exstream software

Course 110 :: # Dialogue System Administration

Product :: Dialogue 6.0

STUDENT GUIDE

Contents

Contents

(continued)

Contents

(continued)

Contents

(continued)

Unit 1 :: About This Course

- Course Description
- Course Design
- Course Schedule
- Scenario

Course Description

Course Description

This two-day course is the starting point for those responsible for performing Dialogue system administration activities.

It provides an introduction to and hands-on experience with installation, setup, and maintenance of the Dialogue environments and objects needed to standardize the creation and production of customized communications.

This course is designed as an introduction to maintaining Dialogue. To perform advanced administrative functions, you need to complete higher levels of training.

Course Goals

To provide Dialogue system administration, you must be able to:

- Install and upgrade Dialogue.
- Set up the System Environment.
- Set up the Design Environment.
- Set up the Delivery Environment.
- Maintain the Dialogue Environment.

This course is designed as an introduction to system administration. To perform higher-level output and delivery tasks, you need to complete higher levels of training such as 211 :: High-Volume Delivery or reference the System Administration Guides.

Audience

Individuals responsible for performing Dialogue's system administration activities.

Prerequisites

Prior to taking this course, you must have successfully completed:

- 101 :: Introduction to Dialogue

Course Design

The course consists of five units and a self-assessment, designed to build your skills and knowledge from unit to unit. This course presents job relevant system administrator tasks, designed around the day in the life of a system administrator. Throughout the course you'll be referencing this *Student Guide* and an accompanying Project Guide.

Course Design

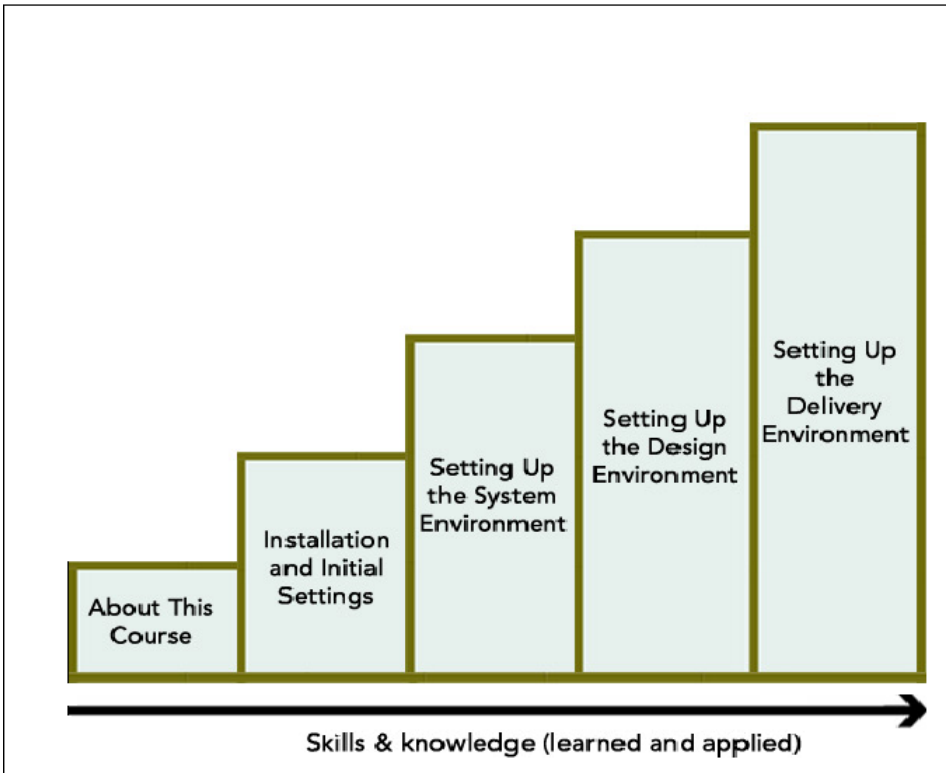
This course is designed using a lecture-lab format. During the lecture portion, the instructor sets the stage by presenting a scenario that provides a series of requirements. After setting the stage, you learn how to use Dialogue to meet those requirements by:

- Listening to the instructor.
- Viewing a series of slides and your guide.
- Observing instructor-led demonstrations.
- Discussing and reviewing content.
- Completing and reviewing hands on exercises.

Units

The complexity of the assigned communications, as well the skills and knowledge learned and applied, increase from unit to unit.

Unit flow

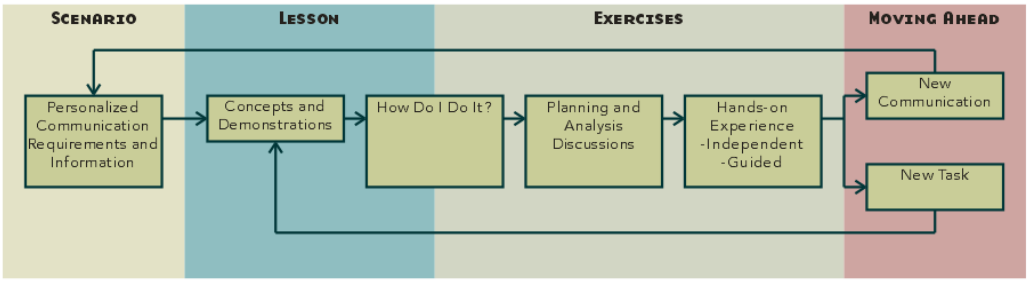


The course contains a series of units. The first unit contains introductory information about the course. The remaining course units are instructional units, as they correspond to each course goal. Units contain a series of lessons, exercises, and a summary.

Course Units

Course units include several instructional strategies.

Course units organization



Scenario

Each unit starts with a scenario that describes a personalized communication that you are then asked to create. It includes the requirements and information necessary to create the communication. When reviewing the scenario, you are asked to start the Planning and Analysis phase of the Life Cycle process by identifying the requirements and information needed to complete the communication.

Lessons

Each lesson includes:

- A scenario presenting a series of job-relevant requirements.
- Objectives to identify the skills you will be able to perform at the end of the lesson.
- Skills and knowledge as they relate to the objective.
- Demonstrations of how to use Dialogue.
- Exercises to allow you to apply the skills and knowledge presented in each lesson.

Exercises

Throughout the course, **exercises** are provided for instructional purposes. Depending on your learning style, you can complete the exercises in one of two ways:

- **Independent Exercises -** Provide high-level processes to complete the assigned tasks in Dialogue.
- **Guided Exercises -** Provide step-by-step procedures to complete the assigned tasks in Dialogue.

An **exercise** is a process for performing required tasks.

Course Materials

Guides

You use the following materials in this course:

GUIDES	CONTENTS	
Student Guide	• Introductions • Conceptual information • Appendix • Self-assessment	• Summaries • Reference information • Independent exercises • Guided exercises
Project Guide	• Scenario content	
Dialogue Interface and Shortcut Quick Reference Guide	• **Design Manager** interface • **Design Manager** shortcuts	• **Designer** interface • **Designer** shortcuts

Symbols

The following symbols are used in the course **Guides**:

SYMBOL	INDICATES	SYMBOL	INDICATES
	Useful tips		**Exercise** Start of exercise
	Warning		**Success!** End of exercise
	**Demonstration**	:: Note	Additional information
	**Go to Project Guide**		

Text Conventions

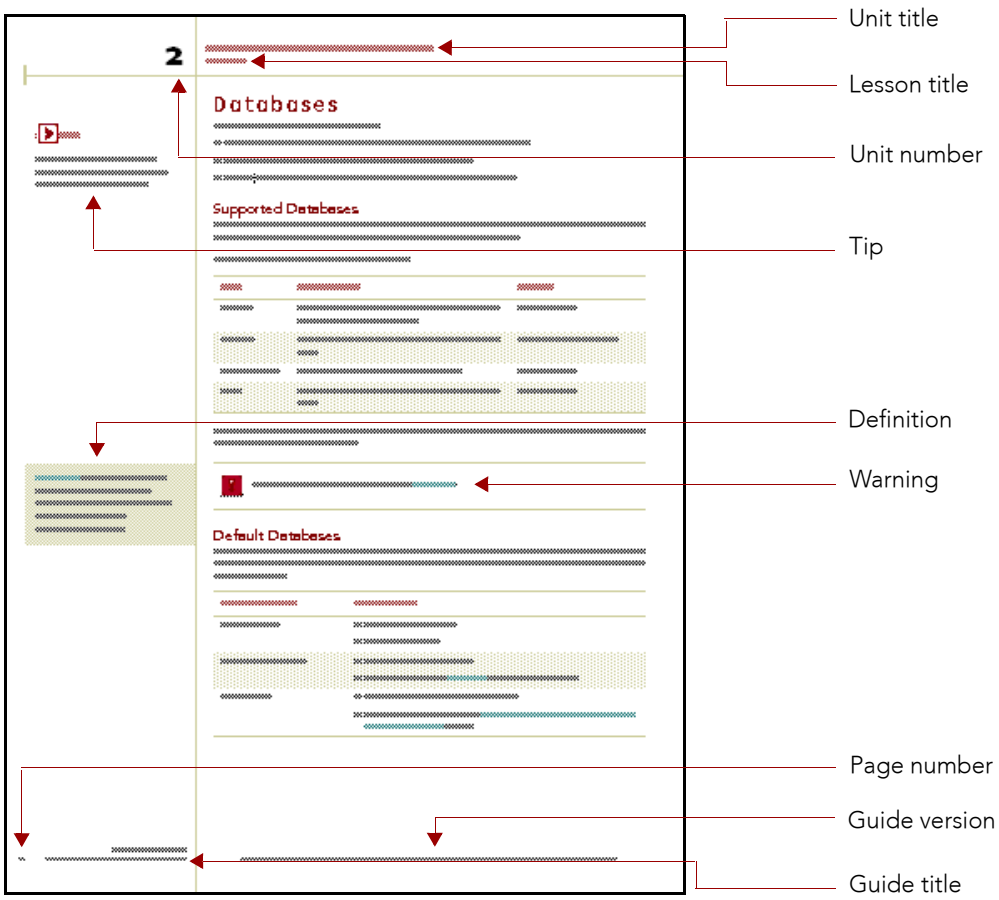
The following text formatting conventions are used in the course guides:

- *Example* - Text you find on the interface.
- **Example** - Name of a guide to reference for more information.
- Example - Text being defined.
- **Example** - Text you enter into a field on the interface.
- Example - An important word for you to remember.

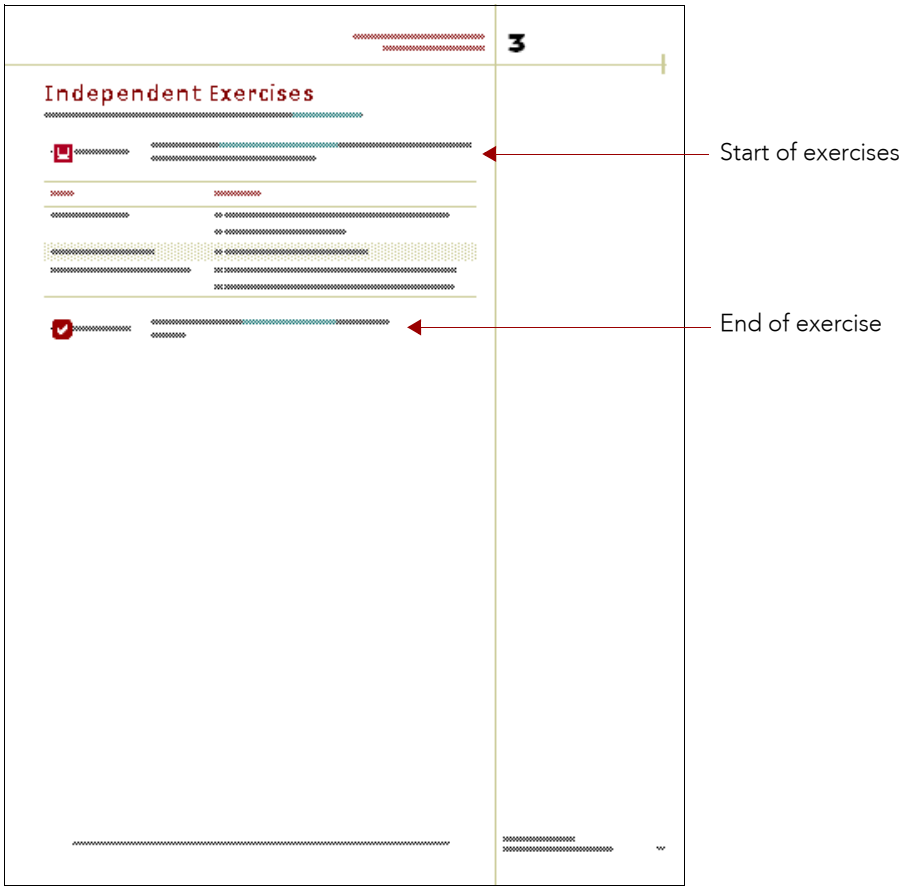
Page Layouts

The **Dialogue System Administration** Student Guide uses the following page layouts.

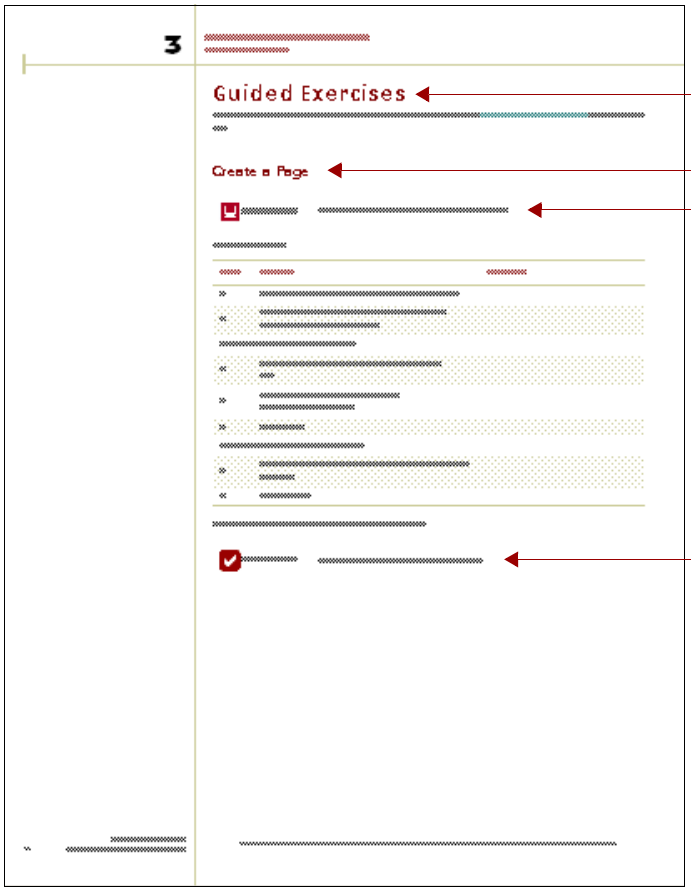
Sample lesson page



Sample Independent Exercise page



Sample Guided Exercise page



Course Schedule

Your instructor keeps the course moving at a reasonable pace. The instructor may need to make some adjustments to the schedule based on your training needs.

Schedule

Please stay with the course, even if you feel you are already familiar with the material and concepts.

The course uses the following schedule.

Day 1

ACTIVITY
Welcome and Introduction
Unit 1: About This Course
Unit 2: Installation and Initial Settings
Unit 3: Setting up the System Environment
Unit 4: Setting up the Design Environment, (Part I)

Day 2

ACTIVITY
Unit 4: Setting up the Design Environment, (Part II)
Unit 5: Setting up the Delivery Environment
Course Self-Assessment

Scenario

The tasks you complete in this course are presented as part of the following scenario.

About Vivanet

Vivanet Communications is a market leader in providing local, long distance, wireless, Internet access, and data services to business and residential customers across Kentucky.

Recently, Vivanet installed Dialogue on several Information Technology, Sales, and Marketing workstations, including your own. Previously, each department created and managed communications using several different systems that no longer meet corporate needs.

Your Responsibilities

You must set up Dialogue to provide demonstrations of functionality in the areas of the user, design, and delivery environments. You are working with John Blake, the sales associate who purchased Dialogue for Vivanet, in arranging the demonstrations. As the head of the IT department, your responsibilities include:

- Installing Dialogue.
- Upgrading Dialogue.
- Maintaining the Dialogue database.
- Maintaining the Dialogue environments.
- Adding new objects to the Dialogue Environment.

Unit 2 :: Installation and Initial Settings

- Dialogue Installation
- Initial Login to Dialogue
- Unit Summary

Dialogue Installation

Installing Dialogue is a simple process of downloading the software then setting up the database. As Dialogue relies on external databases to contain all data about the objects and users, the database is of utmost importance.

This lesson provides the process for installing Dialogue.

Objectives

By the completion of this lesson, you will be able to:

- Identify the Dialogue system requirements.
- Identify the steps of the Dialogue installation process.
- Identify how to download the software.
- Identify how to install the software and the documentation.
- Identify how Dialogue uses databases.
- Create a new Access database.
- Set up a DSN for an Access database.
- Update the database.
- Identify Database Maintenance.
- Identify login Methods.

Terms

New terms used in this lesson include:

- **DSN (Data Source Name)** - A database representation that enables Dialogue to connect to the design database.
- **Schema** - A group of related tables in relational databases. Schemas separate the various tables in a database into more manageable groupings.

Additional Information

For more information on this topic, refer to the Dialogue:

- `Getting Started` Guide.
- `System Administration` Guide.

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Dialogue System Requirements

To install and run the full installation of Dialogue for the design environment, you need:

- A Pentium III Windows workstation with:
  - 400 mHz or greater processor speed.
  - 256 megabytes of RAM.
  - At least 100MB of free disk space.
- A valid system key (EKF) to enable Dialogue and run the Engine.
- The zip file password for the version you have downloaded.

Dialogue Installation Process

Installing Dialogue is a simple process, involving downloading the software, running the installation, and preparing the database for use.

Complete the following steps to prepare Dialogue for the initial login:

1. Obtain a user name and password from your Exstream Account manager.
2. Download the software and documentation from Exstream's site.
3. Install the software and documentation.
4. Create a system DSN (if needed).
5. Update the database.

This lesson guides you through each of these steps.

Software Download

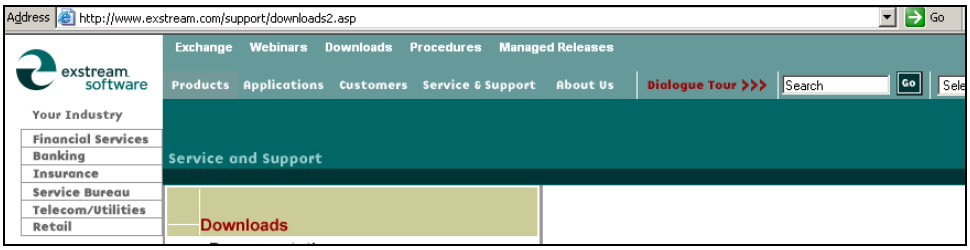
All Dialogue products are downloaded from the Exstream web site. You must obtain a login and password to access the Dialogue download site. You also need a password to open the downloaded files. Once you have obtained this information, download the software and products available to you.

:: Note

Your Exstream Account Manager provides you with the necessary passwords.

To download, go to **http://www.exstream.com**, log in, and download the version you want to a temporary directory on a local drive. The file is compressed -- unzip the file into the temporary directory.

The Exstream website



Release Versions

Dialogue is released in two methods:

Version Type	Description
General availability (GA)	Official, announced versions of Dialogue.
Managed release (MR)	Versions with small changes or new features.

Generally, a GA is a combination of several MRs. MRs are a response to a specific request by an Exstream customer. You can also download updates to the software from the website, under the **Upgrade** folder.

Character Sets

Each release version is available with the following character sets:

Character Set	Description
SBCS (Single Byte Character Set)	• Represents 256 different characters at any time. • Supports *Native*, *ASCII*, and *EBCDIC* using code pages.
DBCS (Double Byte Character Set	• Represents all characters internally using Unicode. • Supports double-byte character sets such as *Traditional Chinese* and *EUC-JN (Japanese)*.

To determine which character sets are available to you in Dialogue, browse to the *License* tab in the *System Settings*.

Tip

There is no installation CD for Dialogue.

Tip

If your organization has purchased the DBCS version of Dialogue, the *License Information* tab displays that information.

Installing the Software and Documentation

Now that the software has been downloaded, you must install it onto your system.

Installing Dialogue

To begin the installation, run the installer. A wizard then takes you through the installation process. The wizard specifies default installation folders and other configuration settings. If you already have the default Data Source Names (DSNs), a DOS window opens and prompts you to overwrite them. A warning dialog box opens if you have previously installed Dialogue. Do not click ***Replace*** unless you want to overwrite the default database and potentially lose all information.

:: Note

Updating the software uses the same procedure as the installation.

Documents Included with the Software

The following documents are installed with the software, in the application directory.

Readme.txt

The **`Readme.txt`** file is placed in the Exstream program directory during the installation process. It provides important information about your Dialogue system, such as:

- Startup and installation information.
- The system administrator login and password.
- Other user logins and passwords.
- Uninstallation information.

Release Notes

Each general availability and managed release of Dialogue is accompanied by the Dialogue Release Notes. Release Notes also explain the major difference between versions of Dialogue. The Release notes do not completely document all the features of a major release. Instead, release notes:

- Contain high-level information.
- Explain the benefit of the function or feature.
- Provide a brief technical explanation of the function or feature.
- Indicate new features and changes in the documentation.
- Provide information about changes in product support.

Maintenance Release Notes

If you have a question that is related to the software version, check the maintenance release notes. Maintenance release notes contain information about interim improvements made to the software between releases.

Installing the Exstream Documentation Set

The Exstream documentation set consists of a series of books in PDF format. They are downloaded individually or all together in the **`Reference Guides.zip`** file. This zip file contains an executable which places the guides in your Exstream program directory.

Tip

Dialogue supports a unique registry entry for each instance of Dialogue installed. This enables you to react more quickly to software changes, as well as test applications without affecting production.

Save guides to your **C:\Program Files\Exstream\Exstream Dialogue Guides <Version>** directory. This enables Dialogue's context-sensitive help to access the relevant guide.

:: Note

If the guides are not installed in the proper directory, the context-sensitive help will not function properly.

Documentation and Training Catalog

The documentation suite also includes a training catalog, which provides:

- A list of the guides and the descriptions.
- A list of courses and their descriptions.

How Dialogue Uses Databases

Now that the software has been installed, take a moment to make sure the database is ready. As a database-centric application, the database is of utmost importance.

Dialogue uses databases for three purposes:

- **Design database** - Contains information about objects and system settings.
- **Data source** - Populates data files and variables in Dialogue.
- **Tracking** - Collects data and other information about marketing campaigns.

Supported Databases

Dialogue installs a Microsoft Access database for your initial use, but your installation of Dialogue can use Oracle, SQL Server, or DB2 databases instead. The related installation scripts are included with each particular platform as purchased.

Dialogue supports the following database platforms.

- Access (97 and above)
- Oracle (8.i and above)
- SQL Server (7)
- DB2 (7.2.0)

For multi-user environments, use Oracle, SQL Server, or DB2 databases with multiple database schemas. A pre-defined Access database is used for this class.

:: Note

Microsoft Access databases do not support schemas.

Default Databases

The Dialogue installation procedure creates three Microsoft Access databases for initial use. They are normally installed on the design workstation in the default directory **`C:\Program Files\Exstream\`**

Database Name	Description
`Exstream.mdb`	• Contains sample objects. • Created for test use.
`EmptyExstream.mdb`	• Does not contain any objects. • Used with the `UpdateDB` utility to send test cases.
`Tracker.mdb`	• Contains the Customer Knowledgebase, featuring information about campaigns. • Used only with the `Advanced Campaign Management` module.

Tip

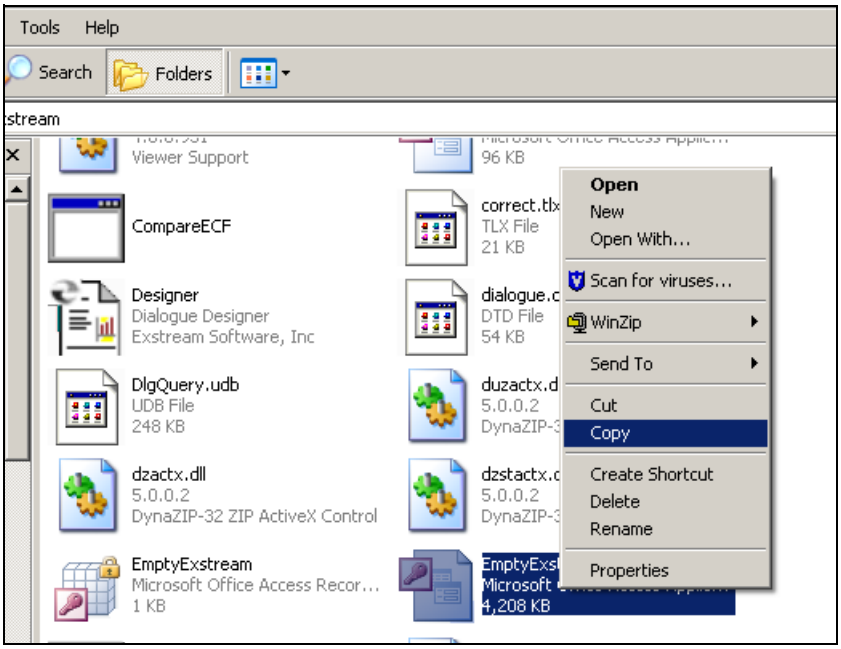
Keeping backups of all Dialogue-related databases and files for your system is highly recommended.

Schemas are a group of related tables in relational databases. Schemas separate the various tables in a database into more manageable groupings.

Creating a New Access Database

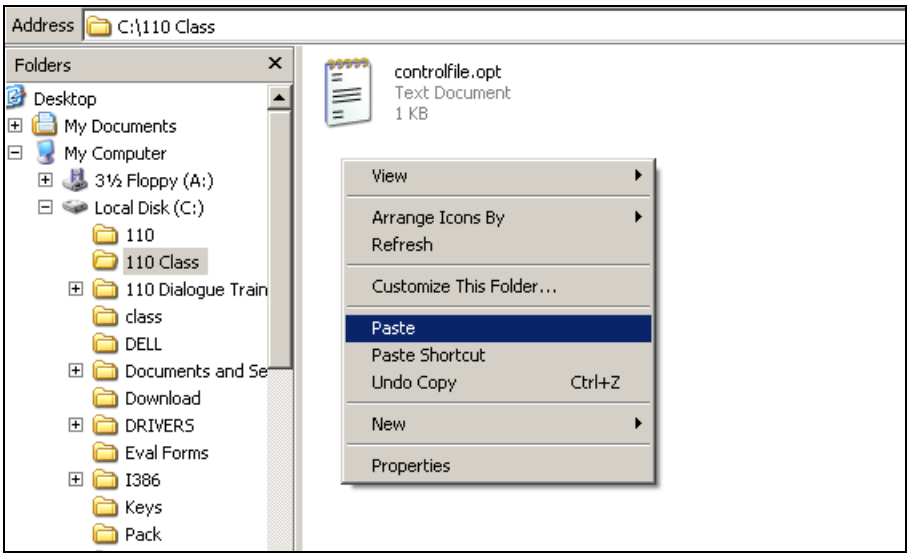
To create a new Access database, browse to the **C:\Program Files\Exstream** directory, right-click the EmptyExstream.mdb database, and select **Copy**.

Copy the database



Browse to the location of the new folder, right-click in the directory, and select **Paste**.

Paste the copy



Then right-click the copy and select **Rename**. Rename the database.

Creating a System DSN

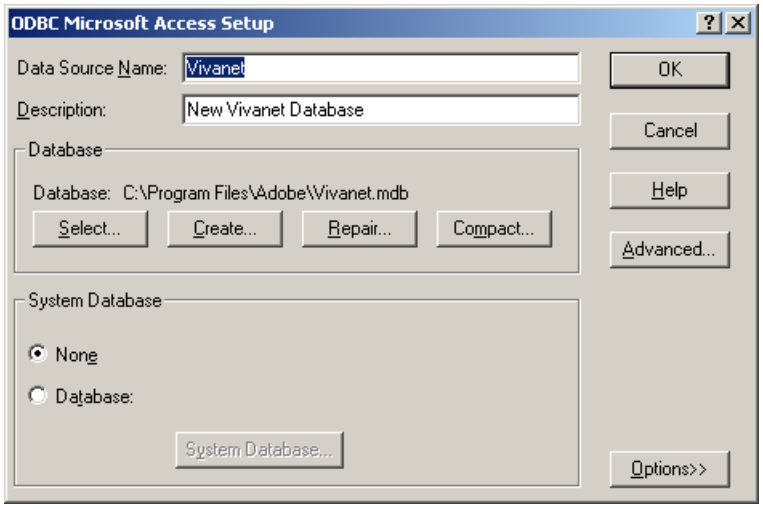
When you use a database other than the default Exstream design database, you create a system **DSN** (data source name) to direct the system to the database. The default database does not need a DSN: Dialogue provides one for it. A DSN is a shortcut, so you do not have to browse to find the database.

A **DSN (Data Source Name)** is a database representation that enables Dialogue to connect to the design database.

The DSN includes the:

- Database name.
- File path to the database.
- ODBC driver type.
- Username and password used to access the database.

Creating a new DSN



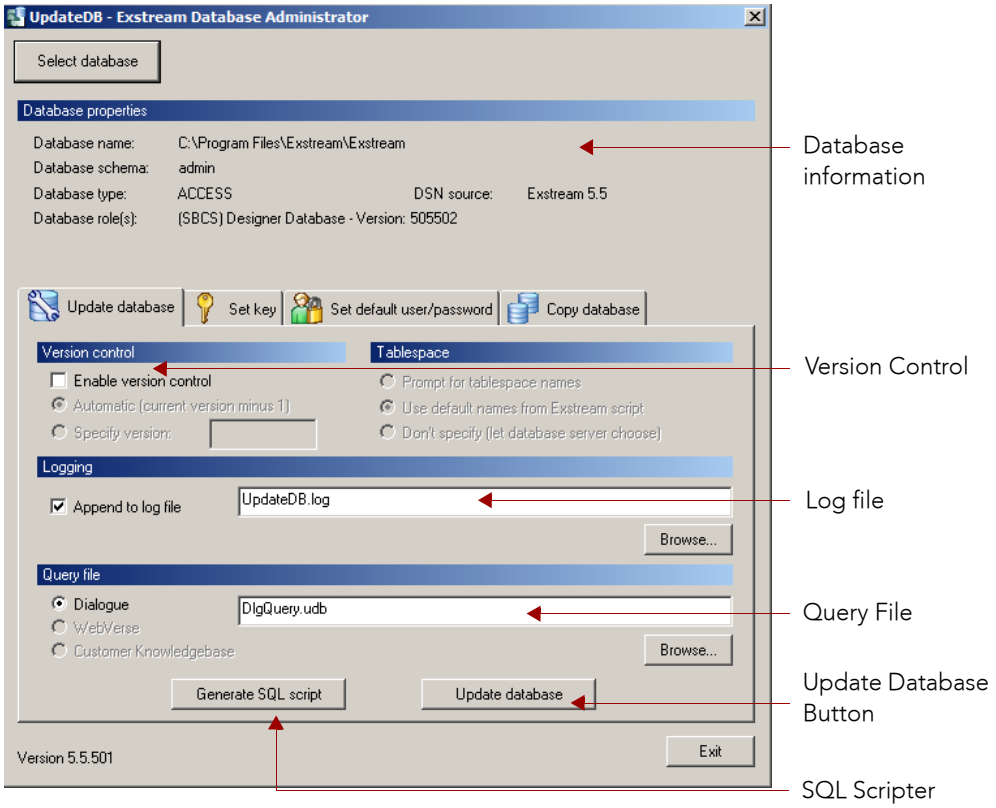
Once a DSN has been created for a specific database, it is used in an application to access the database. Dialogue provides Microsoft Access databases for the local test environment, but use Oracle, SQL Server, or DB2 in multi-user environments.

When creating DSNs for use by Dialogue, you must ensure that you are creating a **system DSN**. This enables all users to access the specified design database.

Updating the Database

You need to update the database before logging in for the first time. Updating is done with an external file called ***UpdateDB.exe*** in the Exstream directory. This application updates the indicated database to the version of Dialogue that was installed on the workstation.

The Update Database Administrator



FEATURE	EXPLANATION
Database Information	Details the database information, such as name, schema, and version.
Interface Panel	Enables you to set update values and copy the database.
Version Control	Enables you to specify the database version.
Log File	Indicates the log file that records all database activity.
Query File	Indicates the log file that records all database queries.
SQL Scripter	Generates the update sequence as an SQL script (does not update until the script runs).
Update Database Button	Activates the database update.

For more information about the Interface Panel, please see the **Dialogue Administrator Guide**.

Tip

Make a backup of your database before you update it.

Invalid Database

If the database does not work, or error messages are occurring, check for the following issues:

- **The database may be in use -** Make sure that there are no running instances of Dialogue.
- **The database may have the incorrect Dialogue version -** Update the database.
- **The database may be corrupted -** Try using a backup or copy.
- **The indicated database may not be supported.**
- **The database may be set to Read-Only.**

Tip

The database may be in use error occurs only with Access, which does not support multi-user access.

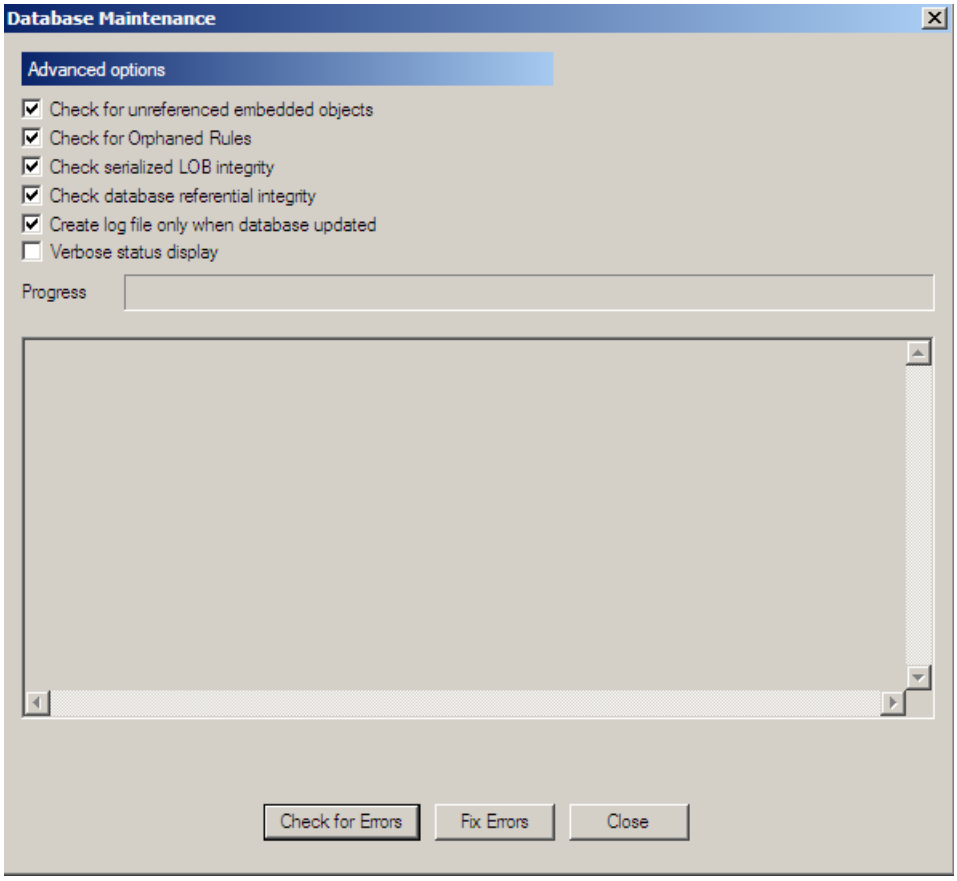
Running Database Maintenance

Dialogue contains a Database Maintenance Tool, which checks your database for any errors that are slowing down operation and interfering with proper referencing. You access the Database Maintenance Tool at *Tools -> Database Maintenance* from the Design Manager.

:: Note

You cannot run the database maintenance until you log into Dialogue.

Database Maintenance Application



The database maintenance application checks for the following issues:

SETTING	FUNCTION
Check Serialized LOB Integrity	This checks and fixes rules and variables in components.
Check for Orphaned Rules	This finds unnamed rules that are not used by any objects and deletes them.
Check database referential integrity	This checks the many references between tables, including relationships that are not enforced though database referential integrity.
Create log file only when database updated	If selected, a log file is only generated when you fix problems in the database. If cleared, a log file is always produced.
Verbose status display	This controls how much information is displayed in the on-screen display.

When the maintenance application finishes scanning for errors, it presents a report. Select ***Fix Errors*** to address the issues found.

For more information about the Database Maintenance Application, please see the Dialogue Administrator Guide.

Login Methods

When loading, Dialogue prompts you for the design database. Select the design database you wish to use for the upcoming session. You also control how users log into Dialogue by specifying the following options in the ***Database and Password Options*** area on the ***Select Database*** tab.

METHOD	DETAILS
Default user and password	• The ***User Logon*** dialog box captures and displays your Windows user ID from the network. • A password is not needed. – If you use a different user ID in the ***User*** field, you must type a password.
NT authentication	• This is used for databases configured to use the security built into their Windows NT network. • Dialogue connects to the database without specifying a user ID or password. A login is not necessary with this method.
Prompt for user and password	• You are prompted to enter two sets of user IDs and passwords. – The database user ID and password. – The Dialogue user ID and password.
Database and Dialogue	• You are prompted to enter a user ID and password used to log in to both the database and Dialogue.

Demonstration	Observe the demonstration.

Independent Exercises: Dialogue Installation

Exercise Create a Vivanet database and create a DSN for the Vivanet database.

If you need help, refer to the steps provided in the following **Guided Exercises**.

TASK	SPECIFICS
Copy and Rename the database	• Copy the *EmptyExstream.mdb* database. • Place it in the **C:\110 Dialogue System Administration** directory. • Rename it *Vivanet*.
Set up a system DSN	• Use a Microsoft Access ODBC driver. • Name the system DSN **Vivanet**. • Use the ***Vivanet.mdb*** Access database.
Update the database	• Update the Vivanet.mdb database.

Success! You have completed the **Dialogue Installation** exercise.

Guided Exercises: Dialogue Installation

Copy and Rename the Database

Exercise Set up a new Vivanet design database in Microsoft Access. Copy the EmptyExstream.mdb to create the new database.

In Windows:

STEP	ACTION	DISPLAY
1.	Open *Windows Explorer*.	Windows
2.	Browse to **C:\Program Files\Exstream**.	Windows Explorer
3.	Right-click the *EmptyExstream.mdb* file and select *Copy* from the shortcut menu.	
4.	Browse to **C:\110 Dialogue System Administration**.	
5.	Right-click within the folder and select *Paste* from the shortcut menu.	
The **EmptyExstream.mdb** file is copied in the *Class Database* folder.		
6.	Right-click the *EmptyExstream.mdb* file and select *Rename* from the shortcut menu.	
7.	Type **Vivanet.mdb** and press ENTER.	

The *EmptyExstream.mdb* file is renamed to *Vivanet.mdb.*

Success! You have created a new Access design database.

Tip

You open *Windows Explorer* by clicking *Start -> Run*, typing **explorer** in the *Open* text box, and clicking *OK*.

Set Up a System DSN

Your Turn Set up a system DSN to point to the **Vivanet.mdb** design database.

IIn Windows NT/2000/XP:

STEP	ACTION	DISPLAY
1.	Go to *Start -> Control Panel -> Administrative Tools -> Data Sources (ODBC)*.	Windows
The *ODBC Data Source Administrator* dialog box opens.		
2.	Check the System DSN tab.	
3.	Click the *Add* button.	*System DSN* tab
The *Create New Data Source* dialog box opens.		
4.	Select *Microsoft Access Driver (*.mdb)* from the list.	
5.	Click *Finish*.	
The *ODBC Microsoft Access Setup* dialog box opens.		
6.	Enter **Vivanet** in the *Data Source Name* text box.	
7.	Enter **New Vivanet Database** in the *Description* text box.	
8.	Click the *Select* button.	
The *Select Database* dialog box opens.		
9.	Browse to the **C:\110 Dialogue System Administration\Vivanet.mdb** file	
10.	Click *OK*.	
You are returned to the *ODBC Microsoft Access Setup* dialog box.		
11.	Click *OK*. You are returned to the ODBC Data Source Administrator dialog box.	
12.	Click *OK*.	

The new system DSN is created.

Success! You have set up a system DSN for the **Vivanet.mdb** design database.

Update the Database

Exercise Update the Exstream Dialogue database.

In Design Manager:

STEP	ACTION	DISPLAY
1.	Log all users out of Dialogue and close the application	Design Manager
2.	Browse to the C:\Program Files\Exstream folder.	Windows
3.	Double-click **UpdateDB.exe**.	
The *Dialogue Database Administrator* opens		
4.	Click *Select database*.	
The *Select DSN* dialog box opens		
5.	Select *Vivanet*.	*Select DSN* dialog box
6.	Click *OK*.	
7.	Click the *Update Database* button	
The *Update completed successfully with no errors* dialogue box opens		
8.	Click *OK* and *Exit*.	

Success! You have updated the Exstream database.

Initial Dialogue Settings

By default, certain system settings are configured as part of the installation or upgrade process. Understanding how these initial Dialogue settings affect a new or upgraded installation is important to setting up the system environment.

This lesson covers the remainder of the Dialogue installation: licensing and basic navigation.

Objectives

By the completion of this lesson, you will be able to:

- Access Dialogue as an Administrator.
- Set up Keys and Licensing.
- Browse the Environment.
- Administer System Settings.
- Set System Configuration.

Terms

New terms used in this lesson include:

- **EKF -** An Exstream Key File containing a 50-character code. This code determines what features are available.
- **IJPDS** - An Ink Jet Printer Data Stream is a printer option that supports high-speed, full-color production with any number of print heads.

Additional Information

For more information on this topic, refer to the Dialogue:

- `System Administration` Guide.

Accessing Dialogue as an Administrator

When accessing Dialogue for the first time, log in under the **ADMIN** user account. This user is created by default with each new database and enables you access to Dialogue. You start Dialogue:

- From the Windows Start menu. **Start -> Programs -> Exstream Software -> Dialogue -> Dialogue Design Manager**
- By double-clicking the Design Manager icon on your desktop.

Tip

For the system administrator login and password, see the `Readme.txt` file included with your Dialogue installation.

User Login Dialog Box

When starting Dialogue, you are prompted to enter your user name and password in the ***User Login*** dialog box.

Login dialog box

The ***User Logon*** dialog box also displays:

- The version of the software.
- The name of the company the software is licensed to.

:: Note

When logging in, the user name is not case sensitive, but the password is case sensitive.

Setting Up Keys and Licensing

Upon the initial load of Dialogue, you are prompted for a key: Dialogue does not function without a valid key.

The **Dialogue Key**:

- Verifies you as a customer of Exstream software.
- Enables the modules you have purchased.
- Enables the drivers you have purchased.
- Determines the amount of output you create.
- Indicates how many users may use a module per the license.

In addition to the Dialogue Key, there is a **Dialogue License**. The **License**:

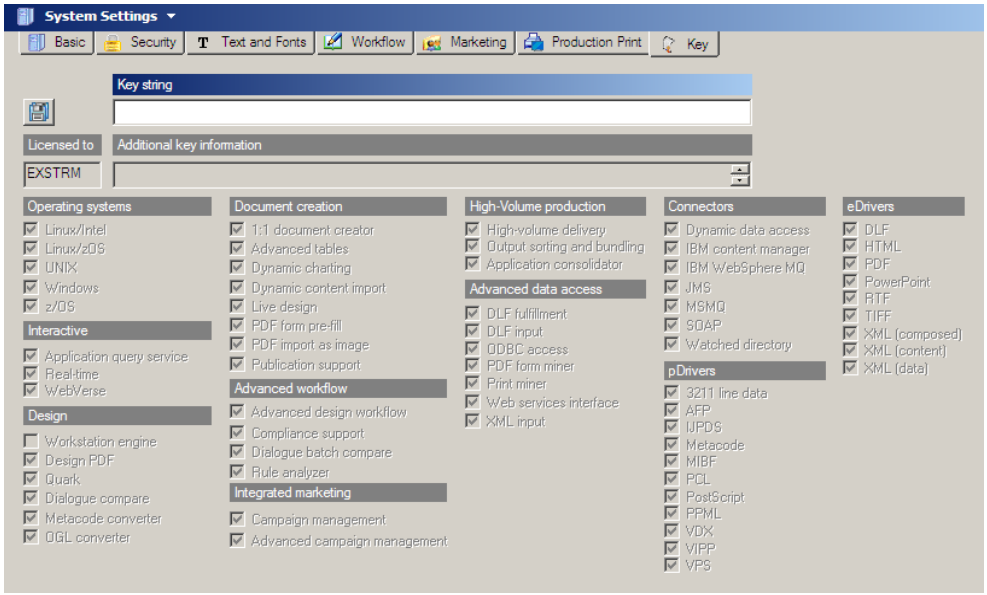
- Works in conjunction with the key.
- Verifies activation of certain modules by communicating with Exstream Software.
- Verifies the number of "seats" purchased.
- Can be specific to an operating system, such as Windows or Linux-only operation.
- Can also be specific to a certain computer, using identifiers such as the MAC address.
- The **Workgroup License Key** enables you to use the Workgroup Engine, which can generate production output without the demonstration banner at up to 120 pages per minute.
  - Some workgroup licenses may also be authorized to do full production output on a central server.

Dialogue Keys

When purchasing Dialogue, you are provided with an **EKF** (**Exstream Key File**) file from Exstream. This file contains your unique 50 to 155-byte system key. For your Dialogue installation to work, you must have a valid system key.

An **EKF** is an Exstream key file containing a 50 to 155-character code. This key determines which features are available.

The License Key



You are prompted to enter your system key when:

- Logging into a new or upgraded installation for the first time.
- Using a database that has just been updated using the UpdateDB utility.

You activate a key three ways:

- Click the  button on the above screen and browse to the .EKF file, and the EKF populates automatically.
- Import a key within the UpdateDB application, under the Save Database tab.
- You are automatically prompted for a key when logging into Dialogue when the database has an invalid key.

Obtaining a Usage License

Your license agreement may limit the number of users for a given module or function. For example, you are allowed three licenses for High-Volume Delivery, so you can install three machines with this module.

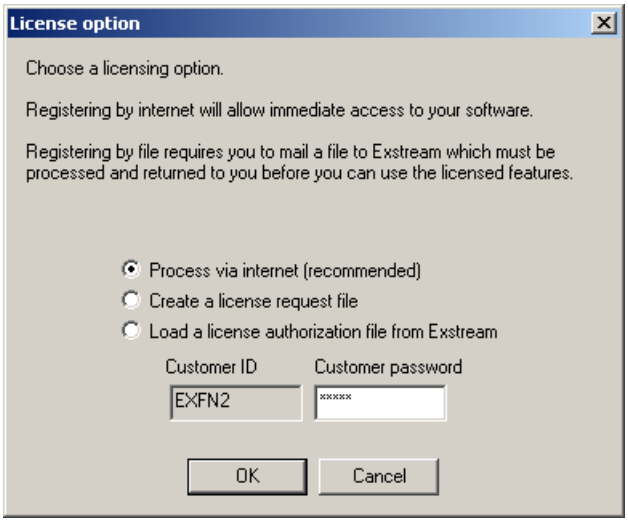
The exact terms of your licensing are encrypted within your EKF. You may never use more licenses than indicated by the EKF, until you replace the EKF.

Upon the initial login, the ***License option*** dialog box may open providing a series of methods to specify a method to allocate the licenses allowed by your EKF. Either use the internet to obtain your license or use a license request file provided by Exstream.

Tip

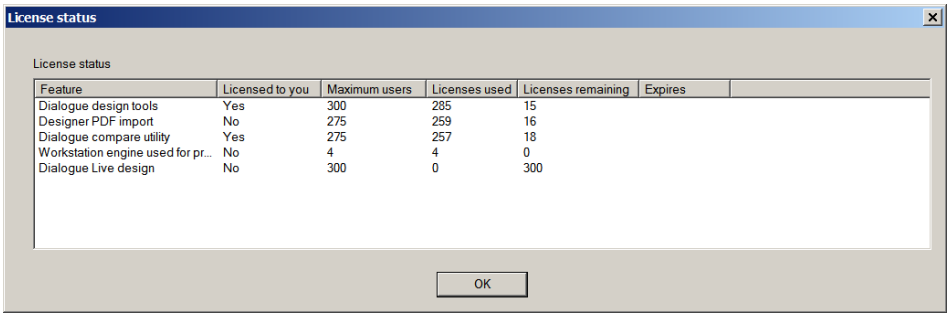
If you do not have access to the Internet on the current machine, you must get an Electronic License Transfer (ELT) file from another machine.

License option dialog box



After verifying the license terms, the ***Request Licenses*** dialog box opens. This asks you which module licenses, if any, to use for the current installation. You are given a tally of how many licenses are currently in use and how many are available. Once you click ***OK***, Dialogue checks with Exstream Software. If the license is available, then it is enabled for this machine and one use for the indicated module is deducted from the tally.

The Request License dialog box



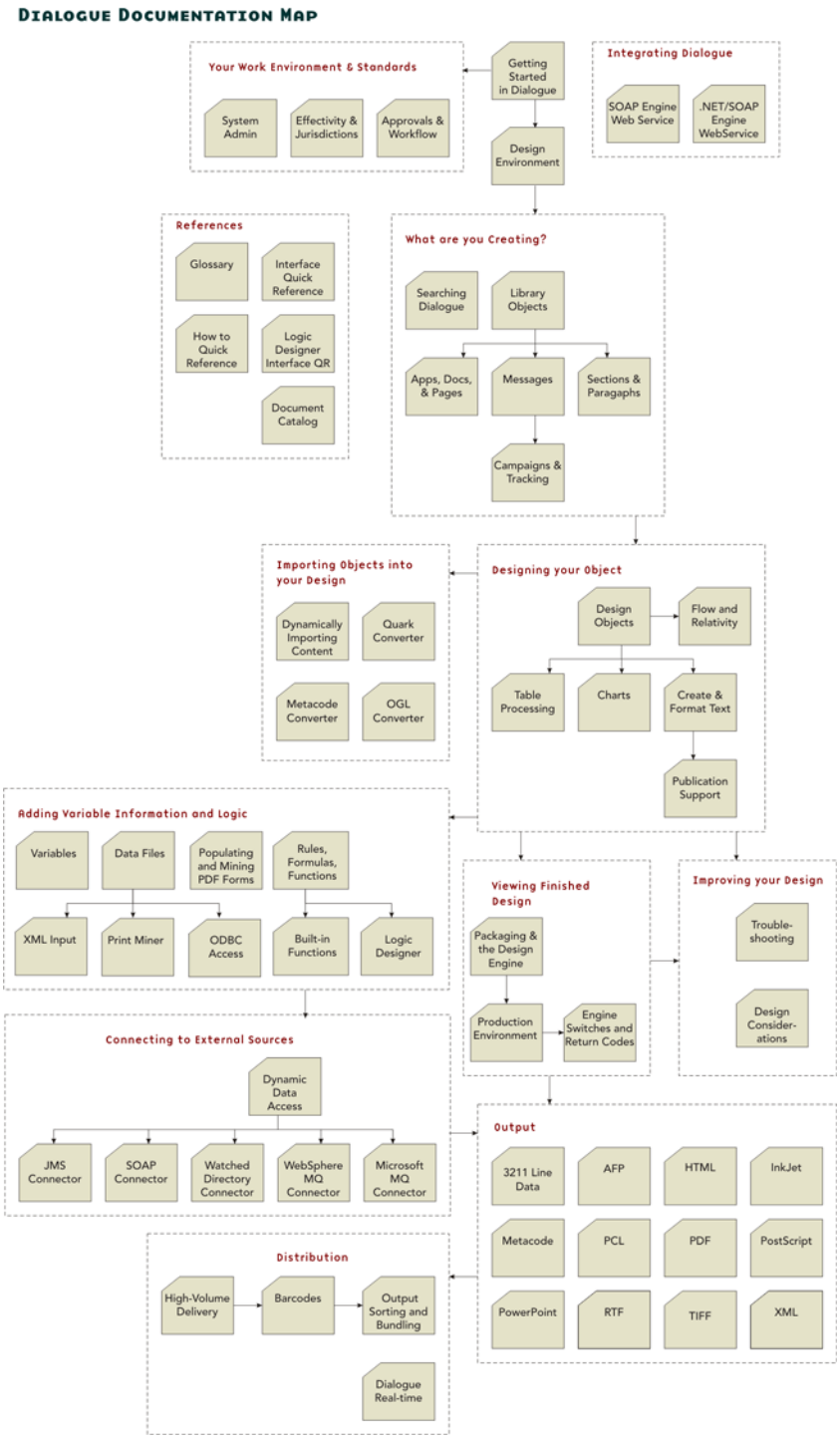
For the purposes of this class, Dialogue does not require a site usage license, so this dialog box does not appear. However, be aware that during an actual installation, you do have to set the licensing. To install new features after a license, license commands are found in Design Manager in the shortcut menu under *Tools* -> *Licensing*.

Demonstration	Observe the demonstration.

Suites and Modules

Additions to the Dialogue software are packaged in modules that correspond to specific functions and features. By default, Dialogue is installed with a full suite of modules; however, only those activated by your system key are available for use.

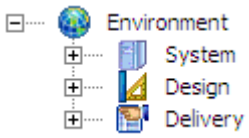
Dialogue modules



Browse the Environment

As an administrator, you have access to the ***Environment*** heading. Normal system users do not see this in their Library View, and they are not able to access these functions. The remainder of this course entails mastery of these settings.

The Environment Settings in Library

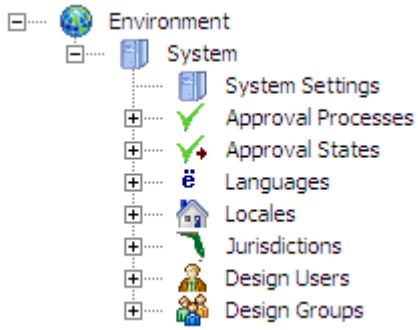


In the Library, the ***Environment*** enables you access to Dialogue's system configuration settings. These are settings that are available only to administrative users. The subheadings under the ***Environment*** categorize several types of system settings.

System Environment Settings

Dialogue's ***System*** Environment Settings are located under the ***Environment -> System*** heading.

User Environment Settings in the Library



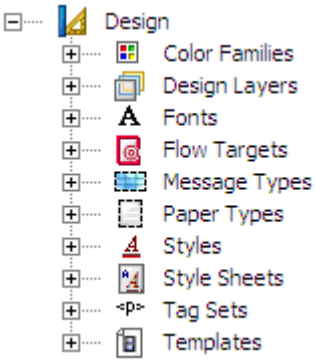
The ***Environment*** heading includes components related to users and approvals.

By dragging the ***System Settings*** heading into the Property Panel, you access System Configuration Options that affect system settings.

Design Environment

Dialogue's ***Design*** Environment Settings are located under the ***Environment -> Design*** heading.

Design Environment Settings in the Library

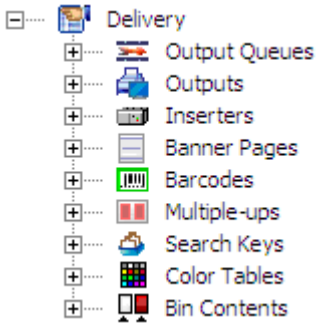


The Design Environment controls how users design output.

Delivery Environment

Dialogue's ***Delivery*** Environment Settings are located in the Library under the ***Environment -> Delivery*** heading.

Production Environment Settings in the Library

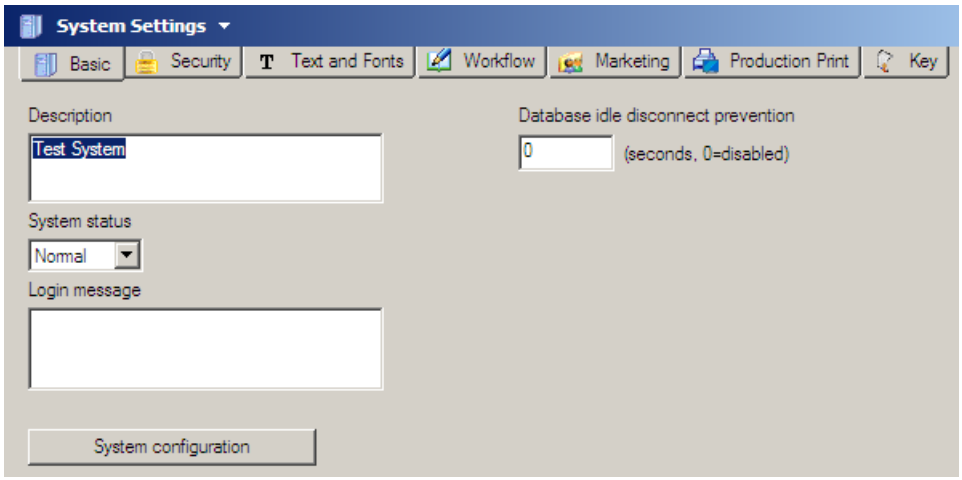


The Production Environment controls how output is processed by output equipment such as inserters and printers.

Administering System Settings

The basic system settings are accessed by dragging the ***System Settings*** heading, under ***Environment -> System*** to the Property Panel. There are six tabs for settings: ***Basic, Texts and Fonts, Workflow, Marketing, Production Print,***and ***License***.

The system settings



Basic Tab

The Basic tab enables you to set the following options:

SETTING	FUNCTION
Description	Describes this Dialogue system.
System Status	**Normal** enables normal operation. **Locked** prevents all users from changing anything in the system.
Login Message	Whatever is entered here appears in a dialog box when any user logs on.
Database idle disconnect prevention	Sets the seconds between access times to prevent you from being disconnected from the database due to inactivity. 0 disables this setting.
System Configuration	Enables you to customize the graphic user interface and the availability of Dialogue functions for users.

Tip

If system status is locked, you can use a login message to inform users.

Security

This tab enables you to set the password and authentication settings for design users.

SETTING	FUNCTION
Passwords	Sets the expiration date, minimum password length, and maximum login failures allowed for all passwords.
External user authentication	Sets alternative login authentication methods. You may use Windows authentication or a custom DLL to verify passwords instead of checking against the DIalogue user password.

Text and Fonts

This tab enables you to set the system design defaults, or the standard font conventions for anything created in the system without a style sheet. This topic is covered at length in the **Design Environment** lesson.

Workflow

The ***Workflow*** tab sets options to control the approval process and versioning.

SETTING	FUNCTION
Edit Control	If an object becomes unreferenced, Dialogue inquires whether to delete the item or not.
Versions and approval	Indicates how many versions of each object to save, and how the system notates submissions for approval.
Regulatory support	This option is only available if you have the Regulatory module. Specifies a home locale, and how to handle cloned objects that have regulatory assignments.
Email	The E-mail server settings, which are required for the approval notification E-mails.

Marketing

The ***Marketing*** tab is available only if you have the **Campaign Management** module. On this tab, choose up to three company-specific data fields that are tracked in your campaigns.

Production Print

Production Print enables you to specify ***Resource naming conventions*** for images, fonts, and Metacode IDEN to specify a string for Metacode or AFP output.

Key

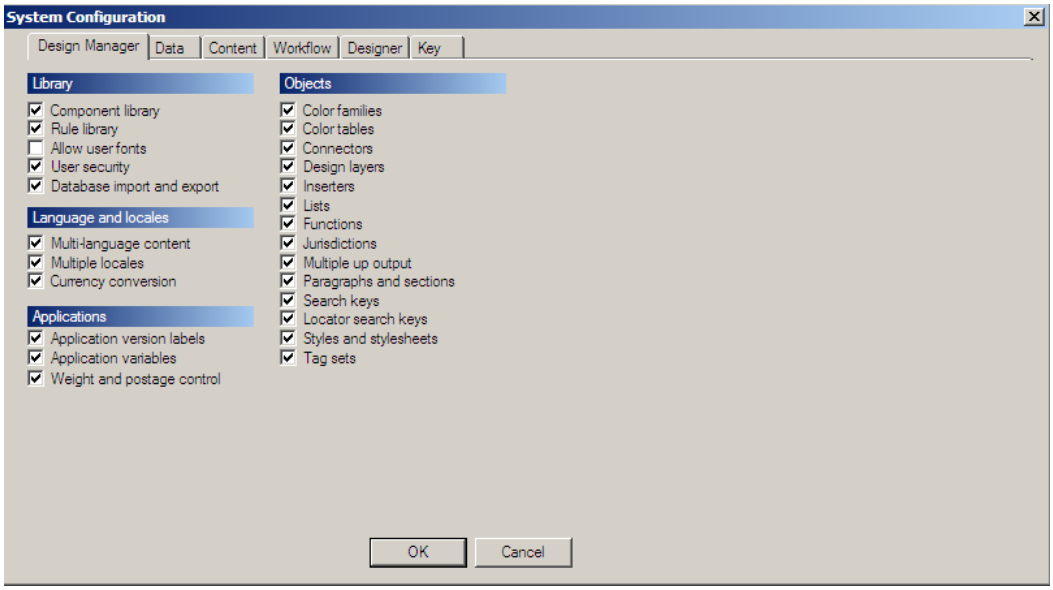
The ***Key*** tab shows your current 50-character EKF code and what options are available. You also use this screen to browse to a different EKF file, or to modify the EKF code.

If you modify your EKF code, Dialogue will not function correctly.

Setting System Configuration

Dialogue's interface and features are customizable to meet the specific needs of your organization. The *System Configuration* dialog box, available by clicking the *System Configuration* button on the *System Settings* Property Panel, enables you to enable or disable Dialogue functions and features. Only the features and functions that are part of modules you have purchased are active on the *System Configuration* dialog box.

System configuration



Certain options on the *System Configuration* dialog box are hierarchical. If you disable an option that is already in use in your system, it remains in use in existing designs. However, when an option is disabled, it cannot be used in future designs. When options are disabled for a user group, those users cannot change objects controlled by the disabled options, but the objects remain intact.

:: Note

This course describes the functions and features of a fully configured system.

Interface Configurations

CATEGORY	CONTROLS
Design Manager	The appearance of objects in the Library.
Data	The appearance of variable and data file features.
Content	The appearance of page, document, campaign, and message features.
Workflow	The appearance of packaging and workflow features.
Designer	The appearance of Designer objects and features.
Key	Features based on the modules available for your organization.

Demonstration	Observe the demonstration.

Independent Exercises: Initial Dialogue Settings

Exercise

Locate the system administrator name and password, and then logon to Design Manager as the administrator. Then customize the system configuration as indicated.

If you need help, refer to the steps provided in the following **Guided Exercises**.

TASK	SPECIFICS
Locate the system administrator login and password	• Use the **`Readme.txt`** file in the Exstream installation directory.
Log into Design Manager and connect to the Vivanet database	• Double-click the Dialogue Design Manager icon on your desktop. • Enter the system administrator login and password and click *OK*.
Customize the system configuration.	• Access the *System Configuration* dialog box for the system. • Clear the *Components* and *Rules Library* check boxes, and then save the configuration. Observe the result. Then restore these two settings. • Enable *Jurisdictions*.

Success!

You have completed the `Initial Dialogue Settings` exercises.

Guided Exercises: Initial Dialogue Settings

Locate the System Administrator Login and Password

Your Turn Locate the default system administrator login and password.

In Windows:

STEP	ACTION	DISPLAY
1.	Open *Windows Explorer*.	Windows
2.	Browse to **C:\Program Files\Exstream**.	Windows Explorer
3.	Double-click the **Readme.txt** file	
The file opens with the default text reader application.		
4.	Scroll down to the **User Login IDs** section and locate the ADMIN login and password.	

Success! You have located the system administrator login and password.

Log into Design Manager and connect to Database

Your Turn

Log in to Design Manager as the administrator by accessing the ***User Logon*** dialog box.

In Windows:

STEP	ACTION	DISPLAY
1.	Double-click the Design Manager shortcut on the desktop.	Windows
The ***User Logon*** dialog box for Design Manager opens.		
2.	Enter the system administrator user name in the ***User*** text box.	***User Logon*** dialog box
3.	Enter the system administrator password in the ***Password*** text box.	
4.	Click ***OK***.	
5.	Select ***File -> Change Database***	
6.	Click the ***Vivanet Database***	***Select Database*** dialog box
7.	Click ***OK***	
8.	Log in to Design Manger.	***User Logon*** dialog box

The user name and password are accepted you are logged in to Design Manager and connected to the Vivanet Database.

Success!

You have accessed the ***User Logon*** dialog box and logged in to Design Manager using the system administrator login and password.

Customize the System Configuration

Your Turn

Demonstrate the customized system interface by turning access to *Components* and the *Rules Library* off. Then re-activate these options, and activate *Jurisdictions*.

In Design Manager:.

STEP	ACTION	DISPLAY
1.	Browse to *Environment -> System -> System Settings*.	Library
2.	Drag the *System Settings* heading into the Property Panel.	
The system settings opens in the Property Panel.		
3.	Click the *System Configuration* button.	Property Panel
The *System Configuration* dialog box opens.		
4.	Browse to the *Design Manager* tab.	*System Configuration* dialog box
5.	Clear the *Component Library* check box.	
6.	Clear the *Rule Library* check box.	
7.	Click *OK*.	
8.	Click the  button.	Library
The *Component* and *Rule Library* headers disappear from the Library.		
9.	Click the *System Configuration* button.	
The *System Configuration* dialog box opens.		
10.	Select the *Component Library* check box.	
11.	Select the *Rule Library* check box.	
12.	Select the *Allow User Fonts* check box.	
13.	Select the *Currency Conversion* check box.	
14.	Select the *Jurisdictions* check box.	
15.	Click *OK*.	
16.	Click the  button and exit the Property Panel.	
The *Component* and *Rules* headers reappear and the J*urisdictions* heading appears in the Library.		

Success!

You have demonstrated the customized system interface.

Tip

If *Jurisdictions* are already enabled, leave the box selected.

Unit Summary

The concepts discussed and knowledge obtained during this unit are used in the next unit. If you have any questions, be sure to ask your instructor during this unit summary.

Concepts and Exercises
– Dialogue Installation
– Initial Dialogue Settings

Concepts and Exercises

Dialogue Installation

CONCEPT	EXERCISES
Dialogue Installation Process	• Copy and Rename the Database
System DSN	• Set up a System DSN
Updating the Database	• Update the database

Initial Dialogue Settings

CONCEPT	EXERCISES
Accessing Dialogue Design Manager	• Locate the System Administrator Login and Password • Log into Dialogue Design Manager
Customizing the System Configuration	• Customize the System Configuration

Unit 3 :: Setting Up the User Environment

- General User Access
- Creating Folders
- Approvals
- Defining Languages and Locales
- Jurisdictions
- Unit Summary

General User Access

To set up your organization in Dialogue, you create users and design groups to enhance collaboration, enforce security, and streamline workflow.

This lesson provides the process by which you create users and design groups and configure design group access levels.

Objectives

By the completion of this lesson, you will be able to:

- Create users and super users.
- Create design groups and add users to groups.
- Identify user access rights.
- Customize the design group system configuration.

Terms

New terms used in this lesson include:

- **Departmental access** - Access rights that are part of the functional access for a design group.
- **Functional access level** - An area of a design group's properties used to specify access to users and design groups to certain system functions.
- **Super user** - A Dialogue user with the highest administrative permission levels or all access rights.
- **User** - A person who accesses Dialogue.
- **Design Group** - A list of one or more users and/or other design groups.

Additional Information

For more information on this topic, refer to the Dialogue:

- `System Administration` Guide.

Creating Users and Super Users

A **user** is a person who accesses Dialogue.

Anyone who works in Dialogue is defined as a **user**.

When creating a user, you define:

- Name and description.
- Password information.
- Login status.
- E-mail and approval notification options.

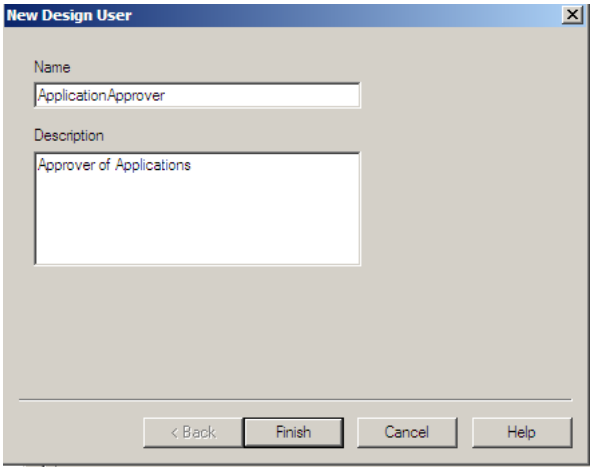
:: Note

A user's functional access is defined by its membership in a design group.

Creating and Defining Users

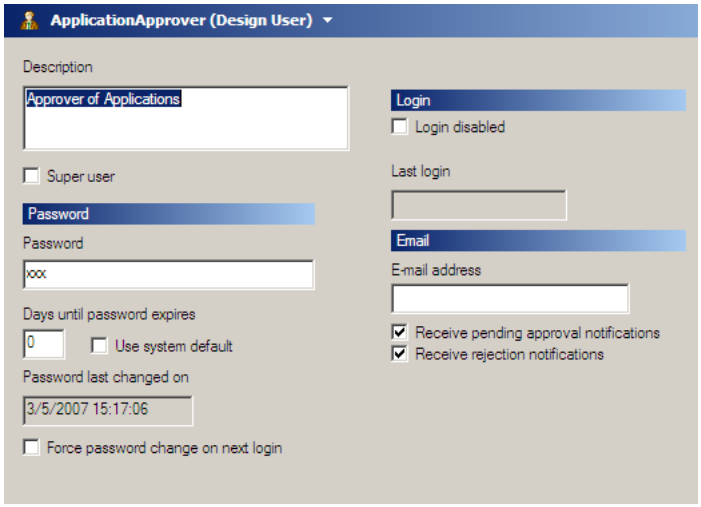
Create a new user by browsing to ***Environment -> System -> Design Users***, right-clicking on the heading and selecting ***New User***.

Creating a new design user



After giving a name and description, you are prompted for the user properties.

Creating a new user



User Properties

There are a variety of settings that are used to further define the user. These settings are defined in the Property Panel. Each profile contains the following information.

PROPERTY SETTING	FUNCTION
Description	Describes the user's function.
Super user	Identifies the user as a super user: grants unlimited access. If this box is cleared, the user reverts to the previously defined access levels.
Password	The user's password authenticates the user identity.
Days until password expires	The system requests a new password from the user after this interval elapses.
Use system default	The system default is used for password renewal.
Password last changed on	The date and time of the last password change.
Force password change on next login	The system requires the user to change the password during the next login.
Login disabled	The system does not allow this user to login.
Last login	The date and time when this user last logged in.
E-mail address	The user's E-mail address for receiving approval notifications.
Receive pending approval notifications	The user receives an E-mail when there is a new document in the system that requires the user's approval. (*Enterprise Workflow Module only*)
Receive rejection notifications	The user receives an E-mail when a document has been rejected. The user must be a member of the approval process. (*Enterprise Workflow Module only*)

A **super user** is a user with the highest administrative permission levels or all access rights.

Super Users

A **super user** is a user who has full access to Dialogue. A super user:

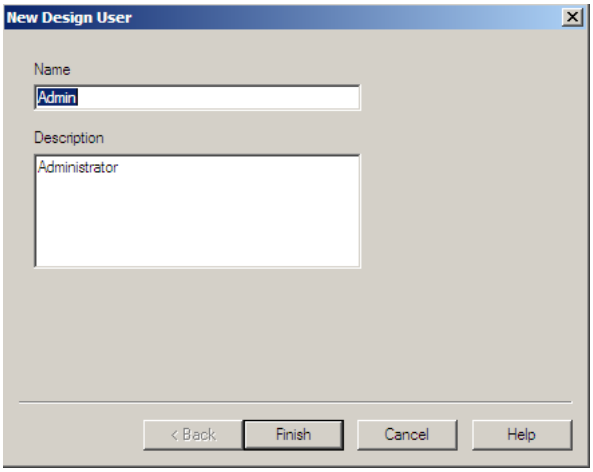
- Has no restrictions on system access.
- Can add, modify, or delete anything.
- Can approve all objects submitted.

Super user access may be removed at any time. When a user is no longer defined as a super user, that user is reverted to the last defined permission settings.

Creating and Defining a Super User

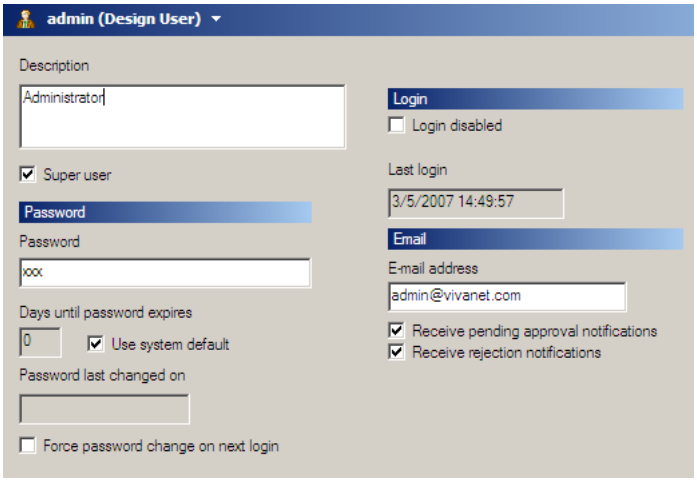
Create a super user by browsing to *Environment -> System -> Design Users*, right-clicking on the heading and selecting *New User*.

Creating a super user



After giving a name and description, you are prompted for the user properties. By selecting the *Super user* option, the user is set up as a super user.

Defining a super user



Creating Design Groups and Adding Design Users to Design Groups

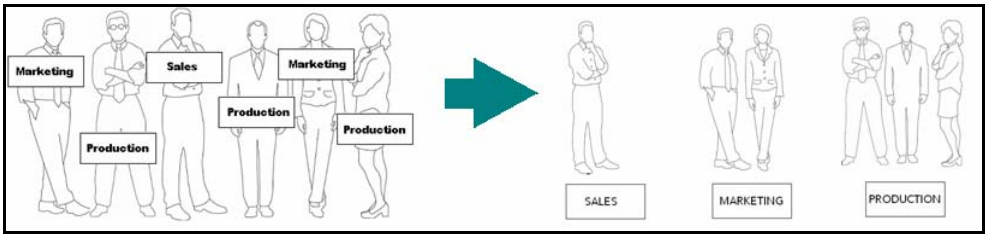
Often many users share purposes or access needs. Therefore, it is advantageous to classify the users into **design groups**. Design groups accomplish two key ends:

- Classify similar employees.
- Define the availability of Dialogue objects.

For instance, create a different design group for Marketing, Sales and Production. This way, you provide a folder for each group, containing only the objects they need for their job.

A **design group** is a list of one or more users and/or other design groups. Each design group object defines access to Dialogue features and functions for multiple users. design groups also classify similar employees. and define the availability of Dialogue objects.

Many users: many functions



Setting Access Rights

Before defining design groups, be aware of each group's function and which areas of Dialogue the design group needs to access. Design group access settings include:

Area	Affected Functionality
Environment	Enables the users in the group to access the administrative functions (below the Environment heading). Enable this option only for design groups with administrative access.
Data	Enables the users in the group to create and modify data files, control files, and batch files.
Application design	Enables the users in the group to create documents, pages, messages and objects.
Campaign design	Enables the users in the group to create campaigns.

Functional access levels

Each of these areas has a **functional access level**. For example, if your design group had the ***Campaign design*** access state set to ***None***, the ***Campaign*** headings does not appear in the Library view. If a user does not have at least the ***View*** access level for an area, the related item does not appear in Design Manager.

A **functional access level** is an area of a design group's properties used to specify access to users and design groups to certain system functions.

:: Note

A user may belong to many groups. Conflicting group rights do not negate each other. If a user belongs to two groups, and one group restricts a function, and the other grants the same function, the user has access to the function.

Tip

While granting ***Environment*** access allows the users of that group to access administrator objects, only a super user may modify users, design groups, and system configuration.

Functional Access Levels

FUNCTIONAL ACCESS LEVEL	SEE	CHANGE	ADD	ERASE
None				
View	X			
Revise	X	X		
Create	X	X	X	
Create and Delete	X	X	X	X

Departmental Access

Departmental access further define access rights that are part of the functional access for a design group.

In addition to the functional access levels, each design group also has **departmental access**:

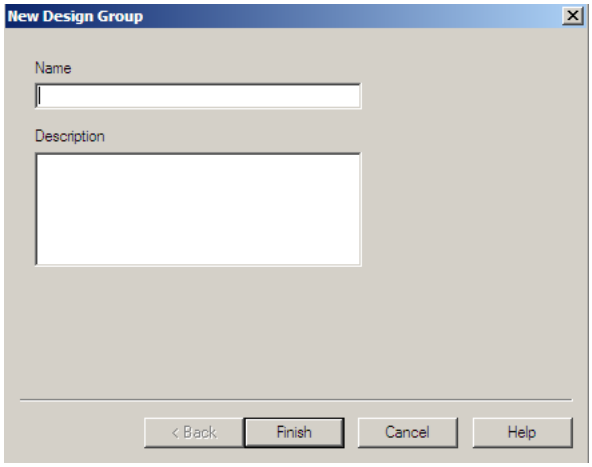
RULE	ENABLES
Folder Administration	The users may create and delete new folders where their design group has at least ***Revise*** access.
Edit Rules	The users may create and edit rules that apply to paragraphs, sections, messages, campaigns, documents and queues where their design group has at least ***Revise*** access.
Edit Content	The users may create and edit paragraphs, sections, messages, campaigns, documents and queues where their design group has at least ***Revise*** access.
Edit Style	The users may add, modify, or delete styles and style sheets.
Approver	The users are included in the approval process for the applicable items in the home folder.
Workflow Administration	The users are allowed to submit items for review, pending the approval process assigned to the current folder.
Super User	Designates every user in this design group as a super user.

Creating Design Groups

Creating a design group is the first step in setting the access levels for a group of users. You also set the starting folder and customized user interface options during this process. Upon creation, the design group opens in the Property Panel for you to define.

Create a new design group by browsing to ***Environment -> System -> Design Groups***, right-clicking on the heading and selecting ***New Design Group***. After giving a name and description, fill out the properties.

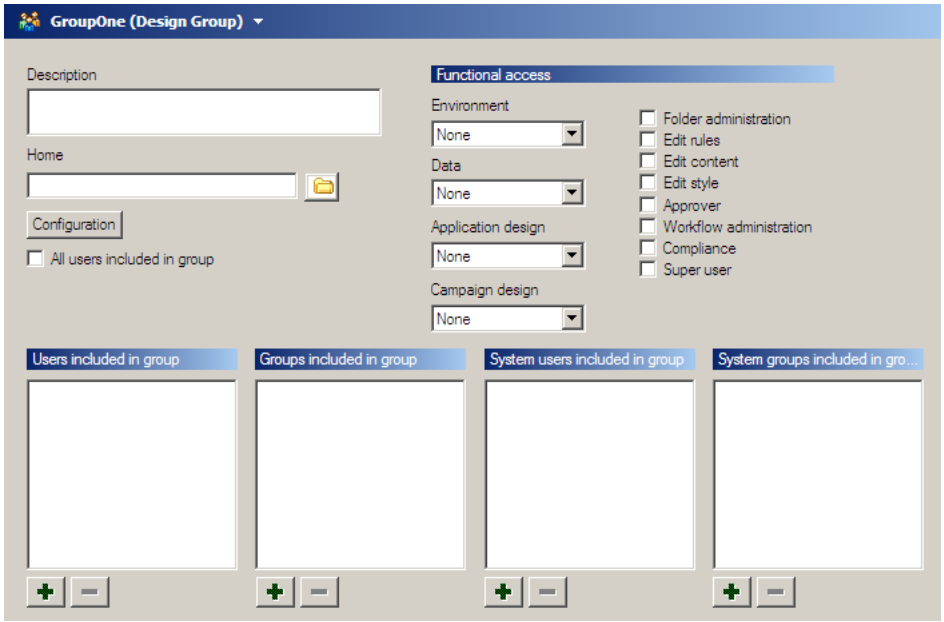
Creating a new Design Group



After giving a name and description, you are prompted for the properties.

You add users to design groups and define permissions with these properties.

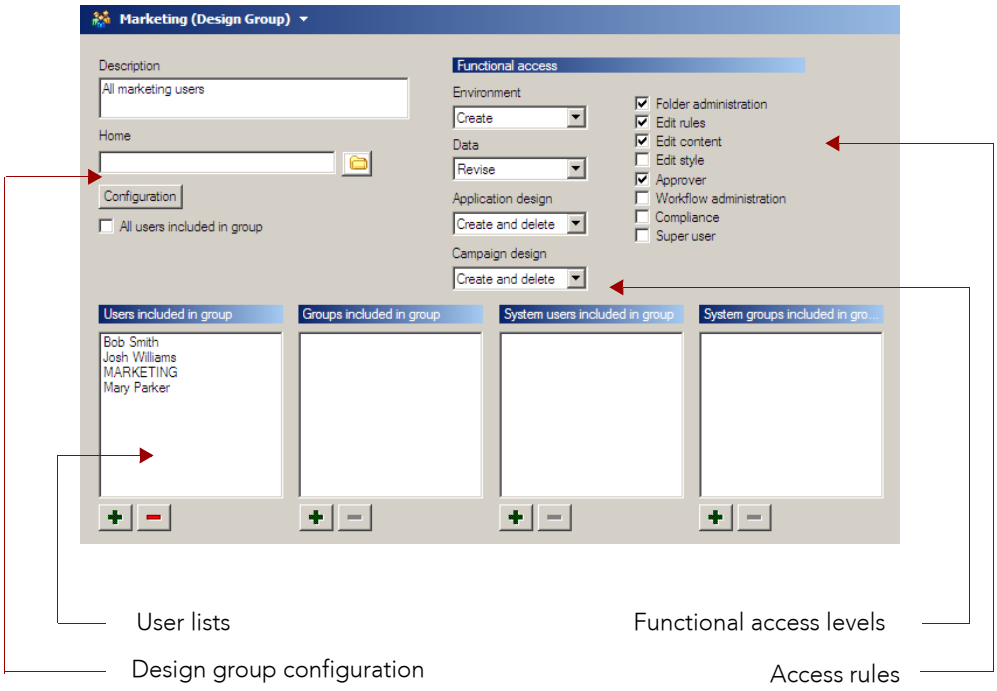
Design Group properties



Adding Users to a Design Group

Once you have created a design group, you must add users and set permission levels for the design group.

Adding users



Design Groups

Either populate the design group by using users and groups already defined in Dialogue, or by adding users and design groups defined by your operating system network. Add items to the lists by clicking on the + button; remove items from the lists by clicking the − button.

Design groups

LIST	DESCRIPTION
Users included in group	Users defined in Dialogue.
Groups included in group	Design groups defined in Dialogue; may contain sub-groups.
System users included in group	Users defined in your network, not in Dialogue.
System groups included in group	Design groups defined in your network, not in Dialogue.

Design groups may be added using the network authentication or a custom DLL file containing the design group information.

:: Note

Refer to **Unit 2: Installing Dialogue** for more information about logging into Dialogue without a design user profile.

Tip

A design group may contain as many users and sub-design groups as you want.

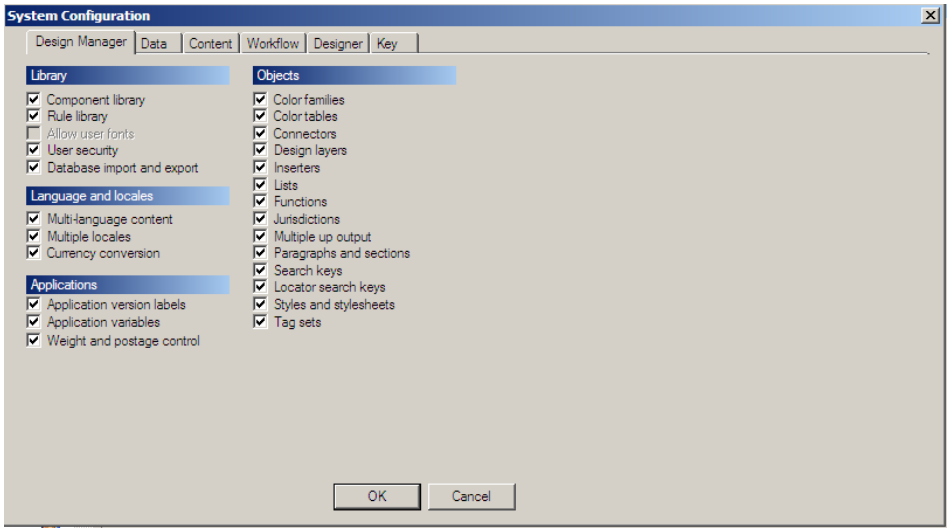
Tip

Design users and design groups may also be specified by an external .DLL. Refer to the Dialogue documentation for more details.

Customizing the User Group System Configuration

You also specify the configuration settings for each design group by clicking on the *Configuration* button. This feature enables you to enable or disable certain functions, regardless of access level, or even super user access. This is different from customizing the System Configuration, which affects every design user, regardless of design group membership.

Customized user interface settings



In conjunction with design group membership, a customized user configuration restricts the design user to only the functions necessary for that user's role.

Design Group Configuration

CATEGORY	DESCRIPTION
Design Manager	Controls the appearance of objects in the Library.
Data	Controls the appearance of variable and data file features.
Content	Controls the appearance of page, document, campaign, and message features.
Workflow	Controls the appearance of packaging and workflow features.
Designer	Controls the appearance of Designer objects and features.
Key	Controls features based on the modules available for your organization.

These settings supersede access levels. So if your design group had *View* permissions to *Components*, and Design Manager was disabled in the *Design Group Configuration* settings, you would not be able to access any Library components.

:: Note

A design user must belong to a design group to be eligible for the design group configuration. If a user is not a super user and the user is not a member of some group, the user has no access rights.

Tip

While super users disregard group limitations, they do not disregard the group's configuration settings.

Demonstration	Observe the demonstration.

Independent Exercises: General User Access

Exercise Set up the design users and design groups within Dialogue, and then customize the user system configuration.

If you need help, refer to the steps provided in the following **Guided Exercises**.

TASK	SPECIFICS
Create users	• Create a user for Fred Drake, Jim Smith, James Wilcher, Steven Maxwell, Roy Ferris, and yourself.
Create a super user	• Set Roy Ferris and yourself as super users.
Identify user access rights	• Identify the functionality granted for each access setting. In the table below, place an **X** in each cell that applies.
Create design groups	• Create a design group for each organization within Vivanet. Set the access levels to create and delete for all areas, except ***Environment***. Set the ***Environment*** to ***None***.
Add users to design groups	• Add all users to the appropriate design groups. • Add yourself and Roy Ferris to the IT group.
Customize the design group Configuration	• Turn off the following options for your design group configuration: ***Color Families*** and ***Design Layers***. • Refresh your Library and observe the result. • Restore the options. • Refresh your Library and observe the result.

ACCESS SETTING	SEE?	CHANGE?	ADD?	ERASE?
View				
Create				
Create and Delete				
Revise				
None				

Success! You have completed the General User Access exercises.

Guided Exercises: General User Access

Create Users

Exercise Create six new users in Dialogue: one for everyone department head in the Vivanet organization, and one for Roy Ferris.

In Design Manager:

STEP	ACTION	DISPLAY
1.	Browse to *Environment -> System -> Design Users*	Design Manager
2.	Right-click the *Design Users* heading and select *New User* from the shortcut menu.	
The *New Design User* dialog box opens.		
3.	Type **Fred Drake** in the *Name* text box.	*New User* dialog box
4.	Type **Fred Drake - Corporate** in the *Description* text box.	
5.	Click *Finish*.	
The new user opens in the Property Panel for you to define		
6.	Enter **drake** in the *Password* field.	Property Panel
7.	Enter *drake@vivanet.com* in the *E-mail address* field.	
8.	Click the button.	
9.	Add the remaining users indicated by your *note from John*. There will be 6 in all.	

Success! You have created dic users in Dialogue.

Create a Super User

Exercise Create Roy Ferris as a super user.

In Design Manager:

STEP	ACTION	DISPLAY
1.	Browse to *Environment -> System -> Design Users*	Library
2.	Right-click *Roy Ferris*.	
3.	Select *Properties* from the shortcut menu.	
The user properties opens in the Property Panel.		
4.	Select the *Super user* check box.	Property Panel
5.	Click the  button.	

Success! You have created Roy Ferris as a super user.

Identify User Access Rights

Exercise

Identify the functionality granted for each access setting. Place an **X** in each cell that applies.

ACCESS SETTING	SEE?	CHANGE?	ADD?	ERASE?
View				
Create				
Create and Delete				
Revise				
None				

You have identified the functionality granted to each of the five access settings.

Success!

You have identified all user access rights.

Create Design Groups

Exercise

Create four design groups, one for each organization within Vivanet, except Information Technology. Every group should have create and delete access for *Data*, *Application Design* and *Campaign Design*, and no access for *Environment*.

In Design Manager:.

STEP	ACTION	DISPLAY
1.	Browse to *Environment -> System -> Design Groups*	Library
2.	Right-click the *Design Group* heading and select *New Design Group* from the shortcut menu.	
The *New Design Group* dialog box opens.		
3.	Type **Corporate** in the *Name* text box	*New Design Group* dialog box
4.	Type a description in the *Description* text box.	
5.	Click *Finish*.	
The design group opens in the Property Panel for you to define		
6.	Select *None* from the *Environment* drop-down list.	Property Panel
7.	Select *Create and delete* from the *Data* drop-down list.	
8.	Select *Create and delete* from the *Application Design* drop-down list.	
9.	Select *Create and delete* from the *Campaign Design* drop-down list.	
10.	Click the  button.	
11.	Add Production, Sales, and Marketing design groups indicated by your note from John.	

Success!

You have created four design groups.

Create an IT Design Group

Exercise Create an IT design group with create and delete access for all areas. Also, enable all other areas of functional access.

In Design Manager:.

STEP	ACTION	DISPLAY
1.	Browse to *Environment -> System -> Design Groups*	Library
2.	Right-click the *Design Group* heading and select *New Design Group* from the shortcut menu.	
The *New design group* dialog box opens.		
3.	Type **IT** in the *Name* text box	*New design group* dialog box
4.	Type a description in the *Description* text box.	
5.	Click *Finish*.	
The design group opens in the Property Panel for you to define		
6.	Select *Create and Delete* from the *Environment* drop-down list.	Property Panel
7.	Select *Create and Delete* from the *Data* drop-down list.	
8.	Select *Create and Delete* from the *Application Design* drop-down list.	
9.	Select *Create and Delete* from the *Campaign Design* drop-down list.	
10.	Select *Folder administration.*	
11.	Select *Edit rules.*	
12.	Select *Edit content.*	
13.	Select *Edit style.*	
14.	Select *Approver.*	
15.	Select *Workflow Administration.*	
16.	Select *Compliance.*	
17.	Select *Super user.*	
18.	Click the button.	

Success! You have created an IT design group.

Add Users to Design Groups

Exercise Add the users to the design groups indicated by the `Organization Chart`.

In Design Manager:

STEP	ACTION	DISPLAY
1.	Browse to *Environment -> System -> Design Groups*	Library
2.	Drag the *Corporate* design group into the Property Panel	
The *Corporate* design group opens in the Property Panel.		
3.	Click the ✚ button under *Users included in group*.	Property Panel
The *Select an item to add to the list* dialog box opens.		
4.	Select *Fred Drake* from the list.	*Select an item to add to the list* dialog box
5.	Click *OK*.	
The user is added to the design group.		
6.	Click the 💾 button.	
7.	Add the remaining users to the appropriate design groups.	
8.	Add yourself and Roy Ferris to the IT design group.	

Success! You have added the employees of Vivanet to design groups.

Customize the Design Group System Configuration

Exercise

Turn off the following Library Interface options for your design group: *Color Families* and *Design Layers*.

In Design Manager:

STEP	ACTION	DISPLAY
1.	Browse to *Environment -> System -> Design Groups*.	Library
2.	Double-click the *IT* design group.	
3.	Click the *Configuration* button.	Property Panel
The *System Configuration* dialog box opens.		
4.	Browse to the *Design Manager* tab.	
5.	Clear the following options under *Objects*: *Color Families* and *Design Layers.*	*System Configuration* dialog box
6.	Click *OK*.	
7.	Click the button.	Design Manager
8.	Expand the *Design* heading under *Environment*.	Library
The Library view has changed: *Color Families* and *Design Layers* are gone.		

Success!

You customized your user interface as indicated.

Restore the Design Group System Configuration

Exercise

Restore the following Library Interface options for your design group: *Color Families* and *Design Layers*.

In Design Manager:

STEP	ACTION	DISPLAY
1.	Browse to *Environment -> System -> Design Groups*.	Library
2.	Double-click the *IT* design group.	
3.	Click the *Configuration* button.	Property Panel
The *System Configuration* dialog box opens.		
4.	Browse to the *Design Manager* tab.	*System Configuration* dialog box
5.	Select the following options under *Objects*: *Color Families* and *Design Layers.*	
6.	Click *OK*.	
7.	Click the button.	Design Manager
8.	Make the *Library* active by clicking on it.	Library
9.	Click the button or press F5.	
The Library view has changed: *Color Families* and *Design Layers* are again available.		

Success!

You have restored the settings turned off in your customized user interface.

Creating Folders

Folders are used in Dialogue to organize content. A folder's properties determine the content of the folder and who has access to the folder.

This lesson describes the role of folders in Dialogue and how to use them to effectively separate work groups and set access to Dialogue components.

Objectives

By the completion of this lesson, you will be able to:

- Describe folder function in Dialogue.
- Create and define folders.
- Define folder properties.
- Assign a home folder to a user group.
- Restrict folder contents.
- Set folder access levels.

Terms

New terms used in this lesson include:

- **Folders** - A container for a set of Library design objects.
- **Folder contents** - List the Dialogue objects that may be created in the present folder.
- **Home folder** - The folder in the Library in which you primarily work.
- **Parent folders** - Folders containing subfolders, which determine the subfolder's content.
- **Root folder** - The top-level folder in the Library from which all other folders branch.

Additional Information

For more information on this topic, refer to the Dialogue:

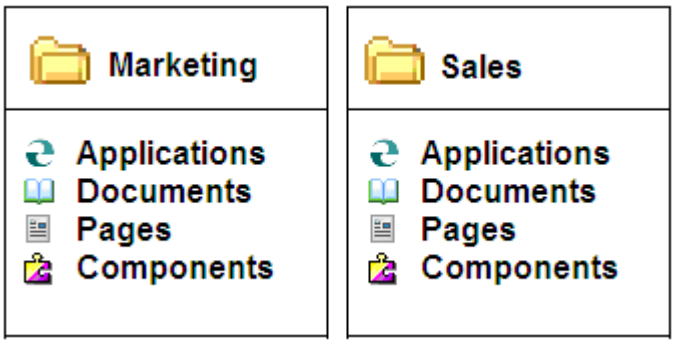
- `System Administration` Guide.

Folders are Library containers for design objects.

Folder Function in Dialogue

Folders can be used to define a user group's access to Dialogue objects and to divide projects or work areas. You can also use folders to divide projects or organize components any way you wish.

Folders in Dialogue



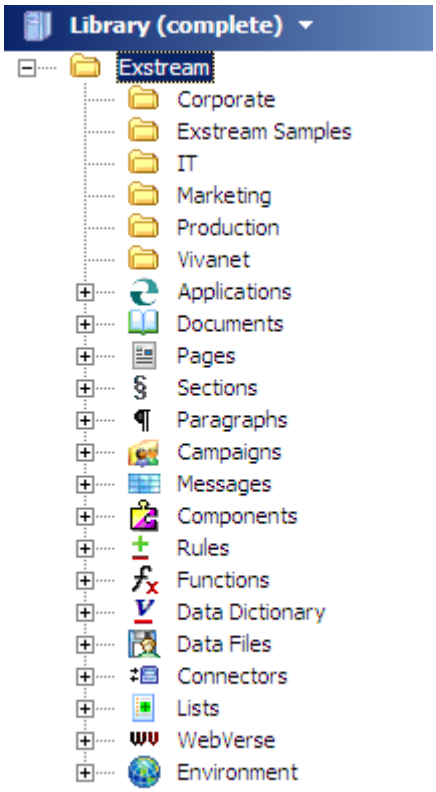
A folder also may assign an approval process to anything inside of it. Each folder also features access lists, which indicates the access level granted to any users browsing in the folder.

The Root Folder

Dialogue Design Manager arranges all folders from the **Root Folder**, found at the base of the Library. In the Library's hierarchal folder structure, this is the folder from which all other folders and headings must branch. It directly or indirectly contains all the objects in the design database.

The **root folder** is the top-level folder in the Library tree from which all other folders branch.

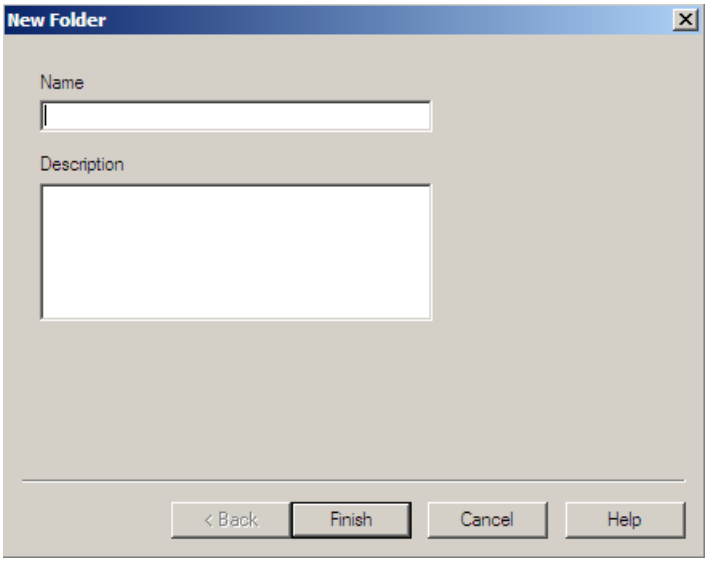
Root Folder



Creating and Defining a Folder

Create a new folder by browsing to the desired location, right-clicking the folder in the Library, and selecting *New Object -> Folder*.

Creating a folder



After giving a name and description, the folder properties appear in the Property Panel.

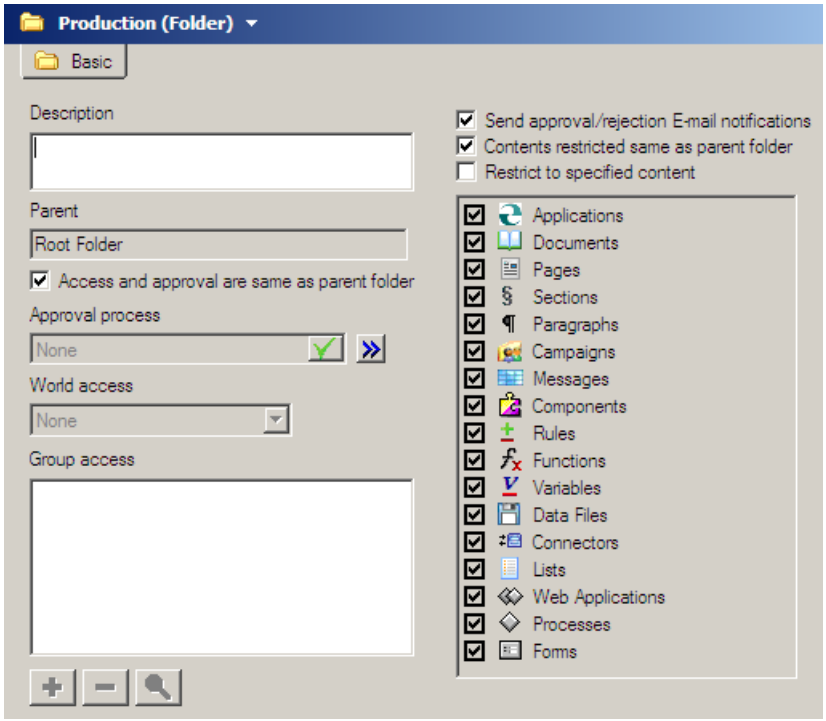
Defining Folder Properties

After you create the folder, the new folder opens in the Property Panel for you to define. Define each of the folder properties.

Folder Properties

OPTION	DESCRIPTION
Description	The description of the folder.
Parent	Each folder has a parent, or folder where it resides. By default, the root is the parent folder.
Access and approval are the same as the parent folder	If this option is selected, the permissions are copied from the parent folder and applied to the current folder. This includes all world permissions, approvals and restricted features.
Approval Process	This option indicates which approval process, if any, is applied to any project or items created in this folder. (*Enterprise module only*)
World Access	Sets the world access level: a default access level for all users able to access this folder.
Group Access	This option sets access for groups with permissions different than those granted by the World Access.
Send approval/rejection E-mail notifications.	This option activates the E-mail approval notification for all user groups in this folder.
Contents restricted same as parent folder	This option sets all restricted content settings identical to the parent folder.
Restrict specified content	All cleared items are not visible or accessible in this folder.

Creating a folder



Assigning Home Folders

Home folder is the folder in the Library in which you primarily work.

You can also assign a **home folder** to a user group, so all users belonging to that group begin in that folder at login. Users may browse away from the home folder, and even create things in other folders, but the user always logs into the home folder upon login. Set home folders through the *User Group Properties*.

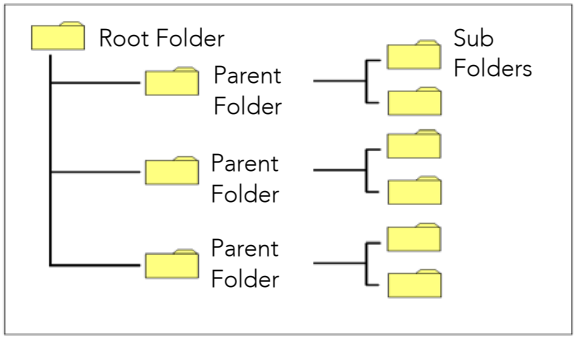
Setting Home Folder

Folder Hierarchy

Parent folders are folders containing subfolders. They determine any sub folder's content.

Parent folders and sub-folders compose the hierarchy of folders in Dialogue. They are arranged in a hierarchy to the Root folder. A folder's content and access levels are patterned after a **parent folder** or the folder it was created in. You may have as many levels of folders as you wish.

Example of parent folders and subfolders



Restricting Folder Contents

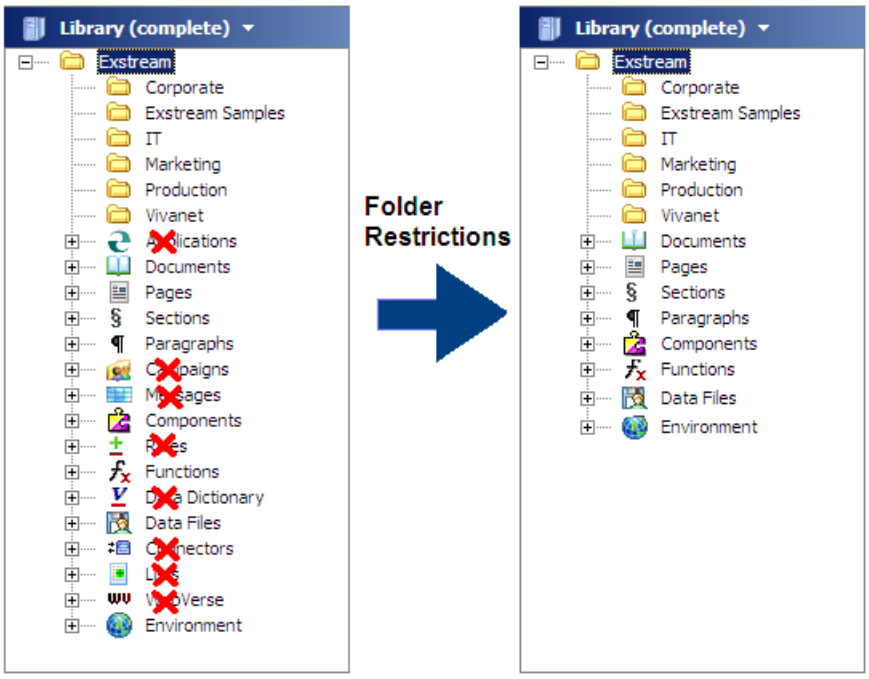
The **folder contents** determine which Dialogue objects are available within that folder. You may restrict any objects. For example, you can create a ***Messages*** folder that contains only messages. Within that folder, only the ***Messages*** header appears in the Library.

Folder contents list the Dialogue objects that may be created in the present folder.

Use folder contents to specify which Dialogue objects can be created within the folder. If a Dialogue object is not in the folder contents, objects of that type may not be added to that folder.

You can restrict folder contents upon creation. You may also restrict contents by modifying the folder, provided there are not already objects of that type existing in the folder. For example, if Marketing creates a document called **Page 1**, you cannot restrict the Document Folder Content unless you remove **Page 1** first.

Folder contents and restrictions



For example, Troy Wilson is in the ***Marketing*** user group. ***Marketing*** is only involved in written content, images, and campaigns. Therefore, all other areas are restricted for this folder. By assigning the ***Marketing*** group to this folder, Troy sees only ***Paragraphs***, ***Campaigns***, ***Messages*** and ***Components*** available. Also, any documents created by Troy are stored in this folder, not the root folder.

Setting Folder Access Level

Before creating any folder, plan the access levels, operational items, and folder contents. Consider what must be set for group access, including world access and any applicable approval processes.

World Access

World Access sets the default access settings for any users who browse to the folder. Any user who browses to this folder is assigned these access settings, except if they are listed in the ***Group Access***.

Group Access

The ***Group Access*** sets exceptions to the ***World Access*** setting. This enables you to assign access levels for specific groups instead of the ***World Access*** setting.

For example, you may want all departments to be able to view the contents of the **Marketing** folder. However, you do not want anyone but someone from the **Marketing** user group creating anything in this folder. You set the folder ***World Access*** to ***View*** and add the **Marketing** user group to the ***Group Access***, with ***Create and Delete access***. Now only **Marketing** users can create, delete, or modify anything in the folder.

:: Note

Be sure to set the ***World Access*** and ***Group Access*** levels accordingly if you do not want any user creating objects within the folder.

Approval Process

An **approval process** is a collaborative feature that enables other users within the group to review and approve an object before it proceeds to the next step. This feature is covered in detail in a later chapter.

The approval process is assigned at the folder level. If a folder includes an approval process, anything that a user creates in the folder is subject to approval.

Demonstration	Observe the demonstration.

Tip

Folders automatically use the same access level settings as the parent folder.

Independent Exercises: Creating Folders

Exercise

Create a home folder for each of the user groups, define each folder, and then restrict the Data Files and Data Dictionary in the Marketing folder. Finally, assign each user group to a home folder.

If you need help, refer to the steps provided in the following **Guided Exercises**.

TASK	SPECIFICS
Create folders	• Create four folders: Corporate, Production, Sales, and Marketing.
Define folder properties	• Define the properties for each folder. Set the ***World Access*** to ***View***, and the ***Group Access*** to ***create, edit and delete*** for the appropriate user group.
Assign home folders	• Assign a home folder to each user group.
Restrict folder contents	• Restrict the Marketing folder's access to ***Data files*** and the ***Data Dictionary***.

Success!

You have completed the Creating Folders exercises.

Guided Exercises: Creating Folders

Create Folders

Exercise Create four folders, one for each Vivanet user group.

In Design Manager:

STEP	ACTION	DISPLAY
1.	Right-click the root folder heading and select *New Object -> Folder* from the shortcut menu.	Library
The *New Folder* dialog box opens.		
2.	Type **Marketing** in the *Name* text box.	*New Folder* dialog box
3.	Type **Marketing Home Folder** in the *Description* text box.	
4.	Click *Finish*.	
5.	Create the Corporate, Production, and Sales folders.	

Success! You have created four folders, one for each of the Vivanet user groups.

Define Folder Properties

Exercise

Define each of the folders. Set the world access to ***View***, and add the folder's home user group into the ***Group access*** with ***create, edit and delete*** permissions.

In Design Manager:

STEP	ACTION	DISPLAY
1.	Double-click the ***Marketing*** folder.	Library
The ***Marketing*** folder opens in the Property Panel.		
2.	Clear the ***Access and approval are same as parent folder*** check box.	Property Panel
3.	From the ***World access*** drop-down list select ***View***.	
4.	Click the  button in the ***Group access*** area.	
The ***Select a group to add to the list*** dialog box opens.		
5.	Select ***Marketing***.	***Select a group to add to the list*** dialog box
6.	Click ***OK***.	
The ***Select the access to provide*** dialog box opens.		
7.	Select the ***Create, edit and delete*** selection.	***Select the access to provide*** dialog box
8.	Click ***OK***.	
9.	Click the  button.	
10.	Define the Corporate, Production, and Sales folders.	

Success!

You have defined the folders per specifications.

Assign Home Folders

Exercise

Assign the respective folders as the ***Home*** folder for each of the Vivanet user groups.

In Design Manager:

STEP	ACTION	DISPLAY
1.	Browse to ***Environment -> System -> Design Groups***.	Library
2.	Double-click the ***Marketing*** design group.	
The ***Marketing*** user group opens in the Property Panel.		
3.	Click the button to the right of the ***Home*** text box.	Property Panel
The ***Folders*** dialog box opens.		
4.	Expand the root folder.	***Folders*** dialog box
5.	Select the ***Marketing*** folder.	
6.	Click ***OK***.	
The ***Marketing*** folder opens in the ***Home*** text box in the Property Panel.		
7.	Click the button.	
Repeat the process for the Corporate, Production, and Sales user groups.		

Success!

You have assigned the respective folders as the ***Home*** folder for each of the Vivanet user groups.

Restrict Folder Contents

Exercise Restrict the *Marketing* folder access to data files.

In Design Manager:

STEP	ACTION	DISPLAY
1.	Drag the *Marketing* folder into the Property Panel.	Library
The *Marketing* folder opens in the Property Panel.		
2.	Clear the *Contents restricted same as parent folder* check box.	Property Panel
3.	Select the *Restrict to specified content* check box.	
4.	Clear the *Data Files* check box.	
5.	Click the  button.	

Success! You have defined the *Marketing* folder per specifications.

Approvals

Dialogue offers an approval system that enables you to review, approve and reject objects created by system users. The optional Enterprise Approval Module expands the approvals functionality and enables you to set up an even more sophisticated, multi-phase approval process.

This lesson describes how to use the Dialogue approval system. It also covers the Enterprise Approval modules for expanding approval functionality.

Objectives

By the completion of this lesson, you will be able to:

- Identify the Dialogue approval states.
- Set up the Dialogue approvals.
- Set up the Dialogue E-mail approval notification.
- Identify the benefits of the Enterprise Approval Module.
- Create an Enterprise Approval process.
- Demonstrate an Enterprise Approval process.

Terms

New terms used in this lesson include:

- **Approval criteria** - The conditions for an approval state to be approved or rejected.
- **Approval process** - A feature used to specify the stages of approval for objects. You can create customized approval states and define the order objects must travel through to be considered approved.
- **Approval state** - User-defined steps an object must go through before being approved.

Additional Information

For more information on this topic, refer to the Dialogue:

- `System Administration` Guide.

Modules

In this lesson, you will use Dialogue and the Enterprise Approval module. The Enterprise Approval module is an optional module.

Dialogue Approvals

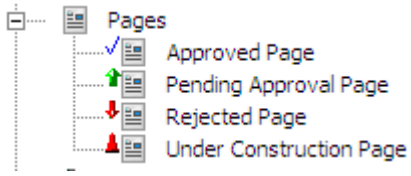
Dialogue features an approval process, which enables designated users to review and approve new objects in the system before they are used. This means that anyone with the proper permissions may create new objects in Dialogue, but they must be approved before used in a production capacity.

:: Technical Note

You designate approvers in your system through their user groups.

In the Library, an object's approval state is shown to the left of the object:

Approval status icons



The icon next to the document indicates its current status.

Icon	Indicates	Status
	Approved	The object has been approved and is ready for use.
	Submitted for approval	The object has been submitted for approval, but an approver has not approved or rejected it yet.
	Rejected	The object has been rejected and may not be used until it is resubmitted and approved.
	Work in Progress	The object is in progress and has not yet been submitted for approval.

For example, Tony Taylor creates a new page in Dialogue. While working, the page status is ***Work in Progress***. When he is ready to submit it for approval, its status changes to ***Submitted for approval***. The manager, who was designated as approver, reviews the page and approves it. The status of the page status changes to ***Approved***.

:: Technical Note

If a component is rejected and then resubmitted, it must restart the approval process from the beginning.

Tip

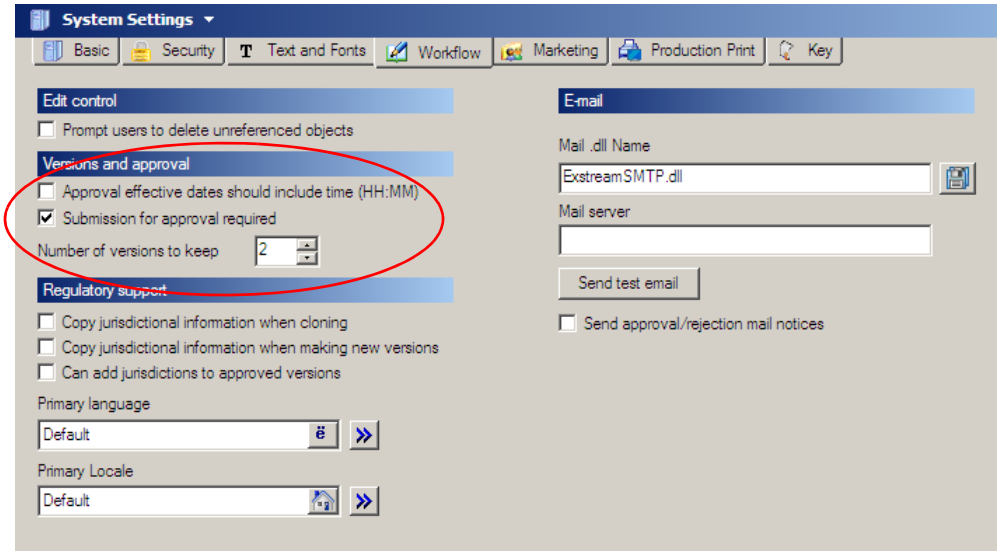
A new object is always created in the **Work In Progress** state.

Setting Up the Dialogue Approvals

Setting up approvals must be done in both the System Settings and the designer group System Configuration.

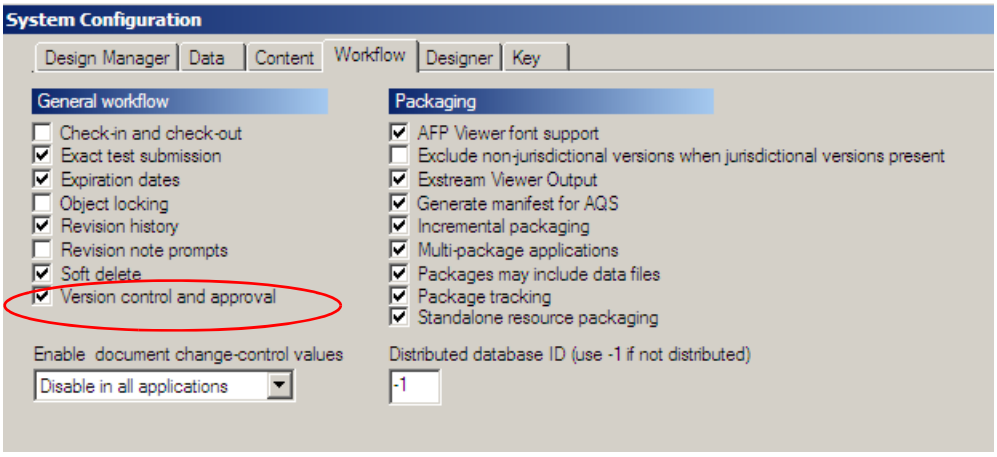
First, go into the ***System Settings*** under the ***Workflow*** tab and select ***Submissions for Approval Required***. Select ***Approval effective dates should include time (HH:MM)*** if desired, and select the ***Number of versions to keep***.

System settings



Next, you must set up approvals in the designer group system configuration under the ***Workflow*** tab. Select the ***Version control and approval*** option to activate the approvals feature.

System configuration

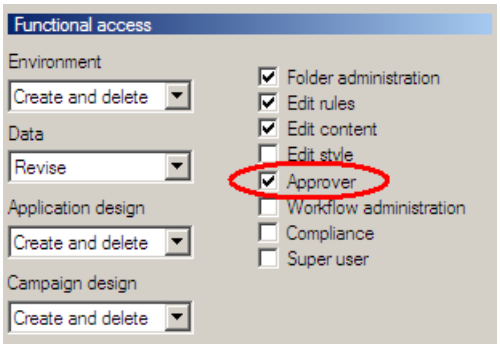


Tip

This feature works for both Dialogue and the Enterprise Approval module. However, the Enterprise Approval module sends additional E-mail notifications.

Next, you must set approvers for the approval process. Approvers are set in the User Group settings, in the *Functional Access* area.

Setting up approvers

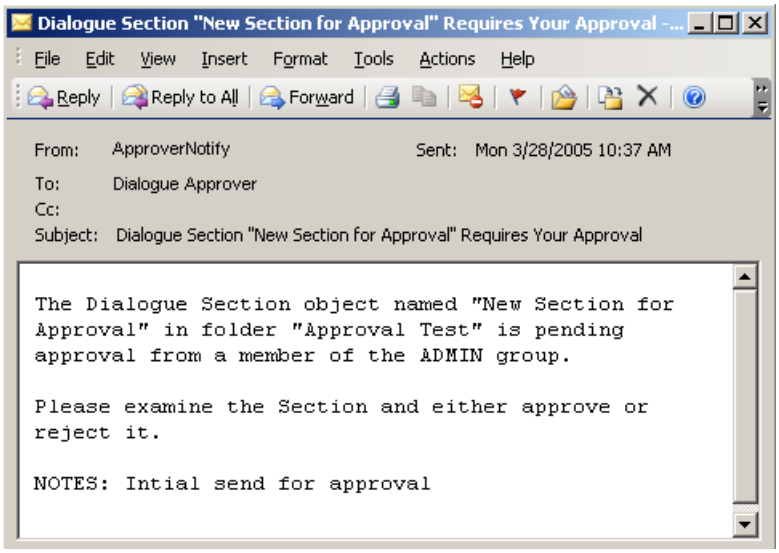


Setting Up the Dialogue Approval E-mail Notification

You can configure the E-mail notification system in Dialogue to inform approvers and submitters that an object's approval status has changed. The notification informs the approvers and submitters when:

- A new object requires approval.
- An object has attained a new status (approved or rejected).
- An object needs a new approval vote.

Notification E-mail

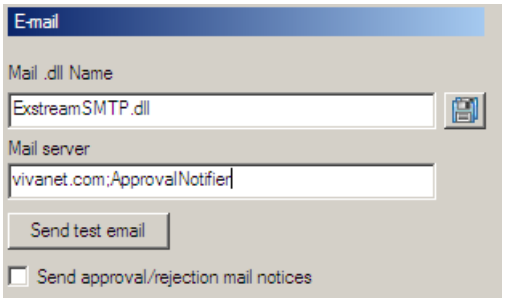


E-mail Settings

Your network must have an existing, functional E-mail system to use the notification feature. Before you set any approval notification, you must direct Dialogue to your E-mail server. Go to the ***System Settings***, browse to the ***Workflow*** tab, and enter the mail dynamic linked library name, and your mail server address.

- **Mail.dll Name -** You may use ExstreamSMTP.dll (included with Dialogue) or you may use your own E-mail .dll file.
- **Mail server -** Provide two pieces of information: first, give the name of the E-mail server. Then, place a semicolon and the name that appears in the ***Sent From*** field. You cannot use a space in the ***Mail server*** field.
- **Send test email** - This button sends a test email to verify that the settings entered are correct.
- **Send approval/rejection mail notices -** When selected, Dialogue will automatically send an E-mail when an object is approved or rejected.

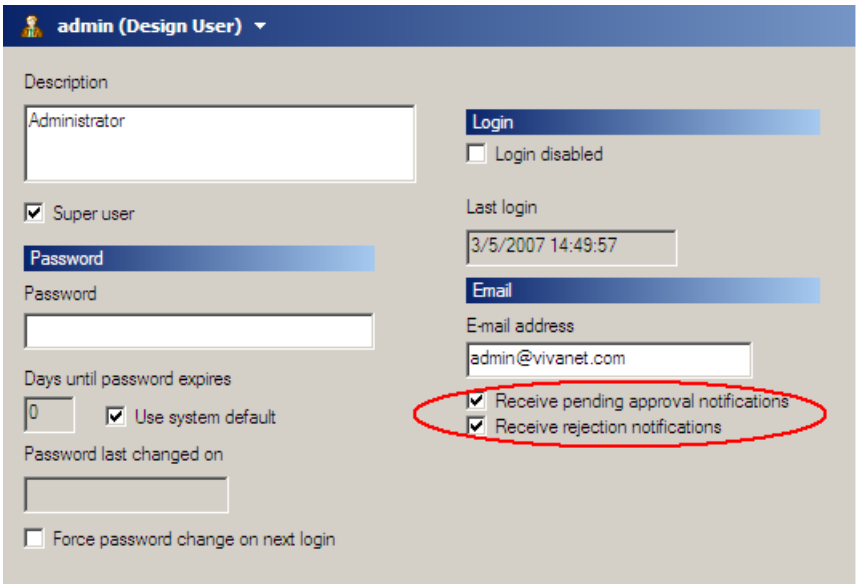
Dialogue E-mail settings



Setting Approval Notification at the User Level

To set the E-mail notification at the user level, open the user in the Dialogue Design Manager. Select the ***Receive pending approval notifications*** and the ***Receive rejection notification***s check boxes. This enables the user to receive the E-mails.

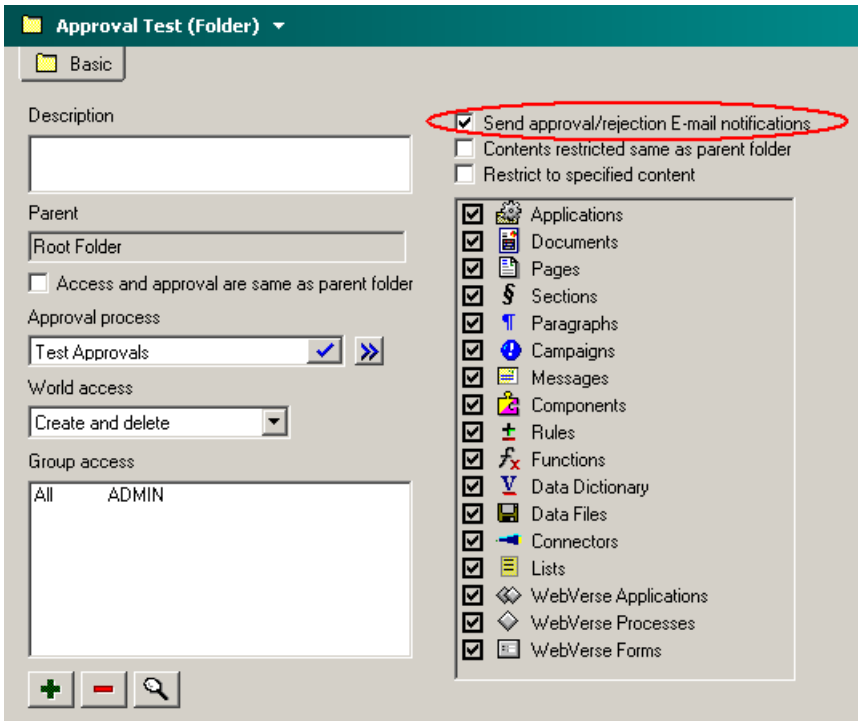
User approval notification



Setting Approval Notification at the Folder Level

To set up the E-mail notification at the folder level, open the folder properties in Dialogue Design Manager. Select the *Send Approval/Rejection E-mail Notifications* option. This enables the system to send the E-mails.

Folder approval notification



:: Note

If the user property is set, but not the folder, the system never sends the E-mail. If the folder property is set, but not the user, the E-mail is sent, but the user never receives it.

Demonstration	Observe the demonstration.

Enterprise Approval Module

The Enterprise Approval module enables a more sophisticated review process. This process canvasses multiple user groups for approval before allowing a project to advance to the next phase, instead of requiring only one approval.

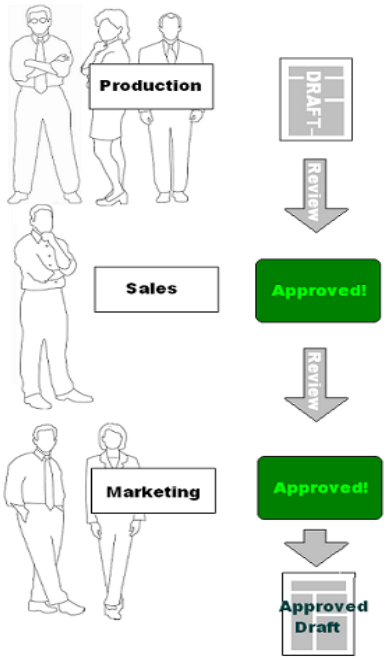
:: Note

Enterprise Approval is an optional module.

For example, the Production Group is in charge of creating the newsletter, but both Sales and Marketing need to approve this document before it is included in an application. By enabling the Enterprise Approval, the indicated user groups have the opportunity to approve or reject a document.

Instead of the standard approval process, an Enterprise Approval Process allows the object to pass through many phases and states before approving. You may also use different approvers at different states of the process.

Enterprise Approval Process Example



Setting Up an Enterprise Approval Process

The **approval process** fosters collaboration among a team by requiring approval from other users before the project advances to the next level. For instance, marketing may wish to see a document in all stages before allowing it to be published.

An approval process is composed of **approval states**. These approval states operate in sequence: once the required number of reviewers have approved the document, it graduates to the next level in the cycle. If an approval state does not get the required number of approvals, it is rejected and expelled from the cycle. When resubmitted, a rejected document must begin from the beginning of the approval cycle.

In the scenario provided, three distinct states of approval are requested: the Draft state, the Edit state, and the Final state. With the Approval Process in place, a user may publish only when it has been approved at the Final state.

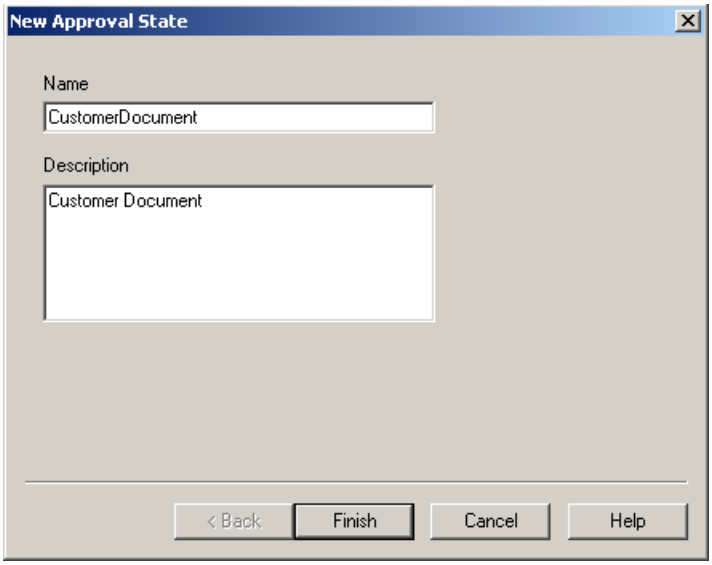
An **approval process** is a feature used to specify the stages of approval for objects. You can create customized approval states and define the order objects must travel through to be considered approved.

Approval states are the user-defined steps an object must go through before being approved.

Create and Define an Approval State

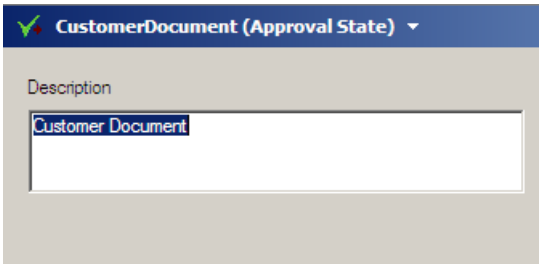
Create an approval state by browsing to *Environment->System->Approval States*, right-clicking the heading, and selecting *New Approval State*.

Creating an approval state



After giving a name and description, the description and properties appear in the Properties Panel.

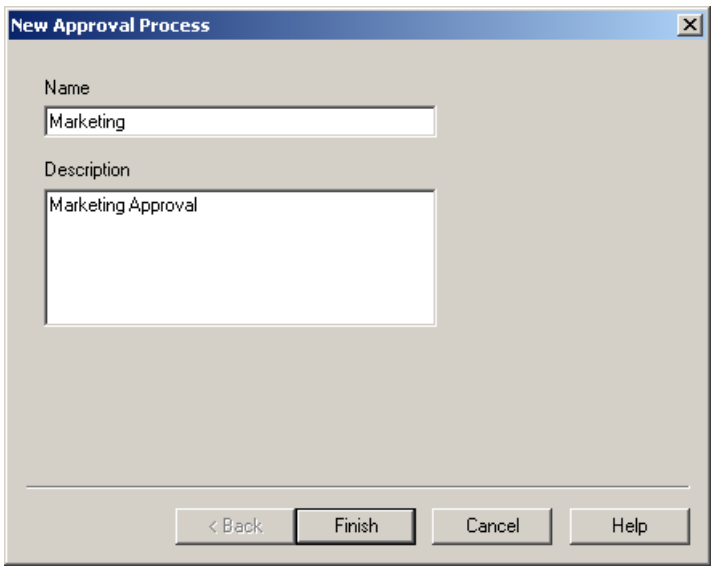
Approval state properties



Create and Define an Approval Process

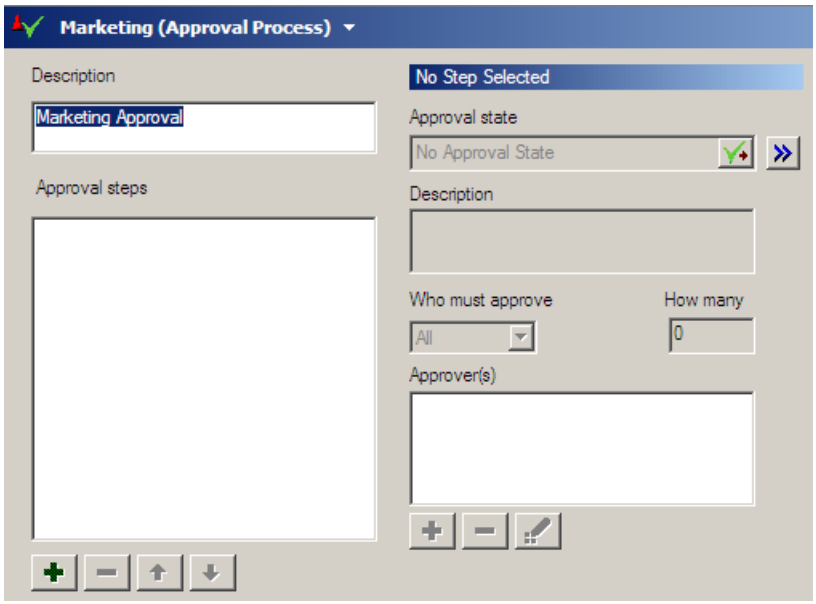
Create an approval process by browsing to *Environment->System->Approval Processes*, right-clicking the heading, and selecting *New Approval Process*.

Creating an approval process



After giving a name and description, the description and properties open in the Properties Panel.

Approval process properties



Adding Approval States to an Approval Process

Once an approval process has been created and defined, you add approval states to the process.

First, click the + button under the ***Approval steps*** selection window, and select the next step in the process from the dialog box that appears.

Next, set the approval criteria in the ***Who must approve*** drop-down list. These are the conditions that must be met before the approval state is met and object is allowed to advance to the next stage.

The **approval criteria** sets the conditions for an Approval State to be approved or rejected.

APPROVAL SETTING	APPROVAL RESULT	REJECTION RESULT
All	Every user within every user group listed must approve to move to the next step.	Rejection occurs when any user rejects the document at any stage.
Any	One approval vote moves the object to the next step.	Rejection occurs only if everyone rejects the document.
Some	Once the required number of approvals has been obtained, the document moves to the next step, regardless of the remaining votes.	Rejection occurs when the minimum approval votes can no longer be met.

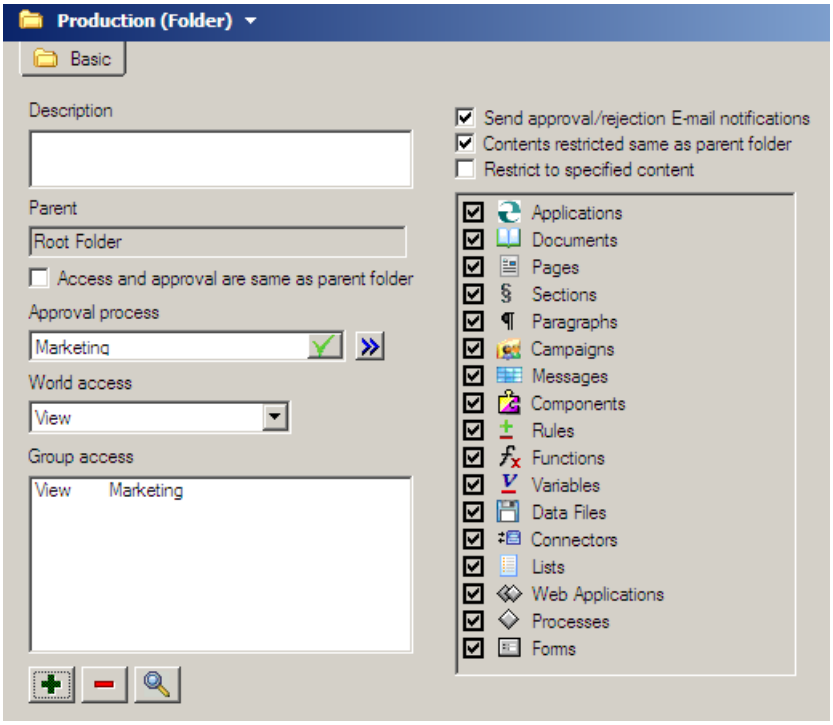
By establishing a series of Approval States, the Approval Process is defined. The order is always sequential. The process begins with the first state and completes once the last state is reached.

Finally, add the approvers by clicking on the + button under the ***Approver(s)*** selection window. You only add user groups, not individual users.

Assigning an Approval Process to a Folder

Any folder in the Dialogue system may be assigned one approval process. To assign an approval process to the contents of a folder, go to the folder properties and select the ***Approval process*** from the drop-down list.

Folder properties

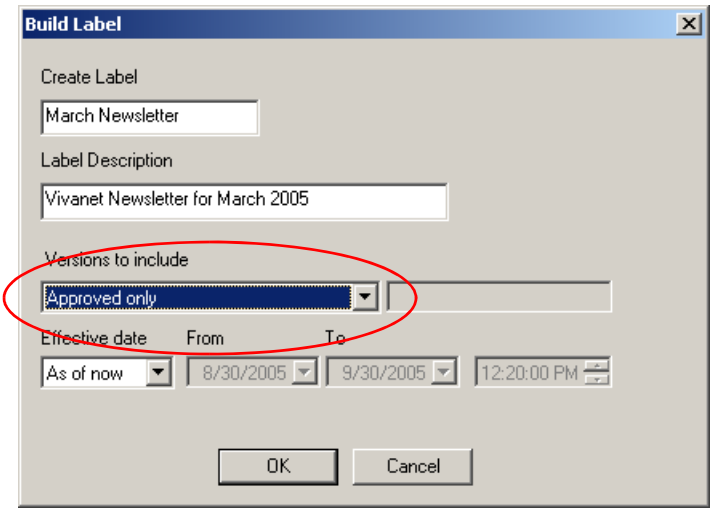


Approval Process Notes

Here are some additional notes about creating an approval process:

- The approval process is sequential. The process moves to the next state upon each approval, and exits the process if any stage fails. You cannot return to earlier approval states.
- If an object is rejected, and then re-submitted for approval, it restarts at the beginning of the approval process.
- You enforce the approval process by selecting ***Approved Only*** in the ***Versions to Include*** field in the ***Version Labels*** tab of the application properties, as depicted below.

Packaging with approved versions



Demonstration	Observe the demonstration.

Independent Exercises: Approvals

Exercise Set up the approval system. Then, demonstrate an Enterprise approval process as detailed below.

If you need help, refer to the steps provided in the following **Guided Exercises**.

TASK	SPECIFICS
Set up the Dialogue Approvals	• Enable the approval system in Dialogue.
Create an Enterprise Approval Process – Create Approval States – Create an Approval Process	• Create three approval states: ***Draft***, ***Edit*** and ***Final***. • Create an approval process called ***Vivanet Approval Process*** out of the three states. Assign yourself as the approver for each state.
Demonstrate an Enterprise Approval Process	• Create a subfolder called ***Vivanet Process Test*** and apply the approval process to it. Then demonstrate the approval process by sending a test paragraph through the process.

Success! You have completed the Approvals exercises.

Guided Exercises: Approvals

Set Up the Dialogue Approval Process

Exercise Enable the approval system in Dialogue.

In Design Manager:

STEP	ACTION	DISPLAY
1.	Browse to *Environment -> System*.	Library
2.	Drag the *System Settings* into the Property Panel.	
The *System Settings* appear in the property panel.		
3.	Browse to the *Workflow* tab.	Property Panel
4.	Select *Approval effective dates should include time (HH:MM)*.	
5.	Select *Submission for Approval Required*.	
6.	Set the *Number of versions to keep* to *2*.	
7.	Click the button.	

Success! You have enabled the approval system in Dialogue.

Tip

The user groups, by default, have the *Version control and approval* option already selected in the user group configuration.

Create an Enterprise Approval Process: Create Approval States

Exercise Create three approval states: ***Draft***, ***Edit*** and ***Final***.

From Design Manager

STEP	ACTION	DISPLAY
1.	Browse to ***Environment*** -> ***System*** -> ***Approval States***.	Design Manager
2.	Right-click the ***Approval States*** heading and select ***New Approval State*** from the shortcut menu.	
The ***New Approval State*** dialog box opens.		
3.	Enter ***Draft*** in the ***Name*** field.	***New Approval State*** dialog box
4.	Enter ***Draft Stage*** in the ***Description*** field.	
5.	Click ***Finish***.	
6.	Click the button.	
7.	Create two additional approval states: ***Edit*** and ***Final***.	

Success! You have created three approval states: ***Draft***, ***Edit*** and ***Final***.

Create an Enterprise Approval Process: Create an Approval Process

Exercise

Create an approval process called *Vivanet Approval Process* out of the three states. Assign yourself as the approver for each state.

From Design Manager:

STEP	ACTION	DISPLAY
1.	Browse to *Environment -> System -> Approval Processes*.	Library
2.	Right-click the *Approval Process* heading and select *New Approval Process* from the shortcut menu.	
The *New Approval Process* dialog box opens		
3.	Type *Vivanet Approval Process* in the *Name* field.	*New Approval Process* dialog box
4.	Click *Finish.*	
5.	Click the  underneath the Approval Steps selection box.	Property Panel
The *Select Approval State* dialog box opens		
6.	Select *Draft*.	*Select Approval State* dialog box
7.	Click *OK*	
8.	Select *Any* from the *Who must approve* field.	Property Panel
9.	Click the  underneath the *Approver(s)* selection list.	
The *New Approver* dialog box opens.		
10.	Select *IT*.	*Select User Group* dialog box
11.	Click the  button.	
12.	Add the remaining two approval states.	

Success!

You have created the requested approval process.

Demonstrate an Enterprise Approval Process

Exercise

Create a subfolder called ***Vivanet Process Test*** and apply the approval process to it. Then demonstrate the approval process by sending a test paragraph through the process.

:: Note

If your computer does not have an internet connection, you will get an error regarding email delivery: this is normal, and will not happen in a production environment.

STEP	ACTION	DISPLAY
1.	In Design Manager, create a new folder in the root folder, ***Vivanet Process Test***.	Library
2.	Clear the ***Access and approval are same as parent folder*** check box.	Property Panel
3.	Click the  button next to the ***Approval Process*** field.	
The ***Select Approval Process*** dialog box opens.		
4.	Select ***Vivanet Approval Process.***	***Select Approval Process*** dialog box
5.	Click ***OK***.	
6.	Set ***World Access*** to ***Create and delete***.	Property Panel
7.	Click the  button.	
8.	Expand the ***Vivanet Process Test*** folder in the Library view.	Library
9.	Right click the ***Paragraphs*** heading and select ***New paragraph***.	
The ***New Paragraph*** dialog box opens.		
10.	Type ***Approval Process Test*** in the ***Name*** field.	
11.	Click ***Finish***.	***New Approver*** dialog box
12.	Right-click the paragraph and submit the ***Approval Process Test*** paragraph for approval.	
13.	Right-click and approve the ***Approval Process Test*** paragraph. Look at the ***Approval State*** in the upper-right-hand corner, and note it in the ***Approval, rejection, and version notes***.	Approve dialog box
14.	Repeat step 14 two times.	
The Approval Process Test paragraph has now been officially approved. A blue check mark is now indicated on the ***Approval Process Test*** paragraph.		

Success!

You have demonstrated the approval process.

Defining Languages and Locales

A global market indicates a wide range of customers. Customers in different countries and regions often speak different languages and use different currency, numeric notation, and operating system strings. By defining languages and locales, you accommodate all these considerations.

This lesson teaches you how to define languages and locales within Dialogue.

Objectives

By the completion of this lesson, you will be able to:

- Identify the functions of Dialogue languages.
- Create and define a language.
- Identify the functions of Dialogue locales.
- Create and define a locale.

Terms

New terms used in this lesson include:

- **Language** - Objects located under the ***System*** heading that enable you to define properties (such as months and days) for languages in Dialogue.
- **Locale** - A region you define in Design Manager under the ***System*** heading that specifies language, currency, and date formats.

Additional Information

For more information on this topic, refer to the Dialogue:

- `System Administration` Guide.

Dialogue Languages

A **language** is an object located under the ***System*** heading that enables you to define properties (such as months and days) for languages in Dialogue.

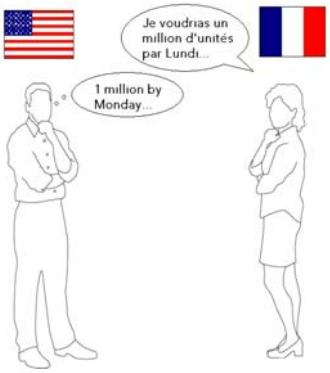
To avoid confusion, indicate which **language** a region speaks. For example, Belgian clients speak French, while Austrian clients may speak German. In addition to communication differences, languages also have different ways of expressing dates and large volume numbers.

Languages in Dialogue assist with verbal expressions. Languages are used to specify spelling dictionaries, days of the week, months of the year, exception files, and for expressing large numeric magnitudes.

:: Note

A **language** in Dialogue is not a **language layer**, although a language layer is based on a language.

Languages have different ways of expressing days and volumes.



Spelling Dictionaries

Dialogue contains several dictionaries (if installed), which enable you to check for proper spelling as dictated by the language. The dictionary does not contain word meanings -- it is only a catalog of the preferred spellings of major words.

:: Note

The dictionaries must be installed prior to use. You select the dictionaries during installation.

Exception Files

Exception files contain special words that ignore the dictionary's conventions for spelling. There are two kinds of exception files: *Hyphenation* and *Case Conversion*.

Hyphenation

There may be exceptions to the hyphenation rules for this language. For example, you may want the words all in one to appear as "all-in-one." By including this spelling in your exception file, it changes any instance of "all in one" to "all-in-one."

Case Conversion

There may be exceptions to letter case rules for this language. For example, the name Mcdonald may be spelled as McDonald. By including this spelling in your case conversion exception file, it arranges the letter cases as indicated.

Dates and Numeric Magnitudes

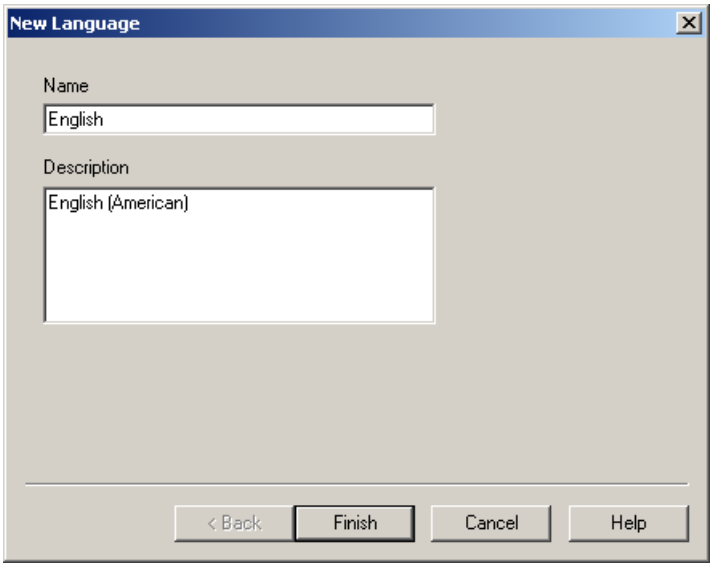
Languages have different ways of expressing the date and high numeric magnitudes. Therefore, express the days of the week (full name and shorthand), months of the year (full name and shorthand), and the method of expressing large numeric magnitudes such as thousands, millions, and billions for each language.

VALUE	ENGLISH	FRENCH
Months	January [Jan], February [Feb]	Janvier [Jan], Fébrier [Féb]
Days of the Week	Monday [Mon], Tuesday [Tue]	Lundi [Lun], Mardi [Mar]
Numeric Magnitude: 1,000	Thousand	Mille
Numeric Magnitude: 1,000,000	Million	Million
Numeric Magnitude: 1,000,000,000	Billion	Millard

Create and Define a Language

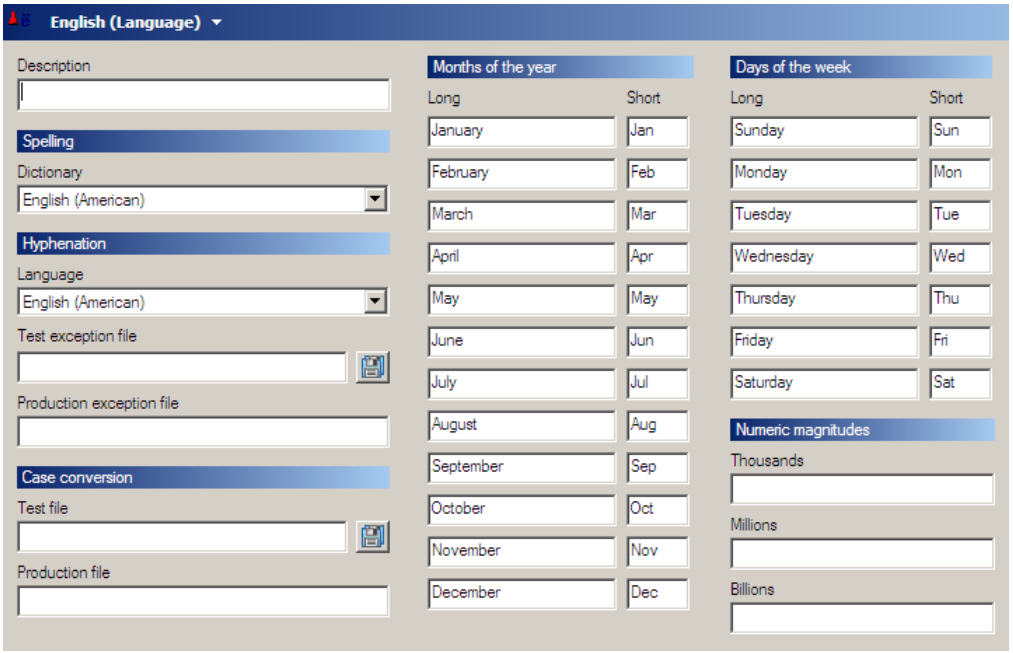
Create a new language by browsing to *Environment -> System -> Languages*, right-clicking the heading, and selecting *New Language*.

Create a language



After giving a name and description, you complete the language properties.

Language properties



Demonstration	Observe the demonstration.

Dialogue Locales

Simply translating the language is often not enough to provide a publication in that locale. Locales assist while expressing numeric expressions such as money notation, decimal notation and date formatting.

A locale is a region you define in Design Manager under the *System* heading that specifies language, currency, and date formats.

For example, America and England both speak English, but there are a number of differences:

ITEM	UNITED STATES	UNITED KINGDOM
Language	English (American)	English (British)
Money	Dollars ($)	Pounds (£)
Date Format	12/30/2005	30/12/2005

When defining a locale, you must provide information regarding:

- *Language* - The spoken language of the region. For example, France, Haiti, and Luxemburg all speak French.
- *Date format* - The preferred date notation for the region. For example, European nations favor using the dd/mm/yy format, whereas Americans commonly use the mm/dd/yy format.
- *Test Operating System String* - Specifies an operating system string unique to that locale.
- *Production Operating System String* - Specifies a production operating system string unique to that locale.
- *Symbol* - The shorthand notation for the basic unit of currency. For example, **$** is used to denote both dollars (United States) and Euros (France and Greece).
- *Decimal Format* - Some locales have different methods of denoting large numbers and uses for decimals. Enter the decimal format here.
- *Currency Convert* - Enter the current exchange rate (based on the United States Dollar) for this currency.

When a locale is specified, all of these attributes are appropriately modified in the document. For example, monetary data opens properly converted and denoted in the locale's currency.

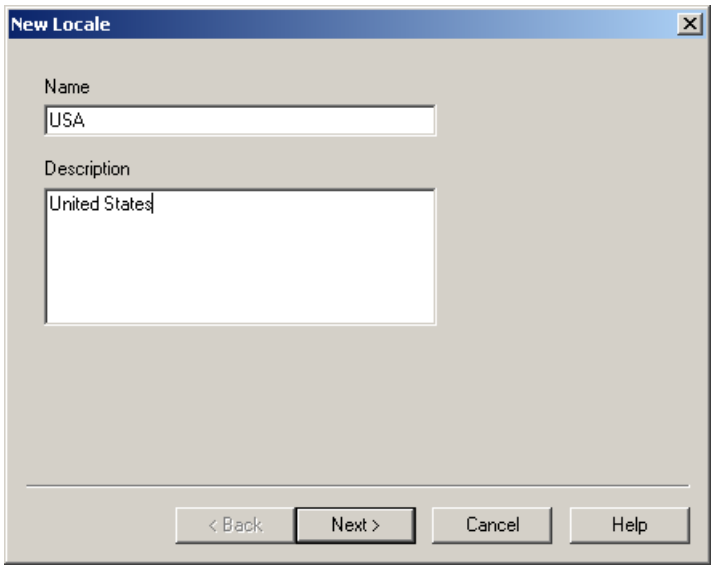
Tip

If you use a foreign locale, update your currency conversion often.

Create and Define a Locale

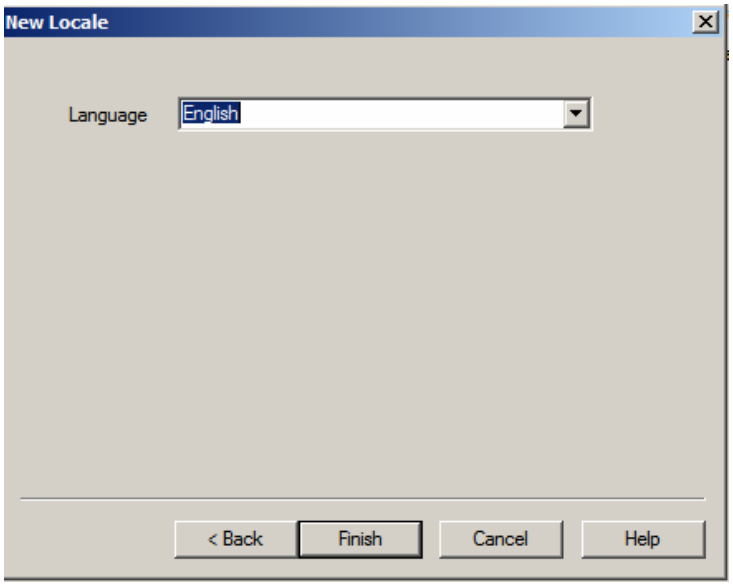
Create a new locale by browsing to ***Environment -> System -> Locales***, right-clicking the heading and selecting ***New Locale***. After giving a name, description, and language, you may fill out the properties.

Create a locale



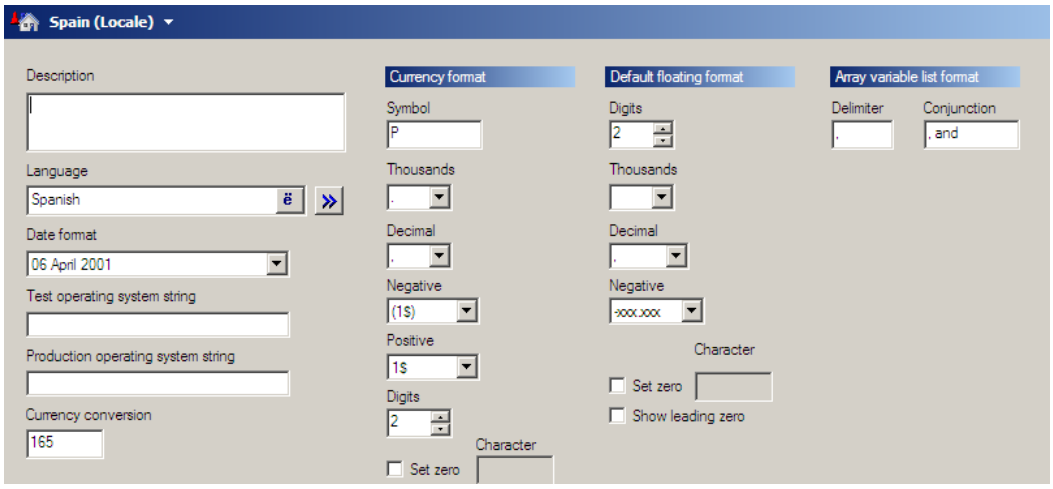
After you provide a name and description for a locale, you are prompted for the locale's language.

Locale language



After providing the language, the locale properties appear in the Property Panel.

Locale properties



Demonstration	Observe the demonstration.

Independent Exercises: Defining Languages and Locales

Exercise Create a Spanish language and a Mexico locale for Vivanet's latest client, Presidente Communications.

If you need help, refer to the steps provided in the following **Guided Exercises**.

TASK	SPECIFICS
Create and define a language	• Create an entry for Spanish. • Set the Spanish dictionaries. • Define the Spanish days of the week. • Define the Spanish months of the year.
Create and define a locale	• Create a locale for Mexico. • Define the currency characteristics for Mexico. • Define the numeric magnitudes for Mexico.

Success! You have completed the **Defining Languages and Locales** exercises.

Guided Exercises: Defining Languages and Locales

Create a Language

Exercise Create Spanish as a language in Dialogue.

In Design Manager:

STEP	ACTION	DISPLAY
1.	Browse to ***Environment -> System -> Languages***	Library
2.	Right-click the ***Languages*** heading and select ***New Language*** from the shortcut menu.	
The *New Language* dialog box opens.		
3.	Enter ***Spanish*** in the ***Name*** field.	Property Panel
4.	Enter ***Spanish*** in the ***Description*** field.	
5.	Click ***Finish***.	

Success! You have created an instance of the Spanish language in Dialogue.

Define a Language

Exercise Define the attributes of the Spanish Language.

In Design Manager:

STEP	ACTION	DISPLAY
1.	Browse to ***Environment -> System -> Languages***	Library
2.	Double-click ***Spanish***.	
The *Spanish (Language)* screen opens in the Property Panel		
3.	Select ***Spanish*** in the ***Dictionary*** drop-down list.	Property Panel
4.	Select ***Spanish*** in the ***Language*** drop-down list.	
5.	Enter the Spanish ***Months of the year***.	
6.	Enter the Spanish ***Days of the Week***.	
7.	Enter ***mil*** in the ***Thousands*** field.	
8.	Enter ***millón*** in the ***Millions*** field.	
9.	Click the  button.	

Success! You have defined an entry for the Spanish Language in Dialogue.

Create a Locale

Exercise Create a locale for Mexico.

In Design Manager:

STEP	ACTION	DISPLAY
1.	Browse to ***Environment -> System -> Locales***	Library
2.	Right-click the ***Locales*** heading and select ***New Locale*** from the shortcut menu.	
The *New Locale* dialog box opens.		
3.	Enter ***Mexico*** in the ***Name*** field.	***New Locale*** dialog box
4.	Enter ***Mexico*** in the ***Description*** field.	
5.	Click ***Next.***	
6.	Select ***Spanish*** from the ***Language*** drop-down list.	
7.	Click ***Finish***.	
The *Mexico (Locale)* screen opens in the Property Panel.		

Success! You created the Mexico locale.

Define a Locale

Exercise Define the Mexico locale in Dialogue.

In Design Manager:

STEP	ACTION	DISPLAY
1.	Browse to *Environment -> System -> Locales*	Library
2.	Double-click *Mexico*.	
The *Mexico (Locale)* screen opens in the Property Panel.		
3.	Select *dd.mm.yyyy (06.04.2001)* in the *Date Format* drop-down list.	
4.	Enter *0.09* in the *Currency Conversion* field.	
5.	Select **.** in the *Thousands* field, under *Currency format*.	
6.	Select **,** in the *Decimal* field, under *Currency format.*	
7.	Select *(1$)* in the *Negative* field, under *Currency format*.	
8.	Select *1$* in the *Positive* field, under *Currency format*.	
9.	Enter *2* in the *Digits* field, under *Currency format.*	
10.	Enter *2* in the *Digits* field, under *Default floating format*.	
11.	Enter **,** in the *Decimal* field, under *Default floating format*.	
12.	Enter *-xxx.xxx* in the *Negative* field, under *Default floating format.*	
13.	Click the button.	

Success! You have defined the Mexico locale.

Jurisdictions

Jurisdictions are geographic or virtual locations for the distribution of communication. For example, you may wish to send special messages to clients in one particular city or state. You do this by using Jurisdictions.

This lesson covers how to define Jurisdictions within Dialogue.

Objectives

By the completion of this lesson, you will be able to:

- Describe the roles of Jurisdictions in Dialogue.

Terms

New terms used in this lesson include:

- **Jurisdiction** - A geographic or virtual location for the distribution of communication.

Additional Information

For more information on this topic, refer to the Dialogue:

- `Effectivity and Jurisdictions` Guide.
- `System Administration` Guide.

Modules

- In this lesson, you will use the Dialogue pDriver and eDriver suites. These suites are not included with Dialogue.

Jurisdictions

A **Jurisdiction** is a geographic or virtual location for the distribution of communication.

Jurisdictions are useful when dealing with different regions such as states. For example, the laws and policies for one state may vary from a neighboring state. Also, you may wish to convey a different message to clientele in a certain region. To accomplish this distinction, create Jurisdictions.

Tip

Jurisdictions may contain other Jurisdictions. For example, a state Jurisdiction contains several cities. This is a **group Jurisdiction**.

Jurisdictions can be extremely broad, or very specific:

- **Global Region -** The Western Hemisphere
- **Continental -** North America
- **Country -** The United States
- **Regional -** The Western United States
- **State -** California
- **City -** San Francisco
- **City Region/Suburb -** Fisherman's Wharf
- **Complex -** The Embarcadero

Thus, you target all clients that are located in the Western Hemisphere, down to only the clients who are located at The Embarcadero in San Francisco.

Objects may be limited by Jurisdiction:

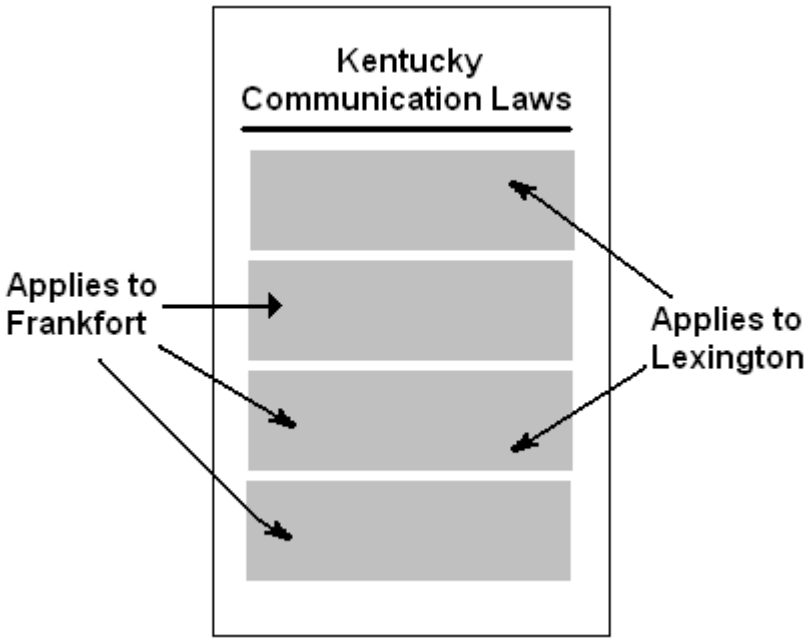
- Documents
- Pages
- Sections
- Paragraphs
- Messages

Some examples of Jurisdictions:

- An insurance company includes an extra page addendum to all Kentucky residents, describing the new changes in Kentucky Insurance laws. This Jurisdiction is *State* level.
- A phone company includes a customized image message on the bill, depending on the city of the client. This Jurisdiction is *City* level.
- A cable company includes a paragraph to notify clients of upcoming maintenance for all clients in the Kendall suburb of Miami. This Jurisdiction is *City Region/Suburb* level.

Jurisdictions and Data

Aside from establishing a customer's location, a Jurisdiction is also used to determine what kind of content needs to be presented. For example, Vivanet customers in Lexington are not concerned with laws affecting Frankfort, but directly affected by Lexington laws. You can use Jurisdictions to map the appropriate information from a larger document.



Therefore, you pull out the text that is relevant only to Lexington contracts, or information that is relevant to Frankfort contracts. The driving data for this selection is the Identifier.

Identifier

The key to assigning a Jurisdiction is the identifier. The identifier is the field each record is evaluated against to determine if it belongs in the current Jurisdiction. For example, if your Identifier was *WY*, then anything labeled with a WY is included. Map your Identifier to the **Sys_CustomerJurisdiction** variable.

Effectivity Dates

To set a Jurisdiction, the object must have a *Regulatory Support* tab. Then you must set the Effectivity of the Jurisdiction. In other words, when does the Jurisdiction go into effect and when does it expire? These details are configured in the *Setting Jurisdicition Effectivity* field.

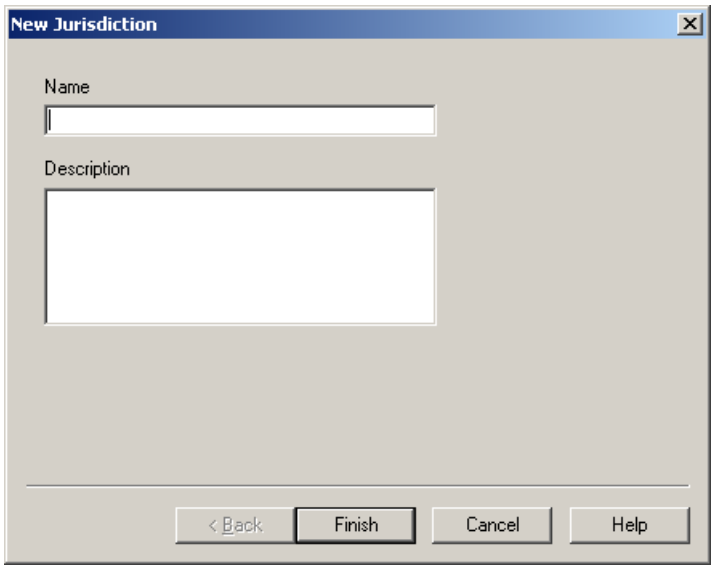
SETTING	EFFECT
All Jurisdictions have the same dates	This Jurisdiction has no specific effectivity details.
Enable for those listed	This object opens if the client belongs to the Jurisdiction.
Disable for those listed	The object does not appear if the client belongs to the Jurisdiction.

Once you have configured the identifier and effectivity, the Jurisdiction is ready for use.

Create and Define a Jurisdiction

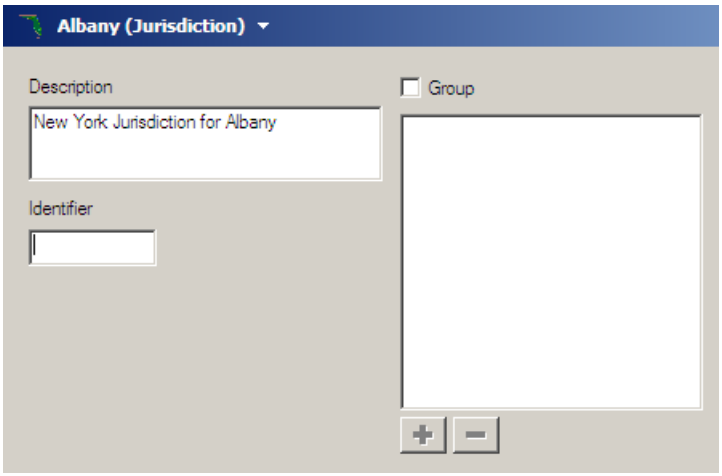
Create a new Jurisdiction by browsing to *Environment -> System -> Jurisdictions*, right-clicking the heading, and selecting *New Jurisdiction*.

Create a Jurisdiction



After giving a name and description, fill out the properties.

Jurisdiction properties



Independent Exercises: Jurisdictions

Exercise This is a group discussion.

If you need help, refer to the steps provided in each corresponding exercise.

TASK	SPECIFICS
Discuss Jurisdictions	Discuss how Jurisdictions can be used in your current environment.

Success! You have completed the Jurisdictions exercises.

Unit Summary

The concepts discussed and knowledge obtained during this unit are used in the next unit. If you have any questions, be sure to ask your instructor during this unit summary.

Concepts and Exercises

– General User Access

– Creating Folders

– Approvals

– Defining Languages and Locales

– Jurisdictions

Concepts and Exercises

General User Access

CONCEPT	EXERCISES
Creating Design Users	• Create a Design User
Create a Super User	• Create a Super User
Design Groups	• Identify the User Access Rights • Create a Design Group • Create an Administrative Design Group • Add Users to a User Group
Custom User Interface	• Customize the Design Group System Configuration • Restore the Design Group System Configuration

Creating Folders

CONCEPT	EXERCISES
Folders	• Create a Folder • Define Folder Properties • Assign Home Folders • Restrict Folder Contents

Approvals

CONCEPT	EXERCISES
Dialogue 1:1 Approvals	• Setting Up the Dialogue 1:1 Approvals
Enterprise Approval Module	• Create an Enterprise Approval Process: Create Approval States • Create an Enterprise Approval Process: Create an Approval Process

Defining Language and Locales

CONCEPT	EXERCISES
Languages	• Create a Language • Define a Language
Locales	• Create a Locale • Define a Locale

Jurisdictions

CONCEPT	EXERCISES
Jurisdictions	• Discuss the application of jurisdictions.

Unit 4 :: Setting Up the Design Environment

- Fonts, Styles, and Style Sheets
- Colors, Paper Types, and Design Layers
- Tag Sets and Page Templates
- Message Types and Message Templates
- Unit Summary

Fonts, Styles, and Style Sheets

Most companies value consistency and therefore set guidelines for publishing documents. By enforcing a style guide and setting standards for publication, the documents have a professional, streamlined appearance. This lesson describes how to administer fonts, styles, and style sheets in Dialogue.

Objectives

By the completion of this lesson, you will be able to:

- Administer fonts, including:
  - Adding fonts.
  - Limiting font usage.
  - Deactivating fonts.
  - Allowing user fonts.
- Set system-wide design defaults, including:
  - Design Resolution.
  - Indent.
  - Bullets and Numbering.
- Identify the benefits of using a style in Dialogue.
- Create styles.
- Identify the benefits of using a style sheet in Dialogue.
- Create style sheets.

Terms

New terms used in this lesson include:

- **Font** - A library object used to define fonts in Dialogue.
- **Style** - A characteristic formatting that affects the appearance of documents.
- **Style sheet** - A collection of styles used to standardize the appearance of text across communications.

Additional Information

For more information on this topic, refer to the Dialogue:

- `Design Environment` Guide.
- `System Administration` Guide.

Administering Fonts

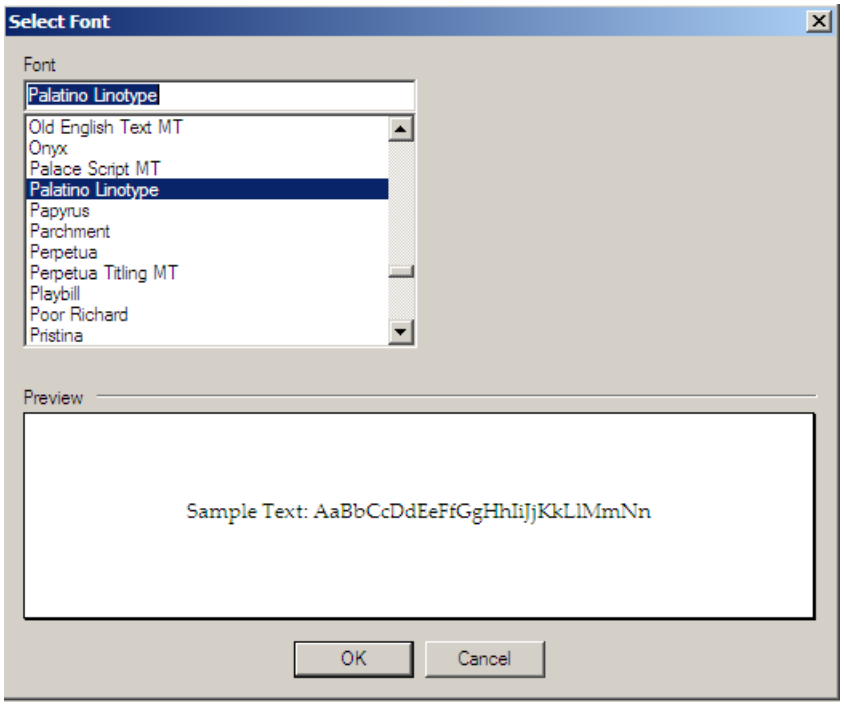
A **font** is a library used to define fonts in Dialogue.

Businesses normally have rules regarding **font** usage. Dialogue enables the use of flexible font management by allowing you to install new fonts, as well as deactivating and limiting the use of any font.

Adding a Font

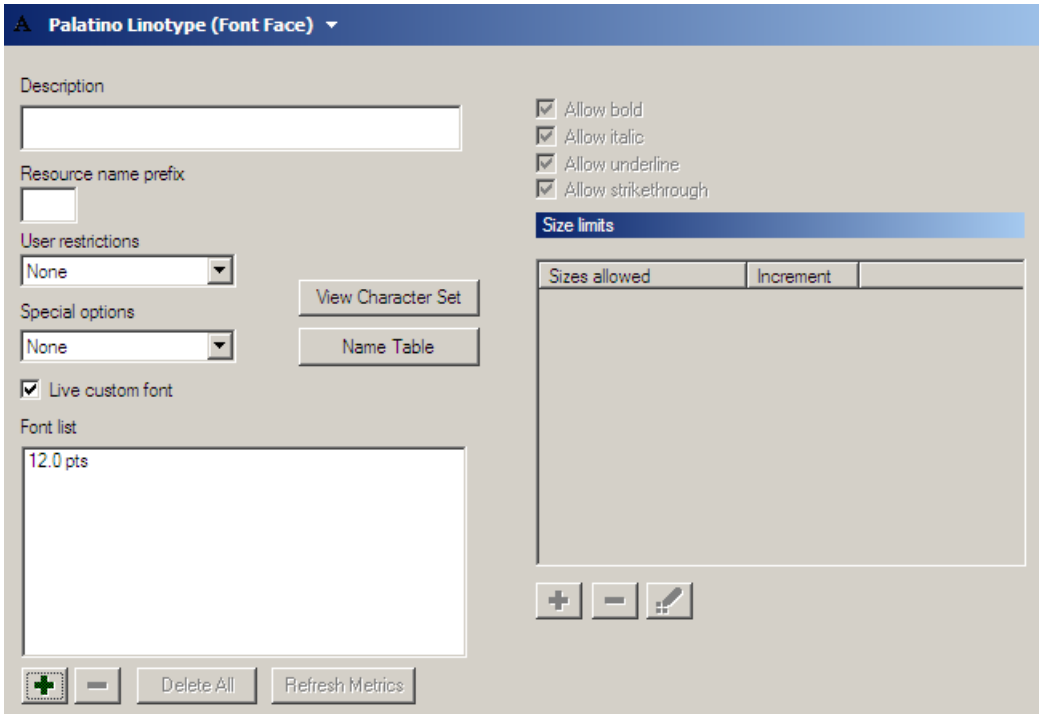
You may add any font installed on your system into Dialogue. The fonts are added from the *Environment -> Design -> Fonts* heading.

Adding a font



Once you have selected the font, enter the font properties. With the font properties, you set usage specifications or deactivate the font.

Font properties



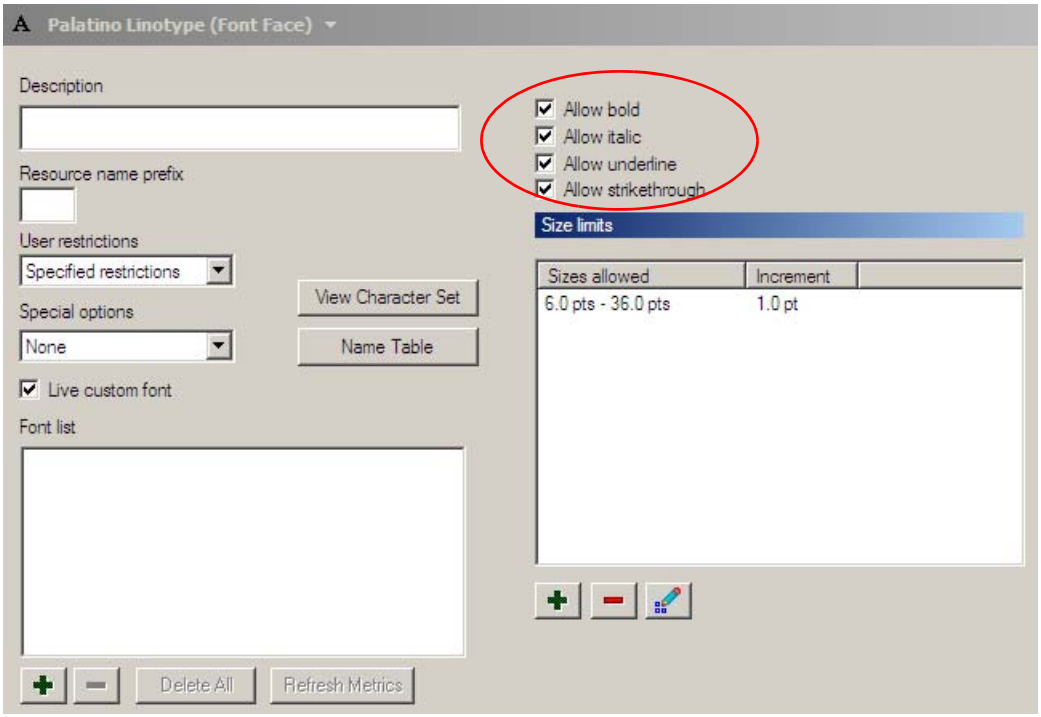
:: Note

Adding a font in Dialogue allows its use; it does **not** install the font on all machines. If another user does not have the font installed, Dialogue uses a substitution font to display.

Limit Font Usage

You may also limit a font to be used only within specifications. By modifying the font properties, you specify a range of point sizes and styles. You also set specific ***Allowed Sizes***.

Limited font settings



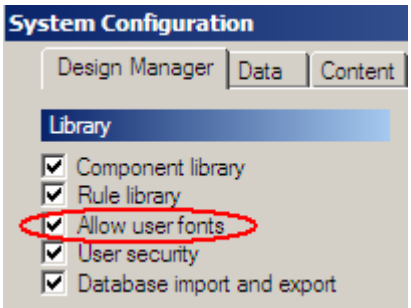
Deactivating a Font

Deactivating a font makes the font unavailable, yet the font remains in the Dialogue system. You deactivate a font by setting the ***User Restrictions*** to ***Unavailable*** in the Property Panel.

Allowing User Fonts

In the system configuration (***Environment -> System -> System Settings -> System Configuration***) you may elect to ***Allow user fonts*** to enable the use any workstation font, including those not set up in the Library.

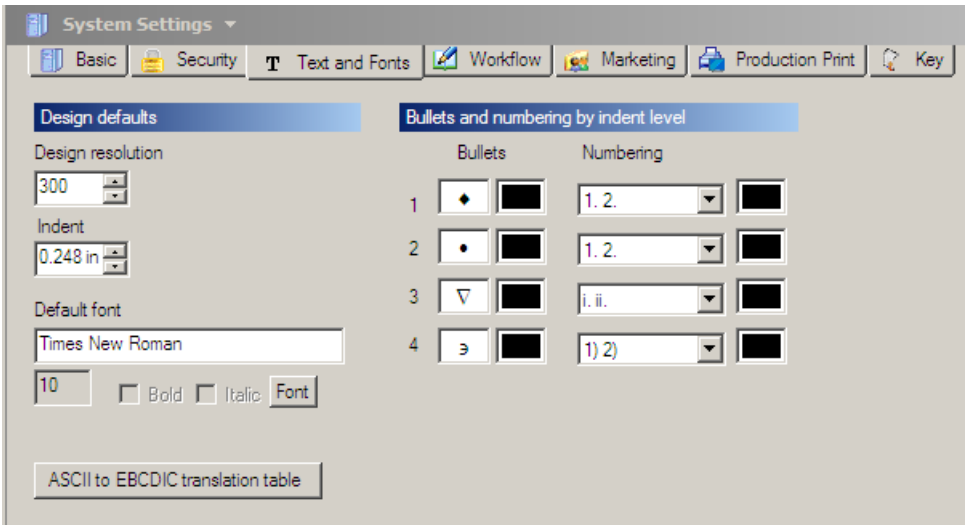
Allow user fonts



Setting System-Wide Design Defaults

In addition to installing fonts, you also set system-wide design settings. These are the default design settings that are enforced when a user creates a page without a page template or any styles. These settings are overridden by templates and style sheets.

Default Design



Single Design Resolution

You specify the ***Design Resolution***, which sets the *dots per inch* (dpi) resolution for the output device. The higher the dpi, the finer the resulting image.

Indent

You set the default indent when a new line is started. The indent is defined as needed (in inches, millimeters, picas, etc.). Every time a carriage return is entered in the Designer, this space is automatically applied to the new line.

Default font, Bullets and Numbering

You define the default font for Dialogue. You also set the bullets for up to four levels of lists. You select which character to use for each level of listing from the font character map.

Demonstration	Observe the demonstration.

Tip

Setting up the Design default is a good idea to make sure basic design standards are included on pages without style sheets, but you cannot enforce heading styles with the Design defaults.

Styles

A **style** is characteristic formatting that affects the appearance of documents.

Styles define characteristic formatting that affects the appearance of documents. These guidelines indicate how a font is used within the document. There are two types of styles:

- **Paragraph styles -** Indicate the characteristics of the text, as well as paragraph settings: spacing, indent, bullets, and flow.
- **Text styles -** Indicate the characteristics of only the text font, size, and usage.

For example, use a paragraph style to format a block of text and a text style to format a handful of words for emphasis.

Text style compared to paragraph style

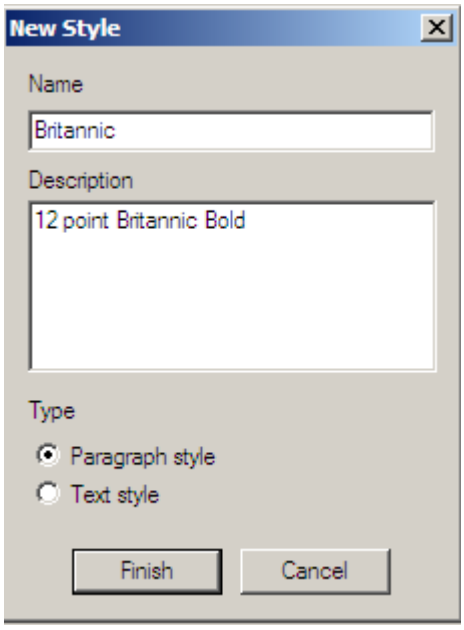
:: Note

Once a style has been created, you cannot change the style type. If you decide to change a paragraph style to a text style, you must delete the style and start over.

Create and Define a Style

Create a new style by browsing to *Environment -> Design -> Styles*, right-clicking the heading, and selecting *New Style*.

Create a style

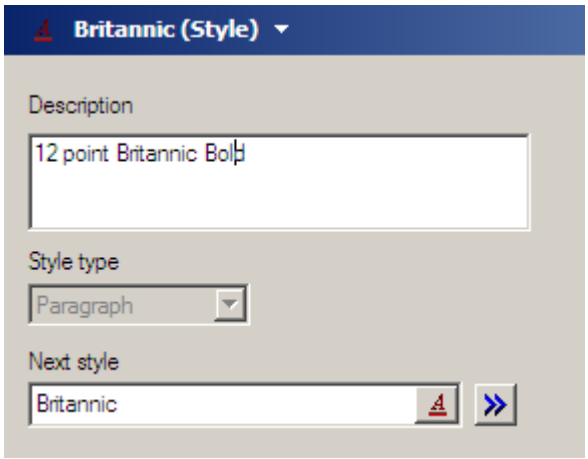


When a style is created, three things are defined:

- The style name.
- The style type: text or paragraph.
- The style following: indicate the style the system defaults to after the designer presses ENTER.

After giving a name, description and next style, you may change the properties you have defined. You may not, however, change the style type.

Style properties



A **style sheet** is collection of styles used to standardize the appearance of text across communications.

Style Sheets

Style sheets are a collection of styles used to standardize the appearance of text across communications.

By creating a style sheet, you control which fonts are available to designers and how these fonts are used. For example, a style sheet may contain the font size and type for several levels of headings.

Style sheets may be applied to documents and pages in Dialogue.

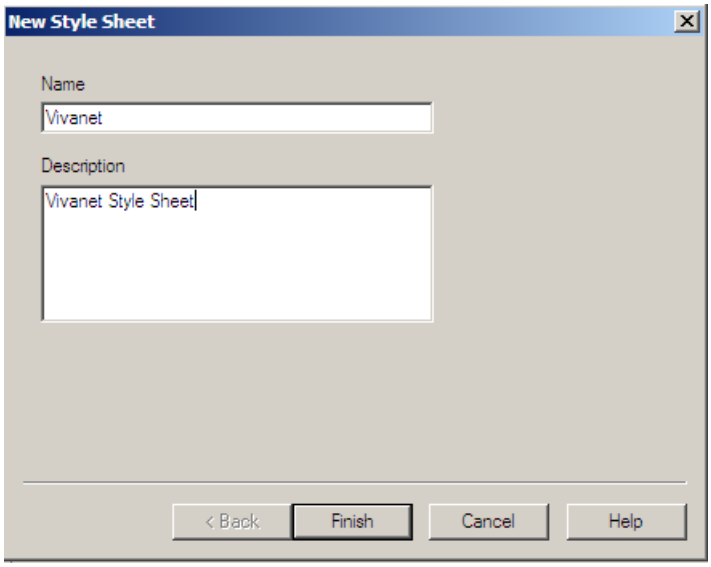
Planning a Style Sheet

Styles are not implemented until they are part of a style sheet. Prior to creating the style sheet, consider how the styles work together. For example, what kind of style follows a heading or an embedded list?

Create and Define a Style Sheet

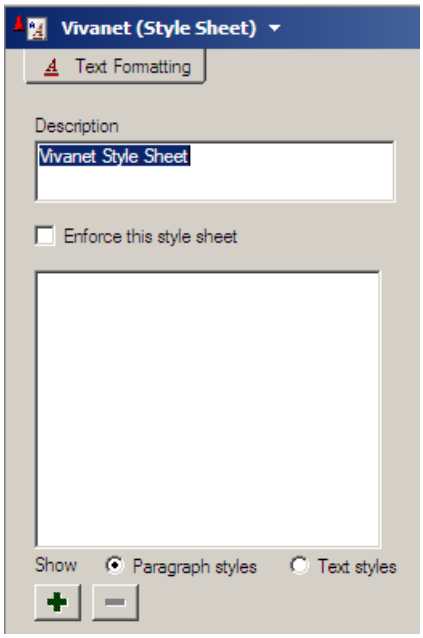
Create a new style by browsing to ***Environment -> Design -> Style Sheets***, right-clicking the heading, and selecting ***New Style Sheet***.

Create a style sheet



After giving a name and description, fill out the properties, including adding styles.

Style sheet properties



Tip

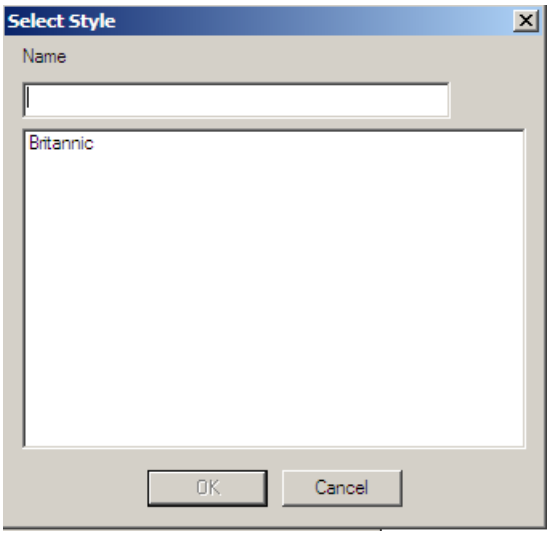
When adding many items, such as styles to a style sheet, select several items in the library view (by clicking SHIFT prior to selecting each one) and drag the group into the dialog box or Property Panel.

Adding Styles to Style Sheets

Once a style sheet has been created, start adding styles to it. First, select which type of style to add, a ***Paragraph Style*** or a ***Text Style***. The current selection determines what fonts appear within the selection window. For example, if ***Paragraph Style*** is selected, you see only paragraph styles.

Add a style to the style sheet by clicking on the button. A ***Select Style*** dialog box opens. Select the style to add and click ***OK***.

Select Style



Once the style is added to the style sheet, define the style. Each of the styles are defined in terms of the following categories.

- **Text Properties -** Sets the properties of all styles for font style, size, and color. This is the only category available for text styles.
- **Paragraph Properties -** Sets properties of paragraph styles for indent and spacing.
- **Bullets -** Sets properties for bulleted paragraph styles.

:: Note

Since you define a style when you add it to a style sheet, one style may be used in many different ways. The same **Style 1** may be completely different on two different style sheets.

Enforcing Style Sheets

When you have created a style sheet, it may be enforced on all successive pages. To do this, set the ***Enforce This Style Sheet*** option on the *Style Sheet Properties* page. When enforced, all users must adhere to the standards detailed in the Style Sheet. Users may not deviate from the styles contained in an enforced style sheet.

Demonstration	Observe the demonstration.

Independent Exercises: Fonts, Styles and Style Sheets

Exercise

Add the Times New Roman font, the restricted Verdana font, and then create a style sheet, based on the specifications given.

If you need help, refer to the steps provided in the following **Guided Exercises**.

TASK	SPECIFICS
Add a font	• Add the Times New Roman font face.
Add a restricted font	• Add the Verdana font face. • Restrict the font to sizes 11, 12, and 14. • Disable the *strikethrough* option.
Set design defaults	• Set the system-wide design defaults to 11 point Times New Roman.
Create paragraph styles	• Create a style for **Vivanet Body Text**, **Vivanet Heading 1, Vivanet Heading 2,** and the **Vivanet Bulleted List**.
Create a style sheet	• Create a Vivanet style sheet for all three styles.

Success!

You have completed the **Fonts, Styles, and Style Sheets** exercises.

Guided Exercises: Fonts, Styles and Style Sheets

Add a Font

Exercise Add Arial to Dialogue.

In Design Manager:

STEP	ACTION	DISPLAY
1.	Browse to *Environment -> Design -> Fonts*.	Library
2.	Right-click the *Fonts* heading and select *Import New Font*. from the shortcut menu.	
The *New Font* dialog box opens.		
3.	Select *Arial* from the drop-down list.	*New Font* dialog box
4.	Click *OK*.	
5.	Exit the Property Panel.	

Success! You have added the Arial font to Dialogue.

Add a Restricted Font

Exercise

Add the Verdana font to Dialogue. Limit the font size to 11, 12 and 14 and disable *strikethrough*.

In Design Manager:

STEP	ACTION	DISPLAY
1.	Browse to ***Environment -> Design -> Fonts***.	Library
2.	Right-click the ***Fonts*** heading and select ***Import New Font***. from the shortcut menu.	
The ***New Font*** dialog box opens.		
3.	Select ***Verdana*** from the drop-down list.	***New Font*** dialog box
4.	Click ***OK***.	
The font properties appear in the Property Panel.		
5.	Enter ***Verdana Font*** in the ***Description*** text box.	Property Panel
6.	Select ***Specified Restrictions*** in the ***User Restrictions*** drop-down list.	
7.	Clear the ***Allow Strikethrough*** check box.	
8.	Click the  button under ***Size Limits***.	
The ***Enter font size restriction*** dialog box opens.		
9.	Select the ***Specific font size*** option.	***Enter font size restriction*** dialog box
10.	Enter ***11*** in the first field.	
11.	Click ***OK***.	
12.	Repeat steps 8-11, and add sizes 12 and 14.	
13.	Click the  button and exit the Property Panel.	

Success!

You have added the Verdana font to Dialogue with the specified restrictions.

Set Up Design Defaults

Exercise Set the Design Default properties to comply with the Vivanet Style Guide as much as possible.

In Design Manager:

STEP	ACTION	DISPLAY
1.	Browse to *Environment -> System -> System Settings*.	Library
2.	Drag the *System Settings* into the Property Panel.	
3.	Browse to the *Text and Fonts* tab.	Property Panel
4.	Click the *Font* button.	
The *Select Font* screen opens.		
5.	Select *Times New Roman* from the drop-down list.	*Select Font* dialog box
6.	Select *11* from the *Point size* drop-down list.	
7.	Click *OK*.	
8.	Click the  button and exit the Property Panel.	

Success! You have set a Design Default of Times New Roman 11 point.

Create Paragraph Styles

Exercise Create each of the styles described in the Vivanet Style Sheet Summary.

In Design Manager:

STEP	ACTION	DISPLAY
1.	Browse to ***Environment -> Design -> Styles.***	Library
2.	Right-click the ***Styles*** headings and select ***New Style*** from the shortcut menu.	
The ***New Style*** dialog box opens.		
3.	Enter ***Body Text*** in the ***Name*** field.	***New Style screen***
4.	Enter ***Body Text*** in the ***Description*** field.	
5.	Select the ***Paragraph Style*** option.	
6.	Click ***Finish***.	
The text style properties appear in the Property Panel.		
7.	Select ***Body Text*** from the ***Next style*** drop-down list.	Property Panel
8.	Click the  button and exit the Property Panel.	
9.	Define the ***Heading 1*** and ***Heading 2*** styles. Use the document from John for the names	

Success! You have created three new styles.

Create a Style Sheet

Exercise Build the Vivanet style sheet based on the styles you have created.

In Design Manager:

STEP	ACTION	DISPLAY
1.	Browse to *Environment -> Design -> Style Sheets*	Library
2.	Right-click the *Style Sheets* heading and select *New Style Sheet* from the shortcut menu.	
The *New Style Sheet* dialog box opens.		
3.	Enter *Vivanet Style Sheet* in the *Name* field.	*New Style Sheet* dialog box
4.	Enter *Default Style Sheet* in the *Description* field.	
5.	Click *Finish*.	
The *Style Sheet* properties appear in the Property Panel.		
6.	Click the  button.	Property Panel
The *Select Style* dialog box opens.		
7.	Select *Body Text.*	*Select Style* dialog box
8.	Click *OK.*	
9.	Select *Times New Roman* from the drop-down list.	Property Panel
10.	Select *11* from the *Point size* drop-down list.	
11.	Click the  button.	
12.	Repeat step 6-13 and add the *Heading 1* and *Heading 2* styles. Use the document from John for the style definitions.	
13.	Exit the Property Panel.	

Success! You have created a style sheet as specified.

Colors, Paper Types, and Design Layers

Your company may have a custom color set or use color for emphasis. You create and modify your own color schemes in Dialogue.

To create quality documents, specify the media. By specifying paper type attributes, you create publications that are produced specifically for your output materials.

Design Layers are another useful tool that enables you to create many levels of design elements, which you add or strip away as needed. Layers are used to create complex multi-layered design elements, or used to place guidelines in the Designer, which are not printed at production time. This lesson describes how to define color, paper types and design layers.

Objectives

By the completion of this lesson, you will be able to:

- Create and define a color family.
- Create and define named colors, including an RGB color, a CMYK color, and a relative color
- Create and define a paper type.
- Create and define a design layer.

Terms

New terms used in this lesson include:

- **Color Family -** A Dialogue feature that enables you to create a set of named colors that are specific to your organization.
- **Design layer** - A virtual layer that selectively adds and removes content based on a destination device.
- **Named color** - A user-defined custom color that you create in color families.
- **Paper type** - An object used to define the size, weight, and color of paper stock, as well as media names for printer control.

Additional Information

For more information on this topic, refer to the Dialogue:

- `Design Objects` Guide.
- `Publication Support` Guide.
- `System Administration` Guide.

Design Colors

Color families enable you to create a set of named colors that are specific to your organization.

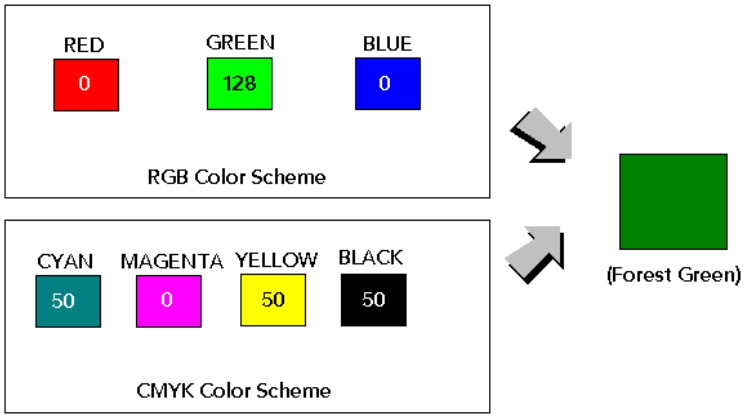
You can add your own custom color scheme to the Dialogue Designer using **color families**. These colors are used to send the specific color instructions to the printer.

A color family is a container. You must define color types to compose a color family. A color family may contain any number of custom colors. Colors are formed by two schemes: RGB and CMYK. These schemes ensure the best color fidelity by matching the displayed colors with the actual ink mixtures used by printers.

- The **RGB Color Scheme** is formed by light absorption, using the colors red, blue, and green and adding or subtracting light.
- The **CMYK Color Scheme** is formed by light refraction, using the colors cyan, magenta, yellow, and black.

A **named color** is a user-defined custom color that you create in color families.

Use either of these schemes to define **named colors**. For example, if you wanted to create forest green, and you wanted to use the RGB Scheme, set the values of [Red: 0, Green: 128, Blue: 0]. However, if you were using the CMYK scheme, use the values of [Cyan: 50, Magenta: 0, Yellow: 50, Black: 50] to attain the same color.



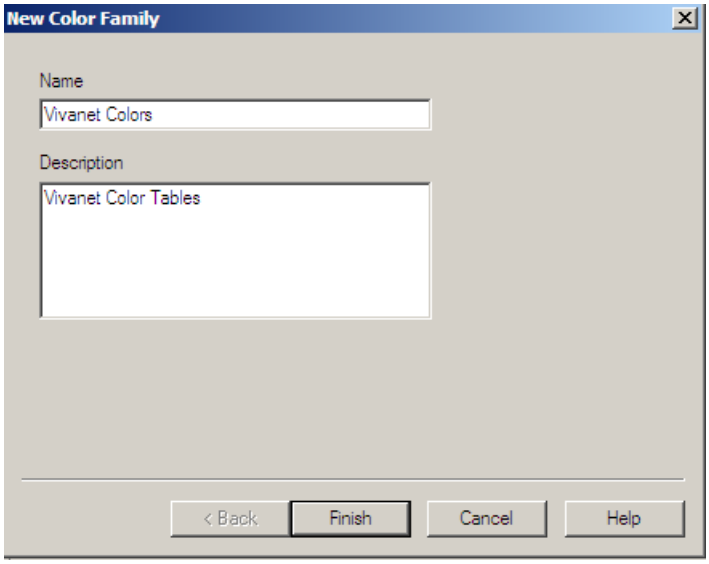
As you define your color, the following options are changed, based on your current color:

- **Black and White -** There are only two options for this color: black or white. Dialogue determines which color, based on the current shade.
- **Grayscale -** If your color opens in a gray scale print, there are 255 shades of gray available to substitute for the color. Dialogue determines the shade based on the current shade and hue.
- **Raster BW -** (Not available for Custom Colors) Rasterization shows the interpretation of the color in a rasterized, non-color display.

Create and Define a Color Family

Create a new color family by browsing to *Environment -> Design -> Color Families*, right-clicking the heading, and selecting *New Color Family*.

Create a color family



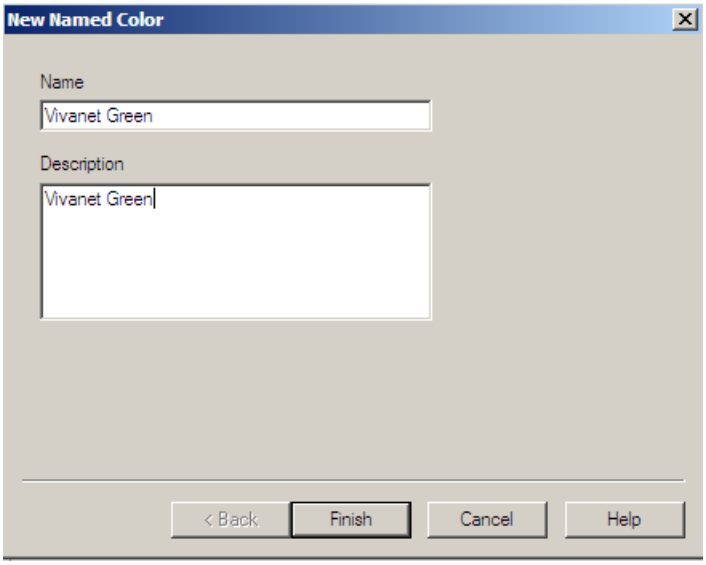
After giving a name and description, the properties open in the Property Panel. The only property for a color family is the name and description.

Color description

Create and Define a Named Color

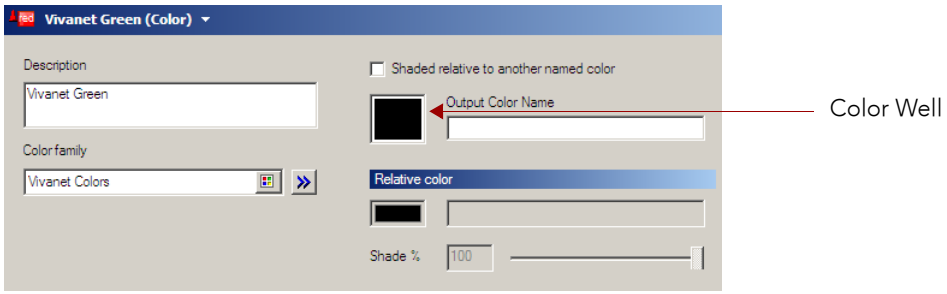
Create a new color by browsing to *Environment -> Design -> Color Families*, right-clicking an existing color family, and selecting *Insert New Color*.

Create a named color



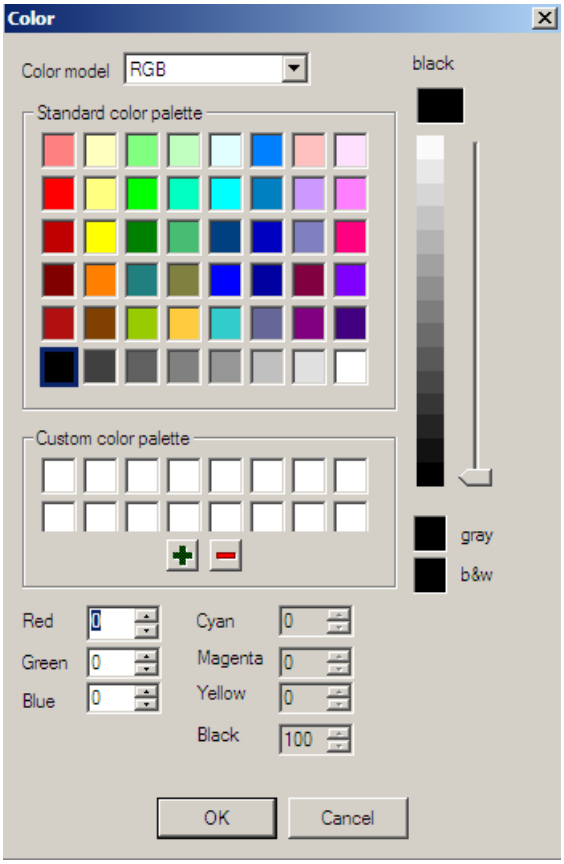
After giving a name and description, the properties appear in the Property Panel. Set the shade by clicking the color well.

Color properties



The *Color* dialog box opens. Select the *Color model* to choose the palette and then enter the color values to define your color.

Color



Output Color Name

Enter an output color name if your printer requires a name string instead of the RGB or CYMK values. Enter the name exactly as read by the printer. Otherwise, the color is defined using the CMYK values entered in Dialogue to define the named color.

Relative Colors

You may want to define many colors based on one color. For example, you may wish to create a color set of orange shades: starting with an plain orange color, you want to create gold, tangerine, and amber.

After you have designed your basic orange, create a a new color called Gold. Then click the ***Shaded Color Relative To Another Color*** check box. This activates the shade slider, after which you can slide to lighten or darken the tone to the one you want. You then define both tangerine and amber based on the basic orange color. If you change a color that has relative links, all of those relative colors are affected.

Demonstration	Observe the demonstration.

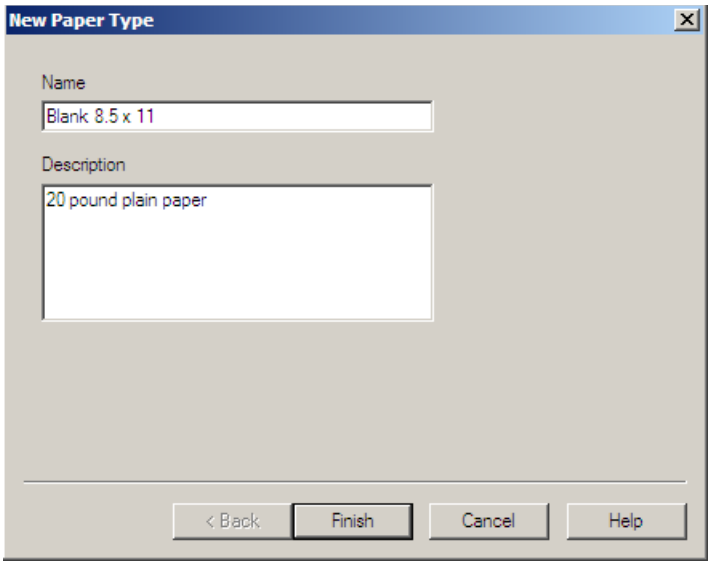
Create and Define a Paper Type

A **paper type** is an object used to define the size, weight, and color of paper stock, as well as media names.

Most publications created in Dialogue require printing. To ensure the best accommodation of the print medium, entering the **paper type** characteristics promotes efficient printing and generates a presentable product. However, paper types do not always define physical paper. Paper types may also define the screen properties for electronic output.

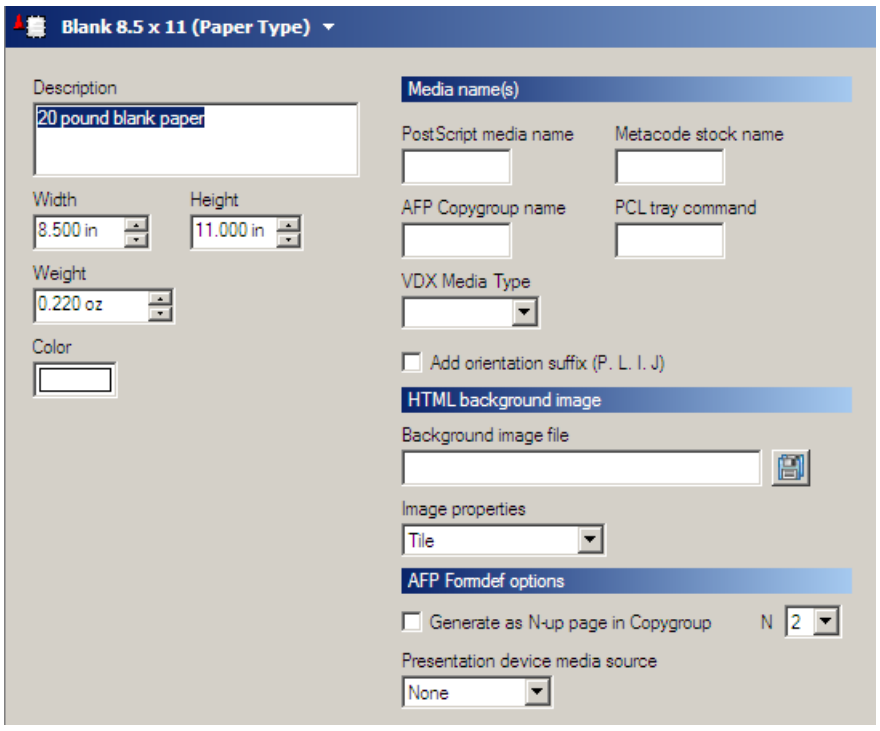
Create a new paper type by browsing to *Environment -> Design -> Paper Types*, right-clicking the heading, and selecting *New Paper Type*.

Create a paper type



After giving a name and description, configure the paper type properties.

Paper type properties



Paper Type Properties

When you create a new paper type, you must define its properties. Consider the following basic attributes:

- Paper Height
- Paper Width
- Paper Weight
- Paper Color

If you are defining the paper width for electronic output, like an image, you only need to set the width. The paper width is converted to pixels when generating the output to the screen. Since electronic pages scroll, the paper height is not important: it is set automatically. Use the following formula while planning the dimensions:

# of pixels / 96 dpi = # inches

Therefore, 770 pixels per inch is about 8 inches, which is ideal for a 800x600 screen.

Media Names

You also set ***Media Names***, which are specific printer commands associated with the page. Refer to the **Publication Support Guide** for more information about media names.

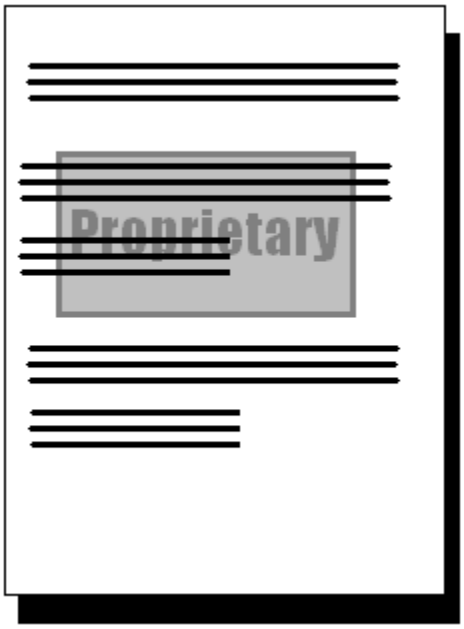
ATTRIBUTE	DESCRIPTION
Postscript Media Name	The name that is used with the PostScript **set page device** command.
Metacode Stock Name	The name that is used with the **Dynamic Job Description Entry** command.
AFP Copygroup Name	The name that is used with the **Invoke Media Map** command.
PCL Tray Command	Specifies any Printer Control Language commands to execute.
Add Orientation Suffix	Adds a suffix to the name indicating the page orientation.
HTML Background Image	Sets up the HTML background image, detailed below.
AFP Formdef Options	Enables you to specify a presentation device media source.

HTML Background Image

If the page contains an HTML printout, you specify a background image as a watermark. This setting is used only for HTML output. After you specify the image (.jpg, .gif and .png formats are supported), specify the image layout properties:

- **Tile -** The image appears normal size and repeat in a grid until the background is entirely filled.
- **Center -** The image opens in the center of the background, normal size.
- **Stretch -** The image is stretched to entirely fill the background.

Example of HTML Background Image



AFP Formdef Options

Many images may be set up within a page. This is set in the AFP Formdef Options.

- **Generate as an N-Up Page In Copygroup -** Select this box to set the page as an N-Up page.
- **N -** Specify how many images are generated per page.

Demonstration	Observe the demonstration.

Create and Define Design Layers

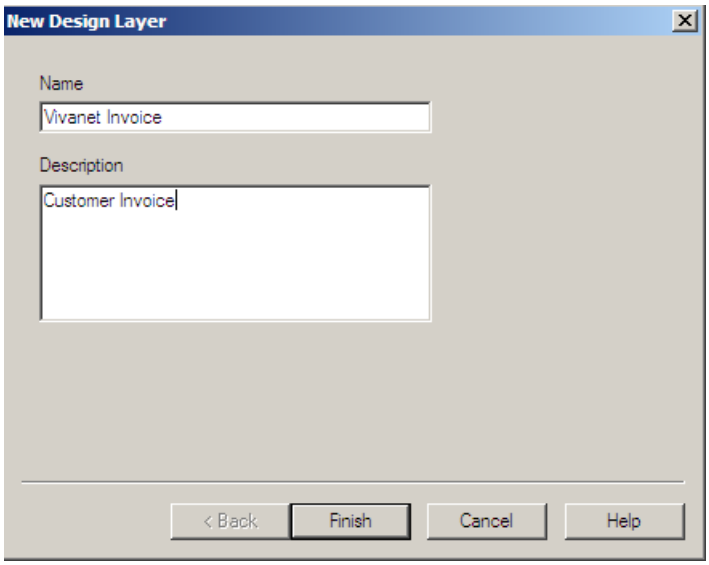
In Dialogue, design layers enable multiple layers of elements that may or may not be present during production. Design layers:

- Help determine the spacing of objects to be printed.
- Include printer marks.

To create a new design layer, browse to ***Environment -> Design -> Design Layer***, right-click the heading, and select ***New Design Layer***.

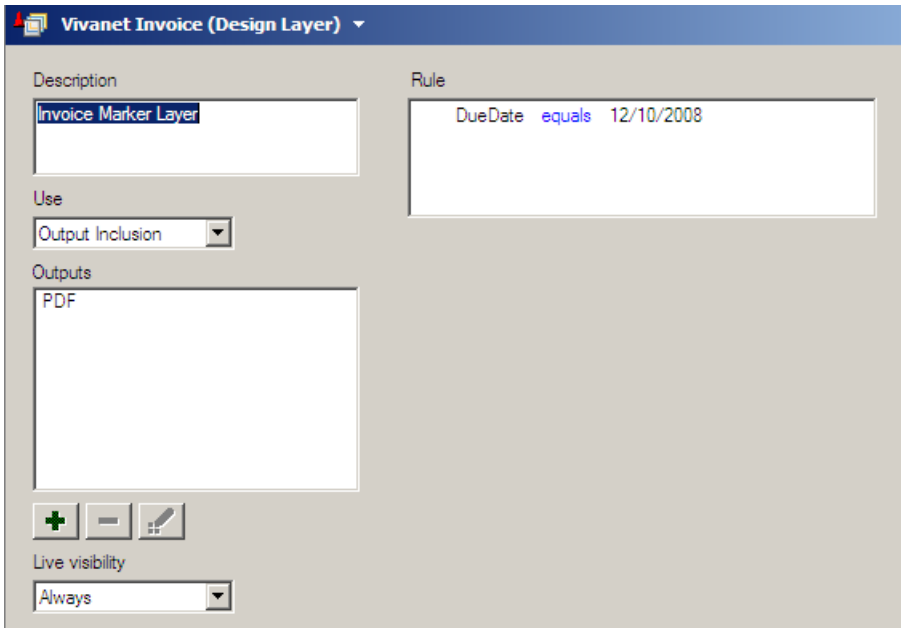
A **design layer** is a virtual object that selectively adds and removes content based on an output device.

Create a design layer



After giving a name and description, fill out the properties.

Design layer properties



Create a Design Layer

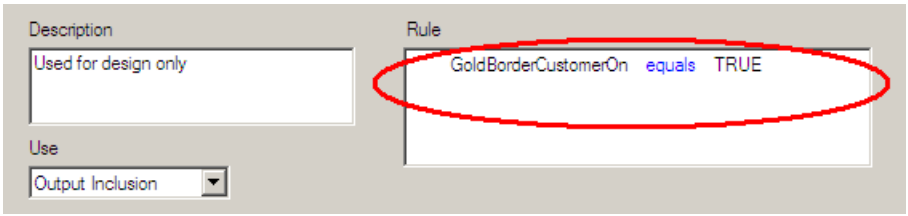
You select one of the following properties when defining a design layer in the Property Panel:

- ***Always*** - This layer is used both when designing and when composing to output.
- ***Design only*** - This layer is used only when designing the page, section, paragraph, message, or template.
- ***Include for outputs*** - When you select this option, the ***Outputs*** box displays. This layer is used only for designing and composing to the selected output. This means the layer is displayed if the object is sent to the specified output(s).
- ***Exclude for outputs*** - When you select this option, the ***Outputs*** box displays. This layer is not used for the selected output. This means the layer is not displayed if the object is sent to the specified output(s). For example, you use this option if you have a pre-printed letterhead loaded in a certain printer.

Defining Inclusion Rules

You can also use Rules to define additional conditions for including the design layers. The design layer appears only if the ***Use*** condition is met and all ***Rules*** are satisfied.

Designer with an inclusion rule



Tip

If you select ***Include for outputs*** or ***Exclude for outputs***, you must choose which output the option references.

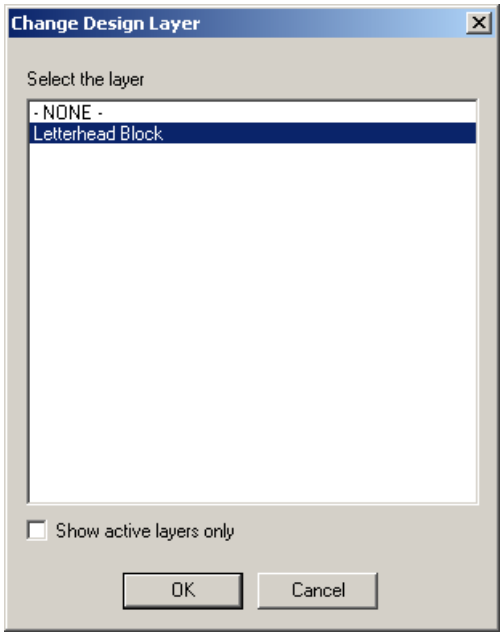
Assigning Objects to a Design Layer

You only add objects to a Design Layer in Designer. When in Designer, select the item you wish to assign to a design layer. Then click the ***Layer*** button.

Layer button

This opens the ***Change Design Layer*** dialog box. Select the layer for the selected element. Once you click ***OK***, the elements are assigned to that design layer. If the design layer is turned off, those elements disappear from the Designer View.

Assigning an object to a layer



Toggling Design Layer Views

You may turn off a design layer, which hides the layer and all assigned elements from the Designer view. However, these elements remain in the object definition. You set up as many layers as desired.

To toggle the view, go to ***View->Design Layers*** in the Designer menu. Select the design layers to show. Any layer not selected does not display in the Designer view.

Demonstration	Observe the demonstration.

Independent Exercises: Colors, Paper Types, and Design Layers

Exercise

Create the Vivanet colors, add the Pinnacle Paper Type, and a create a design layer for the letterhead.

If you need help, refer to the steps provided in the following **Guided Exercises**.

TASK	SPECIFICS
Create and define a color family	• Create the Vivanet Color Family
Create the Vivanet colors – Insert a CMYK Color – Insert a Relative Color	• Insert a CMYK color for Vivanet Blue. • Insert a relative color for Vivanet Light Blue.
Create and define a paper type	• Create the *Pinnacle Page* paper type.
Create and define a letterhead design layer	• Name the design layer **Vivanet Header**. • Set the layer to ***Design only***.

Success!

You have completed the **Colors, Paper Types, and Design Layers** exercises.

Guided Exercises: Colors, Paper Types, and Design Layers

Create a Color Family

Exercise Create the Vivanet color family to ensure consistent logo colors.

In Design Manager:

STEP	ACTION	DISPLAY
1.	Browse to *Environment -> Design -> Color Families*	Library
2.	Right-click the *Color Families* heading and select *New Color Family* from the shortcut menu.	
The *New Color Family* dialog box opens.		
3.	Enter *Vivanet Color Family* in the *Name* field.	*New Color Family* dialog box
4.	Enter *Vivanet Color Family* in the *Description* field.	
5.	Click *Finish* and exit the Property Panel.	

Success! You have created the Vivanet Color Family.

Create the Vivanet Colors

Exercise Create Vivanet blue using the CMYK palette.

In Design Manager:

STEP	ACTION	DISPLAY
1.	Browse to ***Environment -> Design -> Color Families***	Library
2.	Right-click the ***Vivanet Color Family*** and select ***Insert New Color*** from the shortcut menu.	
The *New Color* dialog box opens.		
3.	Enter ***Vivanet Blue*** in the ***Name*** field.	*New Color* dialog box
4.	Enter ***Vivanet Blue*** in the ***Description*** field.	
5.	Click ***Finish***.	
The color properties open in the Property Panel.		
6.	Click the color well in the upper right-hand corner of the menu.	Property Panel
The ***Color Table*** dialog box opens.		
7.	Select ***CMYK*** from the ***Color Model*** drop-down list.	***Color Table*** dialog box
8.	Enter ***63*** in the ***Cyan*** field.	
9.	Enter ***63*** in the ***Magenta*** field.	
10.	Enter ***0*** in the ***Yellow*** field.	
11.	Enter ***37*** in the ***Black*** field.	
12.	Click ***OK***.	
13.	Click the  button and exit the Property Panel.	Property Panel

Success! You have created the Vivanet Blue color with the CMYK palette.

Create the Vivanet Colors: Insert a Relative Color

Exercise

Create a color relative to Vivanet Blue: the relative color will be called Vivanet Light Blue.

In Design Manager:

STEP	ACTION	DISPLAY
1.	Browse to *Environment -> Design -> Color Families*	Library
2.	Right-click the *Vivanet Color Family* and select *Insert New Color* from the shortcut menu.	
The *New Color* dialog box opens.		
3.	Enter *Vivanet Light Blue* in the *Name* field.	*New Color* dialog box
4.	Enter *Vivanet Light Blue* in the *Description* field.	
5.	Click *Finish*.	
The color properties open in the Property Panel.		
6.	Select the *Shaded relative to another named color* check box.	Property Panel
7.	Click the color box under *Relative Color*.	
The *Color* dialog box opens.		
8.	Select *Vivanet Color Family* from the *Color model* drop-down list.	*Color* dialog box
9.	Select *Vivanet Blue* from the *Color name* drop-down list.	
10.	Click *OK*.	
11.	Enter *20* in the *Shade %* field.	
12.	Click the  button.	

Success!

You have created the a new Vivanet Light Blue color based on the Vivanet Blue color.

Create and Define a Paper Type

Exercise Add the *Pinnacle Page Type* to the ***Paper Types***.

In Design Manager:

STEP	ACTION	DISPLAY
1.	Browse to ***Environment -> Design ->Paper Types*** heading under ***Environment***.	Library
2.	Right-click the ***Paper Types*** heading and select ***New Paper Type*** from the shortcut menu.	
The ***New Paper Type*** dialog box opens.		
3.	Enter ***Pinnacle Page*** in the ***Name*** field.	***New Paper Type*** dialog box
4.	Enter ***Pinnacle Page*** as the ***Description***.	
5.	Click ***Finish***.	
The ***Pinnacle Page (Paper Type)*** properties appear in the Property Panel.		
6.	Set the ***Width*** as indicated by your **design scenario**.	Property Panel
7.	Set the ***Height*** as indicated by your **design scenario.**	
8.	Set the ***Weight*** as indicated by your **design scenario.**	
9.	Click the  button and exit the Property Panel.	

Success! You have added the *Pinnacle Page Type* to the ***Paper Types***.

Create and Define a Letterhead Design Layer

Exercise Create a non-printable design layer to accommodate the Vivanet Header for the Vivanet Header Page.

In Design Manager:

STEP	ACTION	DISPLAY
1.	In the Library, expand the ***Design*** heading under ***Environment***.	Windows
2.	Right-click the ***Design Layers*** heading and select ***New Design Layer*** from the shortcut menu.	
The ***New Design Layer*** dialog box opens.		
3.	Enter ***Vivanet Header Layer*** in the ***Name*** text box.	***New Design Layer*** dialog box
4.	Enter **Used for design only** in the ***Description*** text box.	
5.	Click ***Finish***.	
The ***Vivanet Header*** design layer is opened in the Property Panel for you to define.		
6.	Select ***Design only*** from the ***Use*** drop-down list.	Property Panel
7.	Click the  button and exit the Property Panel.	

Success! You have created and defined a non-printable design layer.

Tag Sets and Page Templates

The ability to import external data files into your applications is key to the personalization of your communications. Dialogue provides an easy way to ensure the desired formatting of this data by using tag sets.

By specifying attributes and assigning page templates, you create publications that are produced specifically for your output materials. Page templates may also be set up to easily assemble documents by pre-defining the object layout and characteristics.

This lesson covers how to define tag sets and page templates within Dialogue.

Objectives

By the completion of this lesson, you will be able to:

- Create and define a tag set.
- Identify the benefits of using a page template.
- Create and define a page template.
- Add objects to a page template.

Terms

New terms used in this lesson include:

- **Page template** - An object that defines a paper type and controls what type of page is used.
- **Tag** - A code embedded within a data file that directs applications how to process certain portions of the content.

Additional Information

For more information on this topic, refer to the Dialogue:

- `Design Objects` Guide.
- `System Administration` Guide.

Modules

In this lesson, you will use the Dynamic File Import module. The Dynamic File Import module is not included with Dialogue 1:1.

Tag Sets

If you have the **Dynamic File Import Module**, you may use tag sets to format text when the Engine runs. This is useful when importing text from a Customer driver file.

A **tag** is code embedded within a file that directs applications how to process certain portions of the contents.

A **tag** is a formatting instruction that opens within the document. For example, a text tag may indicate that the following text opens as bold, tabbed a pre-defined amount, or that the text opens in a defined style. If you are using an exported file with formatting tags, using a tag set interprets the tags and formats accordingly.

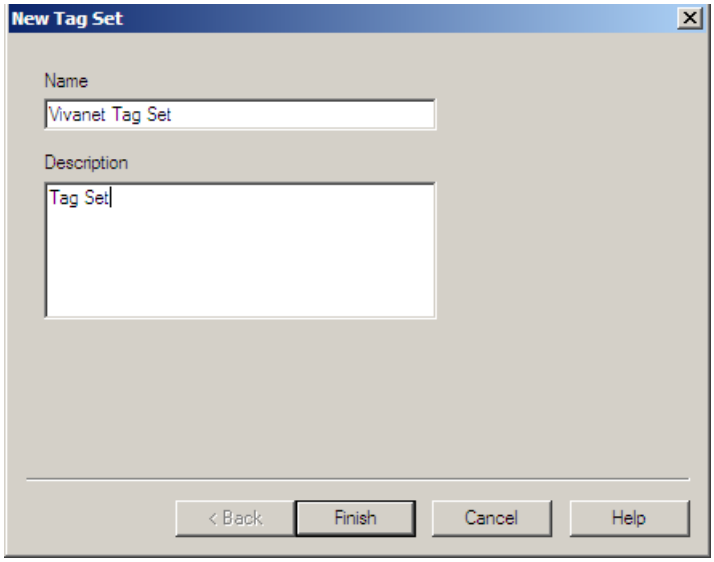
Tags are identified with a tag marker, or a pointed bracket set **<>**. When the Engine processes a package file, Dialogue interprets the tag and applies the corresponding formatting to the text indicated.

Tag sets have a start tag and sometimes an end tag. The start tag indicates to begin formatting. The end tag indicates to stop formatting. In this regard, tags work very much like HTML tags.

Create and Define a Tag Set

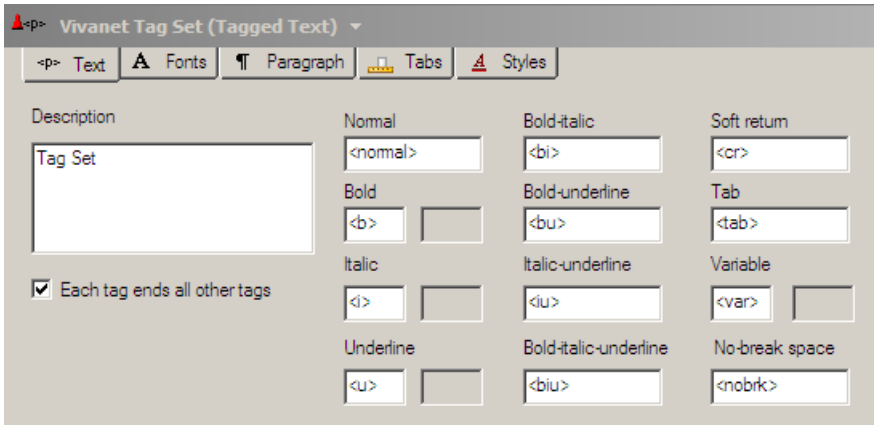
Create a new tag set by browsing to *Environment -> Design -> Tag Sets*, right-clicking the heading, and selecting *New Tag Set*.

Create a tag set



When you create a new tag set, it contains the Dialogue default tags.

Tag set properties



Tag Set Properties

There are five tag set categories within the properties.

Tab	Sets
Text	The text to bold, italics, tabs, or identify variables.
Fonts	The text in the indicated font format.
Paragraph	The paragraph's properties, such as centering, indenting and spacing.
Tabs	Tab spacing.
Style	The following selection in a defined style.

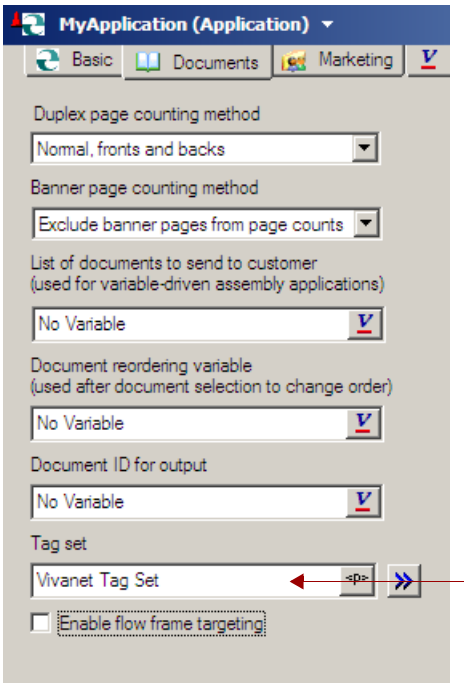
Tip

While only one tag set may be used per application, you may create many different tag sets.

Using a Tag Set

Once you have created and defined the tag set, it must be specified in the application. You may specify one tag set per application, under the ***Documents*** tab.

Using a tag set



Demonstration	Observe the demonstration.

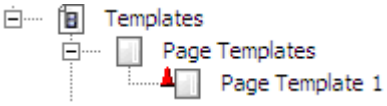
Page Templates

Page templates are used to define the paper type and controls what kind of page is used. By defining characteristics and setting objects within the template, you create consistent pages and enforce style sheets.

A **page template** is an object that defines a paper type and controls what type of page is used.

The page template also simplifies document creation by pre-setting components within a new document. For example, you want to create a template for correspondence. When the user creates a new page with the template, the letterhead, the date, the watermark, and the body text box are already set up for the page. The designer has to write the content.

Page templates in the Design Manager



A page template sets the new page with pre-set specifications for:

- Style sheet
- Paper type
- Page orientation setting
- Design defaults
- User restrictions

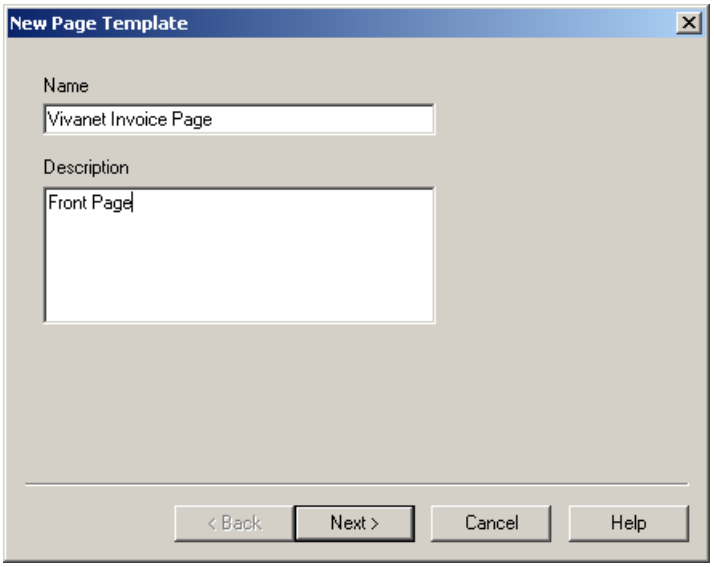
:: Note

The Dialogue users may create many pages based on templates. Typically, only the system administrator creates the page templates.

Create and Define a Page Template

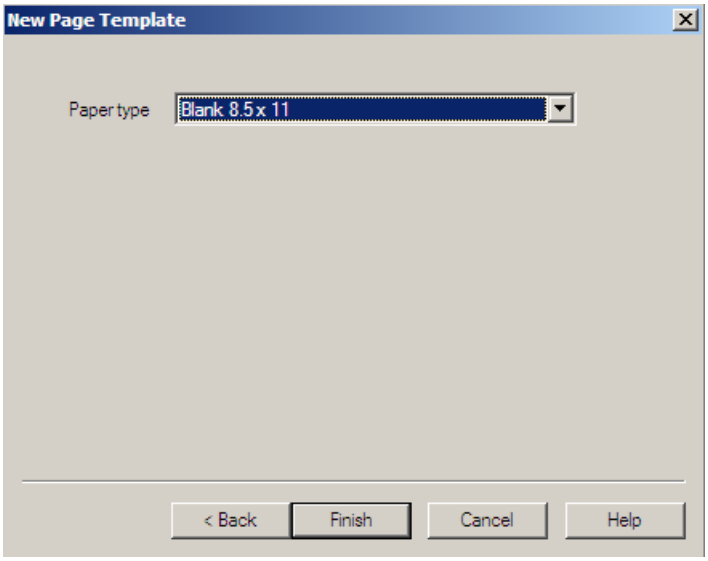
Create a new page template by browsing to *Environment -> Design -> Templates -> Page Templates*, right-clicking the heading, and selecting *New Page Template*.

Create a page template



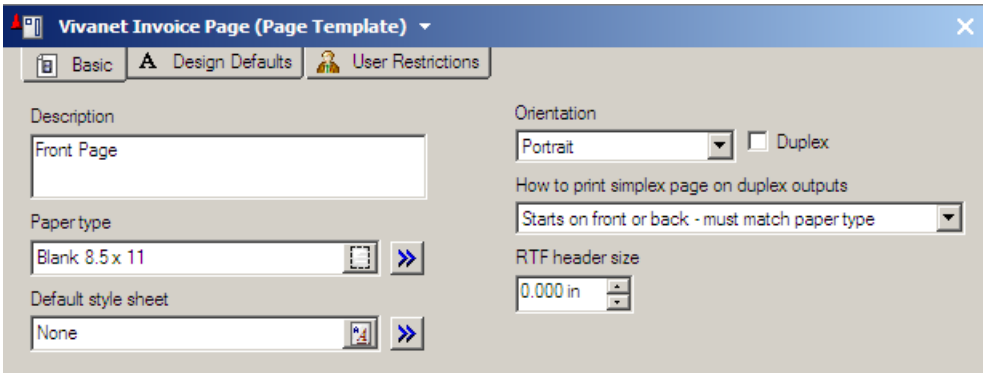
After you give a name and description, you must enter a paper type to use for the template.

Select paper type



After selecting a paper type, fill out the template properties.

Page template properties



Template Properties

Once a template is created, you define the template properties within three options:

- *Basic*
- *Design Defaults*
- *User Restrictions*

Basic

The ***Basic*** template properties set the fundamental template characteristics, which include the attributes below.

ATTRIBUTE	DESCRIPTION
Paper Type	The Paper Type this template uses.
Default Style Sheet	The Style Sheet enforced for this template.
Orientation	The layout for the page: portrait, landscape, portrait reversed, or landscape reversed.
Duplex	Prints on both sides of the sheet. (Not supported by all printers)
How to print simplex pages on a duplex outputs	Indicates the method of printing single-page documents if the printer is set to duplex.
RTF header size	Specifies, in inches, the header space used for Rich Text Files.
AFP Formdef Options	Enables you to specify a presentation device media source.

Design Defaults

The ***Design Default*** options for the template enable you to specify new design defaults for tab size, default font, and bullet schema. This supersedes any system design defaults. Selecting **Use system wide design defaults** enforces the definitions in the system settings.

User Restrictions

With ***User Restrictions***, you restrict the Dialogue Designer functionality for the specified page. For example, you can specify that editors may modify text but not add anything. You can also limit user access, variables, and font availability in this category.

Adding Objects to a Page Template

Once you have created a template, open it in Designer and add objects.

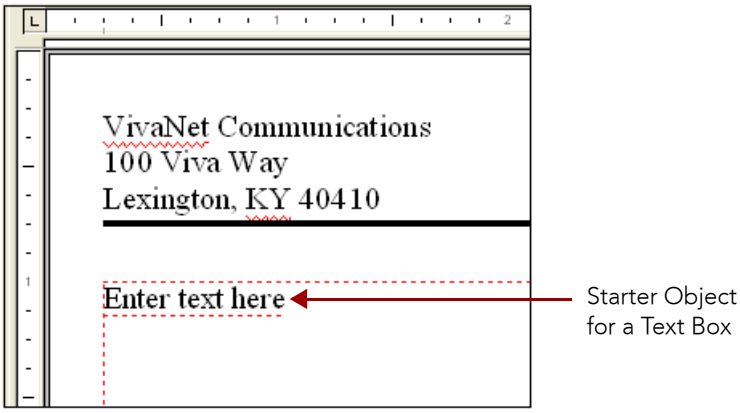
Template Objects

Template objects enable you to create non-interactive elements. For example, you may add an image to appear in the background as a watermark. This watermark may not be deleted or altered.

Starter Objects

Starter objects contain text that assists the users, such as helpful hints or instructions. For example, ***Enter text here*** in a text box is an ideal starter object for a text box. Starter objects appear in red and do not appear on the final composed output.

Starter object



Duplex Templates

A Duplex Template is a template that uses the front and the back of the page. By selecting the ***Duplex*** check box in the ***Template Options***, the printer uses the front and back of the page. This setting is for design purposes only: it does not affect printers or other outputs.

Demonstration	Observe the demonstration.

Tip

You may use RTF imports in conjunction with templates to create many documents quickly.

Independent Exercises: Tag Sets and Page Templates

Exercise Create a correspondence template based on the model sent to you.

If you need help, refer to the steps provided in the following **Guided Exercises**.

TASK	SPECIFICS
Create and define a page template	• Create the correspondence template. • Assign the Vivanet Style Sheet. • Assign portrait orientation.
Define a page template – Add the logo – Address block – Body block	• Arrange the elements of the correspondence template. Include the Vivanet logo, the address text box, and the correspondence body. The logo is located on your computer at **C:\110 Dialogue Vivanet-logo.tif\System Administration**

Success! You have completed the **Tag Sets and Page Templates** exercises.

Guided Exercises: Tag Sets and Page Templates

Create and Define a Page Template

Exercise

Create a Vivanet Correspondence Template that uses the *Pinnacle Paper* type and uses the Vivanet Style Sheet.

In Design Manager:

STEP	ACTION	DISPLAY
1.	Browse to ***Environment -> Design -> Templates -> Page Templates*** heading under ***Environment***.	Library
2.	Right-click the ***Page Templates*** heading and select ***New Page Template*** from the shortcut menu.	
3.	Enter ***Correspondence Template*** in the ***Name*** field.	***New Page Template*** dialog box
4.	Enter ***Correspondence Template*** in the ***Description*** field.	
5.	Click ***Next***.	
6.	Select ***Pinnacle Page*** from the ***Paper type*** drop-down list.	
7.	Click ***Finish***.	
The ***Page Template Property Panel*** opens.		
8.	From the ***Default Style Sheet*** list select ***Vivanet Style Sheet***.	Property Panel
9.	Select ***Portrait*** from the ***Orientation*** list.	
10.	Click the  button and exit the Property Panel.	

Success!

You have created the Vivanet Correspondence Template that uses the *Pinnacle Page* paper type and the Vivanet Style Sheet.

Define a Page Template: Add the Logo

Exercise

Now open the Correspondence Template and import the Vivanet logo. Use John's sketch as a guide.

STEP	ACTION	DISPLAY
1.	In Design Manager, drag the *Correspondence template* into the *Edit Panel*.	Library
The *Dialogue Designer* opens.		
2.	Click the button.	Dialogue Designer
The system asks if you want a click-on image placeholder.		
3.	Click *No.*	
The *Import an image* dialog box opens.		
4.	Browse to **C:\110 Dialogue System Administration**.	
5.	Select **Vivanet-logo.tif**.	
6.	Click *Open*.	
The *Import an Image* dialog box opens.		
7.	Click *OK*.	*Import an Image* dialog box
A message opens informing you that the original color data has been saved.		
8.	Click *OK*.	
9.	The letterhead image opens in the document.	Dialogue Designer
10.	Right-click the image and select *Image Properties* from the shortcut menu.	
The *Image Properties* dialog box opens.		
11.	Browse to the *Placement* tab.	*Image Properties* dialog box
12.	Set the placement as indicated by the design prototype.	
13.	Click *OK*.	
14.	With the image still selected, click the button on the *Layout* toolbar.	
	The *Change Design Layer* dialog box opens.	
15.	Highlight the *Vivanet Header Layer*.	
16.	Click *OK*.	
17.	Click the button.	

Success!

You have designed this segment of the correspondence template. You will complete this in the next exercise.

Define a Page Template: Address Block

Exercise Continuing from the last exercise, add the address block component to the Correspondence Template. Use John's sketch as a guide.

In Designer:

STEP	ACTION	DISPLAY
1.	Click the button.	Dialogue Designer
2.	Place a text box under the logo.	
3.	Right-click the text box and select ***Text Properties*** from the shortcut menu.	
Text Properties dialog box opens		
4.	Browse to the ***Template Object*** tab.	***Text Properties*** dialog box
5.	Select ***Starter Object***.	
6.	In ***Starter Text*** enter ***Type address here***.	
7.	Browse to the ***Dynamic Size and Placement*** tab.	
8.	Turn off ***Autosize width*** and ***Autosize height***.	***Dynamic Size and Placement*** tab
9.	Browse to the ***Placement*** tab.	
10.	Set the placement properties as indicated by the design prototype.	***Placement*** tab
11.	Click ***OK***.	
12.	Click the button.	

Success! You have designed the entire correspondence template as requested.

Define a Page Template: Letter Body

Exercise

Continuing from the last exercise, add the letter body component to the Correspondence Template. Use John's sketch as a guide.

In Designer:

STEP	ACTION	DISPLAY
1.	Click the button.	Dialogue Designer
2.	Place a text box under the address block.	
3.	Right-click the text box and select *Text Properties* from the shortcut menu.	
The *Text Properties* dialog box opens		
4.	Browse to the *Template Object* tab.	*Text Properties* dialog box
5.	Select *Starter Object*.	
6.	Enter *Type body text here* in the *Starter Text* field.	
7.	Browse to the *Dynamic Size and Placement* tab.	
8.	Clear the *Autosize Width* option.	
9.	Clear the *Autosize Height* option.	
10.	Browse to the *Placement* tab.	
11.	Set the *Text Properties* as indicated by the design prototype.	
12.	Click *OK*.	Dialogue Designer
13.	Click the button and close Designer.	

Success!

You have completed the entire correspondence template.

Message Types and Message Templates

While the designers construct the messages, the system administrator controls certain message properties and how certain images are used. This is done with message types in Dialogue.

For example, you want to create a certificate. The designer provides the necessary text in the certificate as a message template, but does not alter the certificate layout, the CEO signature scan, or the date. These objects are set within a graphic message template.

This lesson describes how to administer message types and graphic message templates within Dialogue.

Objectives

By the completion of this lesson, you will be able to:

- Identify the four types of messages.
- Create and define a message type.
- Create and define a graphic message template.
- Create a graphic message using a template.

Terms

New terms used in this lesson include:

- **Message type** - A category for text messages.
- **Message template** - An object that defines a message type and controls what kind of message can be placed in a frame.

Additional Information

For more information on this topic, refer to the Dialogue:

- `System Administration` Guide.
- `Messages and Campaigns` Guide.

Modules

In this lesson, you will use the High Volume Delivery module. The High Volume Delivery module is not included with Dialogue 1:1.

Message Types

A **message type** is a category for messages.

Message types are the basic identifiers for all messages used in a document. Message types are created by an administrator to guide designer-created messages to the appropriate message frames. There are four message types in Dialogue:

MESSAGE TYPE	DESCRIPTION
Text	A communication that contains text and embedded graphic objects. They are placed on a page in areas held in reserve by frames.
Graphic	A communication that is created using design objects. They are placed on a page in areas held in reserve by frames.
Insert	A pre-printed message stored in an inserter bin that can be added to customer documents during output.
Graphic/Insert	Messages that are a pre-printed insert or a graphic message, depending on whether the message is defined for the inserter bin.

There are two objects used to create messages in Dialogue:

- **Message type** - A message type is the fundamental category identifier of a message and is used by message frames to place the appropriate message. For example, an **Article 1** message type identifies any message created with it as **Article 1** and includes this message in any frames requesting an **Article 1** message type.
- **Message template** - A message template creates a ready-made message that the user builds upon. For instance, a message template may provide an introduction.

When you create a frame, you are asked what message type to include. Think of message types as the media elements within a page: articles, banners, and images.

Planning a Message

Before you begin building a message type, plan what the message contains and how it is to be used by designers.

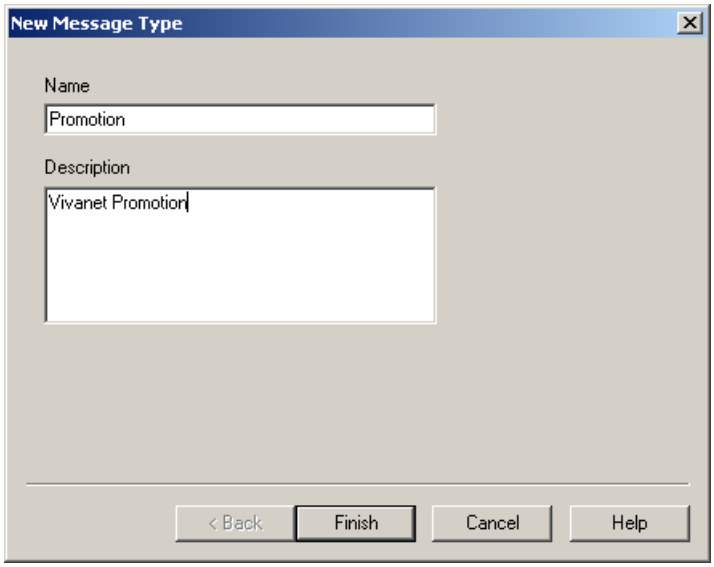
- Is the message text-based or graphic-based?
- What style sheets are attached to the message?
- Who will use this message type?
- What messages can be created?
- What message frames are needed to create these messages?

Once you have built the message type, create text messages using that type. If you are using graphic messages, you must create a message template in addition to the message type.

Create and Define a Message Type

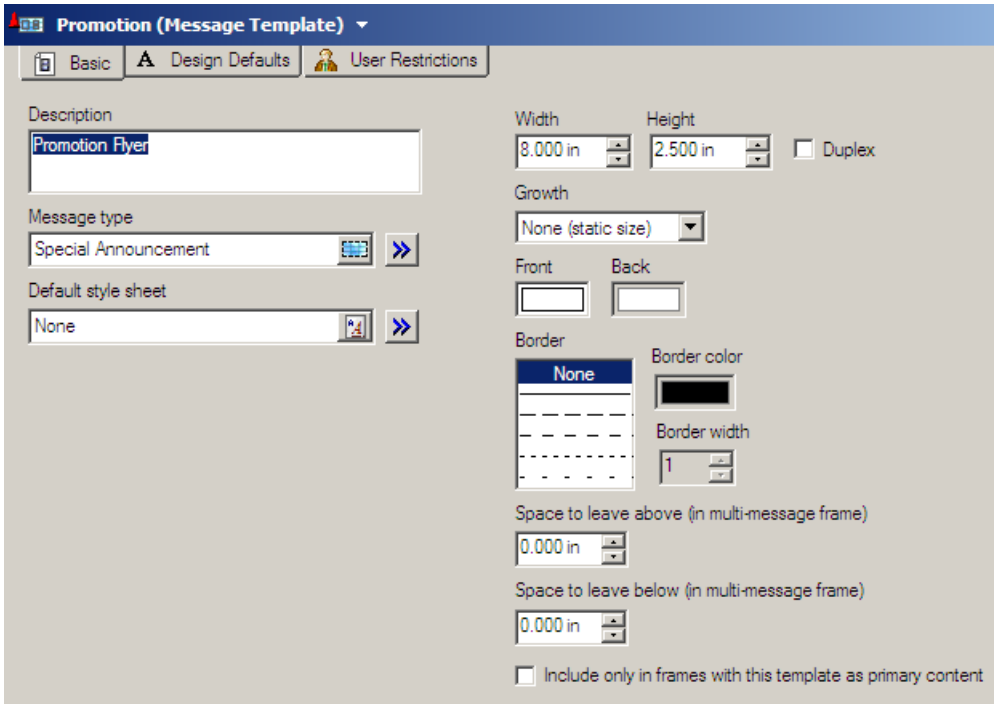
Create a new message type by browsing to *Environment -> Design -> Message Types*, right-clicking the heading, and selecting *New Message Type*.

Create a message type



After giving a name and description, complete the properties.

Message type properties



Demonstration	Observe the demonstration.

Message Templates

Message templates are used to create graphic messages, or starter messages that the designer may add to, but not delete.

Some uses for message templates:

- The company logo and mission statement.
- An article that features the same introduction and end text, but lacks the body.
- A image border around the message to be created.

:: Note

Only graphic messages use message templates. Text messages do not use message templates.

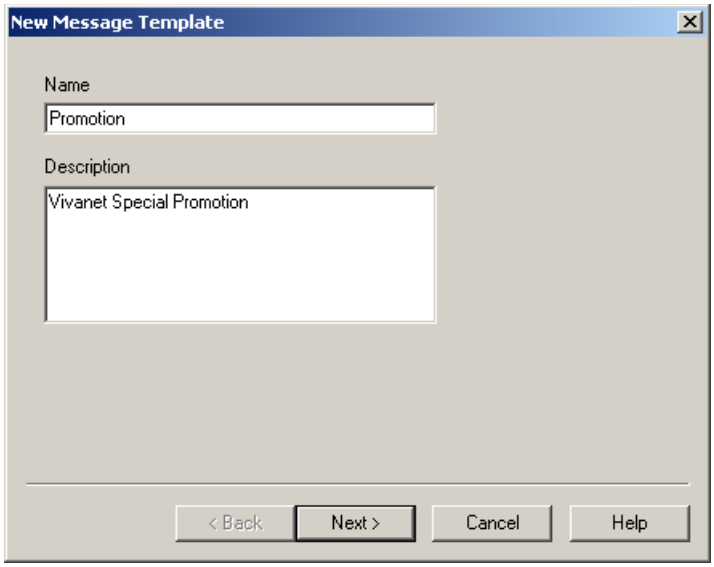
Tip

A text message contains an image only if it is embedded, but a graphic message may contain text.

Create and Define a Message Template

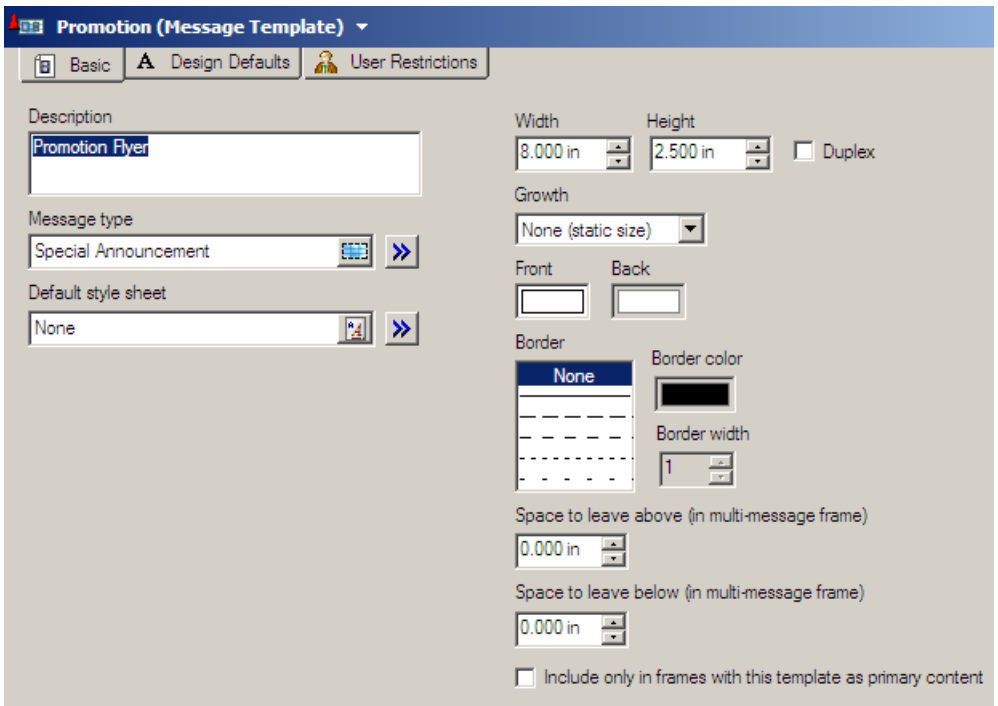
Create a new message template by browsing to *Environment -> Design -> Templates -> Message Templates*, right-clicking the heading, and selecting *New Message Template*.

Create a message template



After giving a name, description, and message type, complete the properties. The properties are categorized within three tabs: *Basic*, *Design Defaults*, and *User Restrictions*.

Message template properties



Basic Settings

The basic settings show a thumbnail of the image, as well as the following settings:

SETTING	INDICATES
Message Type	The message type to use with this template.
Default Style Sheet	The style sheet to be used when building this template.
Width and Height	The dimensions of the message: they are not changed in Designer.
Front and Back Color Boxes	The color of the message.
Border Settings	The border width, color, and type, if any.
Space Settings	The space to leave above or below messages.

Design Defaults

The Design Defaults set overrides to the system-wide Design Defaults, if the ***Use system-wide design defaults*** check box is cleared.

User Restrictions

The user restrictions apply to anyone modifying the template (not messages generated from the template).

SETTING	ALLOWS
Add	Objects to be added to this template (text, images, etc).
Delete	Objects to be deleted from this template.
Move	Objects to be moved in this template.
Rotate Text	Text to be rotated in this template.
Inclusion Rules	Inclusion rules to be set when this template is used.
Dynamic Positioning or Sizing	Dynamic positioning and sizing (growing, shrinking, relative placing) to be used when this template is used.
Resize	Objects to be resized in this template.

Demonstration	Observe the demonstration.

Independent Exercises: Message Types and Message Templates

Exercise Create and define the message types and message template as described in the Project Guide.

If you need help, refer to the steps provided in the following **Guided Exercises**.

TASK	SPECIFICS
Create and define a message type	• Create a graphic message type for the seasonal promotion.
Create a message template	• Create a message template for the seasonal promotion.
Define a message template – Setting the image – Setting the text	• Use the **specialpromo.bmp** image in the **C:\110 Dialogue System Administration** directory.
Create a message from a message template	• Create a sample message of the seasonal promotion from the message template.

Success! You have completed the **Message Types and Message Templates** exercises.

Guided Exercises: Message Types and Message Templates

Create and Define a Message Type

Exercise Create a message type for the Vivanet Promotion.

From Design Manager:

STEP	ACTION	DISPLAY
1.	Browse to *Environment -> Design -> Message Types*	Library
2.	Right-click the *Message Types* heading and select *New Message Type* from the shortcut menu.	
The *New Message Type* screen opens in the Property Panel.		
3.	Enter *Vivanet Promotion* in the *Name* field.	
4.	Enter *Vivanet Promotion* in the *Description* field.	
5.	Click Finish	
The message type properties appear in the Property Panel.		
6.	Assign the *Vivanet Style Sheet* as the *Default style sheet*.	Property Panel
7.	Click the  button and exit the Property Panel.	

Success! You have created and defined a message type for the Vivanet Promotion.

Create a Message Template

Exercise Create a message template for the Vivanet Special Promotion.

From Design Manager:

STEP	ACTION	DISPLAY
1.	Browse to ***Environment -> Design -> Templates -> Message Templates***	Library
2.	Right-click the ***Message Templates*** heading and select ***New Message Template*** from the shortcut menu.	
The ***New Message Template*** dialog box opens.		
3.	Enter ***Vivanet Promotion*** in the *Name* field.	***New Message Template*** dialog box
4.	Enter ***Vivanet Special Promotion*** in the *Description* field.	
5.	Click ***Next***.	
The ***Select the Message Type*** dialog box opens.		
6.	Select ***Vivanet Promotion*** from the ***Message Type*** drop-down list.	***Select the Message Type*** dialog box
7.	Click ***Finish***.	
8.	Click the  button.	Property Panel
The ***Select Style Sheet*** dialog box opens.		
9.	Select ***Vivanet Style Sheet.***	***Select Style Sheet*** dialog box
10.	Click ***OK.***	
11.	Set ***Width*** to ***4***.	Property Panel
12.	Set ***Height*** to ***2.5***.	
13.	Click the  button and exit the Property Panel.	

Success! You have created a new message template for the Vivanet Promotion.

Define a Message Template: Setting the Image

Exercise Define the message template to contain the Vivanet Promotion image.

From Design Manager:

STEP	ACTION	DISPLAY
1.	Browse to *Environment -> Design -> Templates -> Message Templates*	Library
2.	Drag the *Vivanet Promotion* message template into the Edit Panel.	
The *Dialogue Designer* opens.		
3.	Click the  button.	Dialogue Designer
The system asks if you want a click-on image placeholder.		
4.	Click *No.*	
The *Import an image* dialog box opens.		
5.	Browse to **C:\110 Dialogue System Administration**.	
6.	Select **specialpromo.bmp**	
7.	Click *Open*.	
The *Import an Image* dialog box opens.		
8.	Click *OK*.	*Import an Image* dialog box
A message opens informing you that the original color data has been saved.		
9.	Click *OK*.	
10.	The special promotion image opens in the document.	Dialogue Designer
11.	Right-click the image and select *Image Properties* from the shortcut menu.	
The *Image Properties* dialog box opens.		
12.	Browse to the *Placement* tab.	*Image Properties* dialog box
13.	Set the horizontal position to 1.5 and the vertical position to .25.	
14.	Click *OK*.	
15.	Click the  button.	Dialogue Designer

Success! You have added a image to the message template.

Define a Message Template: Setting the Text

Exercise

Continuing from the previous exercise, add the text, "A new offer for our valued Vivanet customers:" and add a text box with the starter text, "Put promotion details here."

From Designer:

STEP	ACTION	DISPLAY
1.	Click the button on the Drawing Toolbar.	Dialogue Designer
2.	Create a text box underneath the special promotion logo.	
3.	Right-click on the text box and select ***Text Properties***.	
The ***Text Properties*** dialog box opens.		
4.	Click on the Placement tab.	
5.	Set the horizontal placement to 0.25, vertical to 0.8, width to 3.0, and height to 0.25.	***Placement*** tab
6.	Click ***OK***.	
7.	Enter the text: ***A new offer for our valued Vivanet customers:***	Dialogue Designer
8.	Click the button on the Drawing Toolbar.	
9.	Create a text box underneath the one just created.	
10.	Right-click the text box and select ***Text Properties*** from the shortcut menu.	
The ***Text Properties*** dialog box opens.		
11.	Browse to the ***Template Object*** tab.	***Text box properties*** dialog box
12.	Select the ***Starter object*** check box.	***Template Object*** tab
13.	Enter ***Provide promotion details here*** in the ***Starter text*** field.	
14.	Browse to the ***Placement*** tab.	
15.	Set the horizontal placement to 0.25, vertical to 1.25, width to 3.5, and height to 1.0.	***Placement*** tab
16.	Click ***OK***.	
17.	Click the button and close Designer.	

Success!

You have completed the promotional message template.

Create a Message from a Template

Tip

When the designers use this graphic message, the logo and lead-in are already in place. All they need to do is add a line about the promotion.

Exercise Create a promotion message using the template you just created.

From Design Manager:

STEP	ACTION	DISPLAY
1.	Browse to ***Exstream -> Messages***	Library
2.	Right-click the ***Messages*** heading and select ***New Message*** from the shortcut menu.	
The ***New Message*** dialog box opens		
3.	Enter ***Vivanet Promotion Message Test*** in the ***Name*** field.	***New Message*** dialog box
4.	Enter ***Vivanet Promotion Message Test*** in the ***Description*** field.	
5.	Click ***Next***.	
6.	Select ***Graphic*** in the ***Type of message*** drop-down list.	
7.	Click the  button.	
The ***Select Message Type*** dialog box opens.		
8.	Select ***Vivanet Promotion***.	***Select Message Type*** dialog box
9.	Click ***OK***.	
10.	Click ***Finish*** and exit the Property Panel.	***New Message*** dialog box
11.	Drag the ***Vivanet Promotion Message Test*** into the Edit Panel.	Library
The Dialogue Designer opens.		
12.	Double-click the box containing ***Provide promotion details here***.	Designer
13.	Add any text describing a sample promotion.	
14.	Click the  button and close Designer.	

Success! You have created a graphic message for the Vivanet promotion.

Unit Summary

The concepts discussed and knowledge obtained during this unit are built upon in the next unit. If you have any questions, be sure to ask your instructor during this unit summary.

Concepts and Exercises

- Fonts, Styles, and Style Sheets
- Defining Color, Paper Types, and Design Layers
- Tag Sets and Page Templates
- Message Types and Message Templates

Concepts and Exercises

Fonts, Styles, and Style Sheets

CONCEPT	EXERCISES
Fonts	• Add a Font • Add a Restricted Font
Set System-Wide Default Design	• Set the Default Design Area
Styles	• Create a Paragraph Style
Style Sheet	• Create a Style Sheet

Defining Colors, Paper Types, and Design Layers

CONCEPT	EXERCISES
Color Families	• Create a Color Family
Colors	• Create the Vivanet Colors: Insert a CMYK Color • Create the Vivanet Colors: Insert a Relative Color
Paper Types	• Create and Define a Paper Type
Design Layers	• Create and Define a Letterhead Design Layer

Tag Sets and Page Templates

CONCEPT	EXERCISES
Page Templates	• Create a Page Template • Define a Page Template: Adding the Logo • Define a Page Template: Address Block • Define a Page Template: Body Block

Message Types and Message Templates

CONCEPT	EXERCISES
Messages Types	• Create a Message Type
Message Templates	• Create a Message Template • Define a Message Template: Setting the Image • Define a Message Template: Setting the Text • Create a Message from a Message Template

Unit 5 :: Setting Up the Delivery Environment

- Basic Output
- High-Volume Delivery
- Output Sorting
- Multiple-Ups
- Running the Engine
- Unit Summary

Basic Output

Dialogue's output capabilities are controlled through the options set and modified under the ***Delivery*** heading in the ***Environment***. As a Dialogue system administrator, this enables you to configure the basic output options for the system.

This lesson provides a process by which output drivers and outputs are defined.

Objectives

By the completion of this lesson, you will be able to:

- Identify output drivers.
- Create and define a pDriver.

Terms

New terms used in this lesson include:

- **eDrivers** - A suite of output driver modules specifically designed for electronic delivery.
- **Output queues** - Objects used to control multiple devices and processes in a production run.
- **Outputs** - Objects located under the Delivery heading in the Library that represent supported output drivers.
- **pDrivers** - A suite of output driver modules specifically designed for delivery to printers. Examples include Metacode and PostScript.
- **Print stream** - The continuous flow of data from one place to another to produce print output.

Additional Information

For more information on this topic, refer to the Dialogue:

- `Output and Delivery` Guide.
- AFP documentation.

Modules

In this lesson, you will use the Dialogue pDriver and eDriver suites. These suites are not included with Dialogue.

Output Drivers

Output drivers assemble application information for final electronic or print output.

An **output driver** assembles application information for final electronic or print output. The driver uses this information to incorporate the appropriate commands into the print stream. Your choice of output driver directly influences the production methods and delivery options available for an Engine run. As a system administrator, you define the properties of an output driver in different output objects. These output objects are found in the Library under the ***Outputs*** heading. You use output queues to assign multiple output objects to an application.

Dialogue supports a wide range of output options in two categories of output drivers.

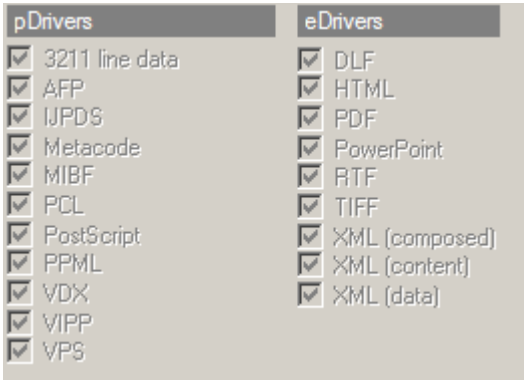
Enabling Output Drivers

The ability to create output is dependent on:

- The pDriver and eDriver suites and modules.
- The particular set of output drivers enabled in ***System Configuration***.

Each available driver has its check box selected.

System Configuration - pDrivers and eDrivers



Dialogue supports the use of embedded objects in all output drivers. This provides users with the ability to create pages based on design rather than output method.

Tip

An application can support more than one output driver.

pDrivers

Printer drivers (**pDrivers**) are printer format drivers that support output in printer-oriented standards as listed below.

pDrivers are a suite of output driver modules specifically designed for delivery to printers. Examples include Metacode and PostScript.

NAME	DESCRIPTION
AFP (Advanced Function Presentation)	A way of describing the presentation of a document according to a very structured organization which addresses problems of reliability, security, transportability, independence of platforms, data independence, and representation methods.
IJPDS (Ink Jet Printer Data Stream)	A proprietary file format for high-speed, full-color, ink jet print streams. The Dialogue IJPDS driver supports duplex printing with any number of heads.
Metacode	A proprietary standard for Xerox high-speed laser printers, with kerning and tracking support for fonts, as well as enhanced shading and area patterns. Highlight and Black and White print modes are supported for both online (to printer) and offline (to tape) runs
PCL (Printer Control Language)	A page description language used as an emulation standard for printers and a language now used throughout the industry. In Dialogue, this Driver provides functionality for PCL versions 4 and 5.
PostScript	Developed by Adobe, PostScript is widely used in business printing, typesetting, and image design. Type42 and Type1 fonts can be created to support Level 2 and Level 3 formats. The properties for PostScript serve as the basis for three other output drivers in Dialogue:
PPML (Personalized Print Markup Language)	Conceived in 1999, this language enables a printer to hold data in memory and present it as required for a customer. PPML uses XML (Extensible Markup Language) as a structural base.
VIPP (Variable Data Intelligent PostScript PrintWare)	Xerox created this driver as a PostScript device-resident software.
VPS (Variable Print Specification)	A language from Creo Incorporated that supports pre-rasterizataion of pages at a rate required for digital color printing. Reusable components are saved in memory and can be arranged on-demand in a number of different ways.
3211 LD (3211 Line Data)	Produces output for line printers. This format is also used by legacy archive tools.
VDX (Variable Data Exchange)	A standard of variable data printing (VDP) that builds on the strengths and implementation base of PPML.

eDrivers are non-printer output drivers that support output in electronic media-oriented standards.

eDrivers

Electronic drivers (**eDrivers**) are non-printer output drivers that support output in electronic media-oriented standards, as listed below.

NAME	DESCRIPTION
PDF	Composes output in Portable Document Format (.pdf) files that are viewed and printed with Adobe Acrobat software.
RTF	Composes output in Rich Text Format (.rtf) files that are viewed, printed, and edited in a variety of text editors and word processors.
TIFF	Composes output to Tagged Image File Format (.tif) files. Often used for archival systems. Typically, each page of output becomes one .tif image file.
HTML	Composes output to Hypertext Markup Language (.html) files, a standard tagged text format.
XML	Composes output to Extensible Markup Language (.xml) files, an emerging tagged text format.
Composed XML	Produces fully composed XML output containing all the objects sent to the print stream, including shapes, images, pages, etc. Uses the Dialogue Exchange Format (.dxf).
PowerPoint	Composes output to Microsoft PowerPoint (.ppt) files that are used for presentations.

PDF Security

For more information on these features, see the **PDF Properties** chapter of the **Output and Delivery** guide.

Dialogue now features additional security for all PDF output created. You can require a password to open a document or change its security settings.

In addition, you can restrict the document's ability to be printed or revised, allow selection of text and images, and allow addition or revision of annotations and form fields.

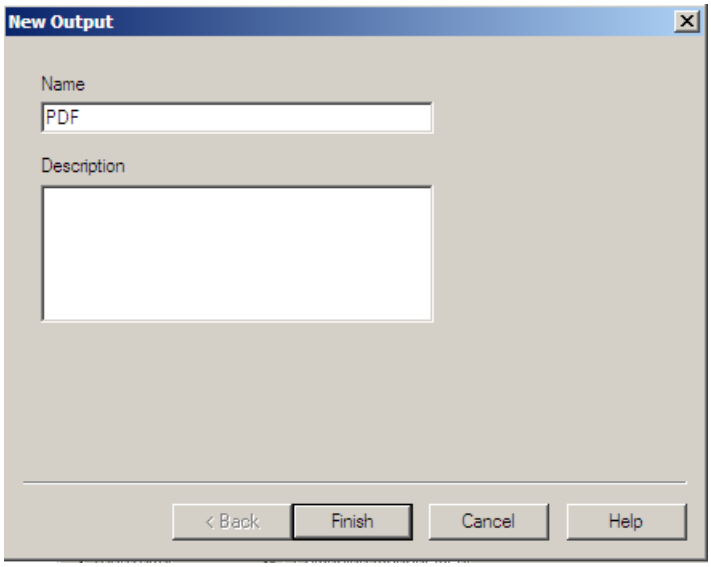
These options are configured from the ***Security*** tab of PDF output objects in the Property Panel.

Create and Define an Output

Outputs are objects located under the ***Delivery*** heading in the Library that represent supported output drivers. The procedure for creating an output device is the same whether you use a pDriver or an eDriver. Only the properties specific to each particular output driver vary.

Create a new output by browsing to ***Environment -> Delivery -> Output***, right-clicking the heading, and selecting ***New Output***.

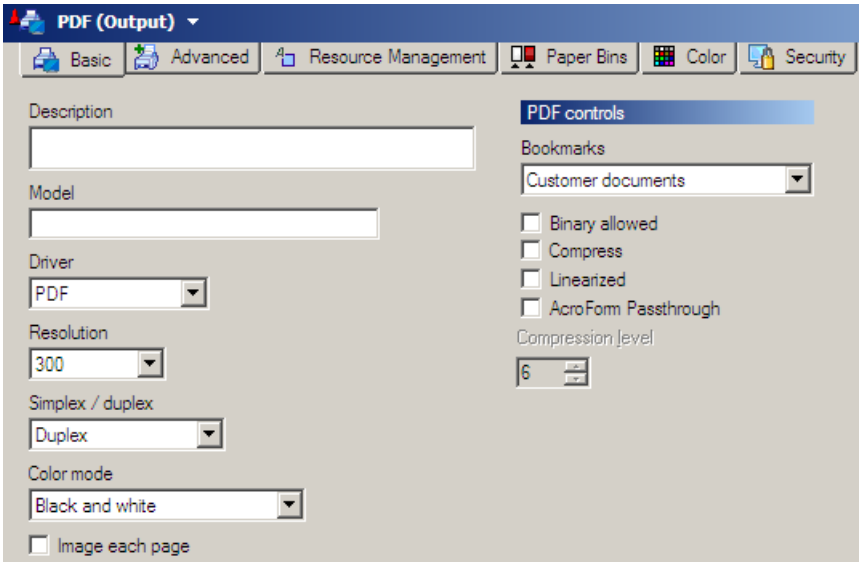
Create an output



After giving a name and description, complete the properties.

Outputs are objects located under the Delivery heading in the Library that represent supported output drivers.

Create an output



The output contains the following property categories.

TAB	PROPERTIES INCLUDE
Basic	The driver, color modes, simplex/duplex mode, name and description.
Advanced	Character fidelity, search keys, post processors, halftones.
Resource Management	Fonts, images and overlays.
Paper Bins	**pDrivers Only.** The media used for output. Paper types, trays and bins.
Color	The color tables and spot adjustments to use.
Security	**eDrivers Only**. Sets the security features for the output.

Print Streams

You must model the output needed for your applications. The specific properties you define affect how the Engine produces output. Because the Engine inserts into the **print stream** all the coded instructions on how to create pages, documents, and other output from an application, a significant portion of what determines the content of the print stream are the settings you select for the particular output driver(s) in use in output objects. Certain types of output drivers utilize print streams to send output information to an output device, as listed below:

A **print stream** is the continuous flow of data from one place to another, involving print output.

NAME	DESCRIPTION
AFP	• Makes use of long variable blocked records.
IJPDS	• Supports 32-bit Vertical Run Length Encoding (RLEV32). • Compresses output to yield smaller output files.
Metacode	• Accepts data and output commands in ASCII or EBCDIC.
PCL	• Enables several different resolutions from a minimum of 300dpi to 600dpi or higher.
PostScript	• Includes 14 standard fonts.

Demonstration	Observe the demonstration.

Independent Exercises: Basic Output

Exercise Create a PDF Output.

If you need help, refer to the steps provided in the following **Guided Exercises**.

TASK	SPECIFICS
Create and define a PDF output	• Name the new output object **Vivanet PDF**. • Use the *PDF* driver. • Use full color coloring.

Success! You have completed the Basic Output exercises.

Guided Exercises: Basic Output

Create and Define a PDF Output

Exercise Create a simplex PDF output device that creates color output.

In Design Manager:

STEP	ACTION	DISPLAY
1.	Browse to *Environment -> Delivery -> Outputs*.	Library
2.	Right-click the *Outputs* heading and select *New Output* from the shortcut menu.	
The *New Output* dialog box opens.		
3.	In the *Name* text box enter **Vivanet PDF** for the new output device.	*New Output* dialog box
4.	In the *Description* text box enter *PDF Driver*.	
5.	Click *Finish*.	
6.	Click the *Basic* tab.	
The *Vivanet Postscript* output device opens in the Property Panel for you to define.		
7.	From the *Driver* drop-down list select *PDF*.	Property Panel
8.	From the *Color mode* drop-down list select *Full color*.	
9.	Click the  button and exit the Property Panel.	

Success! You have created and defined a PDF output device.

High-Volume Delivery

Dialogue enables you to control output devices, such as inserters, in an advanced production facility. In addition, you can create output in a high-volume environment using output objects such as barcodes, banner pages, and output queues to control production.

This lesson provides the process by which barcodes, inserters, and banner pages are created and combined to form an output queue.

Objectives

By the completion of this lesson, you will be able to:

- Create and define a barcode.
- Create and define an inserter.
- Create and define banner pages.
- Create an output queue.

Terms

New terms used in this lesson include:

- **Banner page** - A page added to your output queue as a visual aid to sorting and bundling the finished output.
- **Barcode** - A standard way to represent data so that it can be read by processing and tracking equipment.
- **Inserter** - An electronic device for inserting pre-printed messages into an envelope.
- **Output queue** - An object used to control multiple devices and processes in a production run.

Additional Information

For more information on this topic, refer to the Dialogue:

- `Output and Delivery` Guide.
- `211: High Volume Delivery` course.

Modules

In this lesson, you will use the High Volume Delivery module. The High Volume Delivery module is not included with Dialogue 1:1.

Barcodes

A barcode is a standard way to represent data so it can be read by processing equipment.

A barcode is a standard way to represent data so it can be read by processing equipment.

All types can be customized, but they must follow the necessary constraints for the equipment used to read them.

The various types of barcodes supported by Dialogue have different requirements for properties such as:

- The size of the bars.
- The thickness of the bars.
- Its position on the page.

Uses for Barcodes

Often, barcodes are defined to control inclusion of preprinted inserts loaded on an inserter. If there is more than one output queue in an application, the particular queue selected for the application places the barcode according to the inclusion rules.

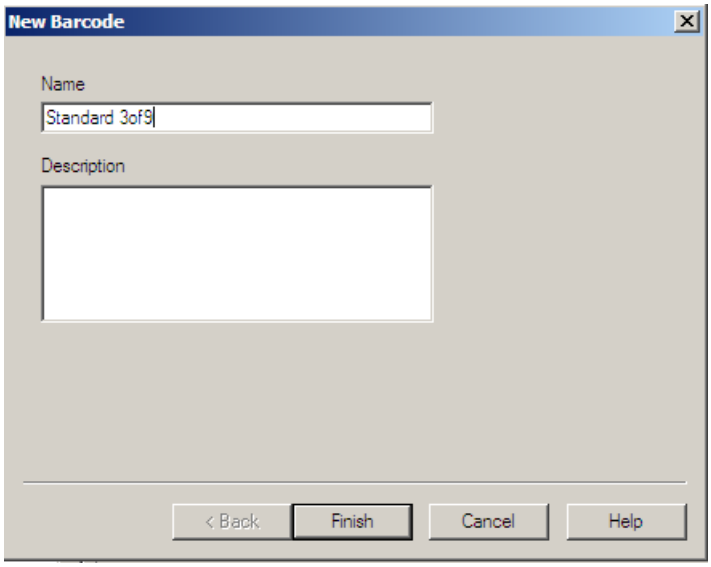
The barcode's variable data then updates the inserter about current customer information so only the intended inserts go into a customer's envelope.

A barcode placed on a message or page is also used to facilitate the ***Tracking*** feature in Dialogue. For example, you can include a campaign number as information to help guide decisions on future campaigns. These numbers can be tracked as they are inserted or, in the case of a postcard that can be returned, scanned with equipment.

Create and Define a Barcode

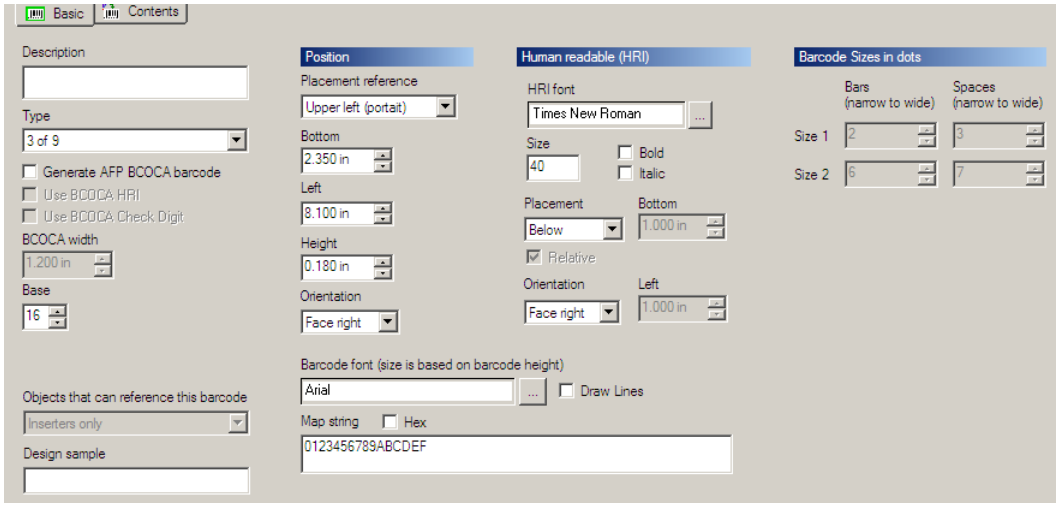
Create a new barcode by browsing to ***Environment -> Delivery -> Barcodes***, right-clicking the heading, and selecting ***New Barcode***.

Create a barcode



After giving a name and description, complete the properties.

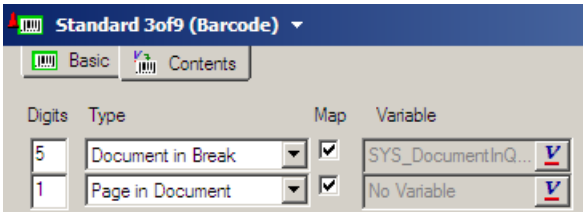
Barcode properties



You can specify variables within the barcode properties to include information from data files, control post-processing equipment, and track customer responses. You can include variable information, such as the customer number or sheet count.

You can also set the barcode contents, which specify the variables the barcode communicates, whether to map these variables, and how many digits to read.

Barcode contents



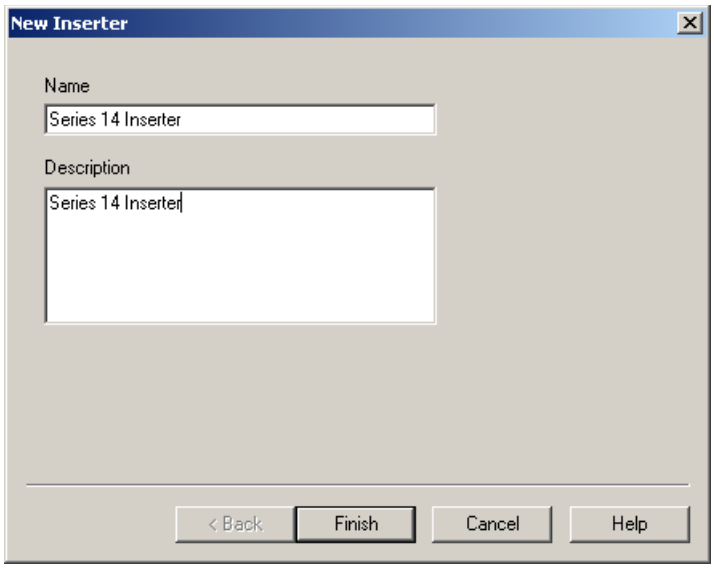
Demonstration	Observe the demonstration.

Creating and Defining Inserters

When you model an **inserter** object, you define the types of inserters you have available and the contents of each inserter bin. Add an inserter by browsing to *Environment -> Delivery -> Inserters*, right-clicking the heading, and selecting *New Inserter*.

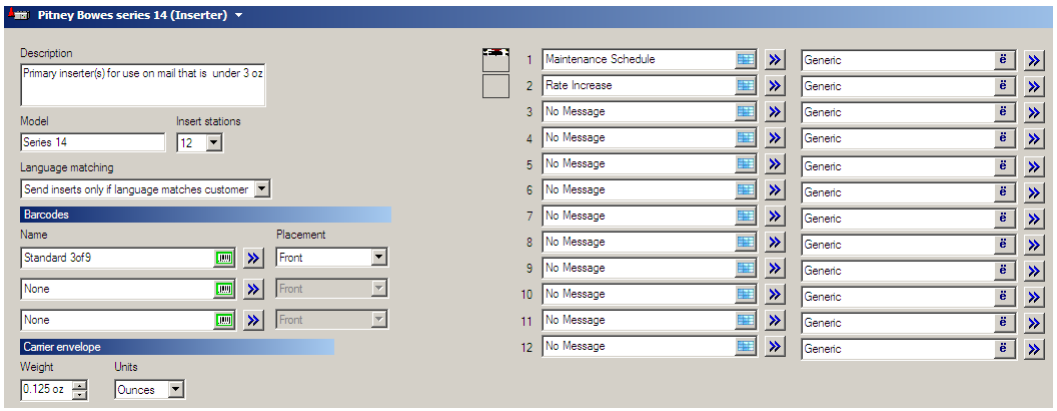
An **inserter** is an electronic device for inserting pre-printed messages into an envelope.

Add an inserter



After giving a name and description, complete the properties.

Inserter properties



The inserter properties define:

- A name (and, optionally, a thumbnail) of the pre-printed contents of each bin.
- A barcode used to control insert selection.
- How customer language is factored into the bin selection process.
- The weight of the envelope for the customer pages and inserts.
- A language from the *Language Processing* drop-down list.

Be sure to update the *Inserter* object when the contents of a bin change.

Tip

Use the **Graphic or Insert** type of message in cases where your mailing demands more inserts than your inserter can hold or if you do not have enough preprinted inserts.

Tip

Since the contents of inserter bins can change, configure several *Inserter* objects in the Library for the same physical inserter.

Types of Messages Specifically for Inserters

When the Engine processes an application involving insert messages, Dialogue checks which bin contains the insert message and whether language controls the selection for each customer.

- An **Insert Message** object refers to a preprinted message in an inserter bin. Since these are already printed, insert messages do not use templates as a basis for their design and cannot be placed on a page.
- A **Graphic or Insert Message** selects the insert from the inserter as long as the one is available. If the insert is unavailable on the inserter, Dialogue computes the message on the page.

Demonstration	Observe the demonstration.

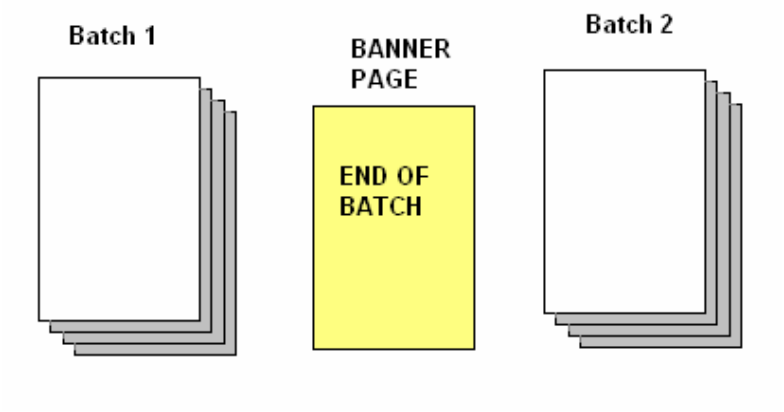
Creating and Defining Banner Pages

Banner pages are optional pages which print at the start and end of certain production events. They serve as visual cues to mark breaks in the output. These pages can be static or contain current or summary information about the production run.

A **banner page** is a page added to your output queue as a visual aid to sorting and bundling the finished output.

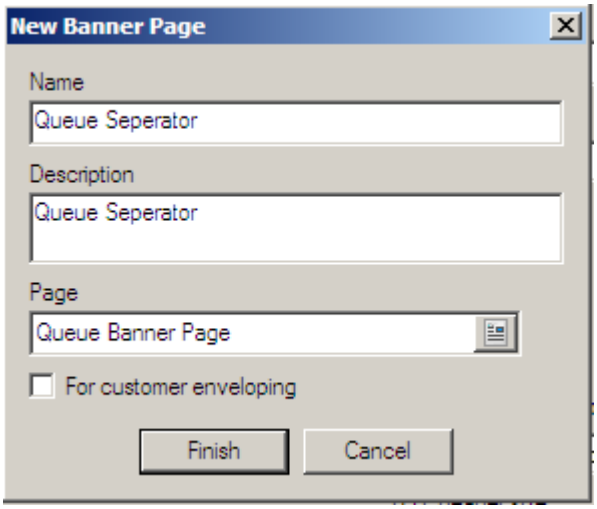
For example, have a banner page mark the end of a batch.

Banner page



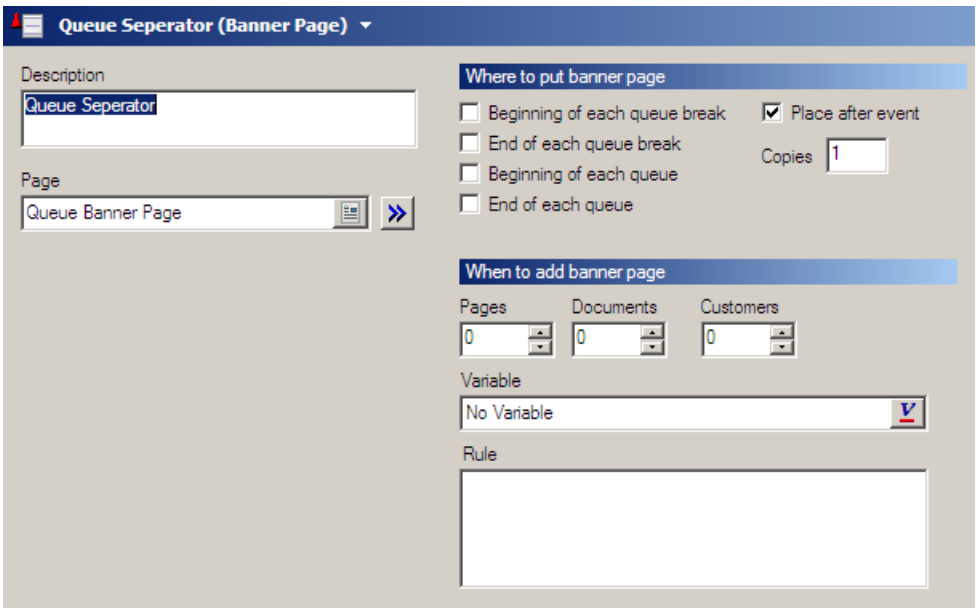
Create a new banner page by browsing to *Environment -> Delivery -> Banner Page*, right-clicking the heading, and selecting *New Banner Page*.

Create a banner page



After giving a name, description and page to use, fill out the properties.

Banner page properties



The banner page properties include the page details, variables, rules, page count and when to include the banner page.

Output Queues

Output queues control multiple devices and processes in final output production. You use output queues to:

- Create multiple output files in a production run.
- Control output devices and inserters.
- Send output to different destinations, such as different printers or a mix of print and electronic equipment.
- Access additional settings to control print stream options.

Both pDrivers and eDrivers benefit from Output Queues. In print production runs, you control devices such as printers and inserters, and set production features such as jogging and banner pages.

Although there are no printing devices present with eDriver production, you can use the properties in an Output Queue to set up such options as output file naming, inclusion/exclusion rules, and print file separation.

An **output queue** is an object used to control multiple devices and processes in a production run.

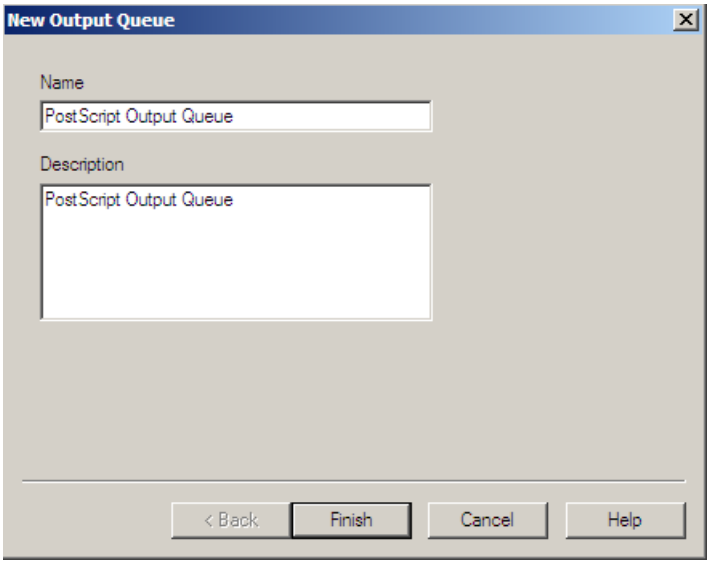
Tip

Use output queues to generate a separate PDF output file for each customer.

Create an Output Queue

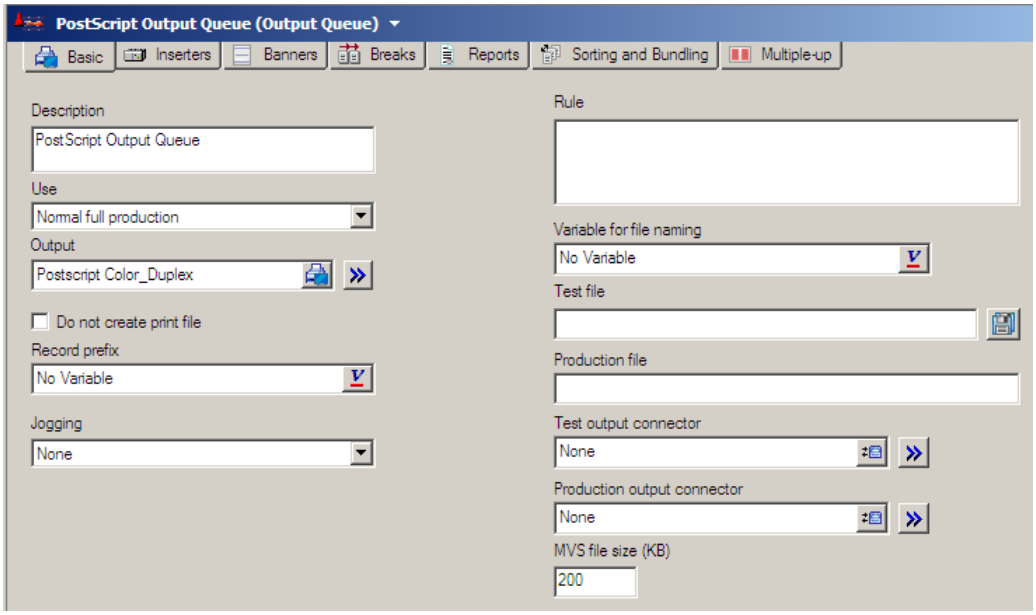
Create a new output queue by browsing to *Environment -> Delivery -> Output Queue*, right-clicking the heading, and selecting *New Output Queue*.

Create an output queue



After giving a name and description, fill out the properties.

Output queue properties



You add inserters, banners, and breaks to this output queue by selecting the related tab in the Property Panel.

Demonstration	Observe the demonstration.

Independent Exercises: High Volume Delivery

Exercise

Build an output queue to bolster the hard copy output. Specifically, add the requested barcode, printer, and banner page, and join them all together in one output queue.

If you need help, refer to the steps provided in the following **Guided Exercises**.

TASK	SPECIFICS
Create and define a barcode	• Use your **scenario** to get the barcode specifications, and create and define the barcode in Dialogue.
Create and define an inserter	• Name it **`Series 14 Inserter`**. Use your **scenario** for specifications. Make sure to assign the barcode to the inserter.
Create and define a banner page	• Create and define a banner page called *Queue Separator* that indicates which queue has just finished printing.
Create and define an output queue	• Name the output queue **`Vivanet Printer Output Queue`**. • Base it on the *PDF Printer*. • Use **`C:\110 Dialogue Training\Output.pdf`** in the *Production file* for the test file. • Use **`EXPDF`** for the production file. • Add the *Queue Separator* banner page. • Add the **`Series 14 Inserter`**.

Success!

You have completed the `High-Volume Delivery` exercises.

Guided Exercises: High Volume Delivery

Create and Define a Barcode

Exercise Create a barcode and set its basic properties.

In Design Manager:

STEP	ACTION	DISPLAY
1.	Browse to *Environment -> Delivery -> Barcodes*.	Library
2.	Right-click *Barcodes* and select *New Barcode* from the shortcut menu.	
The *New Barcode* dialog box opens.		
3.	In the *Name* text box enter `Standard 3of9`.	*New Barcode* dialog box
4.	In the *Description* text box enter `Standard 3of9 barcode`.	
5.	Click *Finish*.	
6.	The *Standard 3 of 9* barcode opens in the Property Panel.	Property Panel
7.	Click the *Basic* tab.	
8.	From the *Type* drop-down list select *3 of 9*.	*Basic* tab
9.	From the *Objects that can reference this barcode* drop-down list select *Inserters only*.	

Success! You have created and started the definition of the *Standard 3of9* barcode. Continue with the barcode position.

Create and Define a Barcode: Barcode Position

Exercise

Continuing from the previous exercise, provide the barcode position details for the new barcode.

In Design Manager:

STEP	ACTION	DISPLAY
1.	From the ***Placement reference*** drop-down list select ***Upper left (portrait)***.	Property Panel
2.	From the ***Bottom*** list select **`2.350`**.	
3.	From the ***Left*** list select **`8.100`**.	
4.	From the ***Height*** list select **`0.180`**.	
5.	From the ***Orientation*** drop-down list select ***Face right***.	
6.	As the ***Barcode*** font select ***39251***.	
7.	From the ***Placement*** drop-down list select ***Below***.	
8.	From the ***Orientation*** drop-down list select ***Face right***.	
9.	Click the ... button next to the ***HRI font*** field.	
The ***Select Font*** dialog box opens.		
10.	Select ***Arial***.	***Select Font*** dialog box
11.	Click ***OK***.	

Success!

You have defined the *Standard 3of9* barcode's position. Continue with the barcode contents.

Create and Define a Barcode: Barcode Contents

Exercise Continuing from the previous exercise, add the barcode contents to complete the barcode definition.

In Design Manager:

STEP	ACTION	DISPLAY
1.	Browse to the ***Contents*** tab.	Property Panel
2.	In the ***Digits*** text box type **5**.	
3.	From the ***Type*** drop-down list select ***Document in break***.	
4.	Select the ***Map*** check box.	
5.	Click the  button.	
6.	Repeat steps 2-5 with the information presented below. • The ***Page in document*** barcode has **1** digit. • The ***Total Pages in Doc*** barcode has **1** digit. • The ***Checksum: Base*** barcode has **1** digit. • The ***Bin 1*** barcode has **1** digit. • The ***Bins 1 to 4*** barcode has **1** digit.	
7.	Exit the Property Panel.	

Success! You have defined the contents of the *Standard 3of9* barcode.

Create and Define an Inserter

Exercise Add the *Series 14 Inserter* and assign the 3 of 9 barcode to the inserter.

In Design Manager:

STEP	ACTION	DISPLAY
1.	Browse to *Environment -> Delivery -> Inserters*.	Library
2.	Right-click the *Inserters* heading and select *New Inserter* from the shortcut menu.	
The *New Inserter* dialog box opens.		
3.	In the *Name* text box enter **`Series 14 Inserter`**.	*New Inserter* dialog box
4.	Enter a description in the Description text box.	
5.	Click *Finish*.	
6.	In the *Model* text box type **`Series 14`**.	Property Panel
7.	Click the top  button under the *Barcodes* heading.	
The *Select Barcode* dialog box opens.		
8.	Select *Standard 3 of 9*.	*Select Barcode* dialog box
9.	Click *OK*.	
10.	Click the  button and exit the Property Panel.	

Success! You have created and defined an inserter.

Create a Page

Exercise Create a queue separator page.

In Design Manager:

STEP	ACTION	DISPLAY
1.	Brows to ***Exstream*** -> ***Pages***.	
2.	Create a new page called ***Queue Banner Page***, using the ***Pinnacle Page*** paper type.	Library
3.	Drag the new page into the Edit Panel.	
Designer opens.		
4.	Click the  button on the ***Drawing Toolbar***.	Designer
5.	Create a large text box on the middle of the page.	
6.	Enter the text ***Banner Page for Queue*** in the text box and press the space bar once.	
7.	Click the  button on the ***Toolbar***.	
The ***Variable Palette*** dialog box opens.		
8.	Select **`SYS_QueueCurrent`**	***Variable Palette*** dialog box
9.	Close the ***Variable Panel***.	
10.	Click the  button and close Designer.	

Success! You have created a seperator page.

Create and Define a Banner Page

Exercise Define the banner page in the Production Environment.

In Design Manager:

STEP	ACTION	DISPLAY
1.	Browse to *Environment -> Delivery -> Banner Pages*.	Library
2.	Right click the *Banner Page* heading and select *New Banner Page* from the shortcut menu.	
The *New Banner Page* dialog box opens.		
3.	In the *Name* field enter *Queue Separator*.	*New Banner Page* dialog box
4.	In the *Description* field enter *Queue Separator Banner Page*.	
5.	Click the button.	
The *Select Page* dialog box opens.		
6.	Select *Queue Banner Page*.	*Select Page* dialog box
7.	Click *OK*.	
8.	Click *Finish*.	*New Banner Page* dialog box
The Queue Banner Page options appear in the Property panel.		
9.	Select the *End of Each Queue* check box.	Property Panel
10.	Click the button and close the Property Panel.	

Success! You have defined the banner page.

Create and Define an Output Queue

Exercise Create and define the **Vivanet Printer Output Queue**.

In Design Manager:

STEP	ACTION	DISPLAY
1.	Browse to *Environment -> Delivery -> Output Queues*.	Design Manager
2.	Right-click the *Output Queues* heading and select *New Output Queue* from the shortcut menu.	
The *New Output Queue* dialog box opens.		
3.	Enter *Vivanet `Printer Output Queue`* in the *Name* text box.	*New Output Queue* dialog box
4.	Enter *PostScript with banner page and inserter* in the *Description* text box.	
5.	Click *Finish*.	
6.	Click the *Basic* tab.	
7.	Click the  button next to *Output*.	
The *Select Output* dialog box opens.		
8.	Select *Vivanet PDF*.	*Select Output* dialog box
9.	Click *OK*.	
10.	Enter **`C:\110 Dialogue System Administration\TestOutput.pdf`** in the *Test file* text box.	Property Panel
11.	Enter **`EXPDF`** in the *Production file* text box.	
12.	Click the  button.	

Success! You have created and defined an output queue. Continue with the next exercise.

Add an Inserter and a Banner Page to an Output Queue

Exercise

Continuing from the previous exercise, add the **Series 14 Inserter** and the **Queue Separator** banner page to the **Vivanet Printer Output Queue**.

In Design Manager:

STEP	ACTION	DISPLAY
1.	Browse to the ***Inserters*** tab.	Property Panel
2.	Click the + button.	
The ***Select an item to add to the list*** dialog box opens.		
3.	Select the ***Series 14 Inserter***.	***Select an item to add to the list*** dialog box
4.	Click ***OK***.	
5.	Browse to the ***Banners*** tab.	Property Panel
6.	Under the ***Banner pages to include in output*** heading click the top button.	
The ***Select Banner Page*** dialog box opens.		
7.	Select ***Queue Separator***.	***Select Banner Page*** dialog box
8.	Click ***OK***.	
9.	Click the button and exit the Property Panel.	

Success!

You have enhanced the output queue with an inserter and banner page.

Output Sorting

With the advanced production-side capabilities of Dialogue, you can process large quantities of customer documents in a high-volume production environment, support various audit and distribution processes, and simultaneously produce output for print and electronic delivery mediums.

This lesson produces an introduction to basic output sorting and bundling concepts. More details and exercises are available with **211 :: High-Volume Delivery.**

Objectives

By the completion of this lesson, you will be able to:

- Describe the benefits of using the Sorting and Bundling module.
- Identify the two steps of the output sorting process.
- Describe the benefits of using the Application Consolidator module.

Terms

New terms used in this lesson include:

- **Bundling** - Grouping files for output based on specific customer information. One type of bundling, called **householding**, groups customer documents together that share the same address (to reduce mail handling and postage costs).
- **Post-sort processing** - A second Output Sorting run that produces output according to the sorted information and data.
- **Pre-sort processing** - An initial Output Sorting run that produces customer data that you can sort, cleanse, and update.
- **Sort Data File** - A file created by the Engine during pre-sort processing that contains customer information you cannot edit.
- **Sort Index File** - A file created by the Engine during pre-sort processing that points to customer data in the Sort data file. This contains one record per customer. You edit the Sort Index File for a variety of updates such as sorting and updating addresses.

Additional Information

For more information on this topic, refer to the Dialogue:

- `Output Sorting and Bundling` Guide.

Modules

In this lesson, you will use the High Volume Delivery module. The High Volume Delivery module is not included with Dialogue 1:1.

Output Sorting

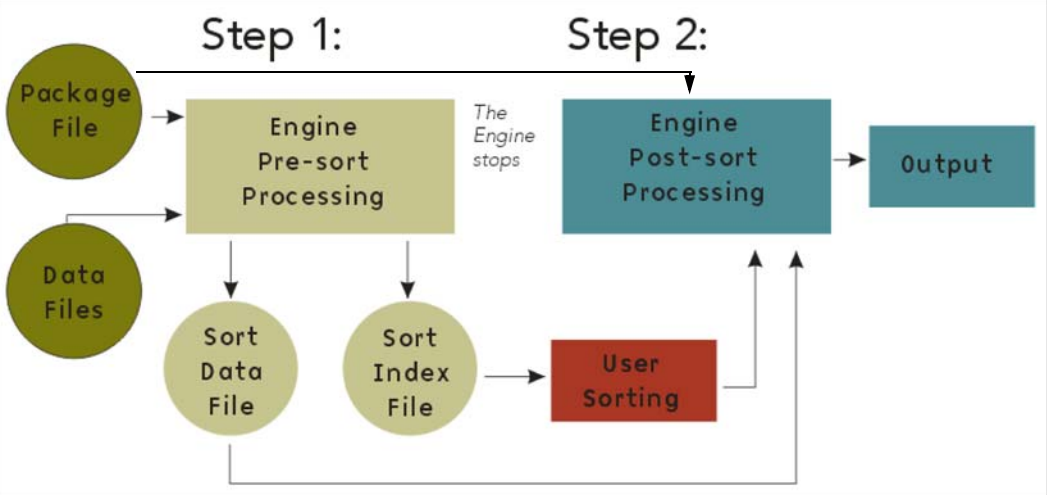
Dialogue's optional **Output Sorting and Bundling** module (part of the **High-Volume Production** suite) enables you to conduct extensive sorts of customer output using third-party software to:

- Make last minute customer updates.
- Conduct address cleansing and mail sorting.
- Sort output based on any information from Driver files (such as alphabetically, by customer number, by location, and so on).
  - Grouping output by any customer-data criterion is called **bundling**.
  - Grouping customer documents by address is called **householding**. This type of bundling reduces postage costs by grouping documents for the same address together.
- Include/exclude certain documents for each customer.
- Send to the print stream certain pages from a document.
- Reprint certain documents from an existing output file.

Run the Engine Twice

There are three major phases to running an application with Output Sorting.

- The first run produces initial customer data and stops processing. This initial Engine run is called **Step 1**.
- You manipulate the application's initial data with third-party software to sort, cleanse, and update customer information during this interim step.
- After Sorting, you run the Engine a second time to produce output according to the sorted information. This second run is called **Step 2**.



Step 1: Pre-Sort Processing

In Step 1, you run the production Engine to generate a package file, a Sort Data File, and a Sort Index File.

Sort Data File

A Sort Data File is an output file containing processed customer data in code and must not be edited. Because it is created outside of Dialogue, it does not appear in the Library.

Sort Index File

A Sort Index File is a columnar file made from the sort data file containing data areas you can edit to complete user sorting. Because it is created outside of Dialogue, it does not appear in the Library.

You direct the Engine how to read information in the Sort Data File (during Step 2) by manipulating the data and arrangement of customer records in the Sort Index File during User Sorting. Twenty bytes in each Sort Index File record point the Engine to a specific location in the Sort Data File for specific customer information.

Step 2: Post-Sort Processing

The Step 2 run produces final output. The Engine uses the data stored in the Sort Data file according to your sorted information in the Sort Index File. During post-sort processing, the Engine:

- Places barcodes, images, and fonts.
- Generates report files.
- Composes design objects defined to be composed after document sorting.

Application Consolidator

With the Application Consolidator optional module you can combine multiple package files to produce a single output file. Enabling consolidated output from various Step 1 package files has two major benefits:

1. **Improved shop loading and production time savings.** Ordinarily, there is a one-to-one relationship between a PUB file and an Output Queue. If your organization produces multiple package files from step 1 runs, then you have to complete multiple Step 2 runs. By consolidating multiple PUB files, you improve shop loading and save significant production time and costs.
2. **Improved postage discounts and simplified mail handling.** Since you use Output Sorting and Bundling with the Application Consolidator, you combine all the Sort Index Files for the various PUB files into one single Sort Index File. During the sorting process, use householding features to simplify mail handling and improve postage discounts.

You can use Step 1 package files from the same application or from different applications that use the same Output Queue.

Exercises

Exercise This is a class exercise.

TASK	SPECIFICS
Discuss the merits of the Sorting and Bundling Module, and the Application Consolidator Module.	• Discuss situations where these modules make production easier. • Give examples of present sorting methods and needs. • Discuss sorting methods and strategies that may be used with the modules. • Discuss the benefits of using one package file instead of many. • Discuss the financial benefits to be gained from these features.

Success! You have completed the `Output Sorting` exercise.

Multiple-Ups

Dialogue enables you to leverage output by converting print streams from simplex to multiple-up, as well as associated document changes such as page numbering, total page counts, and inserter control marks and files to support the multiple-up print format.

This lesson provides a process by which the benefits and use of multiple-ups are identified and the process of creating multiple-up pages and frames are defined.

Objectives

By the completion of this lesson, you will be able to:

- Create a multiple-up page.
- Create a multiple-up frame.
- Set orientation for a multiple-up page.
- Set imposition for a multiple-up page.

Terms

New terms used in this lesson include:

- **Imposition** - The process of arranging pages from a multiple-up sheet in the proper order for printing booklets or brochures.
- **Multiple-up** - A layout sheet that holds frames for entire pages.

Additional Information

For more information on this topic, refer to the Dialogue:

- **High-Volume Delivery** Guide.

Creating Multiple-Ups

With **multiple-up** (also known as M-up) printing, you can print several pages on one sheet of paper.

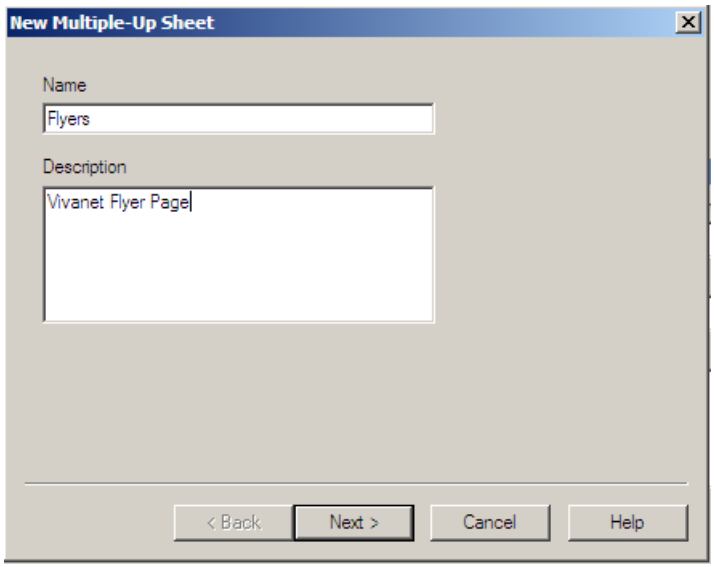
Multiple-up pages reside under the ***Multiple-Ups*** heading in the Library, located under ***Delivery Tools*** in the ***Environment***. To define a multiple-up page, you must have an appropriate paper type object defined in the Library.

Create and Define a Multiple-Up Page

You create multiple-up pages in Design Manager or in Designer. If you begin creating the object in Design Manager, complete designing the object in Designer; if you begin in Designer, complete defining the object in Design Manager.

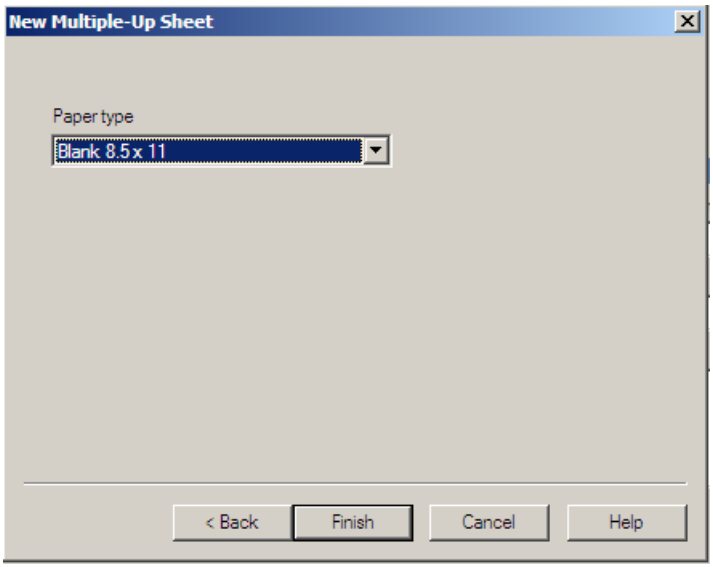
To create the multiple-up in Design Manager, browse to ***Environment -> Delivery -> Multiple Ups***, right-click the heading, and select ***New Multiple-Up***.

New multiple up page



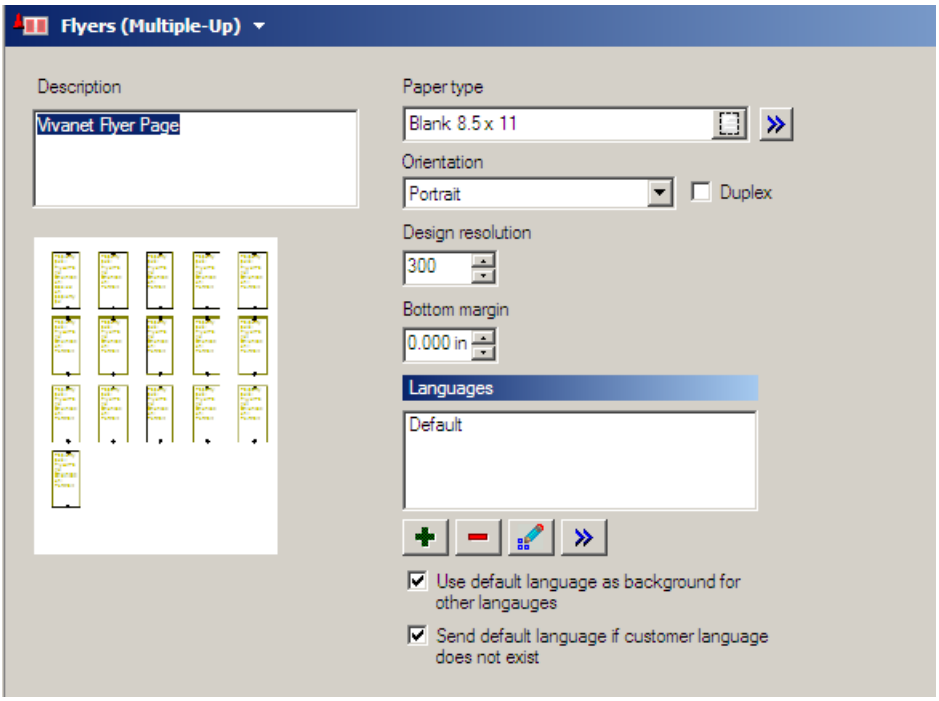
After providing the name and description, you are prompted for the paper type. This determines the page to print the multiple-ups on, not the size of the multiple-up pages.

Paper Type



After providing the paper type, the Multiple-Up properties open in the Property Panel. Here, you change the paper type, the orientation, or specify the language layers. However, the multiple up is not complete until you add some frames to the sheet.

Multiple up properties



Create a Multiple-Up Frame

Typically, multiple-up frames appear on the entire sheet, but you can design other objects as well. For example, you can add custom marks such as registration marks, color bars, and trim marks. In Designer, multiple-up frames have a yellow background. Each frame represents a different page.

Multiple-up frames

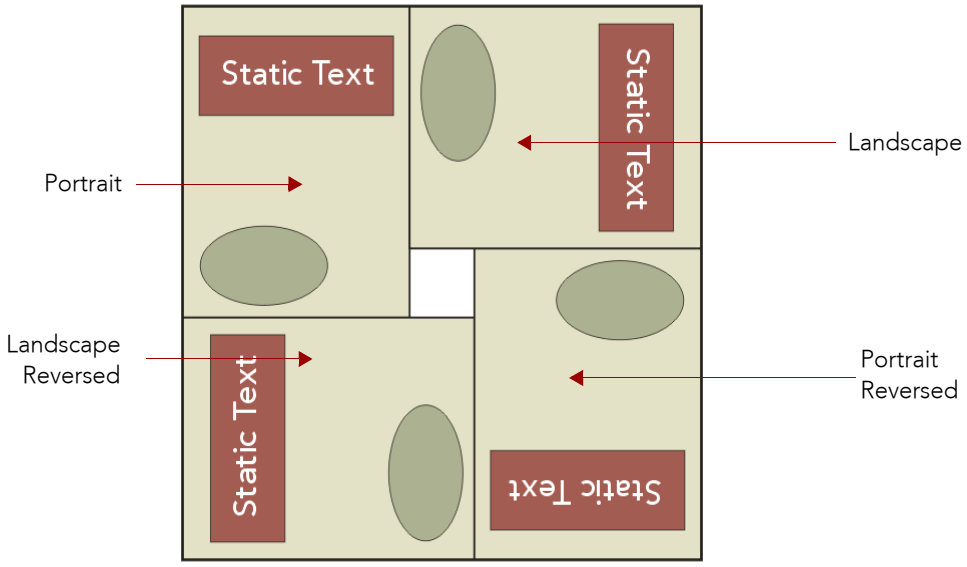
Orientation

Pages can be rotated as they are placed into multiple-up frames. When a frame is placed on a page, its *Draw Orientation* can be selected.

OPTION	DESCRIPTION
Portrait	Rotates all pages so they are placed as Portrait.
Landscape	Rotates all pages so they are placed as Landscape.
Portrait Reversed	Rotates all pages so they are placed as Portrait Reversed.
Landscape Reversed	Rotates all pages so they are placed as Landscape Reversed.
Based on Paper type	Places pages in the frames as they are designed.

For more information on rotated multiple-up frames, see the Multiple-Up chapter of the High-Volume Delivery guide.

Orientation example



Tip

The mixed orientation depicted is for illustration. In a multiple-up sheet, all of the instances must have the same orientation.

If the output device cannot rotate resources, the package file includes the appropriate rotations. This increases the file size and Engine memory usage.

Imposition

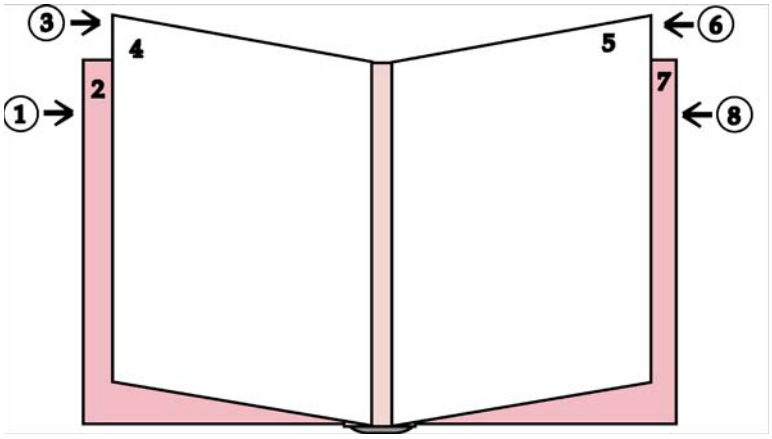
Imposition is the process of arranging pages from a multiple-up sheet in the proper order for printing booklets or brochures.

With **imposition** the Engine takes pages from a multiple-up sheet and arranges them in the correct order for binding in post-processing. In the small booklet example below:

- The outer duplex sheet needs to have pages 1 and 8 on the back and pages 2 and 7 on the front.
- The inner duplex sheet needs to have pages 3 and 6 on the back and pages 4 and 5 on the front.

With Dialogue, the Engine automatically selects these various pages from a multiple-up sheet in the correct order.

Imposition - booklet example



There are different ways to use imposition. Select a specific imposition setting in *Output Queue* properties, *Page Sorting* area, on the *Sorting and Bundling* tab.

Demonstration	Observe the demonstration.

Running the Engine

When you have finished building an application with Dialogue, the first step is to create a package file. Once a package file has been created, you then have to run the Engine. Running the Engine completes the process by including all variables, imports, components, images, and all other elements and producing your final product.

Objectives

By the completion of this lesson, you will be able to:

- Prepare a package file.
- Use a batch file for packaging.
- Identify the necessary packaging switches.
- Identify the steps in running the Engine in the production environment.
- Run the Engine from the command prompt.
- Set up a script to run the Engine in a UNIX/LINUX environment.
- Set up a control file to run the Engine.
- View the system report and message file.

Terms

New terms used in this lesson include:

- **Batch file** - A text file containing commands for running the Engine.
- **Control file** - A text file created outside of Dialogue that is used to send arguments, in the form of switches, directly to the Engine.
- **Package file** - Contains all the objects necessary to run in production mode.

Additional Information

For more information on this topic, refer to the Dialogue:

- `Engine Switches and Return Codes` Guide.
- `Packaging and Design Engine` Guide.
- `Production Environment` Guide.
- `System Administration` Guide.

Modules

In this lesson, you will use the Dialogue 1:1 product. No additional modules will be required.

Preparing a Package File

A **package file** contains all the objects necessary to run in production mode.

After a Dialogue application is created, it must be bundled with all the information, such as rules and data definitions, that the Engine requires to process the application. The act of packaging creates a **package file**.

Building a Package File

The process of creating a package file occurs in Dialogue's design environment. You can package:

- An entire application at once.
- Incrementally.

This enables Dialogue to pre-compose the design elements and resources used by the application, which reduces processing time during a production Engine run.

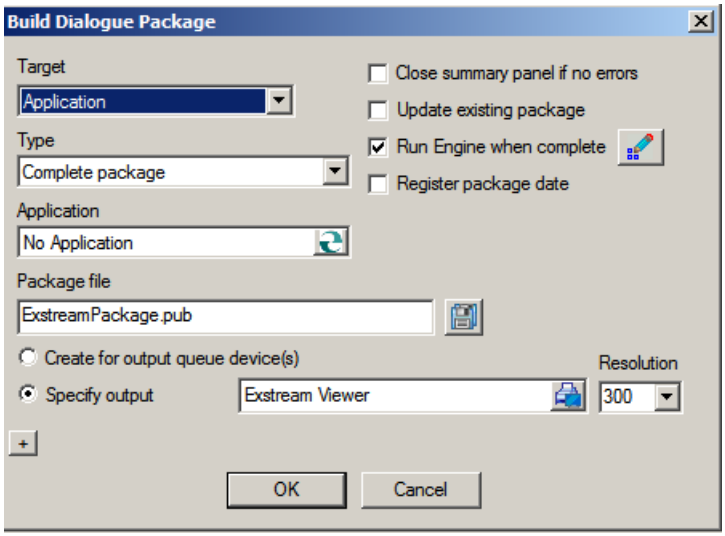
If you have an application open in the Property Panel when you click the ***Package Application*** button, it is chosen by default in the dialog box. If the application has version labels and has a version label selected while in the Property Panel, then the label is also chosen by default.

Build Dialogue Package Dialog Box

The ***Build Dialogue Package*** dialog box is where packaging options are set. The entire production process can be completed from this dialog box, including:

- Packaging.
- Running the Design Engine.
- Indicating the output.

Build Dialogue Package dialog box

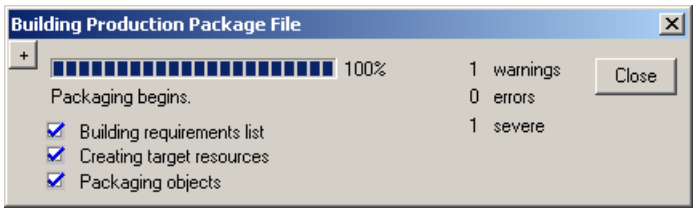


Click the + button to expand the dialog box and provide additional packaging options. These options are covered in advanced production classes.

Building Production Package File Dialog Box

After you have made your selections in the ***Build Dialogue Package*** dialog box and clicked ***OK***, the ***Building Production Package File*** dialog box opens. Click the + button to expand the dialog box and provide a more detailed view of the packaging process.

Building Production Package File dialog box



After the package file is built:

- Click ***Cancel*** to close the dialog box and run the Engine later.
- Click the Engine button to run the Engine.

Batch Files

You use a **batch file** to package applications. Each line in a batch file signifies a command to be passed on to the Engine. Because the Dialogue Engine is a batch processor, each command is executed one line at a time. Batch files are used to automate repetitive packaging and production tasks. Batch files are created using a text editor and run from the command prompt.

A **batch file** is a text file containing commands for running the Engine.

:: Note

In Windows, Dialogue batch files must have the filename extension **`.bat`** or **`.cmd`**. In UNIX, the filename extension is **`.sh`**.

Batch Packaging

In Dialogue, multiple iterations of packaging can be initiated from the command line by making multiple calls to the Engine within a single batch file. All the applications referenced in the batch file must use the same data source, which must be the active and current data source in Dialogue.

Packaging from the Command Prompt

To package using a batch file, type the name of the batch file at the command prompt, where the prompt is pointing to the directory where the batch file is located.

Packaging Switches

Packaging switches enable you to send options to the Engine at run time. They are used when packaging from the command line or from a control file.

:: Note

The **-APPLICATION** packaging switch is the only mandatory switch necessary for packaging.

If multiple packaging switches are required, they are placed in a control file and called from the command line or within a batch file.

Transferring Package Files

Because package files are designed to be platform-independent, they can be transferred from the Windows design environment to any of the production platforms supported by Dialogue.

Since package files are often very large and require an accurate byte-to-byte transfer between environments, the following transfer methods are recommended:

- FTP - Used to transfer files from one Internet-connected system to another. A client program must be running on the system initiating the connection and the host system must be running a server program which accepts incoming requests. Once connected, files can be transferred in either direction.
- Across a LAN - For transfers between two machines that are suitably connected, it is possible to use file sharing or peer-to-peer networking, which makes part or all of the file system of one machine visible to the other.
- Portable media - For almost any transfer, you have the option of using portable media such as writable CDs or DVDs, Exabyte tapes, ZIP or JAZ cartridges, or USB flash drive.

Running the Engine

The Dialogue production Engine can be run on the following operating systems:

- AS/400
- HP-UX
- IBM AIX/RS6000
- MVS/OS-90
- Sun Solaris
- Windows 98/NT/2000/XP
- z/OS

You control the production speed of the Engine by allowing a specific number of pages per minute, as well as limit the Engine for use to a certain user group and the number of Engines that can be run simultaneously.

Command Prompt

If you are running the Engine on a Windows system, you can run the **Engine.exe** executable file from the command prompt by entering the following command:

prodengine -PACKAGEFILE=<control> (where **<control>** is the name of the package file).

The **-PACKAGEFILE** switch is the only mandatory command to run the production Engine. This switch tells the Engine which package file to use in composing the application.

:: Note

If the package file name has spaces in it, enclose the file name in double quotes (" "). The entire path is only necessary to specify file names when it resides in a different directory than Dialogue's home directory.

Scripts

You can also run the Engine on a UNIX/LINUX or AS/400 server by using a shell command. For the script to be executed, upload the script file to the server. A sample shell script is shown below, with comments to explain the actions occurring with each command:

Sample shell script

```
# The file input.dat is linked to the pseudo-file DD:INPUT1
ln input.data DD:INPUT1

# The file optional.rule.file is linked to the pseudo-file DD:INPUT8
ln optional.rule.file DD:INPUT8

# The Dialogue Engine (called EXSTRE000) is executed with command options
exstre000 -b -t=f -c=control.file -m=message.summary

# A file called DD:OUTPUT1 is created and renamed to output.file
mv DD:OUTPUT1 output.file
```

This example assumes that all files are in the current directory of execution and that the Engine is in the execution path of the current user.

A **control file** is a text file created outside of Dialogue that is used to send arguments, in the form of switches, directly to the Engine.

Control Files

A **control file** is a text file created in a text editor program that contains the commands necessary for the production or packaging run. The control file is a means of sending options to the Engine. When Engine switches are placed into a control file, the only command necessary at the command prompt or in a batch file is the **-CONTROLFILE=** command.

In Windows, Dialogue control files must have the **.opt** extension.

:: Note

Options that appear in the control file override options selected via the command prompt.

Control File Basics

Your control file must have at least the following lines included:

```
-PACKAGEFILE=<path ending with filename where the package file is located>
-OUTPUTFILE=<path ending with filename you want Dialogue to produce>
-MESSAGEFILE<path ending with filename for the log file>
```

Running the Engine from the Command Prompt

To run the production Engine from the command prompt, type the following at the command prompt, where the prompt is pointing to the Dialogue installation directory:

prodengine -CONTROLFILE="C:\<control>.dat" (where **<control>** is the file name of the control file)

Ensure that any file names containing spaces are surrounded by double quotes.

Engine Switches

Engine switches are used to pass on commands to the Engine at run time. All Engine switches can be used:

- From the command prompt.
- Within a control file.

Avoid using spaces between options, values, and successive file names in a command line. Example: **VERBOSE=ON** instead of **VERBOSE = ON**.

Engine Messages

When the Engine runs, it generate a report file if indicated by the control file. This is a good idea, as the report file details how the packaging occurred, including any errors. The name and location of the message depends on the attributes set by the **-MESSAGEFILE** switch.

Message File Languages

Dialogue supports many languages. Many different language versions are available from Exstream Software. However, regardless of the version, you may specify a language file to output in a specific language using the –DLGMSGLANGUAGE switch.

Message file language switches

-DLGMSGLANGUAGE Switch	Message File Language
–DLGMSGLANGUAGE=FR-FR	French
–DLGMSGLANGUAGE=DE-DE	German
–DLGMSGLANGUAGE-JA-JP	Japanese

Demonstration	Observe the demonstration.

Independent Exercises: Running the Engine

Exercise Run the Engine using a control file, and then read the output and messages generated by the Engine.

If you need help, refer to the steps provided in the following **Guided Exercises**.

TASK	SPECIFICS
Run the Engine with a control file	• Use the **C:\110 Dialogue System Administration\controlfile.opt** control file.
View Engine output and messages	• View the **C:\110 Dialogue System\ Administration\Unit 5 exercise.txt** text file. • View the **C:\110 Dialogue System\ Administration\Unit 5 exercise.pdf**

Success! You have completed the **Running the Engine** exercises.

Run the Engine With a Control File

Exercise Run the Engine from the command prompt using a control file.

In Windows:

STEP	ACTION	DISPLAY
1.	Go to **Start->Run**	Windows
2.	Enter *command*	
3.	Click *OK*.	
A **command.com** box opens.		
4.	Enter **C:**	**Command.com** box
5.	Press **ENTER** to move to the local drive.	
6.	Enter **`cd c:\progra~1\exstream`**.	
7.	Press **ENTER** to change the active directory.	
8.	Type **`engine -CONTROLFILE=C:\110 Dialogue System Administration\controlfile.opt`** to specify the control file.	
9.	Press **ENTER** to execute the Engine.	
10.	Type **EXIT** and press **ENTER** to close the command window.	

Success! You have run the Engine.

View Engine Messages

Exercise View the Engine output and messages generated during the production run for the *ExstreamOutput.pub* package file.

In Windows:

STEP	ACTION	DISPLAY
1.	Browse to the **C:\110 Dialogue System Administration** folder.	Windows
2.	Double-click **Unit 5 exercise.pdf** to open the file.	
3.	Browse through the output and close the file.	
4.	Double-click **Unit 5 exercise messages.txt** to open the file.	
5.	Browse through the messages and close the file.	

Success! You have viewed Engine messages.

Unit Summary

The concepts discussed and knowledge obtained during this unit are built upon in the next unit. If you have any questions, be sure to ask your instructor during this unit summary.

Concepts and Exercises
- Basic Output
- High-Volume Delivery
- Output Sorting
- Multiple-Ups
- Running the Engine

Concepts and Exercises

Basic Output

CONCEPT	EXERCISES
eDrivers	• Create and Define a PDF Output

High-Volume Delivery

CONCEPT	EXERCISES
Barcodes	• Create and Define a Barcode • Create and Define a Barcode: Barcode Position • Create and Define a Barcode: Barcode Contents
Inserter	• Create and Define an Inserter
Banner Pages	• Create a Banner Page • Define a Banner Page
Output Queues	• Create and Define an Output Queue • Add an Inserter and a Banner Page to an Output Queue

Output Sorting

CONCEPT	EXERCISES
Sorting and Bundling / Application Consolidator	• Discuss the merits of the Sorting and Bundling Module, and the Application Consolidator Module.

Running the Engine

CONCEPT	EXERCISES
Run the engine with a control file.	• Run the Engine
View the output and message files.	• View Engine Messages