Articles and Orders

In this article we'll learn:

- The **differences** between **Articles** and **Orders**
- How to create an **Article** or **Order**
- Which **parameters** are necessary for creating Articles and Orders

1. Article or Orders

Articles and **Orders** can be used to store print data in a predefined form or by simply adding items to either of those. Workflow users should decide in advance how to structure their data storage.

We describe using both Articles and Orders in more detail below.

1.1. Articles

Articles are able to be managed using a minimum of resources and administrative effort and therefore offer maximum flexibility and efficiency in production. In addition to being able to freely define the storage structure of print data, Articles also allow the pre-definition of certain output parameters such as the Substrate to be used. This chapter shows you the available functions in the workflow when working with Articles.

Essentially a single Article corresponds to a single print file, which can be stored in a structured manner using the following parameters:

- Substrate – A Substrate must be assigned to an Article. This is necessary so that all color-relevant information can be calculated and displayed in the Workflow based on the output profile.
- Customer – A single Article can only be assigned to a single Customer. Assigning a Customer to an Article is an optional step. By assigning a Customer, a Customer's print data can be displayed quickly and efficiently.
- Collections – Articles can be assigned to several Collections at once. However, assigning Collections can also be omitted. Collections can represent generic information such as Order Number, Project Number, Item Groups, Substrate Categories, or any other grouping that fits the needs of the company. Collections allow the company to ensure a stable but flexible way to store print data in the Workflow.

- Tags – Several Tags can be assigned to an Article. Tags can also be omitted in the process of creating and storing Articles. Tags can also be used to categorize print data or to assign them to specific departments within the company.
- Process Steps – Several Process Steps can be assigned to an Article. Process Steps, however, can also be omitted. Process Steps describe further processing steps such as laminating, varnishing, cutting, embossing, etc. for individual print files.

Typically, *Process Steps* and *Tags* are used to find files that can be produced quickly in certain departments according to the required process steps, i.e., *Substrate*, *Customer,* and *Collections* are used to structure print data clearly. In addition, Print Items are clearly described using metadata such as width, height, name, User-defined Fields, etc.

1.2. Orders

Orders allow (separately from an MIS or ERP system) storage as well as locating print data, specific Customer and Production Information such as completion date, shipping dates, address, etc. directly in the Workflow in the same structure.

Orders store print data in a predefined structure. The structure of an Order can be described as follows:

- Order – An Order corresponds to a sales order that was entered in an MIS or ERP system. An Order can consist of several Order Items.
- Order Item – An Order Item describes the Substrate-related component of an Order. A Substrate must therefore be assigned to the Order Item. It does not matter which Printer the Substrate is printed on. At least one Print Item (print file) needs to be assigned to an Order Item. However, several Print Items, e.g., Items with different color management needs, can also be in an Order Item. The commonality for added Print Items is that they are produced on the same Substrate.
- Print Item – A Print Item represents the actual print file. The print file can be single-sided or multi-page and can be of any size.

2. Creating Articles

Print data can be uploaded or created as an **Article** in the Workflow for customers using the Workflow Plus version of the license. To upload print data and create an Article, proceed as follows:

1. Select the menu item **Article > Articles [2]**. A list of currently filtered **[4]** Articles will be displayed (this only occurs when the user has previously entered text in the Search Input field).

2. If you want to use the abbreviated upload format to create an Article, you can simply drag and drop your print files into the drop zone **[3]**. The drop zone provides two distinct ways of handling print files:

- **Uploading of single print files** – Files are uploaded to the Workflow, checked in, and created as single Articles in the Workflow. Articles using the drop zone are only assigned to the default Substrate that was selected for the *Default Color Policy* under **Administration > Settings > Color Management**. Further information can be assigned manually afterward.

- **Upload a folder with multiple print files** – Files are uploaded to the Workflow, checked in and also created as single items in the Workflow. The only difference here is that a new Collection with the name of the folder is created and the Collection is automatically assigned to these Articles.

Figure 1: The *Article List* displaying filtered *Articles*.
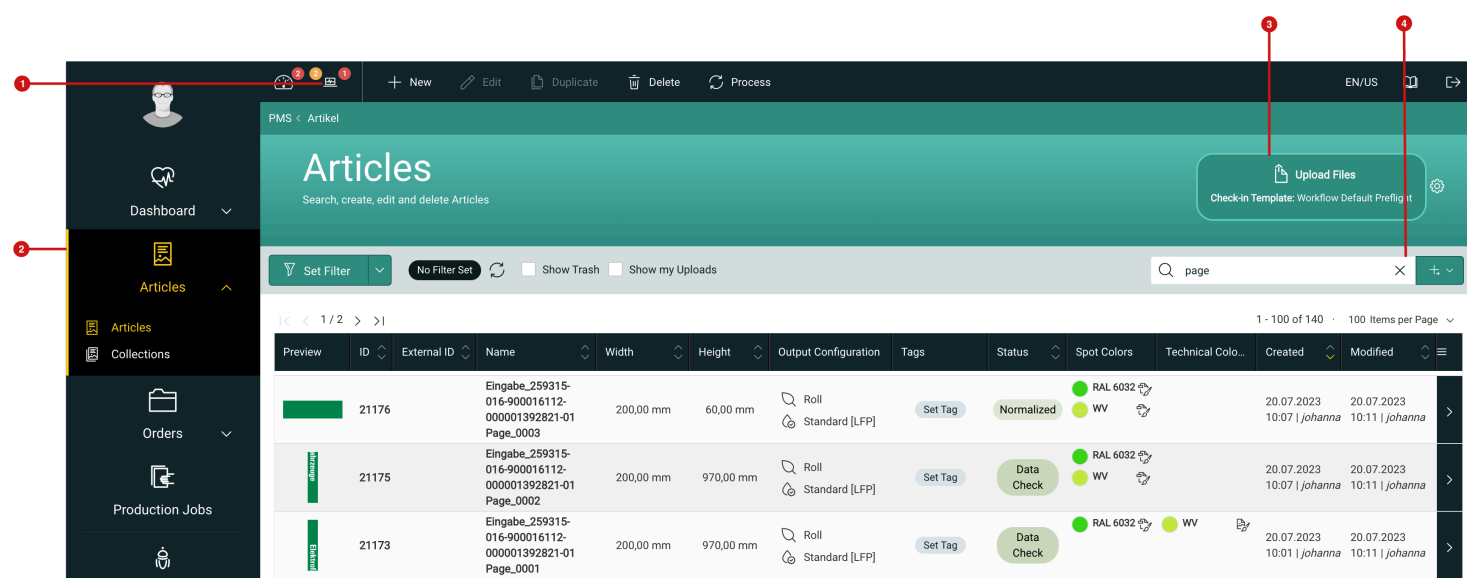
3. However, there is an alternate way to create single Articles which includes more detailed information that is entered during the creation of the Article. Click on **+ New [1]** in the Action Bar. This opens the *Create Article* dialog, which is divided into a drop zone with three tabs below it: **General Properties [6]**, **File Properties [7]** and **User-defined Fields [8]**.

4. Start by dragging the desired file into the drop zone **[5]**. You can only upload one file at a time.

5. Select the desired **Customer [9]**.

6. Then add a **Collection(s) [10]** if necessary.

Figure 2: The *Create Article* dialog with the *General Properties* tab selected.

Figure 3: The *Create Article* dialog with the *File Properties* tab selected.

7. Switch to the **File Properties** tab **[11]**and enter all article-specific information.
   - **Print Item Name** – The file name is used as default.
   - **Width and Height** – By default, the width and height are determined from the uploaded document. If other sizes are required for the file, you can specify them here. If the entered sizes do not match the determined size, a warning will be displayed in the detail window.
   - **Substrate [13]** – Select the desired Substrate and/or **Color Policy**.
   - **Post Printing Steps [14]** – Select any Post Printing Steps that are needed for the Article.

8. If you are working with User-defined Fields, switch to the **User-defined Fields** tab **[12]** and enter the information belonging to the Article.

9. To finish creating the new Article, click on **Save [15]** in the footer of the dialog.

Figure 3: The *Create Article* dialog with the *File Properties* tab selected.

3. Creating Orders

Print data can be uploaded or created as Print Items in the Workflow for customers using the Workflow Plus version of the license. To upload or create print data as Print Items in the structure of an **Order**, proceed as follows:

1. Navigate to **Order > Orders [17]**. The Order List with currently filtered **[20]** entries is displayed.
2. Listed entries can be opened **[21]**. At the top of a List entry is the *Order* which displays order-specific information **[18]** in **blue**. When you expand the Order (either by double-clicking the entry or clicking on the right-facing arrow), the corresponding **Order Items [19]** appear in **green** and the information specific to the Order Item is displayed. These in turn contain all uploaded **Print Items [22]**.

Figure 4: The *Order List* showing entries and an expanded *Order*.

Figure 5: The *Create Order* dialog with the *Order* tab selected.
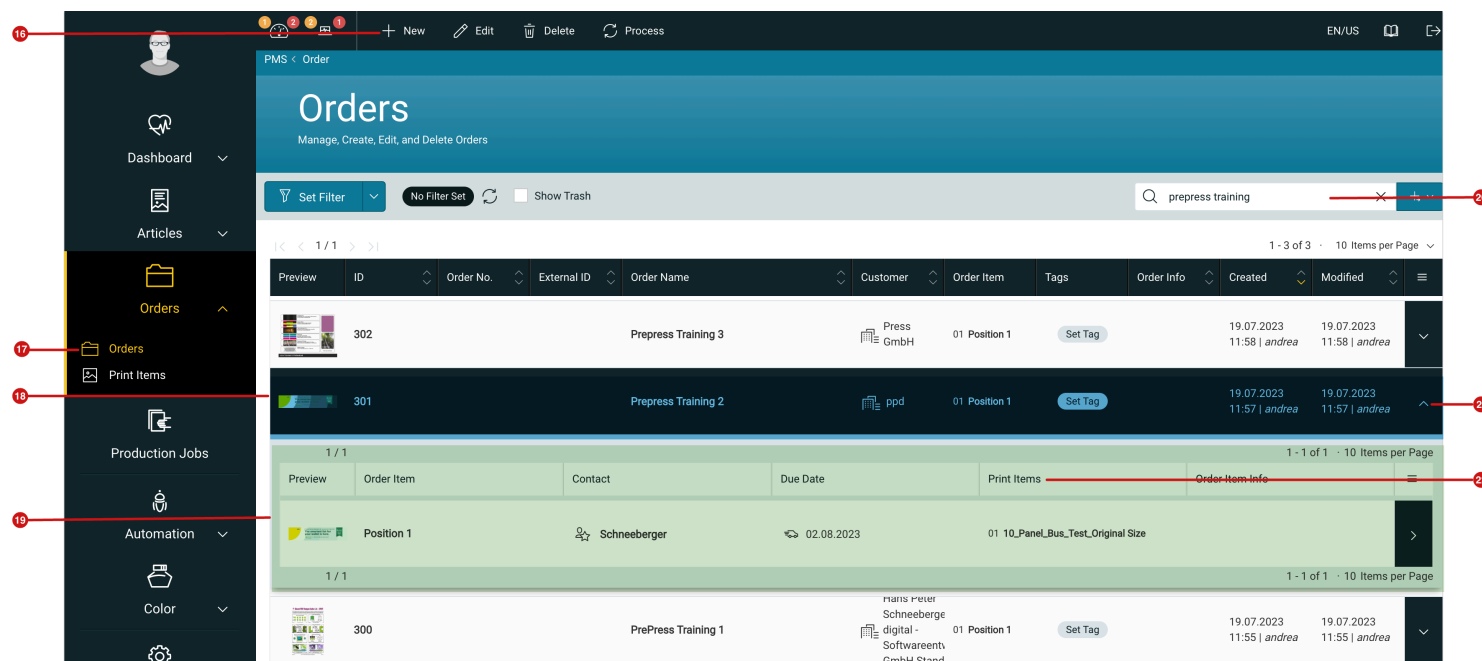
3. To create a new Order, click on **+ New [16]** in the Action Bar. This opens the *Create Order* dialog, which is divided into four tabs: **Order [23]**, **User-defined Fields [24]**, **Order Item [25]** and **Print Item [26]**.

4. In the **Order** tab **[23]** enter all order-specific information such as *ID*, *Order Name*, *Customer* and an optional *Comment*.

5. If you have defined User-defined Fields specifically for Orders, switch to the **User-defined Fields** tab **[24]** and enter the required company-specific information there.

7. Switch to the **Order Item** tab **[27]** and enter all Order Item specific information.
   - **Order Item Name** – Enter the name for the Order Item.
   - **Contact Person**, **Delivery Address** and **Due Date** – This information can be entered optionally. This information could be used to search for Print Items and to add the delivery address for example to the finished imposition output.
   - **Substrate Category [28]** – The Category and the **Substrate** must be selected for an Order Item.

Figure 6: The *Create Order* dialog with the *Order Item* tab selected.

8. Switch to the **Print Item** tab **[29]**, add Print Items by dragging the files to the drop zone **[30]**and enter all Print Item-specific information here. If no print data is available yet, the Order can still be created without adding Print Items. Print Items can be added at a later date. The following Print Item-specific information can be selected:

   • **Drop Zone** – Drag print data here to upload.
   • **Width and Height** – By default, the width and height are determined by the files uploaded. If a differing size is required for all files, you can specify this by deactivating the **Use Size from PDF** checkbox. If the entered sizes do not match the determined size, a warning will be displayed in the detail window.
   • **Number of Pages** – Specify whether the uploaded print data are single- or multi-page files.
   • **Copies [31]** – Specify number of copies for each individual file.
   • **Prepare for Shape Nesting [34]** – Check this box if you want to prepare the Print Item for Shape Nesting.
   • **Color Policy [32]** – This is optional. Select a different *Color Policy* if needed. If no Color Policy is selected the default Color Policy will be used.
   • **Winding Type [33]** – This can be selected depending on the type of Substrate used (must be a roll material).
   • Furthermore, **Use size from PDF** and **Split multipage files into individual Print Items** can be entered optionally.

9. After you have filled in all input fields, you can create the Order by clicking **Save** which initiates the check-in process.

Figure 7: The *Create Order* dialog with the *Print Item* tab selected.

4. Creating Articles and Orders from an ERP system

Both **Articles** and **Orders** can be created either manually (as described above) or automatically by a leading ERP system. In order for the ERP system to be able to do this, the appropriate integration processes must also be initiated. Integrations can be based on the available REST-API, XML, JDF or other control files.

Please contact your sales partner if you have any questions about integration projects.

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