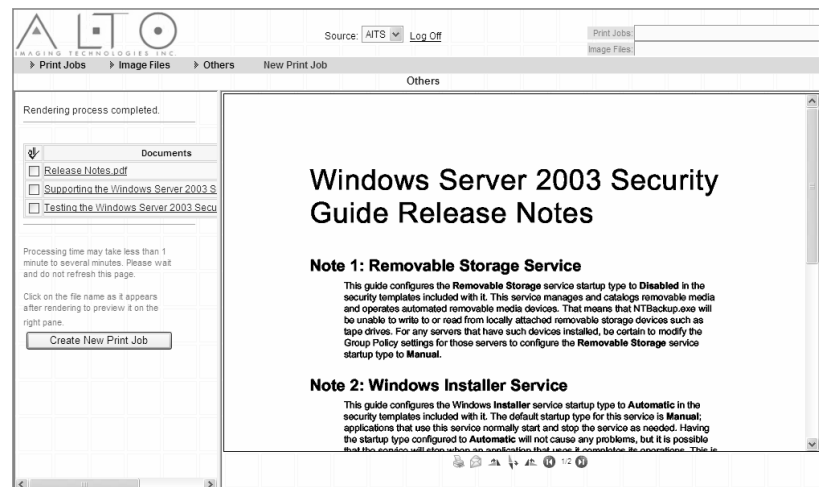
Choose from the following tasks prior to completing submission of your print job:

Use  (**Print**) to print the current document to a local printer.

Use  (**Email**) to send the current document as an attachment.

Use  (**Rotate**) to change the document orientation in the preview pane.

Use  (**Previous Page; Next Page**) to move between pages in the document.



**Figure 8. Proof print-ready images after your files are converted.**

## Creating a New Print Job

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Once your documents are converted, you are ready to complete the **Print Job Settings** form. The Print Job Settings form is where you choose the print options and services available from your print center.

1. Place a check mark next to each document you want to include in the print job.
2. Click **Create Print Job**.

The **Print Job Settings** form loads (Figure 9).

---

**Note** **Selecting multiple documents will create a single print job containing all selected files. To create individual print jobs, select a document and and click Create Print Job, then repeat the process as needed.**

---

3. Type **Job Information** in each field.

Use the radio buttons and drop-down lists to select **Print Settings** and **Finishing Options**.

Type **Additional Instructions** about your job.

---

**Note**

**A Job Reference number is assigned and listed in the Job Information section. This number is used to track you print job throughout the AITS system.**

---

4. Click **Update** to recalculate the **Estimated Price** based on the services and options you selected.
5. Click **Next** to add the print job to your queue.

Your **Print Job Queue** is displayed.

Once you create a print job, it is automatically added to the Print Jobs library. See the next chapter to find out how to work with these print jobs.

The screenshot shows the 'Enter New Print Job Settings' form in the AITS web interface. The form is organized into several sections:

- JOB INFORMATION:** Includes fields for Job Description (Windows Security Guide), Department (Information Systems), Date (11/1/2004), Phone Ext # (123), Department #, Due Date, Job Reference # (2004308003), Charge # (4158), and Job Type (Black/White).
- PRINT SETTINGS:** Includes options for Collated (checked), Uncollated, PLEX (Side1, Side2, 2-UPS), Staple (3, 3, 3), and Media Type (Letter).
- FINISHING OPTIONS:** Includes options for Hole Punch (None), Binding (Perfect Bind), Cutting (None), and Folding (None).

At the bottom of the form, there is a 'Create New Print Job' button and an 'Update Price' button. A note at the bottom states: '\* Estimated Price: \$103.00 \* Price may vary based on imposition or special layout configuration.'

**Figure 9. Add job information and select print settings.**

---

## Managing the Print Job Queue

---

All pending print jobs are displayed in the **Print Job Queue** (Figure 10). Use the queue to review **Print Job Settings** and **Submit Print Jobs** to your print center.

1. Click a **Job Reference** number link to review or modify **Print Job Settings**.
2. Place a check mark next to each print job you want to submit.
3. Click **Submit Print Job**.

The Print Job is submitted and removed from the **Print Job Queue**, the status is set to **Submitted** in the **Print Job Library**.



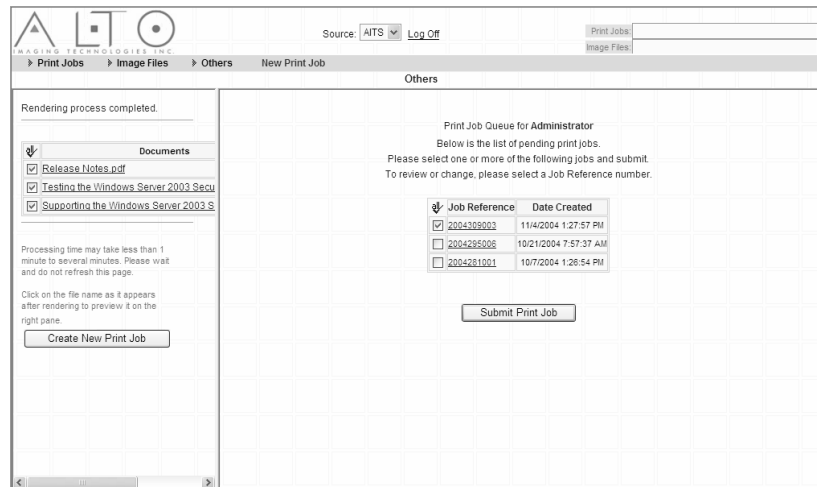


Figure 10. Select one or more jobs to submit.

---

**Note** Documents are added to a print job in the order originally uploaded, or as they appear in the rendering frame. If the order is not correct, do not select Submit Print Job. Use the reference number to locate the print job in the Print Job Library. Reorder the documents and submit the print job as outlined in the next chapter.

---



## Working With the Print Jobs Library

AITS maintains a library of all print jobs and their associated documents. Using a simple query form you can quickly locate any print job, make changes to its Print Job Settings, resubmit it to your print center, and perform many other tasks like:

- Delete a print job from the library
- Send documents as an email attachment
- Add a new image file
- Generate an Invoice
- Submit a pending job to print
- View, change, or update Print Job Settings and Costs
- Duplicate a print job and submit as new

## Searching the Print Job Library

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AITS powerful search feature lets you locate a print jobs based on a number of different criteria including job reference number, date submitted, department, or other information you provided when it was originally created.

1. Logon to the AITS system.

See [Accessing AITS](#) for help doing this.

2. Move your mouse pointer over **Print Jobs** on the AITS menu bar.

Select **Search Print Jobs** from the sub-menu.

The **Search Criteria** frame is loaded on the left side.

---


**Note** If a search was performed during an existing session, selecting **Search Print Jobs** will return you to the existing search result set.

---

3. Type information about a print job into the form fields or select choices from the drop-down lists.
- 



**Note** The more information you provide, the more specific you search results will be. See Appendix for advanced search options.  
If you want to see all print jobs in the archive, leave the search criteria empty.

---

4. Click  (Search) or the **Search** button.

Print Jobs matching the search criteria are displayed in the

**Search Results** frame on the right side.

A search may return many print jobs spanning several pages. Use  (**Previous**),  (**Next**) icons, or the Page drop-down list at the bottom of the Search Results frame to advance between Search Results pages.

---

**Note** Set the number of results to display on each page of the Search Results frame by selecting a value in the drop-down list next to the Search button on the Search Criteria frame.

---


## Search Result Tasks

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A toolbar is displayed above the Print Jobs Search Results. Each tool lets you perform a task on one or more selected print jobs. A description of each task is listed here.




**Figure 11. Toolbar available from print job search results.**


 **Delete.** Deletes the selected print job from the library. Documents that are part of the print job remain in the Image Files library.

---

**Note** Delete may not be available based on global AITS settings and security settings for your user account.

---


 **Select All.** Selects all print jobs in the Search Result set.


 **Email.** Attaches the documents included in the selected print job to a new message in your email application.

---

**Note** Email may not be available based on global AITS settings. You must have a MAPI compliant email client installed on you computer.

---

 **View Settings.** Specify which fields columns are displayed in the Search Results frame. This is a per user setting.


 **Add to Collection.** Adds the selected Print Job to the current Collection.


---

**Note** Add to Collection may not be available based on global AITS settings.

---

 **Add Current Image File.** Adds the current Image File to the selected Print Job.


 **Generate Invoice.** Calculates and displays an invoice based on the Print Job Settings for the selected print job.

 **Submit Print Job.** Sends the selected print job to your print center.

---

**Note**     **Submit Print Job is only available for print jobs with a pending status.**

---

 **Security.** View or modify the list of users or groups who can access a selected print job.

## **Print Job Information**

---

Information about a print job can be viewed or modified. Tasks that can be performed on a print job while working within the Print Job Information area include:

- Updating document information or print settings
- Duplicating for submission as a new print job
- Viewing or modifying the Job Settings form
- Recalculating the estimated job cost
- Generating an invoice

Document elements that make up a print job are also available here. Tasks related to individual document management include:

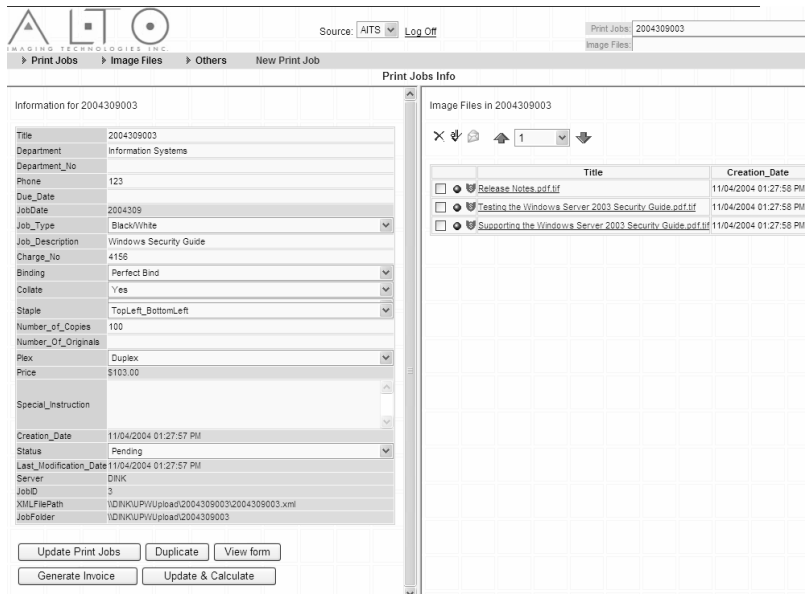
- Deleting document from the print job
- Sending a document as an email attachment
- Reordering documents within the print job
- Searching for other print jobs that are using a selected document
- Viewing or modifying document security
- Viewing the print ready document image

You must have an active Search Result to view Print Job Information, or an **Active Print Job** listed in the drop-down list above the menu bar in the main workspace.

1. Click a print job title link from the **Search Results** or select an **Active Print Job** from the drop-down list to view the print job information.

The **Print Job Information** frame loads in the left side and the Image Files list loads in the right side of the main workspace.

Use the **Update Print Jobs** button after modifying Print Job Information to save changes to the current print job.



**Figure 12. View information about a print job including linked image files.**

---

**Note** **Update Print Jobs does not recalculate print job costs that may result from a change to print settings or service options. Use Update & Calculate instead.**

---

The following tasks are available:

Use the **Duplicate** button to make a copy of the print job. The copy becomes the current print job and is displayed in the workspace. See [Duplicating a Print Job](#) for more information.

---


**Note** **Duplicate clones an existing print job, assigns a new Job Reference number and sets status to Pending.**


---

Use **View Form** to view or modify the **Print Job Settings** form. See [Modifying the Print Job Settings Form](#) for more information.

Use **Generate Invoice** to create an invoice based on the selected options and print job services. See [Generating Print Job Invoices](#) for more information.

Use **Update and Calculate** to recalculate print jobs cost based on changes you make to the print job settings. See [Recalculating Print Job Costs](#) for more information.

Use  (Rotate) to change the document orientation in the preview pane.

Use   (Previous Page; Next Page) to move between pages.

## Viewing a Print Job

---

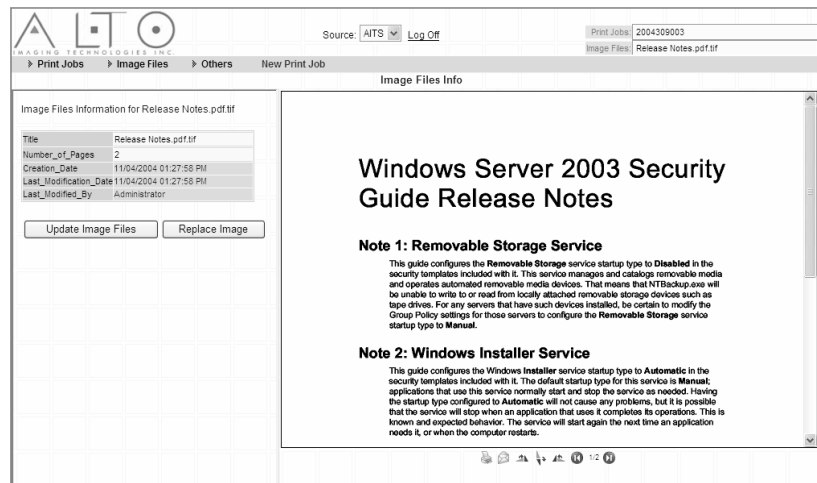
Documents can be selected for viewing from the Document List contained in each print job. The viewer used to display the document depends on the “helper” application registered for a specific file type on your computer.

1. Locate your print job using the steps described in the previous section.

Click the title link to load the print job into the workspace. The **Image Files List** appears in the frame on the right.

2. Click a document title link from the **Image Files List**.

**Image Files Information** loads into the workspace. Image File Information appears in the frame on the left, the document appears in the frame on the right.



**Figure 13. View an image file and its associated information.**

You can return to the print job by clicking the **Active Print Job** link above the AITS toolbar. Return to your previous **Search Results** set by selecting **Search Print Jobs** from the AITS menu

## Modifying and Updating a Print Job

---

After locating a print job using the AITS search feature, you can add or modify information simply by typing new information, or selecting choices from a drop-down list.

1. Search the **Print Job Library** to locate your print job.

See [Searching the Print Job Library](#) for help doing this.

Click the title link to load the print job into the workspace.

---

**Note** You can also select an **Active Print Job** from the drop-down list above the menu bar in the main workspace.

---

2. Type information directly into text fields, or select items from drop-down lists.

---

**Note** Drop-down lists that appear in some fields indicate that only specific values are allowed. Fields that appear with a gray background cannot be edited.

---

3. Click **Update** or **Update and Calculate** button to save your changes.

---

**Note** Use the **Update and Calculate** button when making changes to fields that contain cost information.

---

## Adding Documents to a Print Job

---

New documents can be added to an existing print job. Additions can be existing documents that are already part of the **Image File Library**, new print ready (native) documents (PDF or TIFF), or new (raw) files that have not yet been converted. The methods for adding a document differ depending on the current format and state of the document.

### Adding Documents from the Image Library

---

Using content from the **Image File Library** is the easiest way to add a document to a print job.

1. Search the **Print Job Library** to locate your print job.

See [Searching the Print Job Library](#) for help doing this.

Click the title link to make the print job *Active*.


---

**Note** The **Active Print Job** appears in the drop-down list at the top right of the workspace.

---

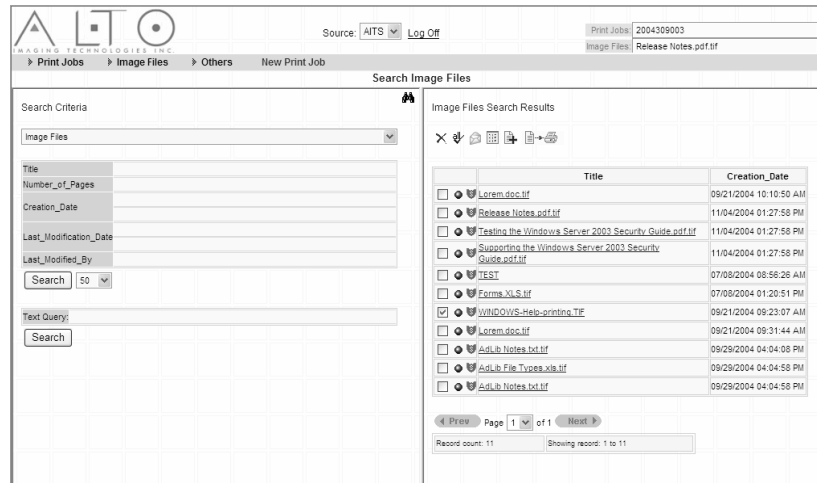
2. Search for a document from the **Image File Library** using the steps described in [Searching the Imaging Library](#).

3. Place a check mark next to the title of each document you want to add to the **Active Print Job** (Figure 14).

4. Click  (**Add to Selected**) icon to link the document to the print job.

The document is added to the print job in the bottom position. See [Changing Document Position In a Print Job](#) for help changing the document order.





**Figure 14. Documents in the Image Library can be added to the active print job.**

---

**Note** Since Print Jobs are really just links to documents, a single document can be a member of many different print jobs. This ensures that changes to a document are reflected across all print jobs that contain that document.

---

## Adding New Print-ready Documents

Primary file types native to AITS printing services include Adobe's Portable Document Format (PDF) and Tagged Image File Format (TIFF). Documents in these formats may be added directly to the Image File Library and immediately linked to existing print jobs using the steps above.

---

**Note** Files of any format can be part of the AITS image library. PDF or TIFF are necessary only if you intend to print using AITS print services.

---

See [Adding Documents to the Image Library](#) for more information.

## Adding Raw (Unconverted) Files

Although files of any type can be added to the Image Library, files to be printed using AITS print services must be converted to a print-ready format. The easiest way is to use AITS to make the conversion, and add the print ready files to your print job.

1. Upload the files to the AITS server.

See [Sending Files to AITS](#) for help doing this.

Preview the print ready documents after the conversion is complete. See [Previewing Print Ready Documents](#) for help doing this.

2. Create a new print job.

See [Creating a New Print Job](#) for help doing this.

---

**Note** Do not click the **Submit Print Job** button unless you want this job to be sent to the print center.

---

3. Add the new documents to your print job.

See [Adding Documents from the Image Library](#) for help doing this.

The document is added to the print job in the bottom position. See [Changing Document Position In a Print Job](#) for help changing the document order.

---

**Note** You can also use 3<sup>rd</sup> party tools to convert a raw document prior to adding them to the Image Library.

---

## Removing Documents From a Print Job

---

Documents are often shared among a number of print jobs. The link between a document and a print job can be deleted. This removes the document from that print job, but leaves the document in the **Image File Library**, and preserves existing links to other print jobs.

To delete a document from the Image Library see [Working With the Image Library: Search Results Tasks](#).

1. Search the **Print Job Library** to locate your print job.

See [Searching the Print Job Library](#) for help doing this.

Click the title link to load the print job into the workspace. The Document List frame appears on the right.

2. Place a check mark next to the title of each document you want to remove from the print job.

3. Click **X (Delete)** to remove the link from the print job.

The link is removed and the **Image File** list is updated.

## Changing Document Position In a Print Job



---

When you use AITS print services, documents are output in the order they are listed within a print job. In some cases, such as adding new documents to a print job, it becomes necessary to change the order of documents within a print job.

1. Search the **Print Job Library** to locate your print job.

See [Searching the Print Job Library](#) for help doing this.

Click the title link to load the print job into the workspace. The **Image File** list appears on the right.

2. Place a check mark next to the title of each document you want to reposition.
3. Use the drop-down list to select the number of places to move, or select the positions **Top** or **Bottom**.
4. Click  (**Up**) or  (**Down**) to reposition the documents.

The documents are repositioned and the **Image Files** list is updated.

## **Recalculating Print Job Costs**

---

As Print Job Information is modified and print options or services change, cost information reflected on the **Print Job Settings** form or invoice can become invalid. You can quickly update and recalculate job costs from the **Print Job Information** frame.

You can also modify and update costs directly on the **Print Job Settings** form. See [Modifying the Print Job Settings Form](#) for more information.

Print job costs are recalculated and updated based on current **Cost Information Configuration**. See [Cost Information Configuration](#) for more information.

1. Search the Print Job Library to locate your print job.  
See [Searching the Print Job Library](#) for help doing this.
2. Modify the options or select new print services.  
See [Modifying and Updating a Print Job](#) for help doing this.
3. Click the **Update and Calculate** button.

## **Modifying the Print Job Settings Form**

---

1. Search the **Print Job Library** to locate your print job.  
See [Searching the Print Job Library](#) for help doing this.
2. Click the title link to load the print job into the workspace.  
The **Print Job Information** appears on the left.
3. Click the **View Form** button.  
The **Print Job Settings** form is displayed in a new window.

JOB INFORMATION		
JOB DESCRIPTION: Windows Security Guide	DEPARTMENT: Information Systems	DATE: 11/4/2004 1:27:57 PM
PHONE/EXT #: 123	DEPARTMENT #:	DUE DATE:
JOB REFERENCE: 2004309003	CHARGE #: 4156	JOB TYPE: Black/White
PRINT SETTINGS		
COLLATED <input type="radio"/>	UNCOLLATED <input type="radio"/>	PLEX Side1 Side2 Side1 ZPPS
Duplex		STAPLE TopLeft_BottomLeft
SETS NEEDED 100	Media Type Letter	
FINISHING OPTIONS		
HOLE PUNCH None	BINDING Bind Perfect Bind	CUTTING None
FOLDING: None		
ADDITIONAL INSTRUCTION:		
TO ENSURE ACCUARATE DELIVERY & PRINT QUALITY PLEASE COMPLETE ENTIRE JOB TICKET		
* Estimated Price: \$103.00		Update Close
* Price may be varying based on imposition or special layout configuration.		

**Figure 15. Modify the Print Job Settings form to request different services and recalculate the estimated price.**

Modify **Job Information** in each field or use the radio buttons and drop-down lists to change **Print Settings** and **Finishing Options**.

4. Click the **Update** button to recalculate the **Estimated Price** based on the services and options you selected.
5. Click the **Close** button to return the AITS workspace.

## Generating Print Job Invoices

The cost information for a print job can be used to create an invoice itemizing charges for the selected options and print services. This invoice can be viewed, emailed, printed, or exported to Microsoft Excel.

1. Locate and modify your print job.  
See [Modifying and Updating a Print Job](#) for help doing this.
2. Click the **Generate Invoice** button.  
The Invoice is displayed in a new window (Figure 16).

- Use the Internet Explorer's built in controls to email or print the invoice.

AITS		1234 Main Street Portland OR 97272		Invoice	
		Date:	Invoice#:		
		11/4/2004	2004309003		
<b>BILL TO:</b> Ato Imaging 3090 Dauphin Square Connector Mobile AL 36618			<b>SHIP TO:</b> Daniels Graphics 131 Airport Blvd Mobile AL 36607		
Description	Page Qty	Copy Qty	Job Qty	Unit Price	Amount
Binding		100		\$1.00	\$100.00
MarkUp		100		\$0.02	\$2.00
Packing			1	\$1.00	\$1.00
Shipping			1	\$0.00	\$0.00
Special Charges		100		\$0.00	\$0.00
Special Instruction Fee					\$0.00
SubTotal:					\$103.00
Tax (7.85%):					\$8.09
Balance Due:					\$111.09

**Figure 16. AITS generates an invoice based on selected services, options, and Cost Configuration Information.**

Right click the invoice and select **Export to Microsoft Excel** to create a new worksheet.

---

**Note**    **Export to Microsoft Excel requires Microsoft Office 2002 or later**

---

## Duplicating a Print Job

---

Any print job in the library can be duplicated for submission as a new print job. You can select new options or print services before resubmitting the new copy without affecting the original print job.

- Search the Print Job Library to locate the print job you want to duplicate.

See [Searching the Print Job Library](#) for help doing this.

- Click the **Duplicate** button.

Click **OK** to dismiss the confirmation dialog.

The new print job is displayed in the workspace and becomes the *Active* print job.

The copy is assigned a new *Job Reference* number and its status is set to *Pending*; all other options and print services values are inherited from the original print job.


## Other Tasks

---

The following tasks are available while viewing **Print Job Information**. These tasks are specific to the documents contained in a print job.

### **Sending a Document as an Email Attachment**

---

1. Place a check mark next to the title of each document you want to email.
2. Click  (**Email**).

Your email application opens a compose window, the document is attached and ready to send.


---

**Note**    **A MAPI compliant email application must be installed on your computer.**

---

### **Viewing and Modifying Document Security**

---

1. Click the  (**Security**) icon next to a document title.  
The **Security** dialog opens.
2. View or modify the security settings.  
Click the **Close** button.



**Figure 17. Assign access and permissions to user and group accounts.**

See the *UltraDoc User Guide* for more information about document security.

## **Searching for Print Jobs that Use a Selected Document**

---

1. Click the **(Search For)** icon next to a document title.

A new **Search Result** set is returned containing all print jobs linked to the current document.





## Working With the Image Library

Each image file uploaded as part of a print job is added to the Image Library. A link is created automatically between a print job and its image files during the submission process. Once an image file is part of the Image Library, you can link it to other print jobs. When you update an image file the change is instantly reflected in all print jobs it is linked to. This helps minimize the effort required to update large Print Job Libraries, and maximize physical storage space.

You can also add image files directly to the image library without submitting it as part of a print job.

Using a simple query form you can quickly locate any image file and perform many tasks like:

- Delete an image file from the library
- Send an image file as an email attachment
- Link an image file to a print job
- Submit an image file as a print job
- View, change, or update Image File Information.
- Replace the image file

## Searching the Image Library

---

Use the Search Criteria form to enter information about the image file you want to locate.

1. Logon to the AITS system.

See [Accessing AITS](#) for help doing this.

2. Move your mouse pointer over **Image Files** on the AITS menu bar.

Select **Search Image Files** from the sub-menu.

The **Search Criteria** frame is loaded on the left side.

---

**Note** **If a search was performed during an existing session, selecting Search Image Files will return you to the existing search result set.**

---


3. Type information about an image file into the form fields or select choices from the drop-down lists.

The more information you provide, the more specific your search results will be. See Appendix for advanced search options.



---

**Note** If you want to see all print jobs in the archive, leave the search criteria empty.

---

4. Click  (Search) or the **Search** button.

Print Jobs matching the search criteria are displayed in the **Search Results** frame on the right side (Figure 1).

A search may return many image files spanning several pages. Use the  or , or the drop-down list at the bottom of the Search Results frame to advance between Search Results pages.

---

**Note** Set the number of results to display on each page of the Search Results frame by selecting a value in the drop-down list next to the Search button on the Search Criteria frame.

---

## Search Result Tasks

---

A toolbar is displayed above the **Image Files Search Results**. Each tool lets you perform a task on one or more selected print jobs. A description of each task is listed here.


 **Delete**. Deletes the selected image file from the library.

---

**Note** Delete may not be available based on global AITS settings and security settings for your user account.

---


 **Select All**. Selects all image files in the Search Result set.


 **Email**. Attaches the image file to a new message in your email application.

---


**Note** Email may not be available based on global AITS settings. You must have a MAPI compliant email client installed on you computer.

---

 **View Settings**. Specify which fields columns are displayed in the Search Results frame. This is a per user setting.

 **Add to Print Job**. Adds the selected image field to the current Print Job.

 **Submit Print Job**. Submits the selected image file to your print center.

 **Security**. View or modify the list of users or groups who can access a selected print job.

---

## Viewing Image Files

---

When you select an image file, information about the document is displayed on the left side, while the image file opens in the viewer

frame on the right. Tasks that can be performed on an image file include:

- Updating document information
- Replacing the image

Other options may be available depending on the helper application used to view the document. Tasks available when viewing a TIFF image include:

- Insert page into a file
- Printing to a local printer
- Sending the file as an email attachment
- Rotating the image in the viewer frame
- Moving between pages

---

**Note** This manual assumes use of the AITS print viewer associated with TIFF image viewing. For other formats, refer to the documentation for the application used to create the file.

---

You need an active Search Result list to view Image Information, or an **Active Image File** listed in the drop-down list above the menu bar in the Control Panel.


1. Click an image file title link from the **Search Results** or select an **Active Image File** from the drop-down list to view the image file.


The **Image File Information** loads in the frame on the left side and the Image Files is displayed in the frame on the right.


Use the **Update Image Files** button after modifying Image File Information to save changes to the current image file.

The following tasks are available:

Use the **Replace Image** button to replace or insert pages into the current image file. See [Replacing or Updating Image Files](#) for more information.

Use  (**Print**) to print the document to your local printer.

Use  (**Email**) to attach the image file to a new message in your email application.

Use  (**Rotate**) to change the document orientation in the preview pane.

Use  (**Previous Page; Next Page**) to move between pages.

## Adding Documents to the Image Library

---

1. Logon to the AITS system.

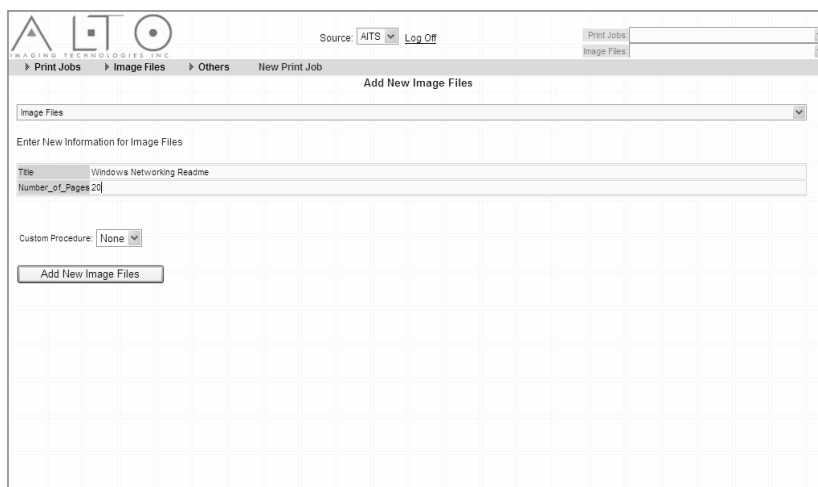
See [Accessing AITS](#) for help doing this.

2. Move your mouse pointer over **Image Files** on the AITS menu bar.

Select **Add New Image Files** from the drop-down menu.

3. Type a **Title** for the image file.

Type the **Number of Pages** if desired.

The screenshot shows the AITS web interface for adding a new image file. At the top, there is a navigation bar with 'Print Jobs', 'Image Files', and 'Others' menus. The 'Image Files' menu is active, showing a sub-menu with 'Add New Image Files'. Below the navigation, there is a form titled 'Add New Image Files'. The form has a 'Title' field with the text 'Windows Networking Readme' and a 'Number\_of\_Pages' field with the text '2'. There is also a 'Custom Procedure' dropdown menu set to 'None' and an 'Add New Image Files' button. The background of the form area is a light gray grid.

**Figure 18. Type a document title. This field is always required.**

---

**Note** Title is a required field

---

4. Click the **Add New Image Files** button.

The request is submitted.

Controls to upload the image file are displayed (Figure 19).

5. Type a **Filename** (including complete path) or click the **Browse** button to search for a file.

Click the **Upload Image File** to send the file to the Image Library.

### ***Other Options:***

**Use Template** to upload a one-page “template” as a temporary place holder.

Select **Later** to add the Image File Information without associating any content with this addition to the Image library.

The addition is confirmed and the Add New Image Files frame is

reloaded so you can continue adding image files.



**Figure 19. Add an image file now, select a template, or add the image file later.**

## Replacing or Updating Image Files

---

You can replace any document in the Image Library overwriting the original content. New content can be a different format than originally submitted.

Images stored in the TIFF format can be overwritten or have new images inserted into the original file at a specific page.

### Replacing an Image File

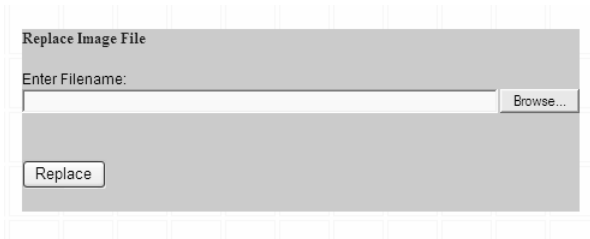
---

1. Locate and load an image file into the AITS workspace. See [Viewing Image Files](#) for help doing this.
2. Click the **Replace Image** button under the Image File Information.

The **Replace File Operation** window is displayed (Figure 20).

3. Type a Filename (including complete path) or click the **Browse** button to enter a **Filename** under **Replace Image File** heading.
4. Click the **Replace** button.

The new document replaces the original and is displayed in the viewer frame.



**Figure 20. Type a filename including path or click browse to select a replacement for the current image or document.**

## Inserting New Images

---

1. Locate and load an image file into the AITS workspace. See [Viewing Image Files](#) for help doing this.
2. Click the **Replace Image** button under the Image File Information.

The **Replace File Operation** window is displayed (Figure 21).

3. Type a **Filename** (including complete path) or click the **Browse** button to enter a **Filename** under **Insert Image File** heading.

Type a page number in the **Insert At Page** field.

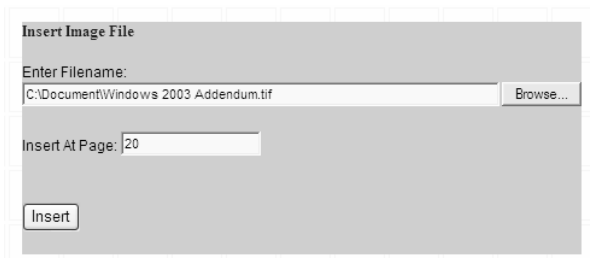
---

**Note** The new images are inserted ahead of the page currently at the page number you enter.

---

4. Click the **Insert** button.

The new images are inserted and the modified document is displayed in the viewer frame.



**Figure 21. Type a filename including path or click browse to select a file. Type a page number to specify the insertion point.**

## Submitting Image Files as New Print Jobs

---


Individual image files can be sent to a print center with the same tools used to create print jobs. Image Files that are not “print-

ready” are automatically converted and displayed for proofing prior to final submission.

1. Search for image file you want to print.

See [Searching the Image Library](#) for help doing this.

2. Place a check mark next to the title of the image file.

3. Click the  icon (**UltraPrint Web**) icon.

Each file is uploaded and the conversion process begins.

4. Preview and proof the document.

See [Previewing Print Ready Documents](#) for help doing this.

5. Create a new print job.

See [Creating a New Print Job](#) for help doing this.

6. Release the job from your print queue.

See [Managing the Print Job Queue](#) for help doing this.

---

**Note** If the image file was converted, the original remains intact in the image library. The print ready file used for this submission is discarded after it is released from the print queue.

---

## Other Tasks

---

### Viewing and Modifying Document Security

---

1. Click the  (**Security**) icon next to a document title.

The **Security** dialog opens.


2. View or modify the security settings.

Click the **Close** button.

See the *UltraDoc User Guide* for more information about document security.

### Search for Print Jobs Linked to a Document

---

1. Click the  (**Search For**) icon next to a document title.

A new **Search Result** set is returned containing all print jobs that are linked to the current document.

### Sorting Documents

---

Click a column heading to **Sort Ascending** or **Sort Descending**.









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