User Guide

XML Job Creator Add On
V21.1.0200

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EFI PrintStream | *V21.1.0200 XML Job Creator Add On User Guide*

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Introduction

Overview

The PrintStream XML Job Creator program was designed to automate the creation of PrintStream mail or print & mail jobs through the use of XML files that work with job templates previously created in your system. XML files are created by your internal programs using your customer's data files and passed to a 'hot folder' which is scanned by PrintStream, initiating the job creation routine. The program is ideal for repetitive or cyclical jobs where the primary specifications can be pre-defined in a template but offers a high degree of customization such as in the passing of customer defined data (User Defined Data) to the job and reports.

This is an add-on feature to Printstream, please contact your support representative or Streamline Sales department to activate this feature.

Contact Information

EFI Support

US Phone:	855.334.4457 (first select option 3, then press option 8, then press option 1)
US Fax:	415.233.4157
US E-mail:	printstream-support@efi.com

Regular Service Desk hours are 8:00 AM to 7:00 PM Central Time, Monday – Friday. Outside of these hours, you may leave a voice mail message and an on-call support representative will be paged. Response time is based on the severity of the issue.

Note For problems involving infrastructure (i.e., computers, networks, operating systems, backup software, printers, third-party software, etc.), contact the appropriate vendor. EFI cannot support these types of issues.

EFI Professional Services

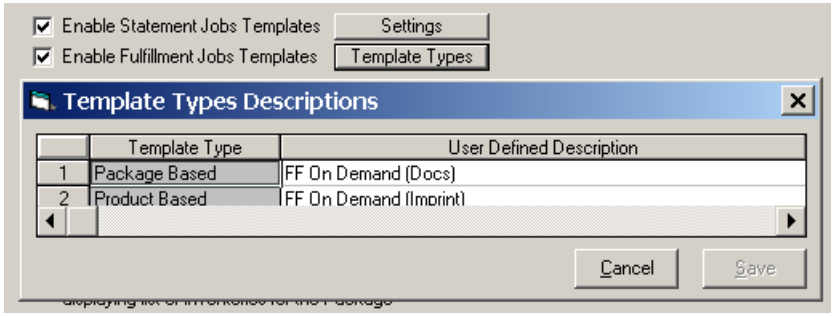
US Phone:	651.365.5321
US Fax:	651.365.5334
E-Mail:	ProfessionalServicesOperations@efi.com

Typical Workflow Overview

- Job templates Created
- XML file created
- XML file sent to hot folder
- PrintStream scans hot folder in user defined interval
- PrintStream creates job
- Work Orders automatically print to defined printers
- User Defined Data viewed in job
- PrintStream creates log file
- PrintStream archives file
- PrintStream generates job notification email to IT administrator
- PrintStream generates email to other specified personnel
- In the event of error, file moves to error folder and error email generated

Required Setup

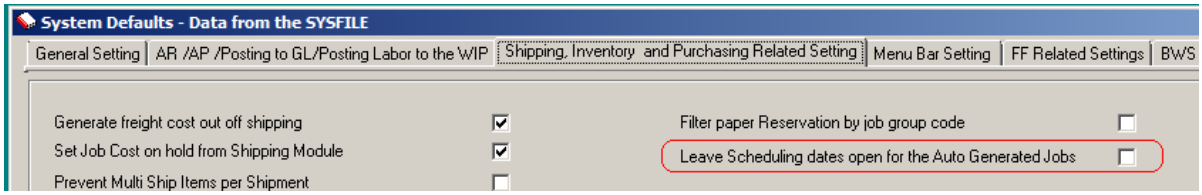
1. Streamline Support to enable license file, system settings in MF Mail Reports/features to purchase and MF Mail Process/Estimating Parameters.



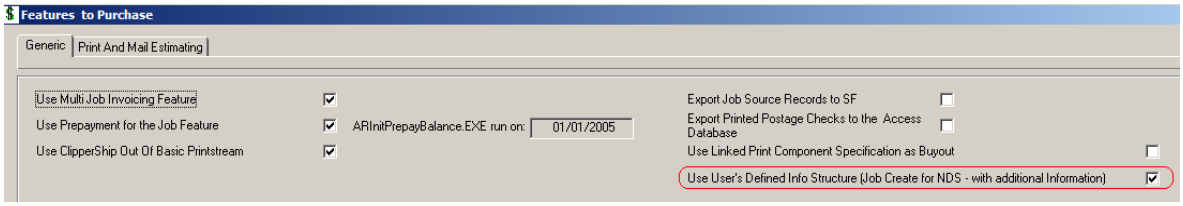
2 Publish the **XML Job Creator**, **Specifications Manager** and **Printing Profiles** programs to the PS Menu bar and set up folder structure for the Hot Folder and schema files.

Additional specialized setup options

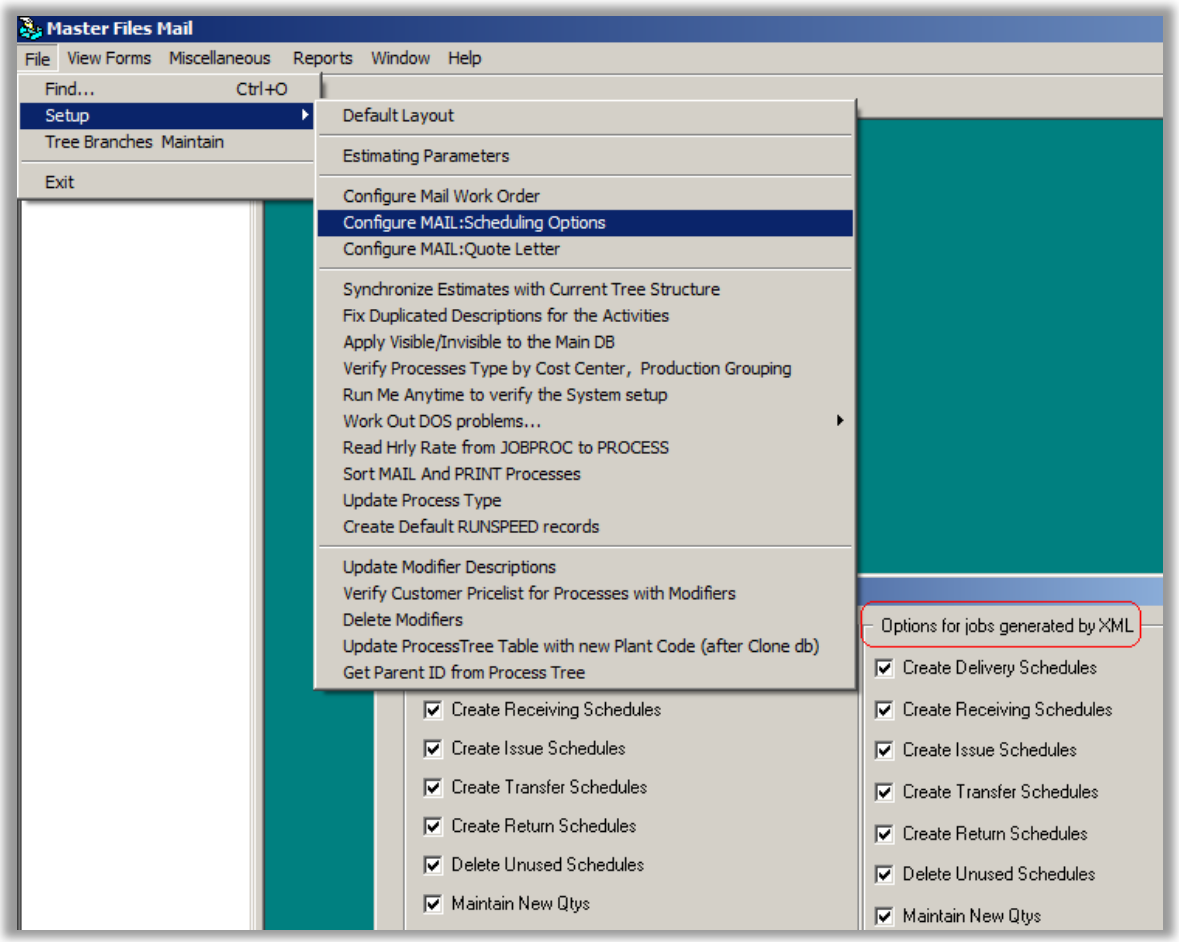
Prevent XML from populating schedule dates



Activate the additional info buttons available in the job to view User Defined Data



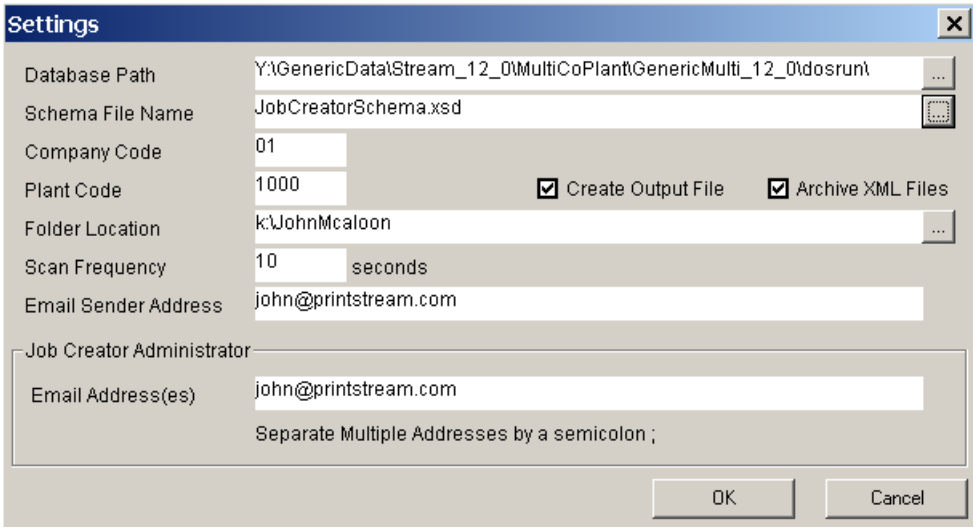
Create Inventory related scheduled tasks for XML Jobs



Define settings in XML Job Creator Program

XML Job Creator Program

File/Settings: Define all fields in the screen shot below. Streamline provides the base schema file which can be found in your Stream\psextern\SchemaDef\JobCreator folder. Check **Create Output File** and **Archive XML Files**.



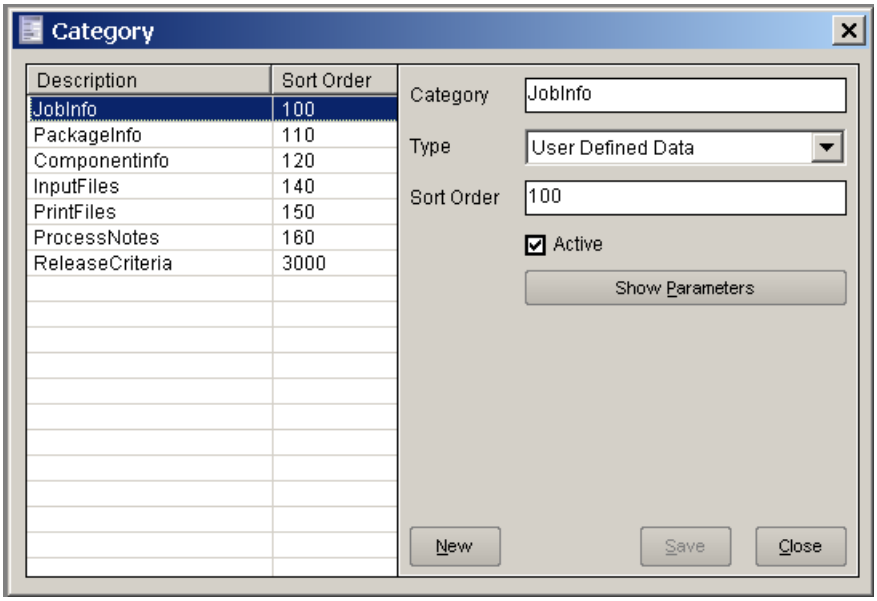
Define Categories and Parameters in Specifications Manger Program

Specifications Manager Program

File/Categories: A category is an ordered collection of parameters.

Define

- Category
- Type
- Sort order

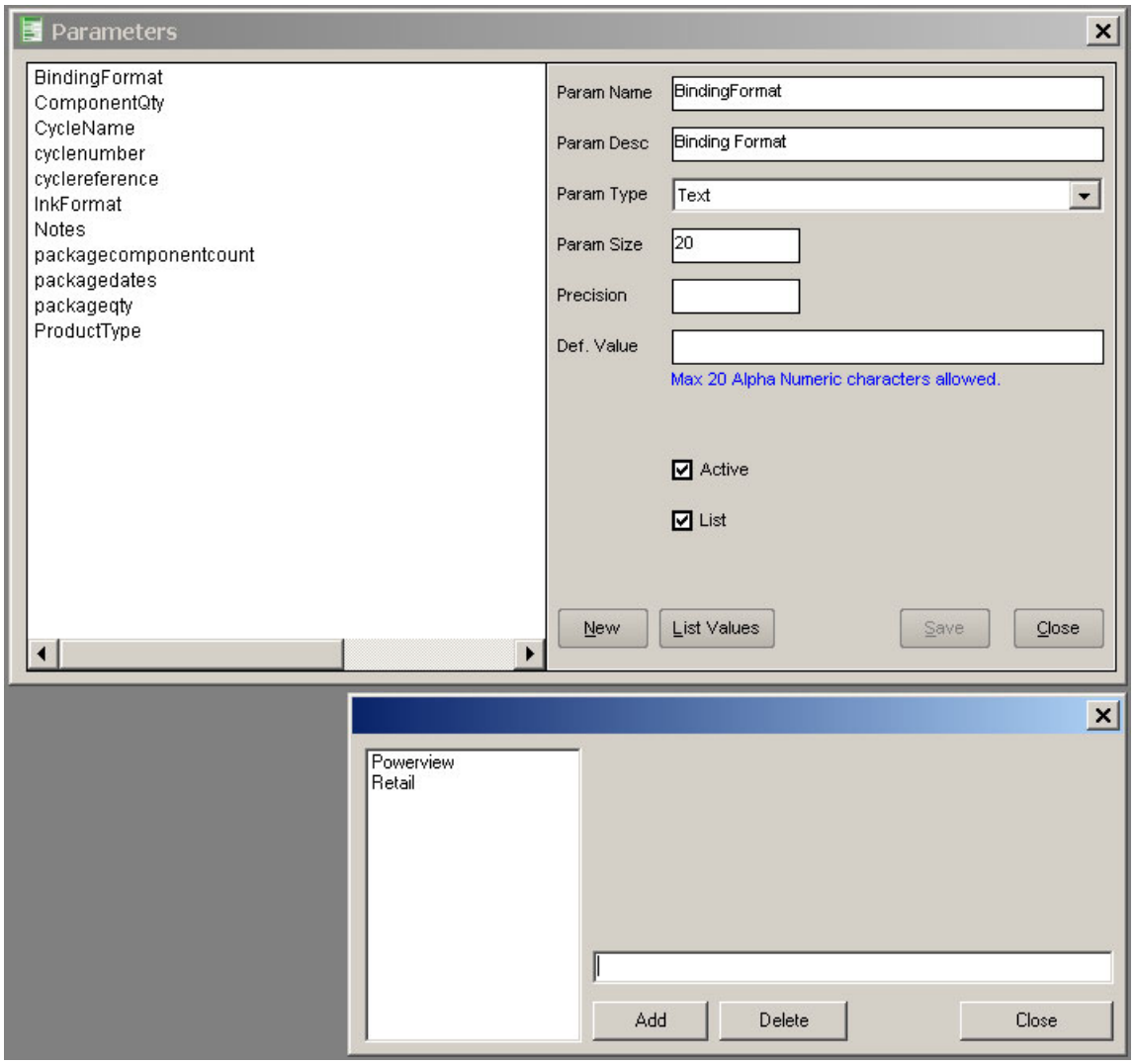


File/Parameters: A parameter is a named data element of data type test, number or another category.

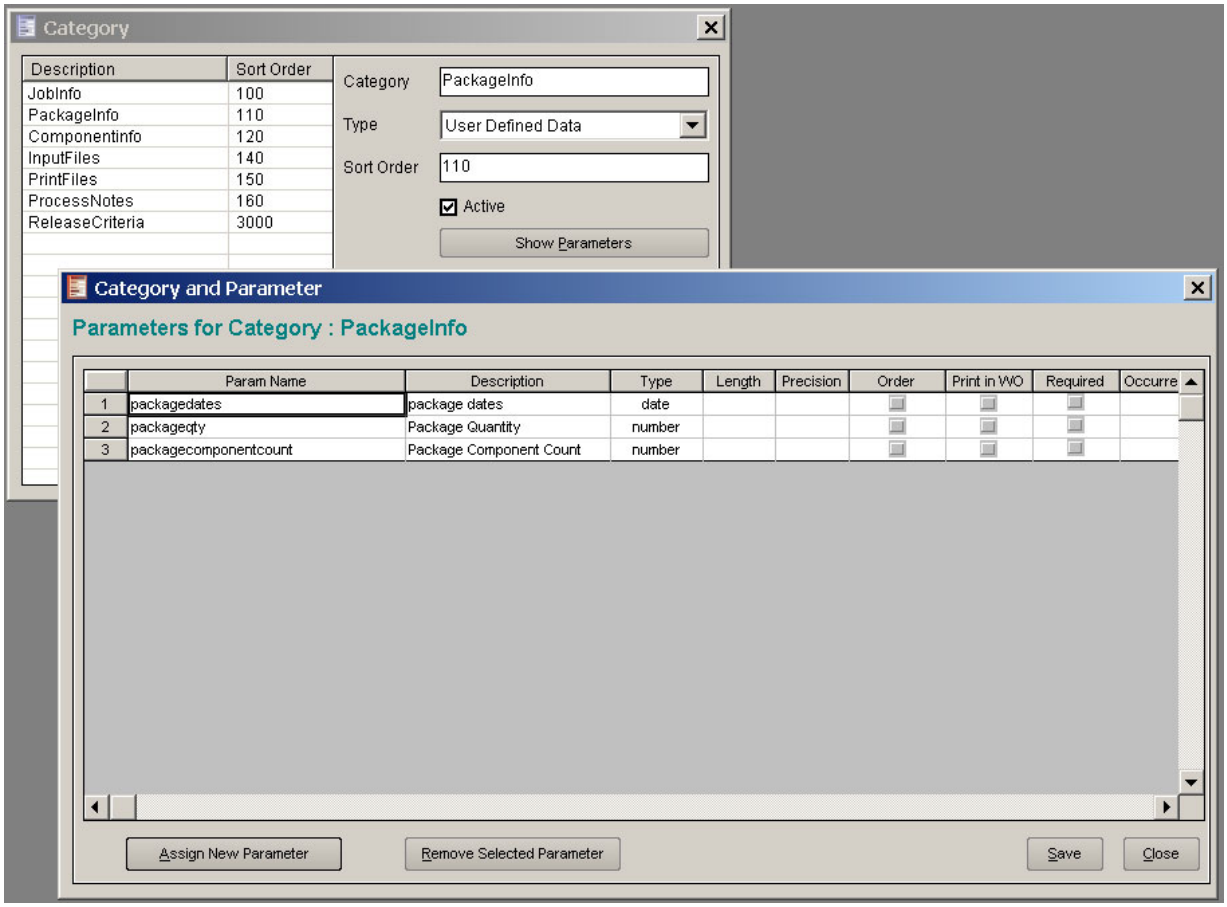
Define:

Parameter

- No spaces are allowed in the Parameter Name
- Characteristics
- Check the list checkbox and select **List Values** to add common parameter data choices available for selection in the tester program.

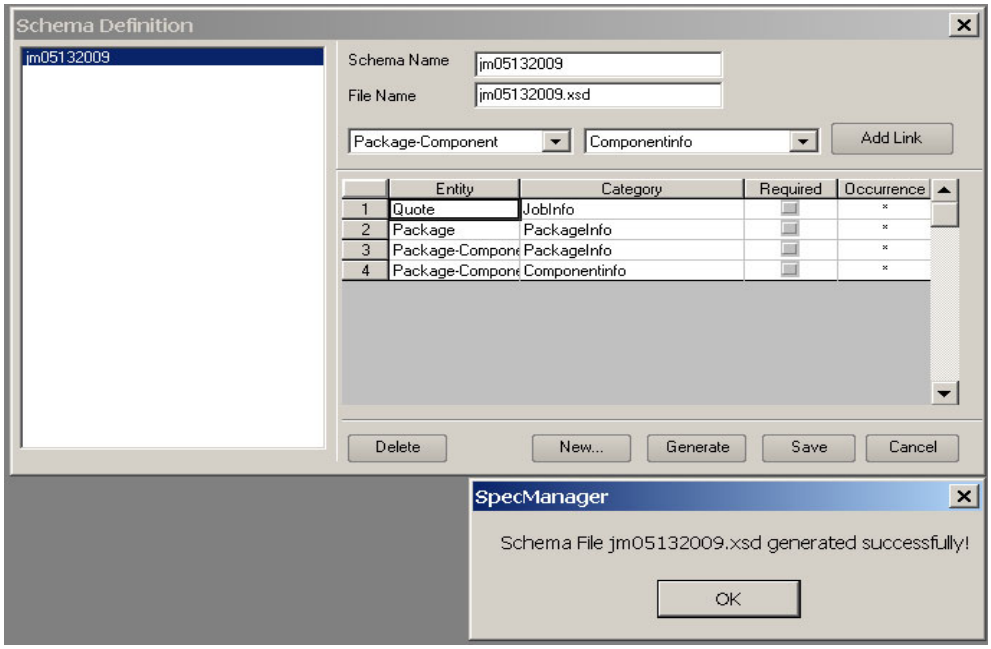


File/ Category: Assign Parameters to Categories. Select **Category** and **Show Parameters**. Double click parameter to select or remove.



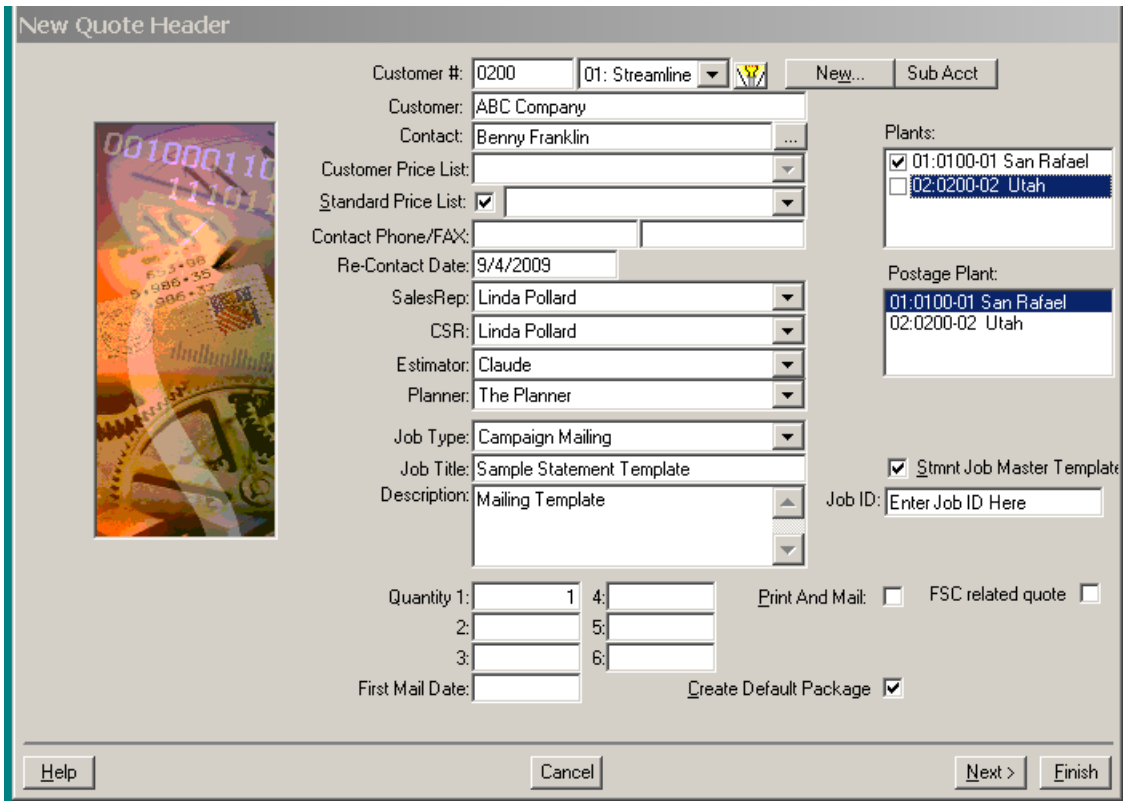
Create XML schema file from defined specifications

File/Schema Definition: Name the new schema file and link to specified Parameters, set Requirement and Occurrence options and select **Generate**. These new entities are added to the existing base schema in the new schema file. The system is designed to work with only 1 schema file at a time. Creating a generic schema file to work with all XML production requirements is recommended.



Master Template Setup

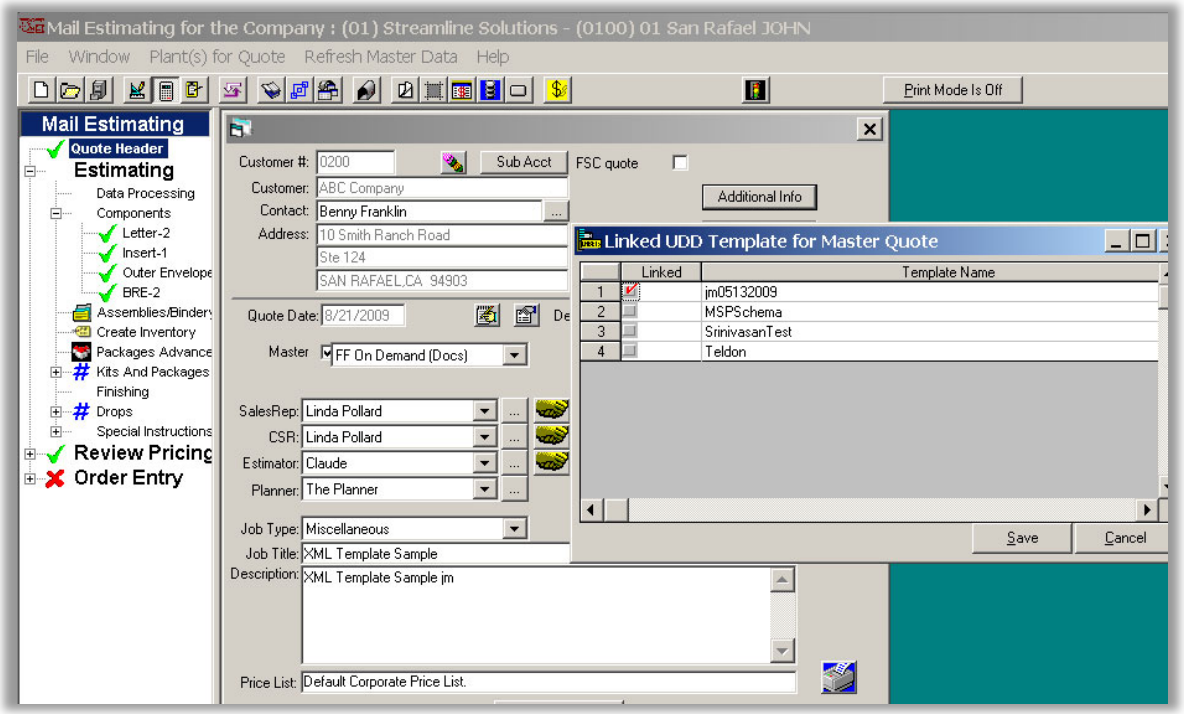
A master template is a PrintStream quote that has been defined in the quote header as a Master Template. Mail System companies who are utilizing the Statement Jobs and Contract Pricing Programs should select the **Statement Job Master Template** option in the quote header after deselecting the Print and Mail checkbox. Once checked, enter a Job ID identifier in the Job ID Box.



Print & Mail Jobs currently require that you use the FF template type. Enter the required quote header info, click **Finish** in the wizard, return to the quote header and check the **Master** box. Choose **FF On Demand Docs** or **Other FF Package** based user-defined template description as setup in estimating parameters.

The additional **Info** button in the quote header is used to **link the template to your schema file**.

Note The additional **Info** button functions differently in the quote header of a job created through XML and is referenced later in this document.



Both statement and FF master templates should use quantities of 1 to start the job.

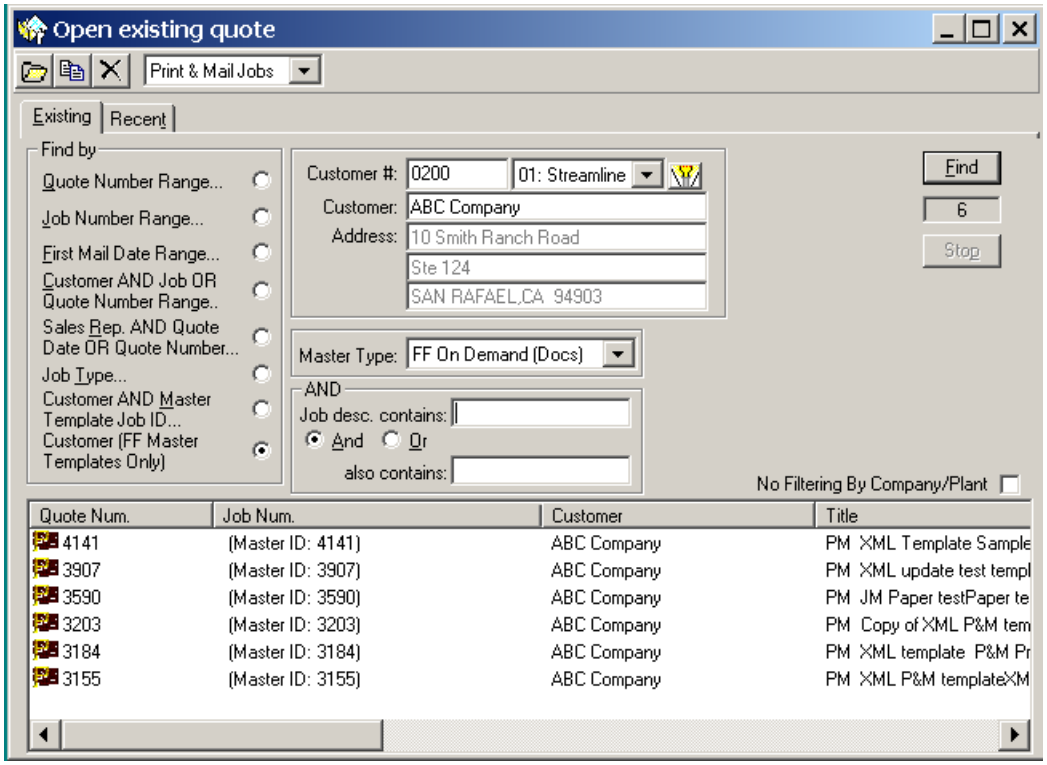
Enter with a quantity of 1:

- Component
- Component Processes
- Package
- Drop Quantities

As Process Quantities are linked to packages and the **Recalc** button is used, these quantities will change, but should reflect desired ratios for the job.

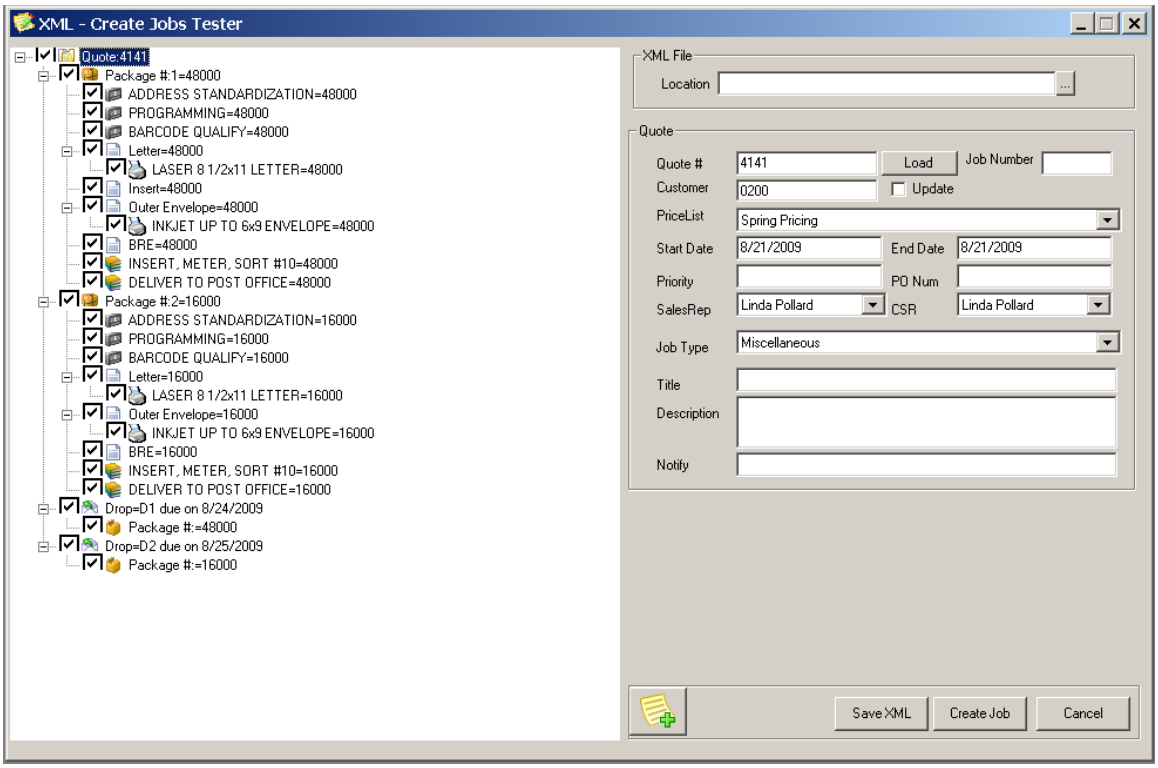
- Process Quantities should be locked in Statement Type templates if also using Contract Pricing with the Statement Jobs program.
- All Master templates should contain at least 1 package.
- Master templates should not be converted to jobs through Mail Estimating. Jobs are created from these templates through the Statement Jobs program, Create Jobs program or XML Job Creator program.

To search for Master Templates in the Mail estimating search screen, enter the Customer and select the **Customer** and **Master Template Job ID** radio button for Statement type templates or the **Customer** (FF Master Templates Only) radio button for FF template types. “Master ID” displays in the job number column.



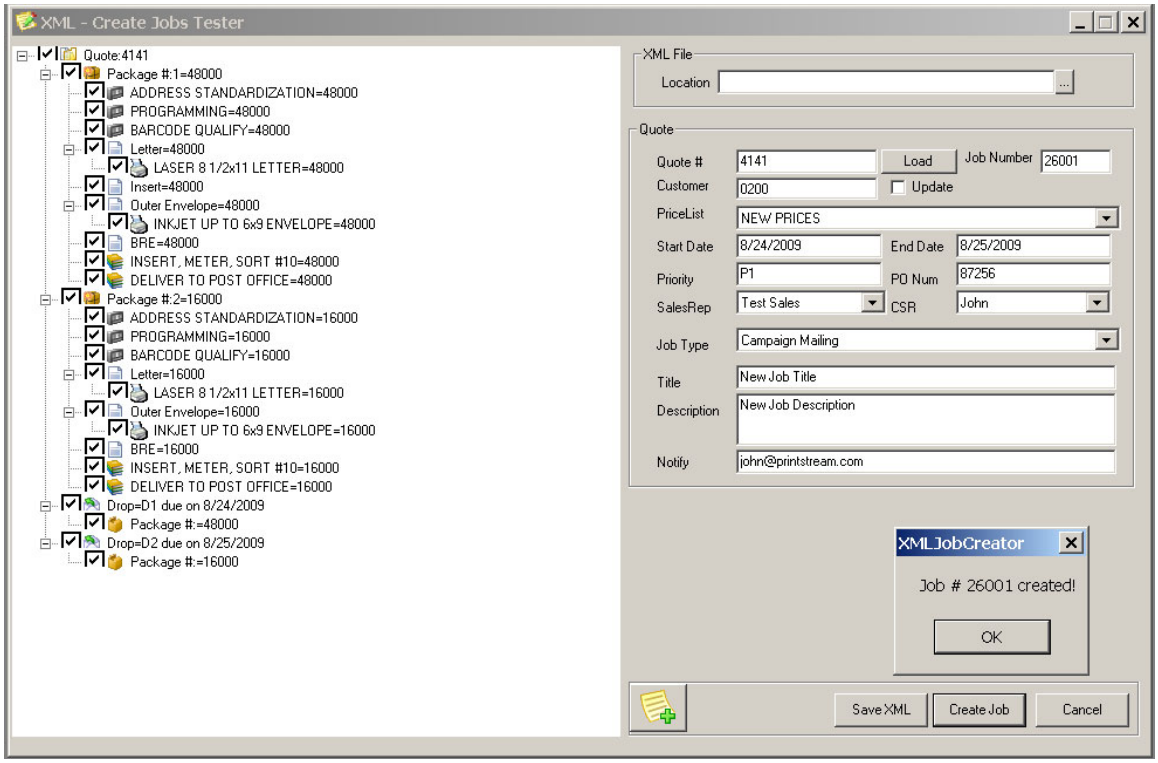
Using the XML Job Creator program to test

1. Jobs can be manually entered to replicate the results of loading an XML file.
    - File/Test: Enter the Quote Number for a Master template and open the tree at left

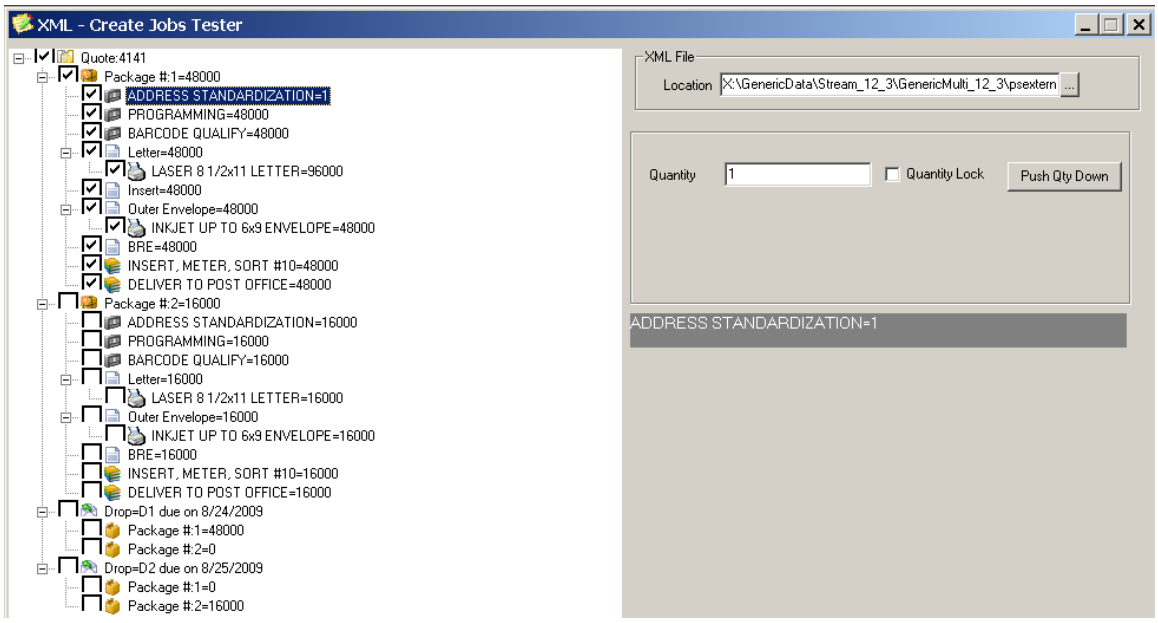


    - New XML tags have been added to enable changing the information in the master template. These are located on the right hand side of the screen below and include **Job Number** (if auto job number generation is not desired), **Customer, Priority, PO Number, Sales Rep., CSR, Job Type, Job Title,** Pricelist for Mail activities and **Job Description**. **Start Date/End Date** entries are required and are used for drop dates if specific drop dates are not entered in tree at the left.
    - Jobs can be created directly through the tester program by clicking **Create Job**.

Note Some XML features such as swapping Inventory items through the XML file require that Jobs be created through the hot folder.



2. Click the box to the left of the Quote Number to select all Packages, Components, Processes and Drops. You can also individually select Packages, Components and Processes. Enter quantities by selecting **Package/Process** or **Component** and enter the quantity. The quantity can also be optionally locked. A package quantity can also be entered then pushed to the Packages Components and processes by selecting **Push Quantity Down** located to the right of the Quantity entry field.

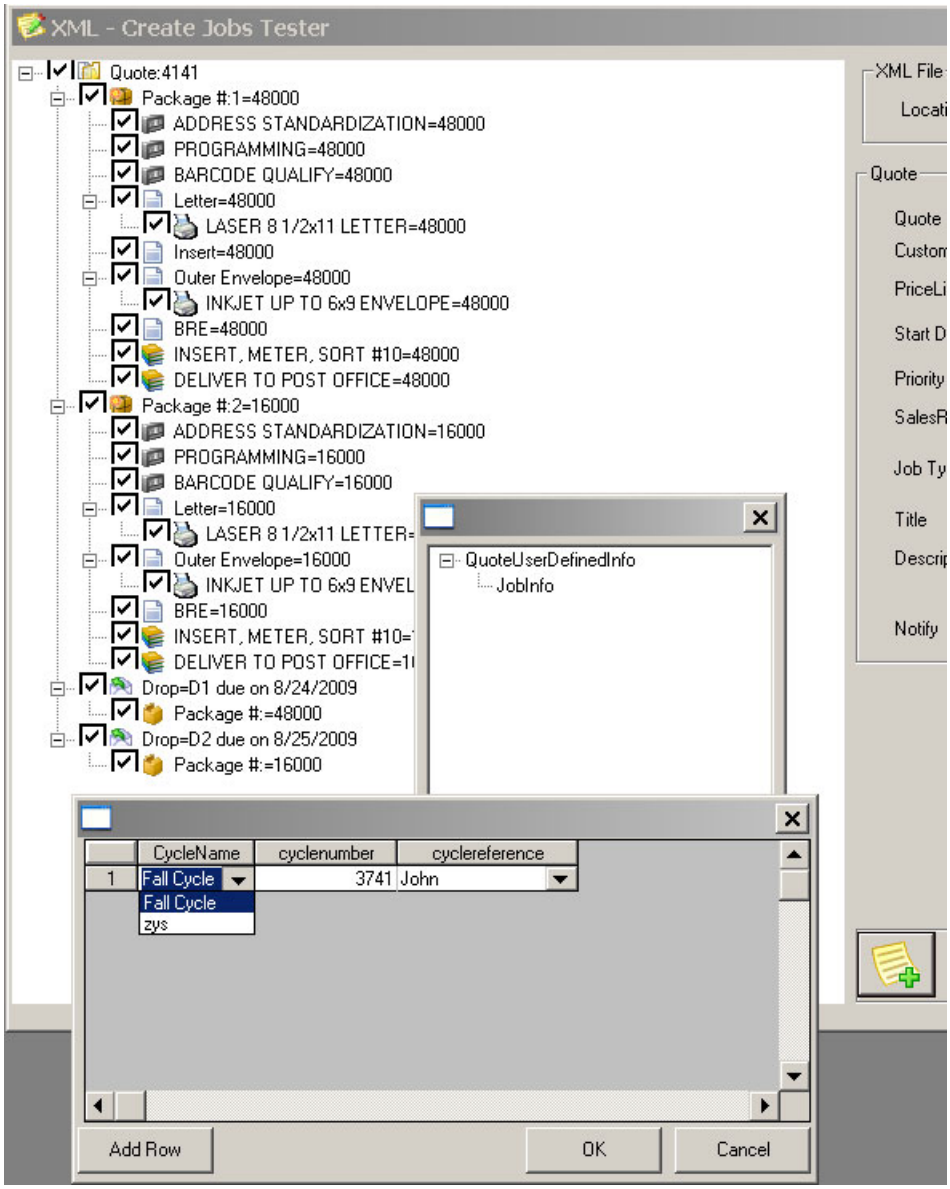


Note Placing a check to left of Process or Component will result in the quantity displayed in the tree. This is pulled from the template and is overridden by entering the Quantity. Selecting no checkbox next to process will result in the quantity being pulled from Package Quantity if package is checked.

3. Enter **User Defined Data** (User Defined Data): Select the first line in the tree to reveal the entry box for selection of User Defined Category. Select the category to open a window to select and enter parameter data. The icon for entering User Defined Data is also available by selecting the Package, Component, or Process line in the tree if categories and parameters have been defined to do so in the **Spec Manager** program and **Schema File**.

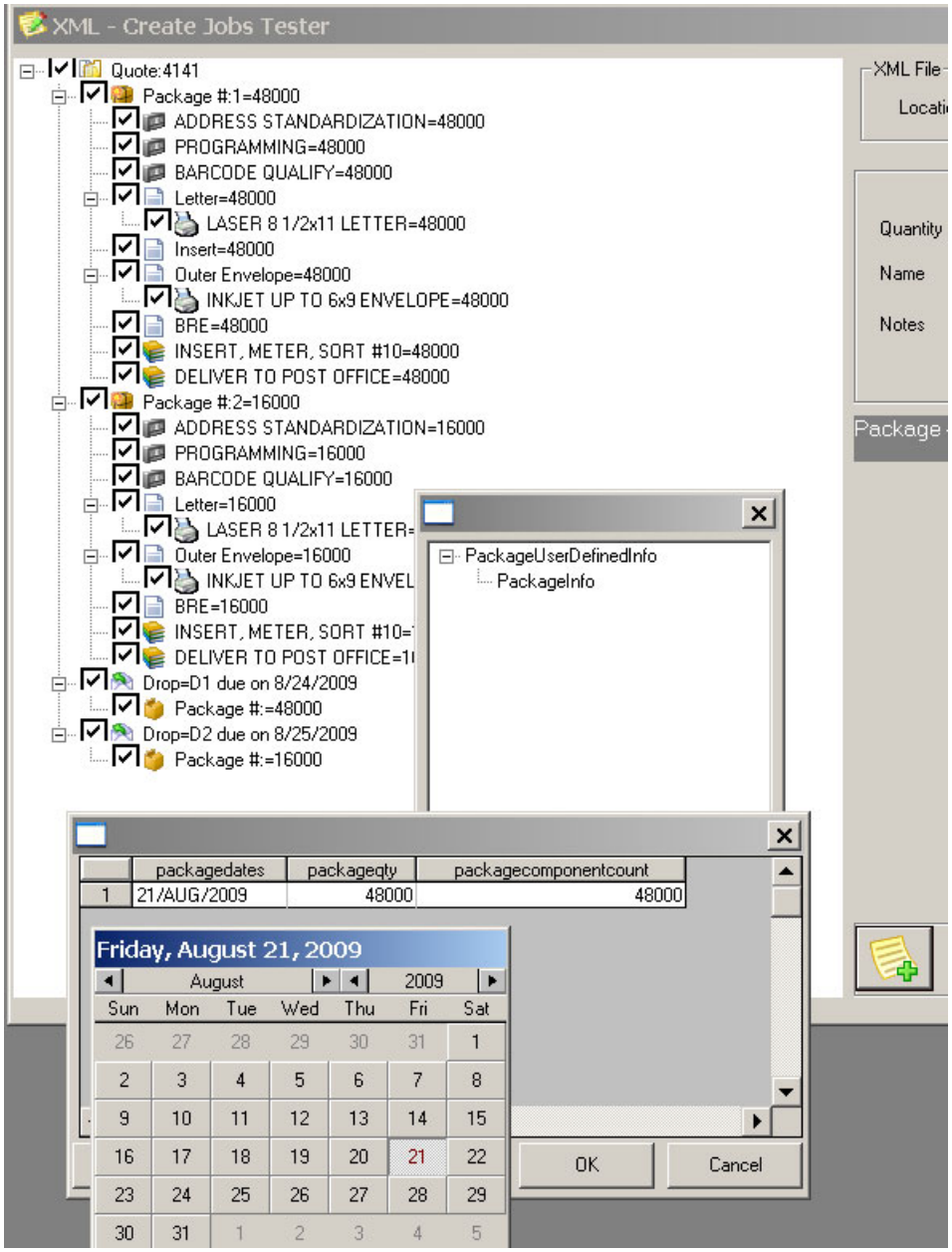
   The screen below illustrates the User Defined Data entry field at the level of the quote.

Note In this example the User Defined Data is available with a drop-down list. These data selections were previously set up with the Spec Manager/Parameters/List Values option.

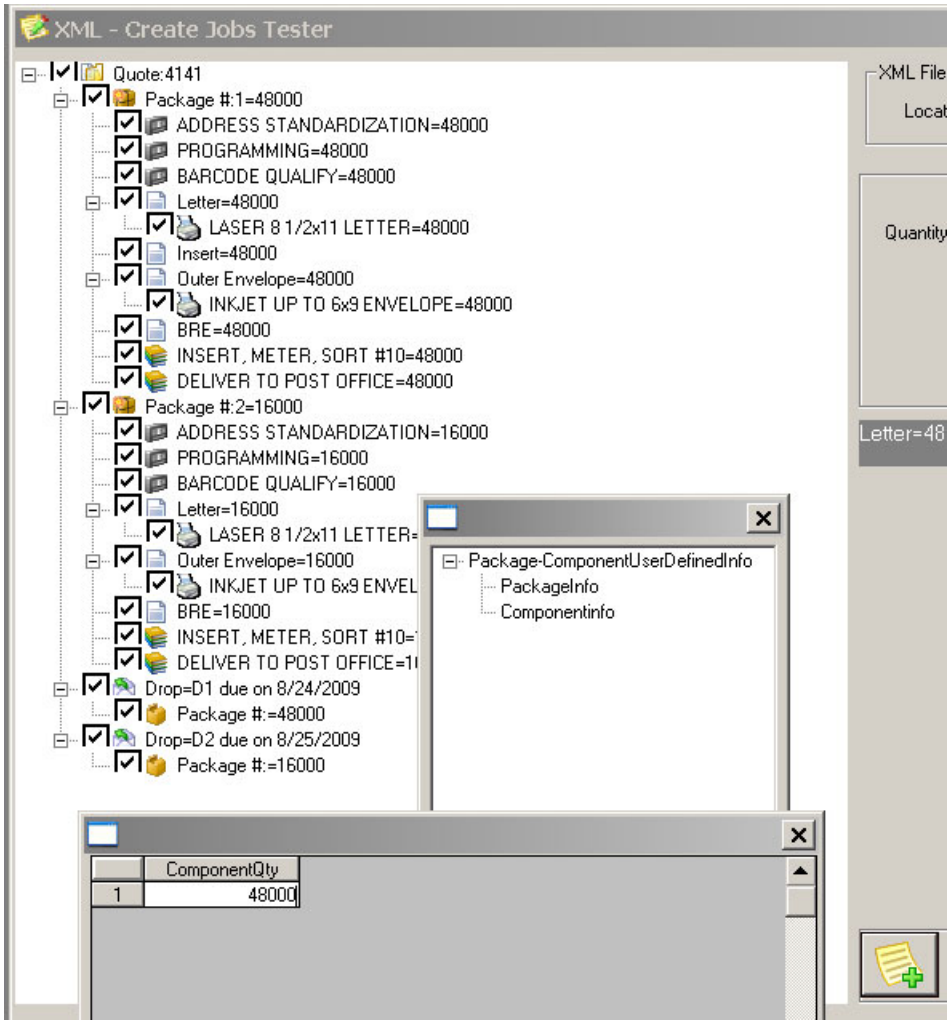


The screen below illustrates the User Defined Data entry field at the level of the Package.

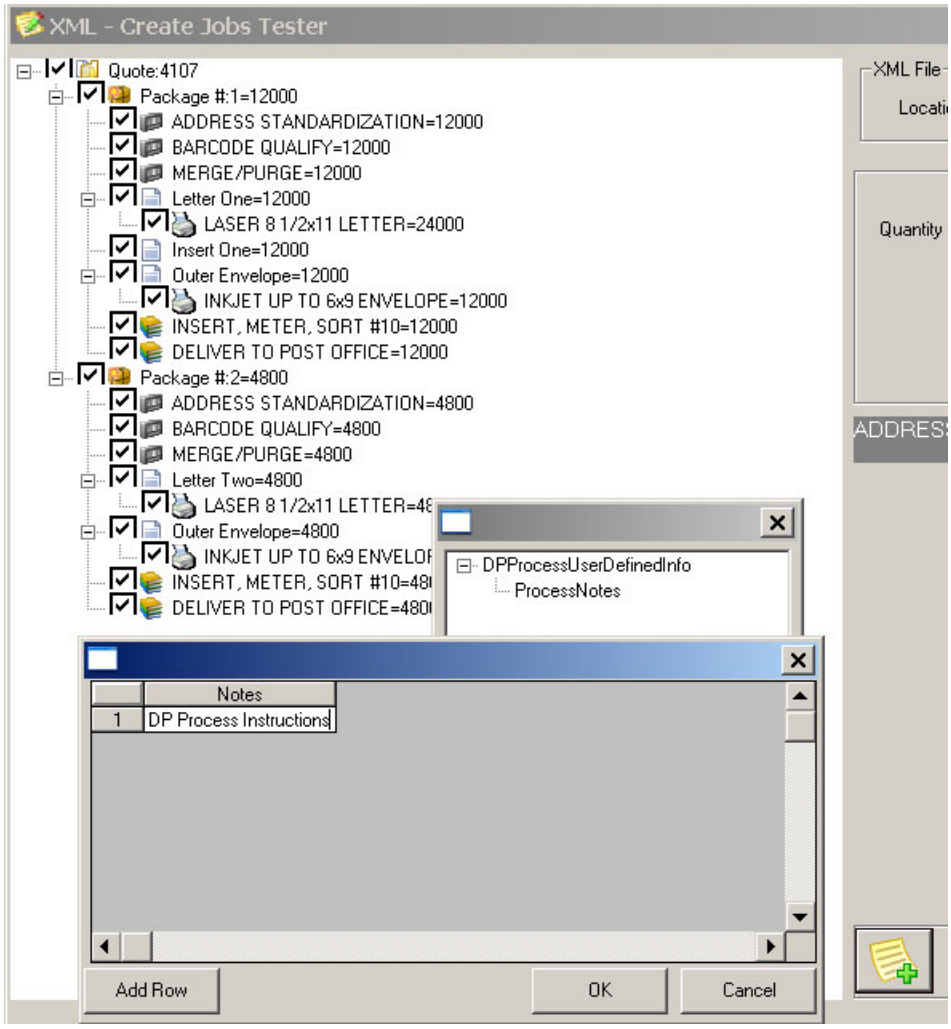
Note Double click the Date Entry fields to display a calendar for date selection.


XML - Create Jobs Tester
Quote:4141
Package #:1=48000
ADDRESS STANDARDIZATION=48000
PROGRAMMING=48000
BARCODE QUALIFY=48000
Letter=48000
LASER 8 1/2x11 LETTER=48000
Insert=48000
Outer Envelope=48000
INKJET UP TO 6x9 ENVELOPE=48000
BRE=48000
INSERT, METER, SORT #10=48000
DELIVER TO POST OFFICE=48000
Package #:2=16000
ADDRESS STANDARDIZATION=16000
PROGRAMMING=16000
BARCODE QUALIFY=16000
Letter=16000
Outer Envelope=16000
BRE=16000
Drop=D1 due on 8/24/2009
Package #:=48000
Drop=D2 due on 8/25/2009
Package #:=16000
XML File
Quantity
Name
Notes
Package
PackageUserDefinedInfo
PackageInfo
packagedates
packageqty
packagecomponentcount
1
21/AUG/2009
48000
48000
Friday, August 21, 2009
August
2009
Sun Mon Tue Wed Thu Fri Sat
OK
Cancel

The screen below illustrates the User Defined Data entry field at the level of the component.



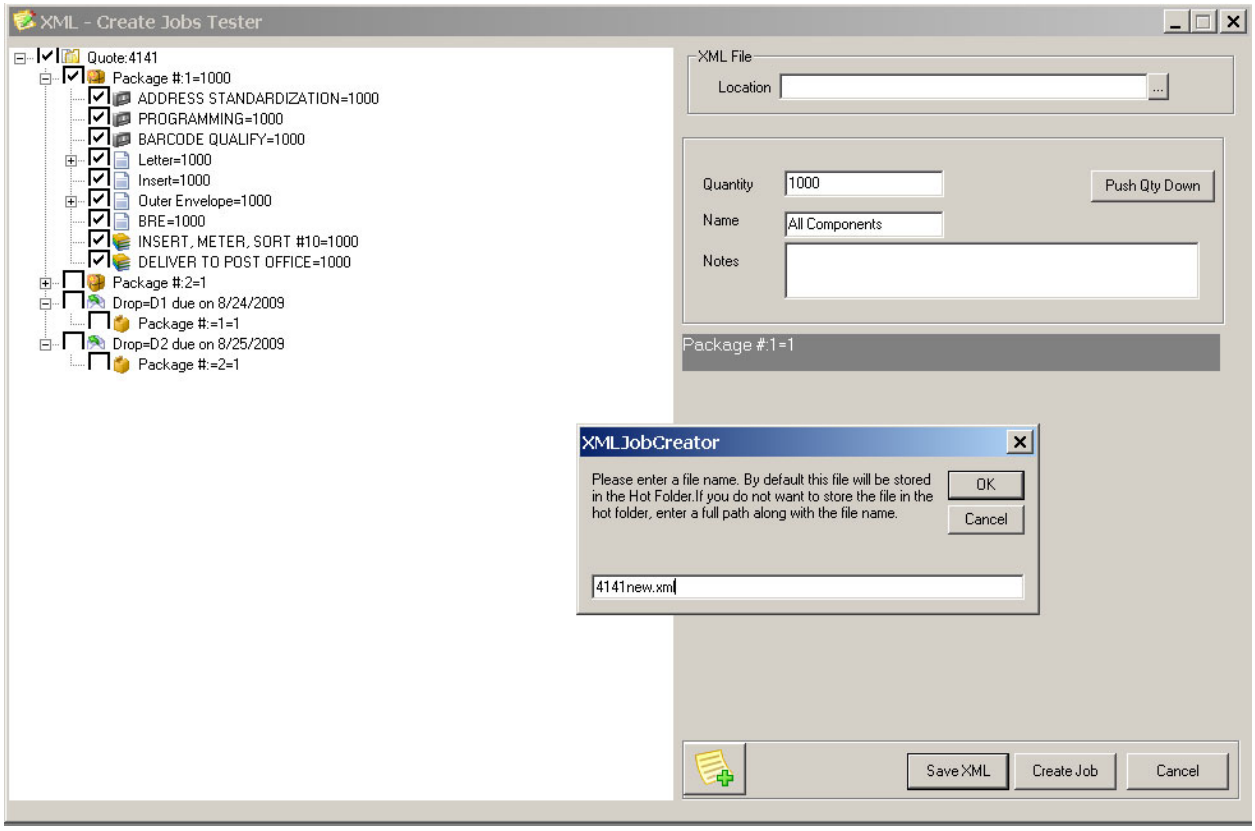
The screen below illustrates the User Defined Data entry field at the level of the Process.



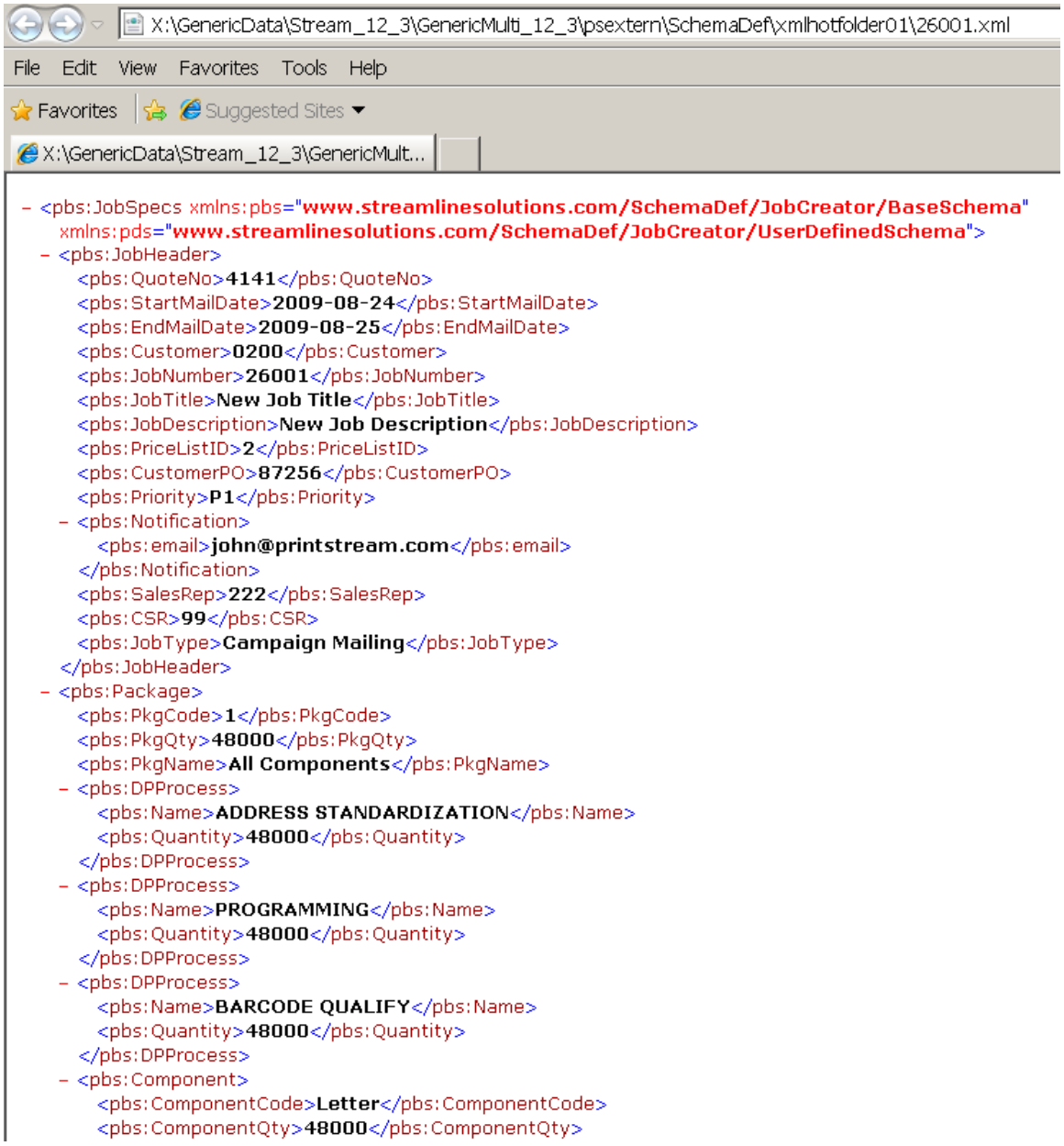
Below is an example of how User Defined Data Process information is displayed in an XML file.

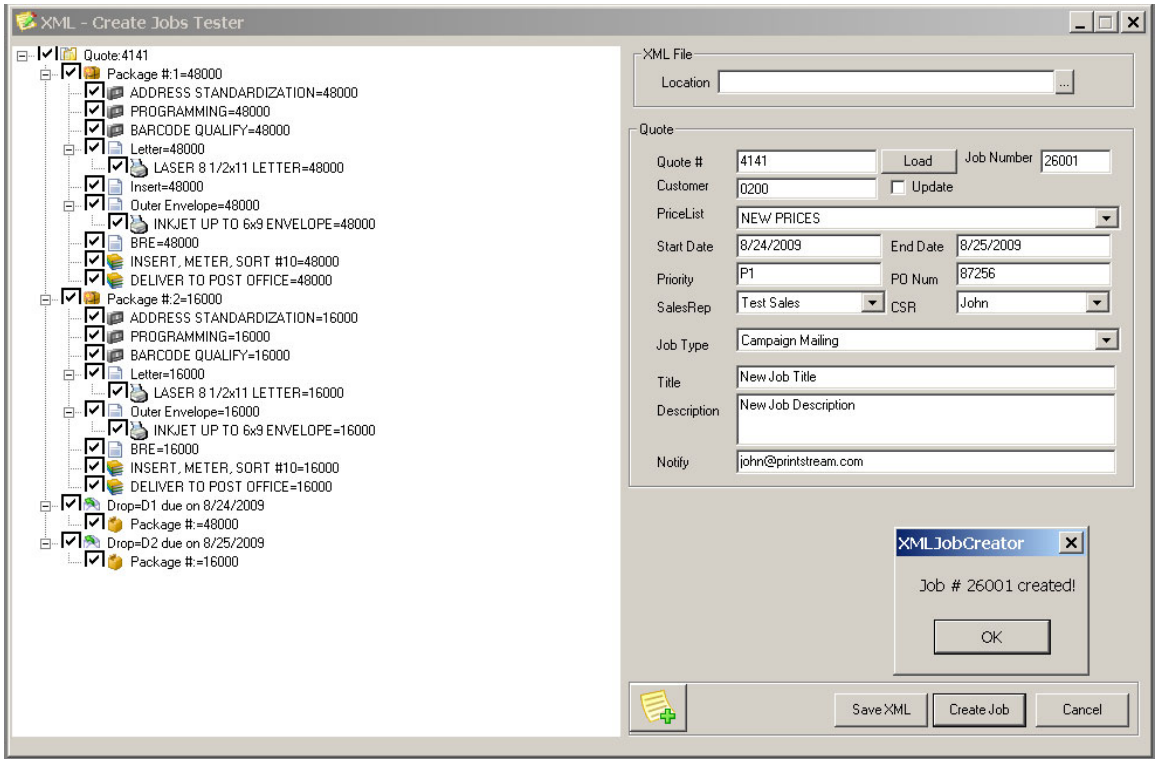
```
- <pbs:DPProcessUserDefinedInfo>
  - <pds:ProcessNotes>
      <pds:Notes>DP Process Instructions</pds:Notes>
    </pds:ProcessNotes>
  </pbs:DPProcessUserDefinedInfo>
```

By selecting **Save XML** at the lower right, a dialogue box displays for entry of a path and file name.

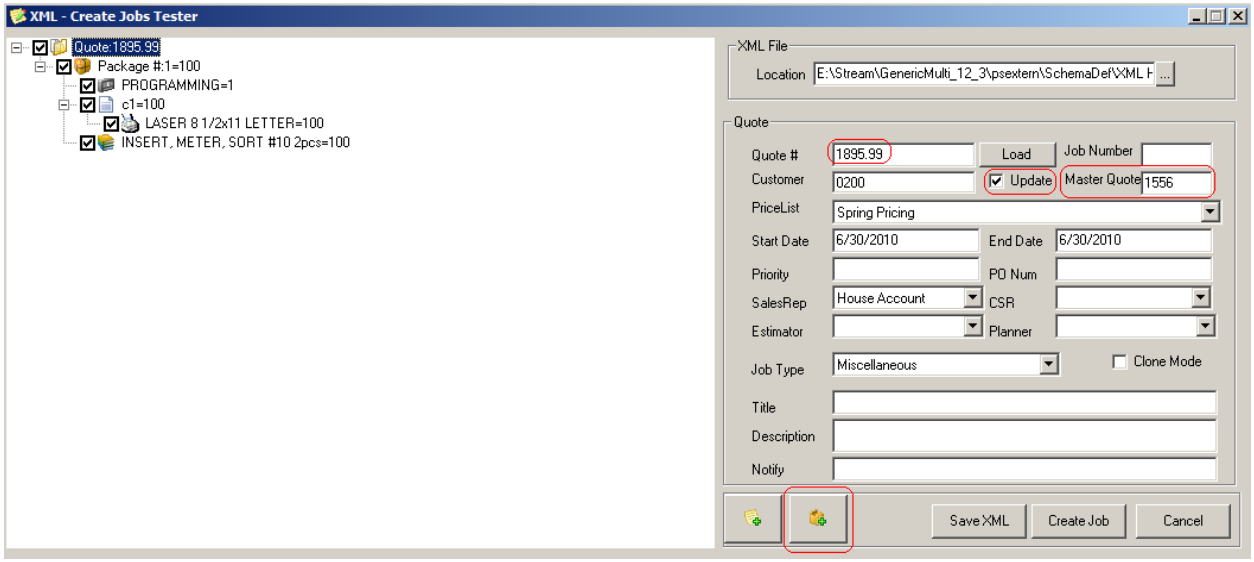


4. Click **OK** to open the XML file in internet explorer for review.





Note The fields and button circled below are features in development that assist with creating XML test files for new v2011 features discussed at the end of this document. By entering the quote number for a job already created through XML, selecting the update checkbox, then selecting the circled icon below, the user can select additional packages from the master template to append the existing job.



Creating Jobs through the hot folder

Note The XML Job Creator program cannot be run as a Windows Service, however it CAN be run as an unattended program as an auto-startup with command line parameters shown below.

/U = “User”

/F = “Plant Code”

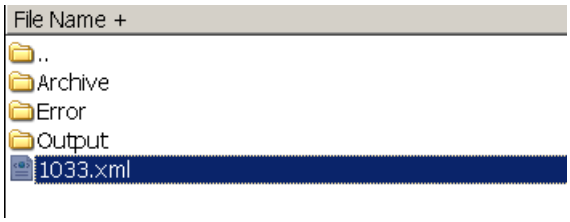
/C = “Company Code”

/D= “Database Path”

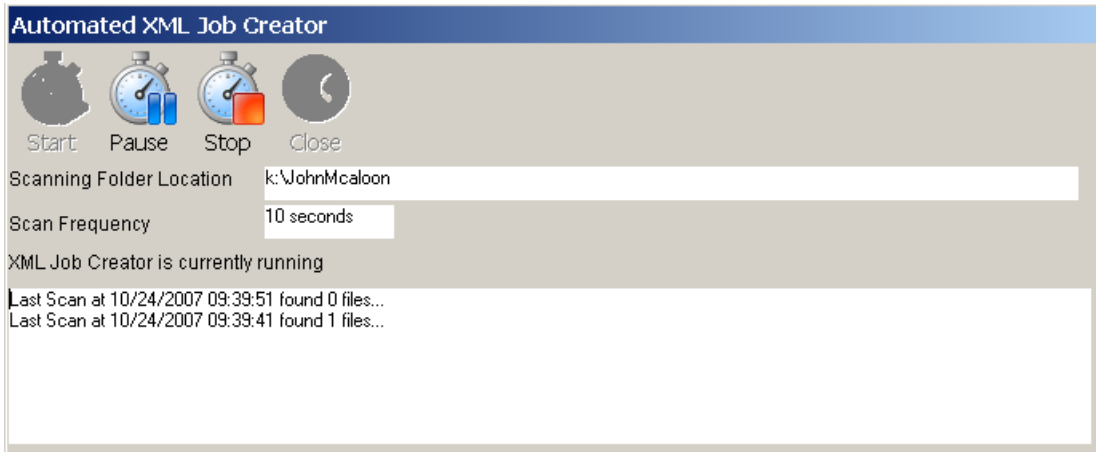
Example:

/U:"XYZ"; /F:"0100";/C:"01";/S:"0";/D:"X:\GenericData\Stream_12_3\GenericMulti_12_3\dosrun"; /P:"TFTFTF"

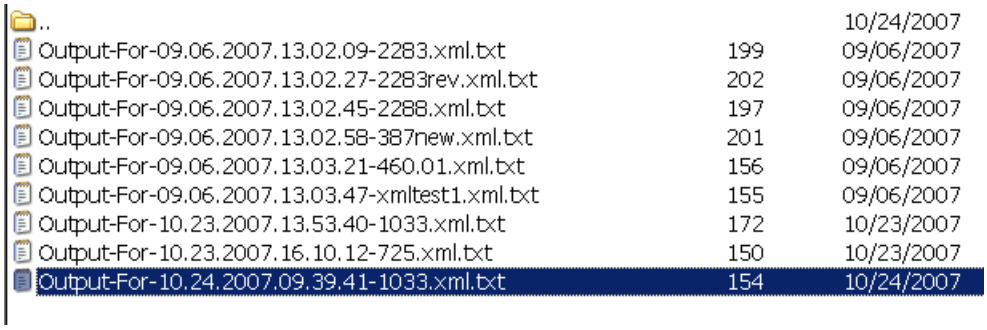
1. Place an XML file in the root of the designated hot folder



2. Navigate to the XML Job Creator program File/Folder Scanner and start the scanner. The system will scan the folder for new XML files and display results in the scanner window. In the example below, the 9:39:41 scan found 1 file. The last scan shows no files because the file has been moved to an archive folder after job creation.



The “Output folder” has been updated with a new file



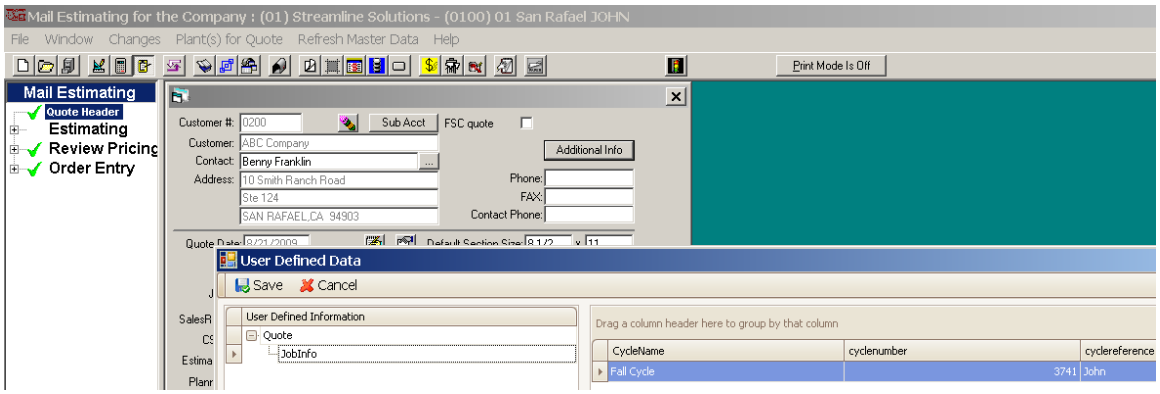
Opening the file displays details of the job that has been created.

```
1: XML FileName :  1033.xml
2: Template Referenced :   1033
3: Job Number :    847
4: Customer Name : STREAM
5: Number of Packages Created:     1
6: Number of Drops Created:        1
```

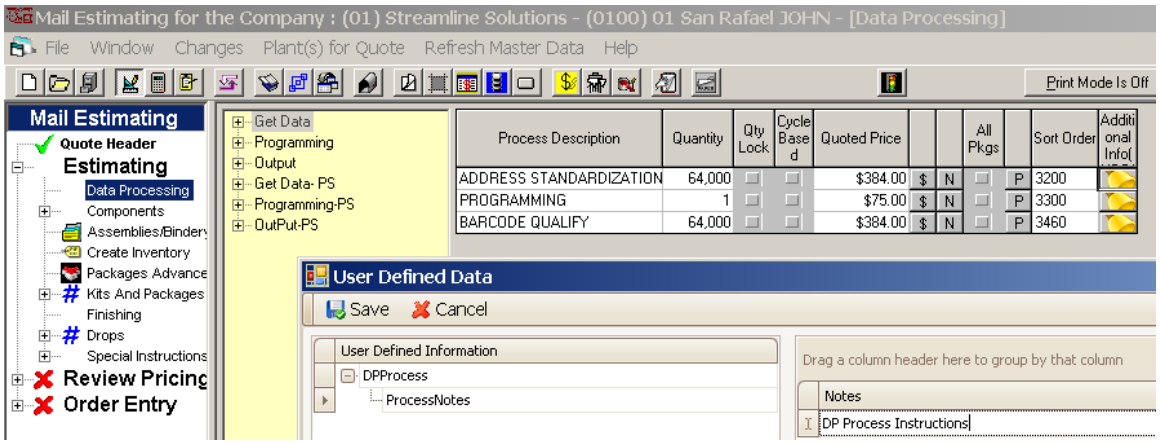
The **Archive** folder now contains the original XML file. The file name has been appended with date and time of job creation.

..		10/24/2007
09.06.2007.10.08.57-pkg2.xml	1,787	08/13/2007
09.06.2007.13.02.08-2283.xml	4,723	08/14/2007
09.06.2007.13.02.26-2283rev.xml	4,495	08/14/2007
09.06.2007.13.02.42-2288.xml	4,844	08/15/2007
09.06.2007.13.02.58-387new.xml	4,743	08/14/2007
09.06.2007.13.03.20-460.01.xml	5,254	08/13/2007
09.06.2007.13.03.37-xmltest1.xml	606	04/10/2007
10.23.2007.13.53.40-1033.xml	1,170	10/23/2007
10.23.2007.16.10.12-725.xml	2,933	10/23/2007
10.24.2007.09.39.41-1033.xml	1,169	10/24/2007

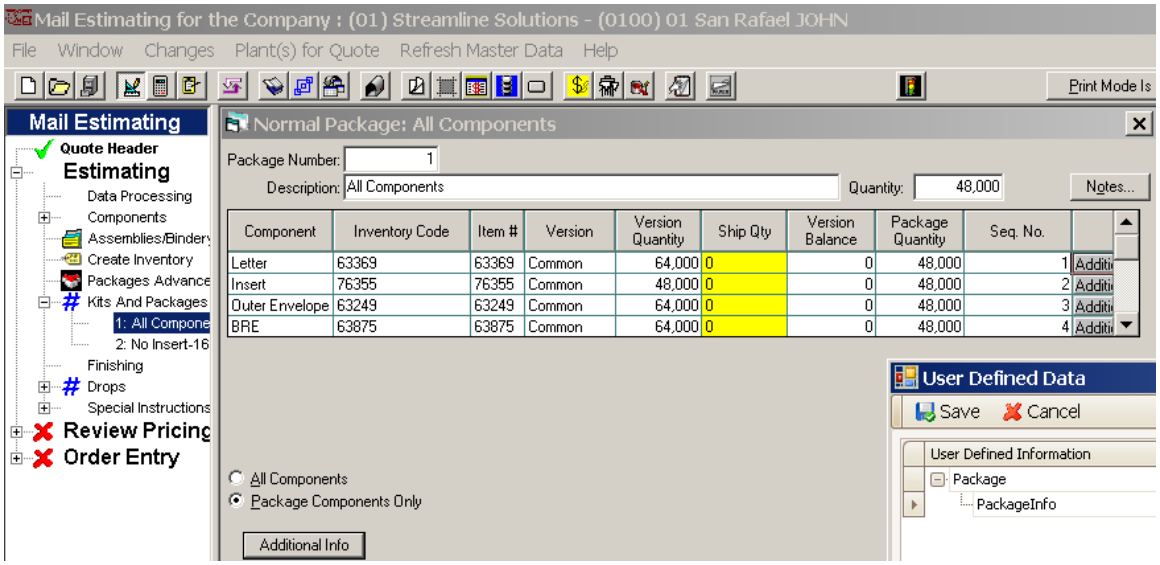
Reviewing the job that has been created, the job level User Defined Data can be viewed and updated in the estimate by selecting **Additional Info** in the quote header.



Data Processing, Component or **Finishing Process** information can be viewed and edited by selecting the yellow icon to the right of each process line.

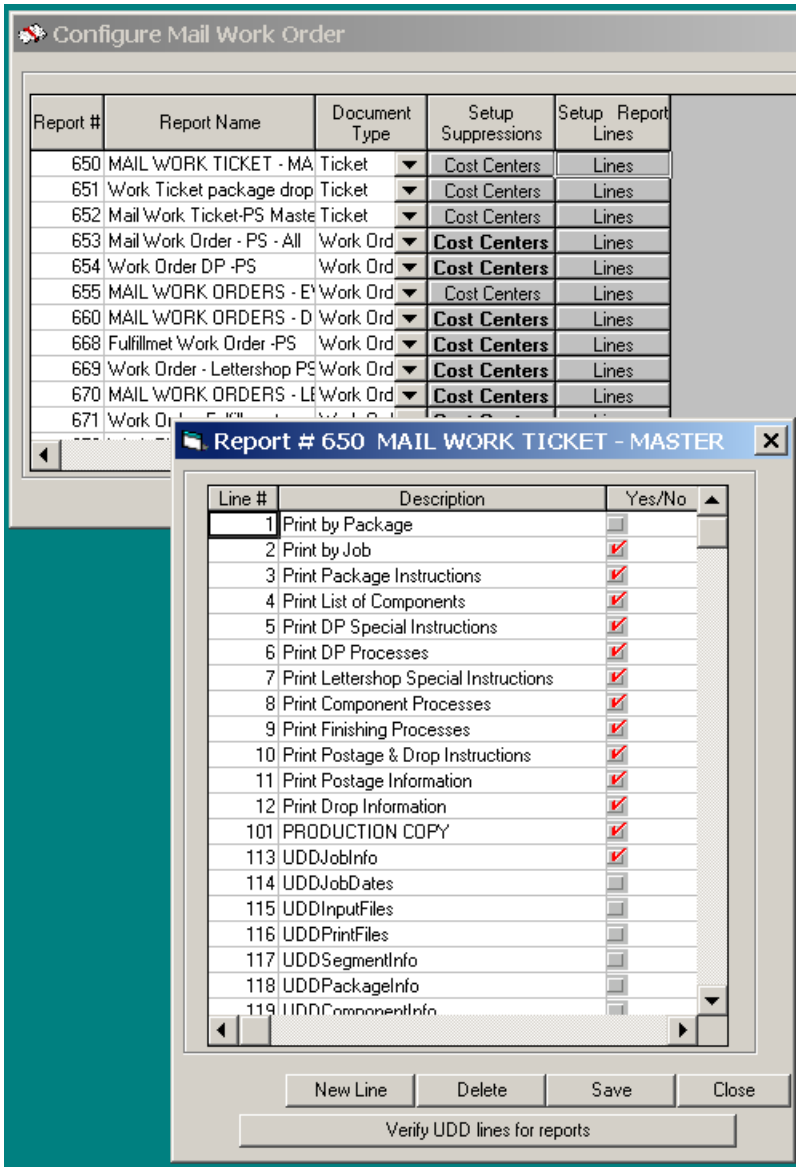


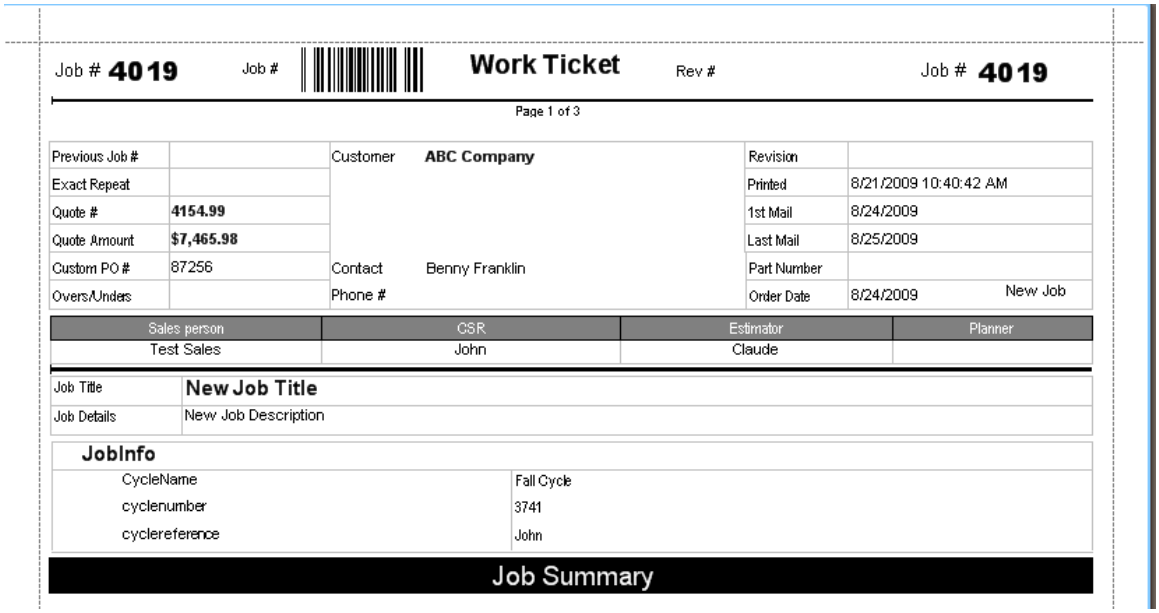
Entered User Defined Data can also be selected at the Package and Component levels by selecting the package and **Additional Info** below at the bottom left and to the right of each component line.



Dependent upon chosen parameter specifications, User Defined Data will display within **Work Order** and **Work Tickets.** This may require setup in Master Files Mail Process/File/Setup/Configure Mail Work Order.

3. Select **Lines** for the report and check the desired User Defined Data line for the report. Select the **Verify User Defined Data Lines for Report** and run for the initial setup. Report formats may also need to be edited in the tables by your Support Representative. Customized placement and positioning of User Defined Data in work documents can be customized through a custom programming request. Printing of User Defined Data on the ".net work ticket" is also supported.





Job # **4019** Job # **Work Ticket** Rev # Job # **4019**

Page 1 of 3

Previous Job #		Customer	**ABC Company**	Revision	
Exact Repeat				Printed	8/21/2009 10:40:42 AM
Quote #	**4154.99**			1st Mail	8/24/2009
Quote Amount	**$7,465.98**			Last Mail	8/25/2009
Custom PO #	87256	Contact	Benny Franklin	Part Number	
Overs/Unders		Phone #		Order Date	8/24/2009 New Job

Sales person	OSR	Estimator	Planner
Test Sales	John	Claude	

Job Title	**New Job Title**
Job Details	New Job Description

JobInfo

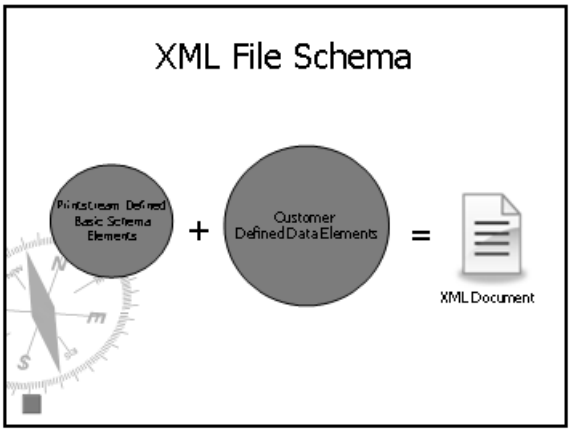
CycleName	Fall Cycle
cyclenumber	3741
cyclereference	John

Job Summary

XML File Requirements

The XML file created by your application must conform to the supplied JobCreator/BaseSchema and can be expanded to contain your customer defined elements.(sample below is partial)

```
xmlns:pbs="www.streamlinesolutions.com/SchemaDef/JobCreator/BaseSchema"
targetNamespace="www.streamlinesolutions.com/SchemaDef/JobCreator/BaseSchema" eleme
<xs:element name="JobSpecs" type="pbs:JobSpecsType" />
- <xs:complexType name="JobSpecsType">
  - <xs:sequence>
      <xs:element name="JobHeader" type="pbs:JobHeaderType" />
      <xs:element name="Package" type="pbs:PackageType" maxOccurs="unbounded" />
      <xs:element name="Drop" type="pbs:DropType" minOccurs="0" maxOccurs="unbounded" />
    </xs:sequence>
  </xs:complexType>
- <xs:complexType name="JobHeaderType">
  - <xs:all>
      <xs:element name="QuoteNo" type="xs:string" />
      <xs:element name="StartMailDate" type="xs:date" />
      <xs:element name="EndMailDate" type="xs:date" />
      <xs:element name="Customer" type="xs:string" minOccurs="0" />
      <xs:element name="JobNumber" type="xs:int" minOccurs="0" />
      <xs:element name="JobTitle" type="xs:string" minOccurs="0" />
      <xs:element name="JobDescription" type="xs:string" minOccurs="0" />
      <xs:element name="PriceListID" type="xs:int" minOccurs="0" />
      <xs:element name="CustomerPO" type="xs:string" minOccurs="0" />
      <xs:element name="Priority" type="xs:string" minOccurs="0" />
      <xs:element name="Notification" type="pbs:NotificationType" minOccurs="0" />
      <xs:element name="ErrorNotification" type="pbs:NotificationType" minOccurs="0" />
      <xs:element name="SalesRep" type="xs:int" minOccurs="0" />
      <xs:element name="CSR" type="xs:int" minOccurs="0" />
      <xs:element name="JobType" type="xs:string" minOccurs="0" />
      <xs:element name="Update" type="xs:boolean" default="false" minOccurs="0" />
    </xs:all>
  </xs:complexType>
- <xs:complexType name="PackageType">
```

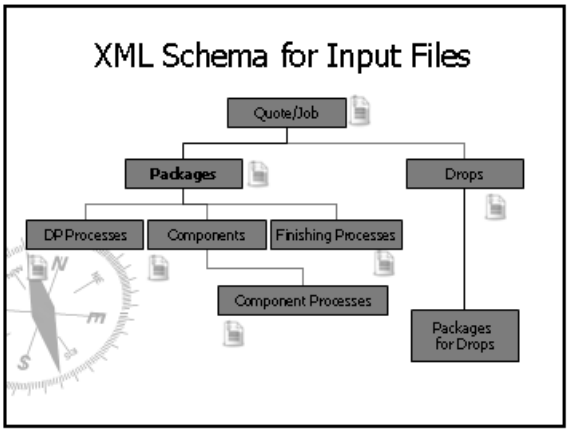


The XML file must contain job information including:

- Start/End Mail dates
- Master Quote number
- Package Identifiers
- Quantities

Optional:

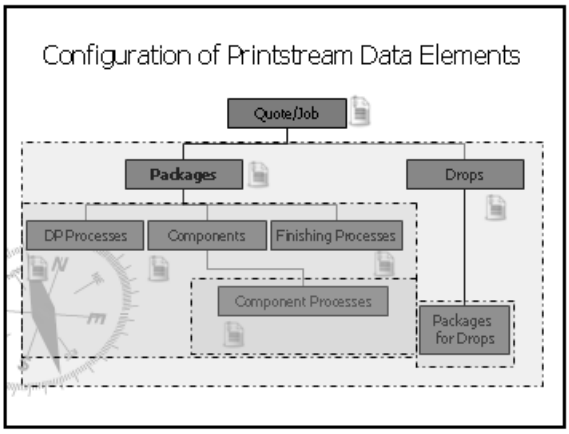
- Data Processing
- Finishing
- Component Process Information
- Component Details
- Drop details
- User Defined Data can be associated at any of these levels as represented by the page icon in the chart below



Configurable PrintStream Data Elements include:

- Component Quantities
- Process Quantities

- Drop Dates
- Drop Quantities

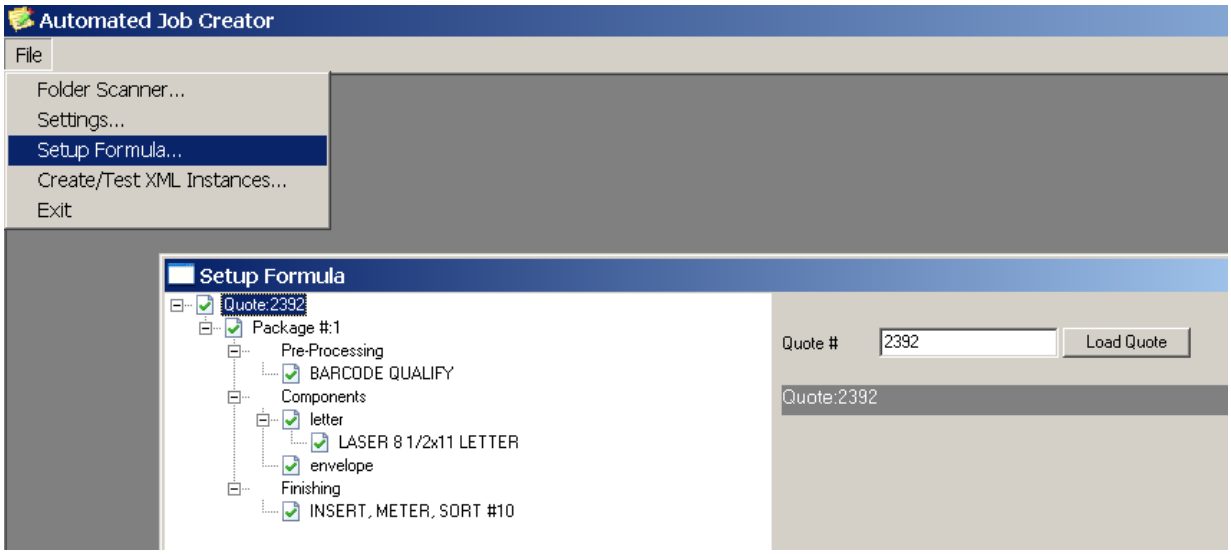


Using User Defined Data Formulas

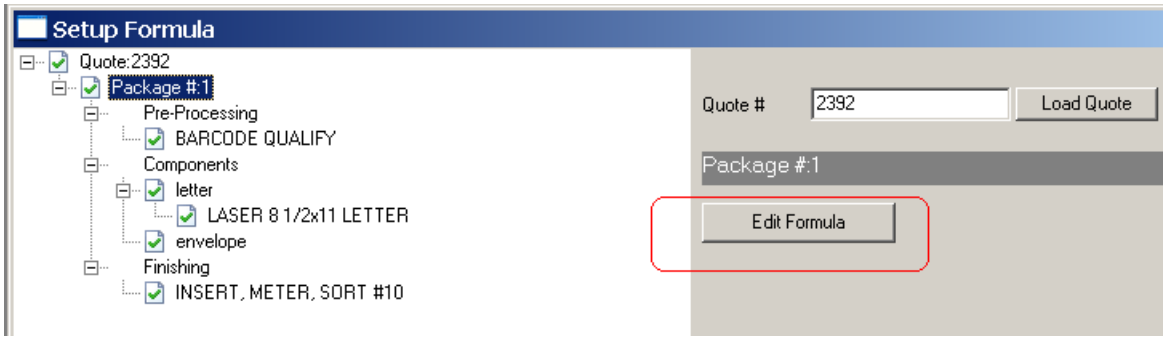
User defined information can also be used to drive Job Package, Process and Component quantities by using the formula option. This is an alternate method to the one described above where quantities are driven by passing the actual process names and quantities through the base schema elements.

By defining a generic language when setting up parameters and using the formula option, changes to equipment and processes can be updated through the editing of parameters and formulas. This may prove easier to manage than changing templates and internal programs that generate XML files. Formulas are template specific and can be edited for change management.

1. Select **Setup Formula** in the XML Tester program file menu. Enter an existing Master Template Quote number.

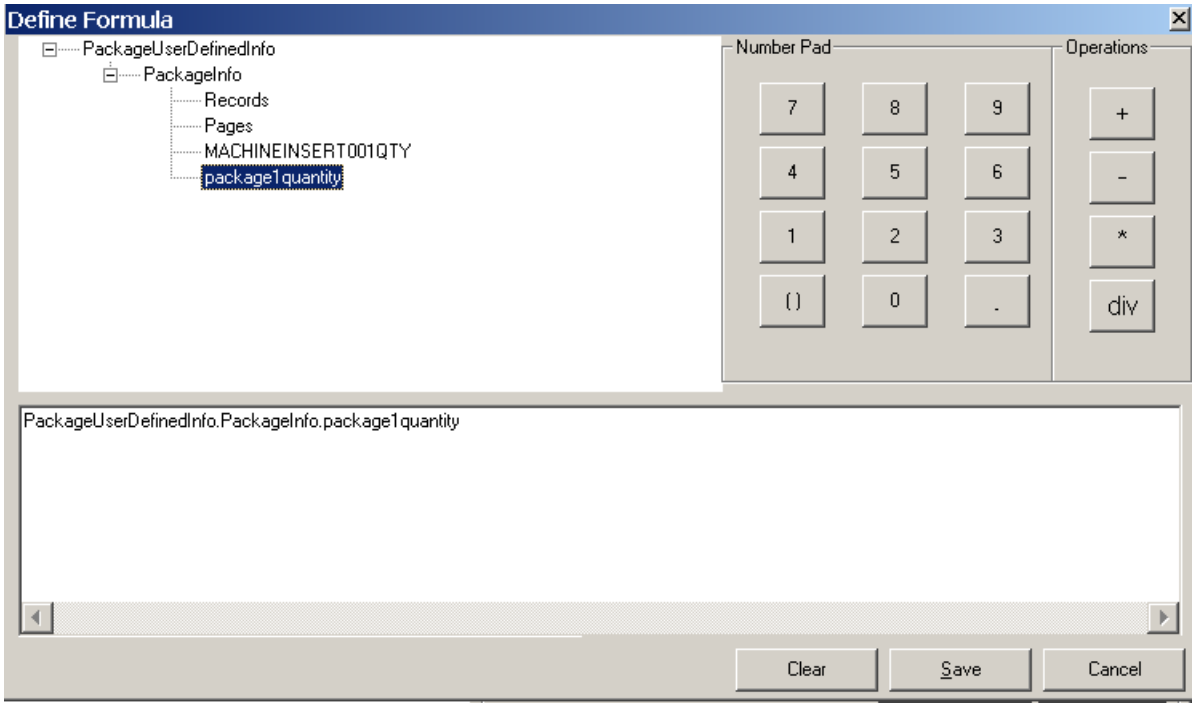


2. Select the **Package** line and **Edit Formula.**

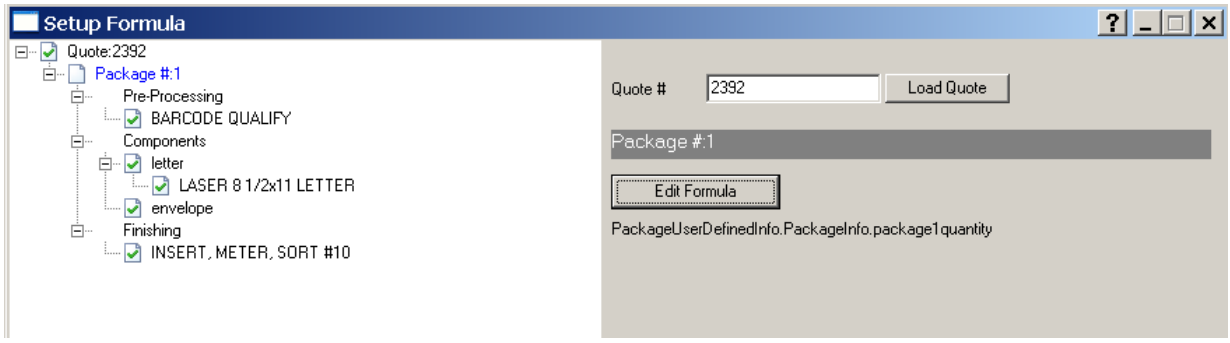


A new window displays for **Define Formula**. Parameters previously defined will display in the tree.

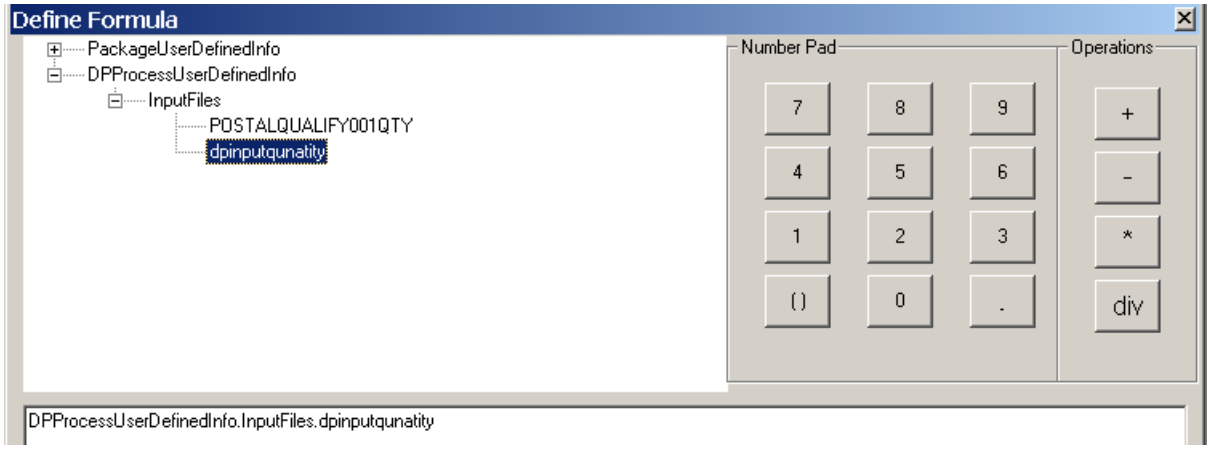
3. Double click on the parameter to create a formula. The parameter will display in the lower window and can be appended by using the operations and number pad.



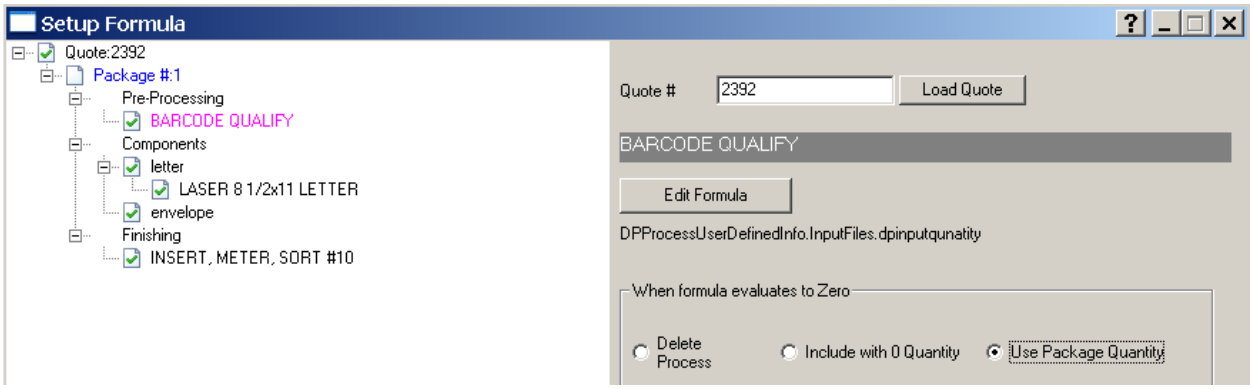
4. The tree now displays the Package line in color to indicate that a formula is present. The formula displays at right and can be edited selecting **Edit**.

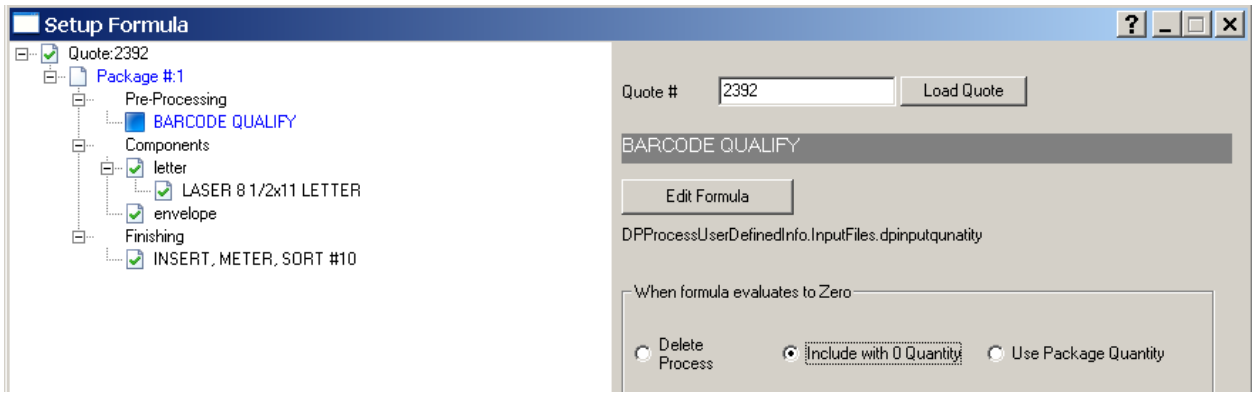


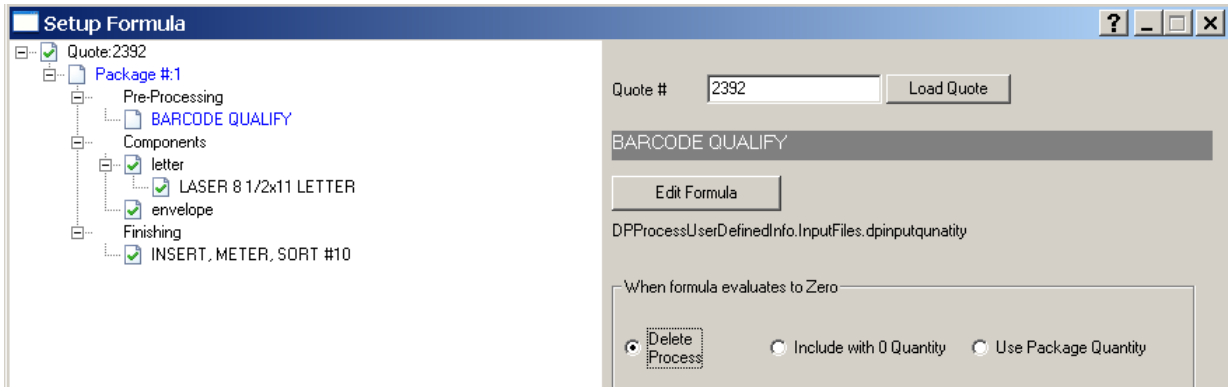
5. Selecting tree lines at the level of data processing processes will display data processing related parameters for selection in formulas. The same approach can be taken for **Components, Component Processes** and **Finishing Processes** and is dependent on the schema file definitions.



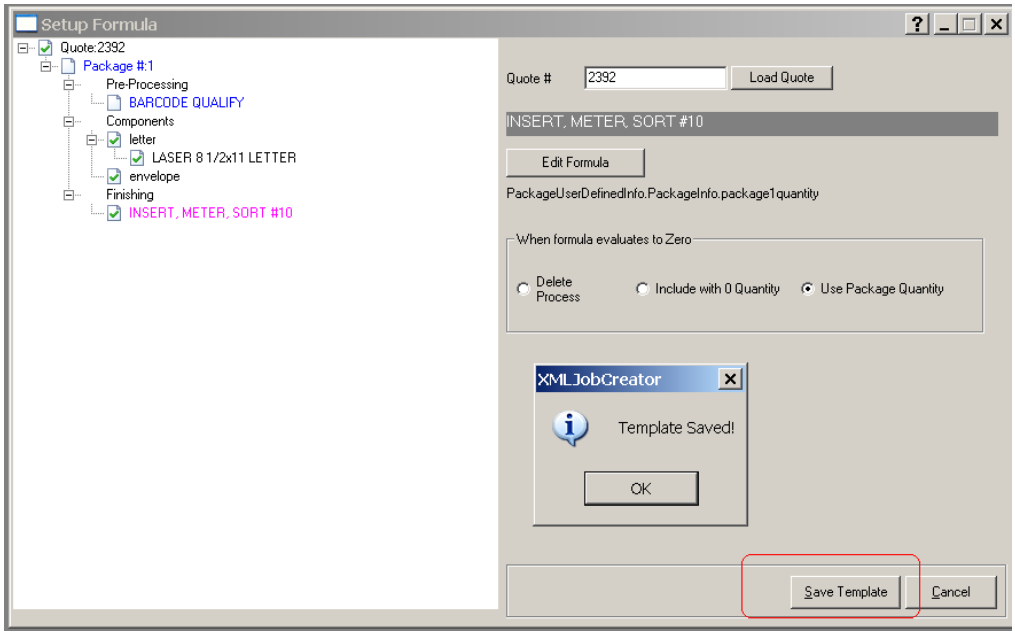
Note If the formula evaluates to 0, you have the option **to Delete Process, Include with 0 Quantity or Use Package Quantity**. Depending on which of these selections are chosen, the process in the tree displays differently.







6. Once all formulas have been defined, click **Save Template**.



7. To test formulas, load a template with defined formulas to the tester program. Note that lines with formulas display in color. Uncheck the box next to tree lines with formulas. Enter the Quantities to be used in the formula by clicking on each **User Defined Data** button and entering values.

Note There is a difference in the XML structure when using the formula option. Formula quantities are passed through PDS lines instead of PBS lines. Changes to the process can be managed by editing Specifications, Parameters and template specific formulas instead of editing internal programs and templates.

```
- <pbs:JobSpecs
    xmlns:pbs="www.streamlinesolutions.com/SchemaDef/JobCreator/BaseSch
    xmlns:pds="www.streamlinesolutions.com/SchemaDef/JobCreator/UserDefi
  - <pbs:JobHeader>
      <pbs:QuoteNo>2392</pbs:QuoteNo>
      <pbs:StartMailDate>1899-12-30</pbs:StartMailDate>
      <pbs:EndMailDate>1899-12-30</pbs:EndMailDate>
    </pbs:JobHeader>
  - <pbs:Package>
      <pbs:PkgCode>1</pbs:PkgCode>
      <pbs:PkgQty>0</pbs:PkgQty>
    - <pbs:DPProcess>
        <pbs:Name>BARCODE QUALIFY</pbs:Name>
        <pbs:Quantity>0</pbs:Quantity>
      - <pbs:DPProcessUserDefinedInfo>
        - <pds:InputFiles>
            <pds:dpinputqunatity>1002</pds:dpinputqunatity>
          </pds:InputFiles>
        </pbs:DPProcessUserDefinedInfo>
      </pbs:DPProcess>
    - <pbs:FinishingProcess>
        <pbs:Name>INSERT, METER, SORT #10</pbs:Name>
        <pbs:Quantity>0</pbs:Quantity>
      - <pbs:FinishingProcessUserDefinedInfo>
        - <pds:PackageInfo>
            <pds:package1quantity>1000</pds:package1quantity>
          </pds:PackageInfo>
        </pbs:FinishingProcessUserDefinedInfo>
      </pbs:FinishingProcess>
    - <pbs:PackageUserDefinedInfo>
      - <pds:PackageInfo>
          <pds:package1quantity>1000</pds:package1quantity>
        </pds:PackageInfo>
      </pbs:PackageUserDefinedInfo>
    </pbs:Package>
  </pbs:JobSpecs>
```

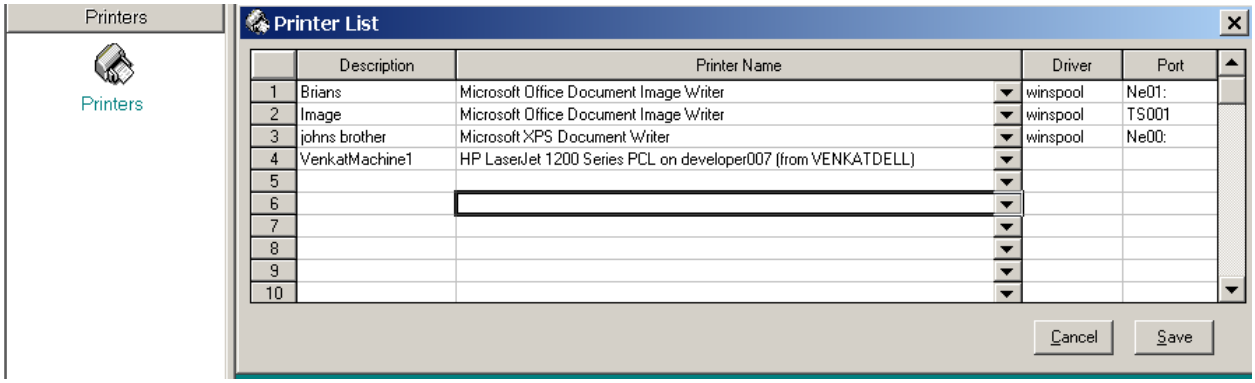
Printing Profiles Setup

Printing Profiles

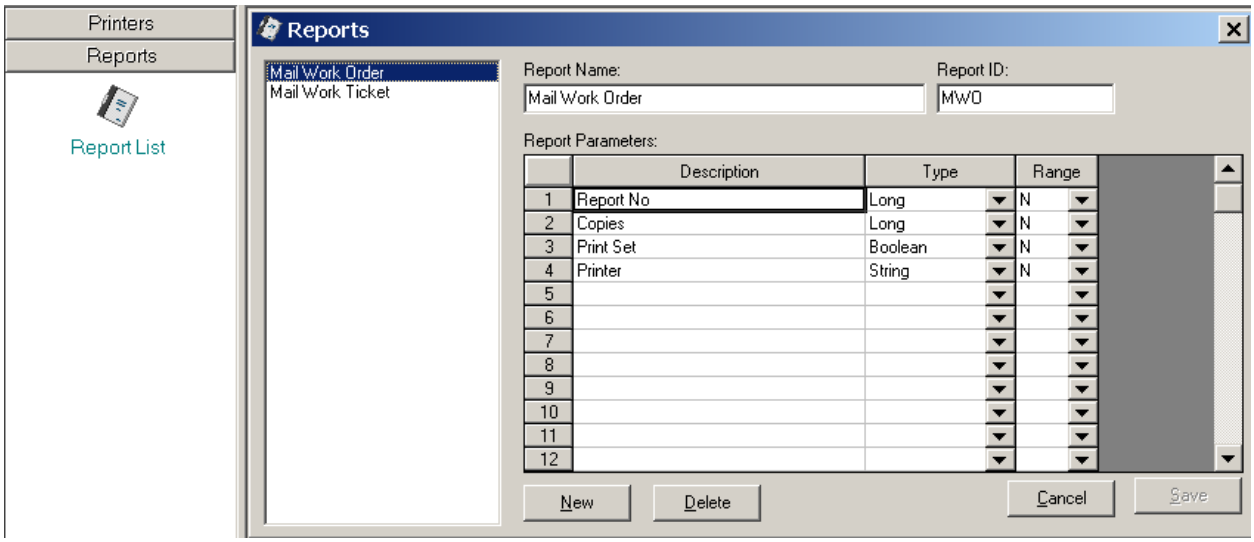
A profile is selected in the **Master Job Quote** to indicate what reports you would like to print upon creating XML jobs. You can create one profile per report – however, a Master Job Quote can have many profiles attached to it.

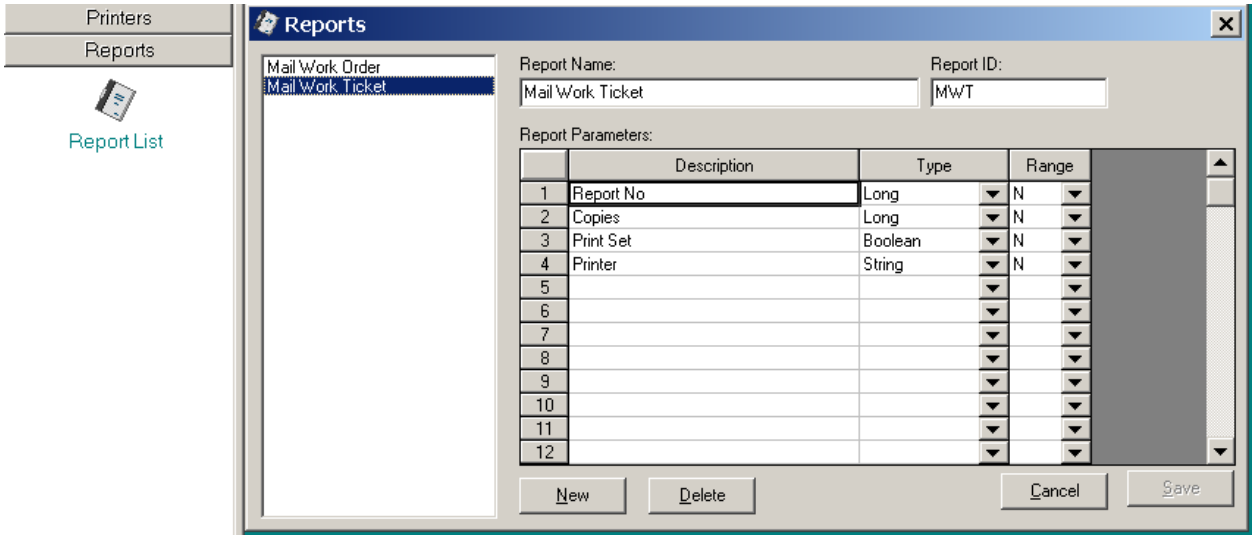
To setup printing profiles:

1. Enter a Printer Description and select an Active Printer name using the dropdown list. The Driver and Port will pull in automatically.

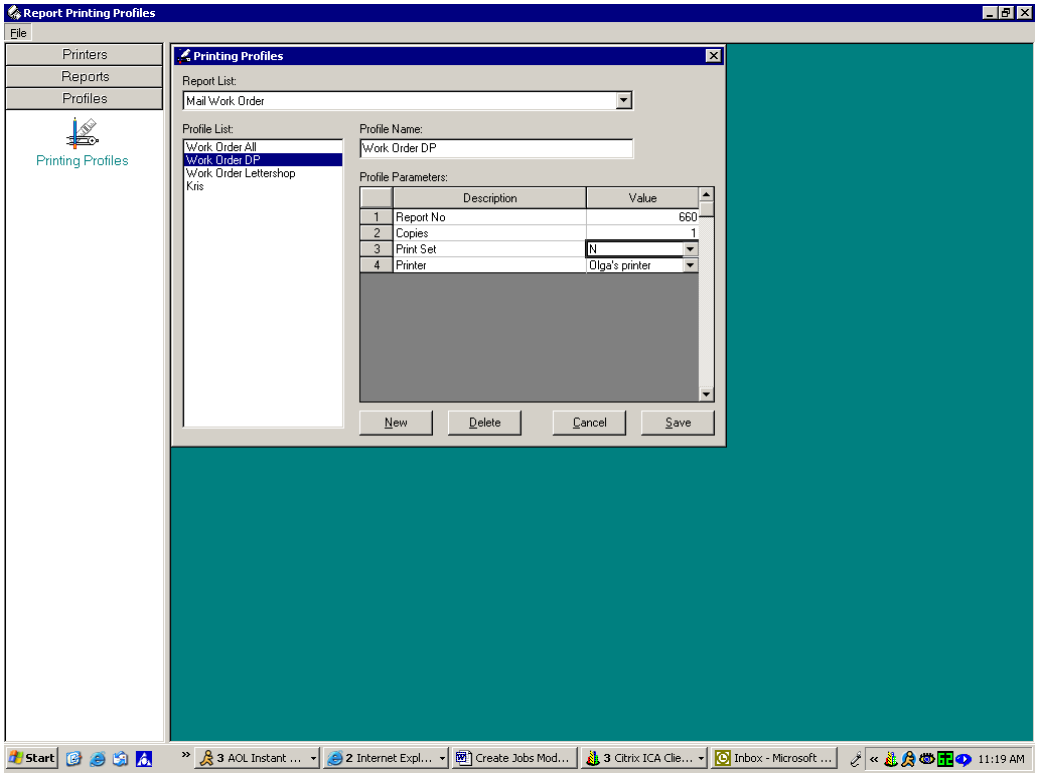


2 On the **Reports** tab and enter Report Name, Report Line Descriptions and Types exactly as in the screen shots below. Select Range (N) from dropdown as below.

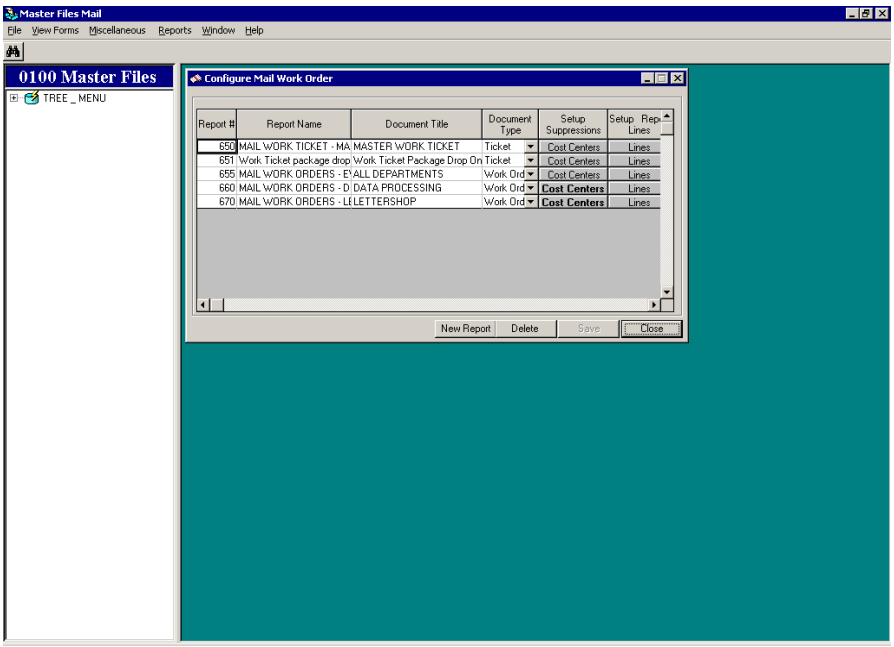




3. To create a new profile, click on the Printing Profiles icon. Select the report type you want to create a profile for. Hit the new button. Enter a profile name – we suggest making the description the same at the report description the profile is for (i.e. Work Order for DP).



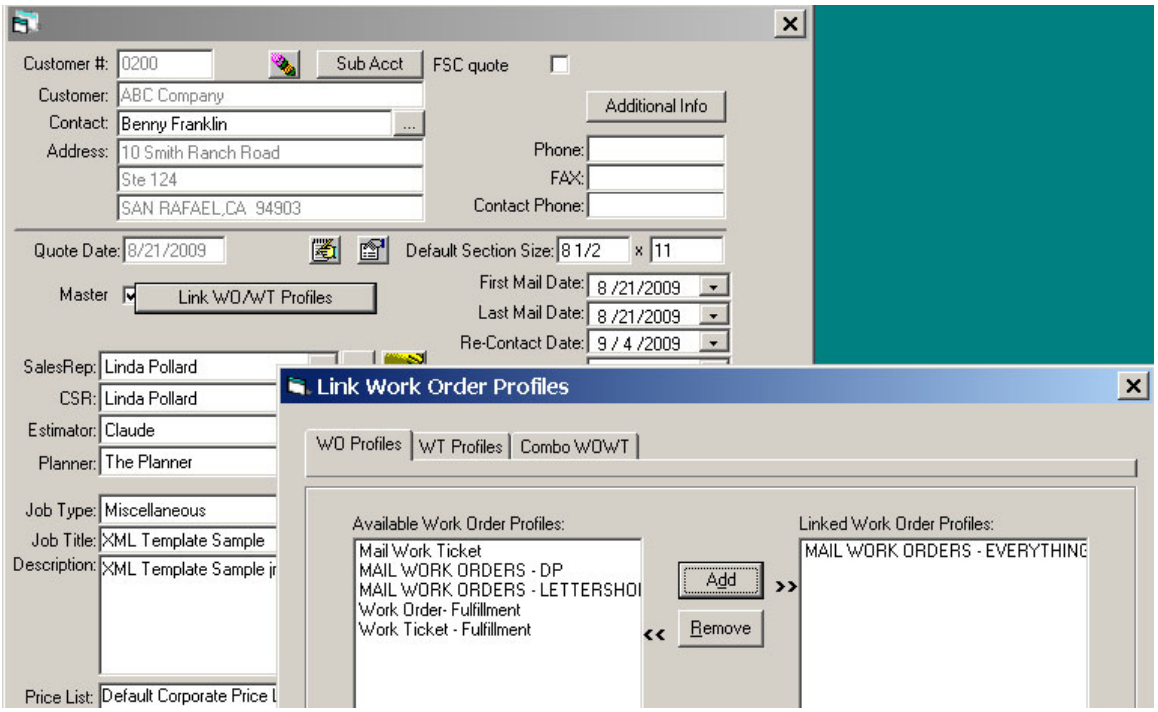
- **Report Number** – enter the Report Number as it was setup in Master File Mail – Configure Mail Work Order.



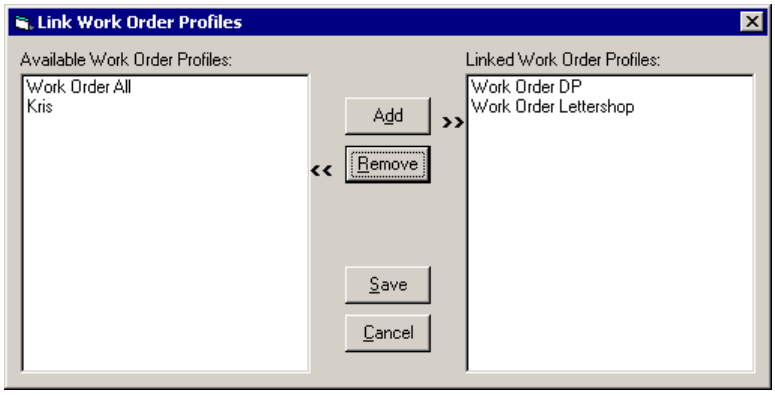
- **Copies** – Enter number of Copies
- **Print Set** – Enter Y to print the set of copies defined in the setup of Master Files Mail - Configure Mail Work Order
- **Printer** – select the Printer from the drop down list.

Attach Profile to Master Quote

1. In the original Quote to be used for copying, navigate to the **Quote Header** and check **Master Job.**



2. Select **Work Order Profiles**.

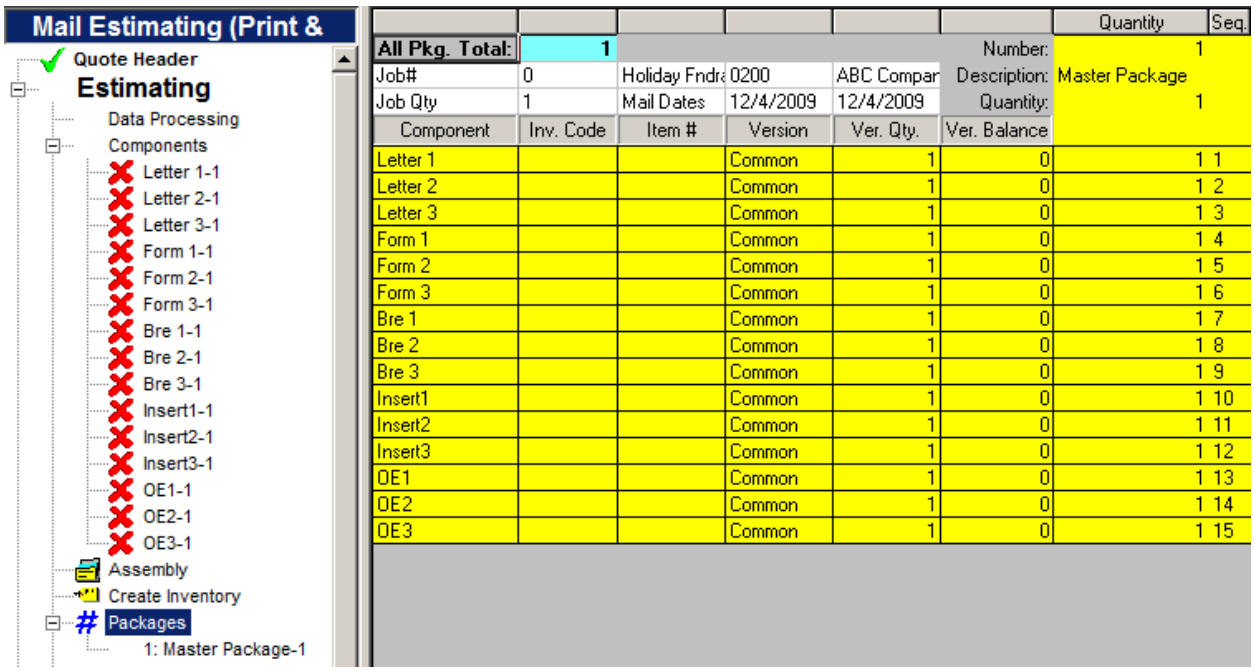


3. Click on each profile you want to automatically print when the **Create Jobs** program is run and click **Add** and then **Save**.

Advanced Topics-New v2011 capabilities

Master Packages

It is possible to use one Master Template to handle a variety of customer projects using the XML Job Creator. Because the Customer, Job Title and other fields can be changed through the XML file, a generic template can be useful. One approach to this workflow is to create the Master Template with one Master Package that contains all possible components and activities. This package can be copied multiple times during job creation, including selecting the appropriate components and processes.



This requires adding a Master Package tag to the XML file. In the example below, the Master Package 1 will be copied to create Package 2 in the new job.

```
- <pbs:Package>
    <pbs:MasterPkgCode>1</pbs:MasterPkgCode>
    <pbs:PkgCode>2</pbs:PkgCode>
    <pbs:PkgQty>1000</pbs:PkgQty>
    <pbs:PkgName>Package 2</pbs:PkgName>
```

The same approach can be used to copy a component from the master template. Note the Master Component tag below.

```
<pbs:Component>
  <pbs:MasterComponentCode>Letter1</pbs:MasterComponentCode>
  <pbs:ComponentCode>Letter1</pbs:ComponentCode>
  <pbs:ComponentQty>29651</pbs:ComponentQty>
  <pbs:InsertNotes>FB</pbs:InsertNotes>
  <pbs:CustomerCode>0200</pbs:CustomerCode>
  <pbs:InventoryCode>79091</pbs:InventoryCode>
```

Appending Jobs and Packages

Jobs that have been created through the XML Job Creator can also be appended and updated through the program. In the example below, the existing job is identified by the Quote Number with a .99 suffix and an append tag has been added to the file to add an additional package (3) to the job. PrintStream knows the original Master Template used to create the job and copies the new package and specified processes and components from the Master.

```
- <pbs:JobHeader>
    <pbs:QuoteNo>1799.99</pbs:QuoteNo>
    <pbs:Append>true</pbs:Append>
    <pbs:StartMailDate>2010-01-14</pbs:StartMailDate>
    <pbs:EndMailDate>2010-01-14</pbs:EndMailDate>
    <pbs:Customer>0200</pbs:Customer>
    <pbs:JobNumber>1521</pbs:JobNumber>
    <pbs:PriceListID>1</pbs:PriceListID>
    <pbs:SalesRep>1</pbs:SalesRep>
    <pbs:JobType>Agency Direct Mail</pbs:JobType>
  </pbs:JobHeader>
- <pbs:Package>
    <pbs:MasterPkgCode>1</pbs:MasterPkgCode>
    <pbs:PkgCode>3</pbs:PkgCode>
    <pbs:PkgQty>200</pbs:PkgQty>
```

Another option is to update a job that has been created through the XML Job Creator by changing Count Information in the original job. In the example below, the original package 2 quantity is being changed after the actual counts have been processed.

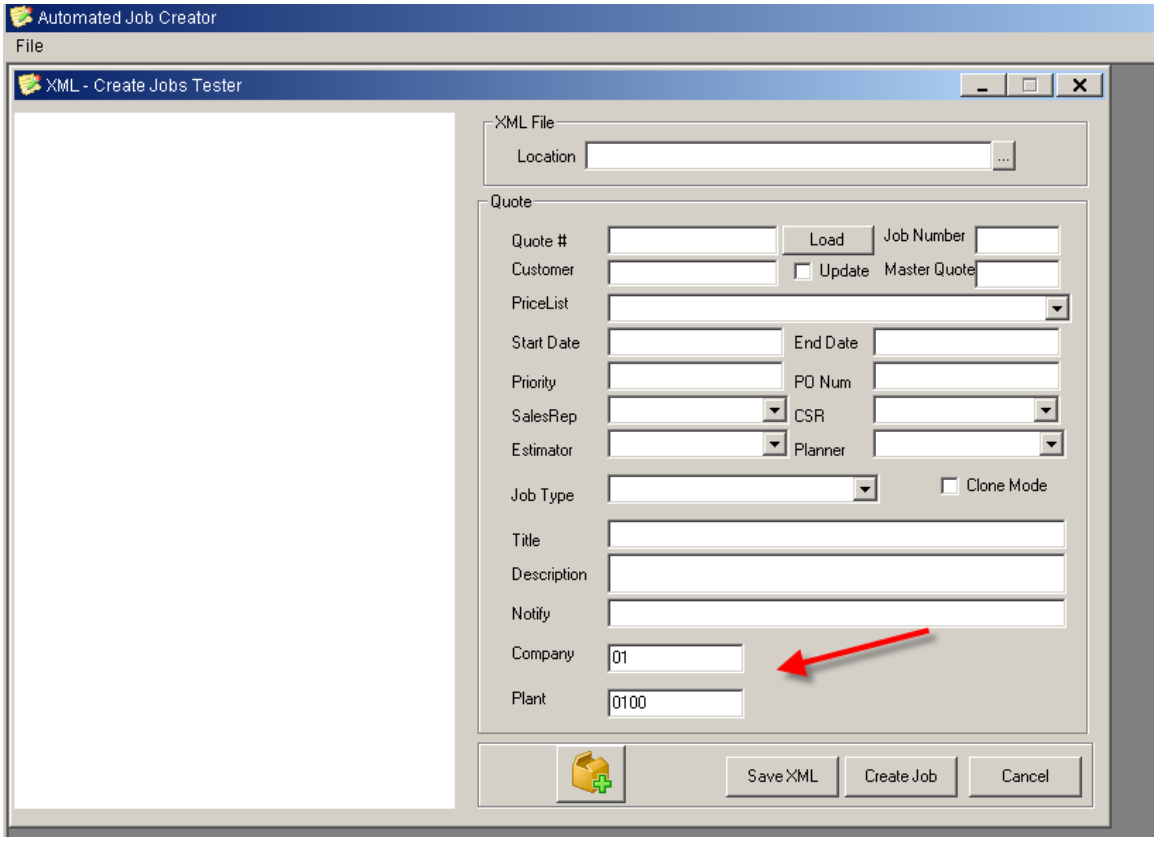
Note The update tag that has been included.

```
- <pbs:JobHeader>
    <pbs:QuoteNo>61178.99</pbs:QuoteNo>
    <pbs:StartMailDate>2010-12-31</pbs:StartMailDate>
    <pbs:EndMailDate>2010-12-31</pbs:EndMailDate>
    <pbs:Customer>00000</pbs:Customer>
    <pbs:JobNumber>56490</pbs:JobNumber>
    <pbs:Update>true</pbs:Update>
  </pbs:JobHeader>
- <pbs:Package>
    <pbs:PkgCode>2</pbs:PkgCode>
    <pbs:PkgQty>4135</pbs:PkgQty>
    <pbs:PkgName>Hartford December</pbs:PkgName>
  </pbs:Package>
</pbs:JobSpecs>
```

XML Job Creator - PrintStream XML Job Creator Service for multi plant

Changes were made to the XML Job Creator to allow the XML Job Creator service to run with the set up in one plant but will scan one hot folder that can contain xmls for jobs to create in different plants or multiple plants.

Previously a multi plant environment would have to set up multiple services which each pointing to a different plant.

The JobCreatorSchema.xsd has been updated with additional attributes for CompanyCode and PlantCode.

In addition, if you use the XMLJobCreator.exe to create the xml files, Create Jobs Tester screen allows the user to set the Company/Plant code. By default, it will load based on what Company/Plant code you defined in your settings. You can change this though on the tester screen when you wish to generate the xml via this program otherwise you will need to manually add this to your xml you create.