

tFlow Approval Connector

Quick start

v 1.4 rel. 15-04-2015

Approval is a web platform system to streamline the process of getting creative works approved by clients quickly.

It allows to electronically delivers documents, to add and show comments and annotation, to check the incoming PDFs (preflight) and to approve the final artwork.

It is also possible to deliver the final PDF document to a connected Print system (tFlow). Basically the people involved in the game are designers, clients, approvers.

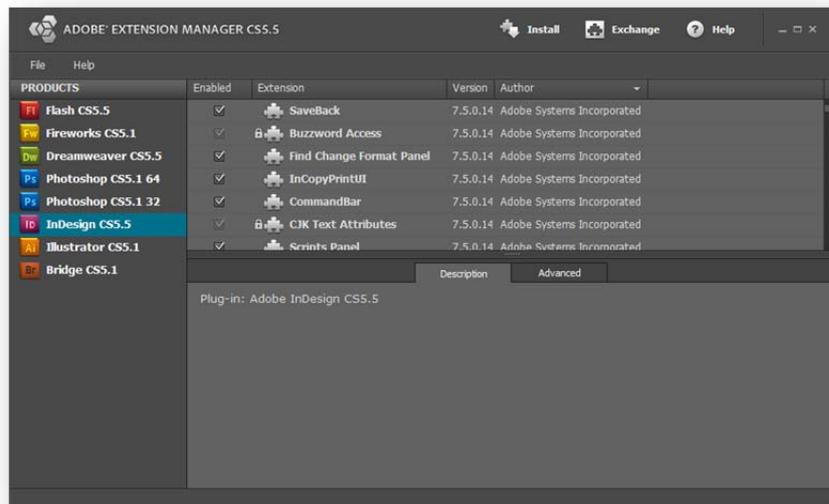
The Approval Connector is an InDesign plugin (extension) that establishes a direct connection from Adobe InDesign to Approval allowing to upload PDF artworks.

System Requirements	
Internet connection	Cable, Wireless or DSL
Operating System	Microsoft Windows or MAC OS X
Creative Suite	Adobe Creative Suite (InDesign, Illustrator) 5, 5.5, 6, Cloud
Web server	Approval v1 or later

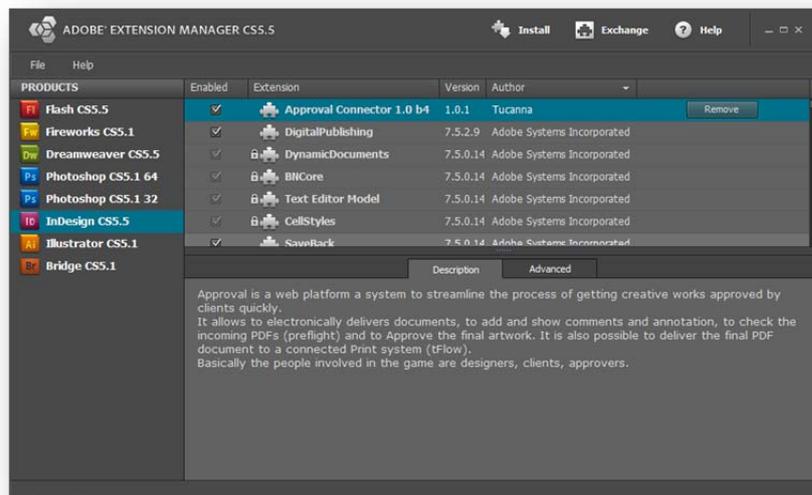
Installation

Run “Adobe Extension Manager” and press “Install”, now select the extension package named “*Approval connector x.y.zxp*” (where x.y is the current version number) and accept the license terms.

Optionally you can double click the fxp from Finder or Windows Explorer to run the Extension Manager.



At the end of installation procedure the Extension manager will list the extension inside the Indesign group:

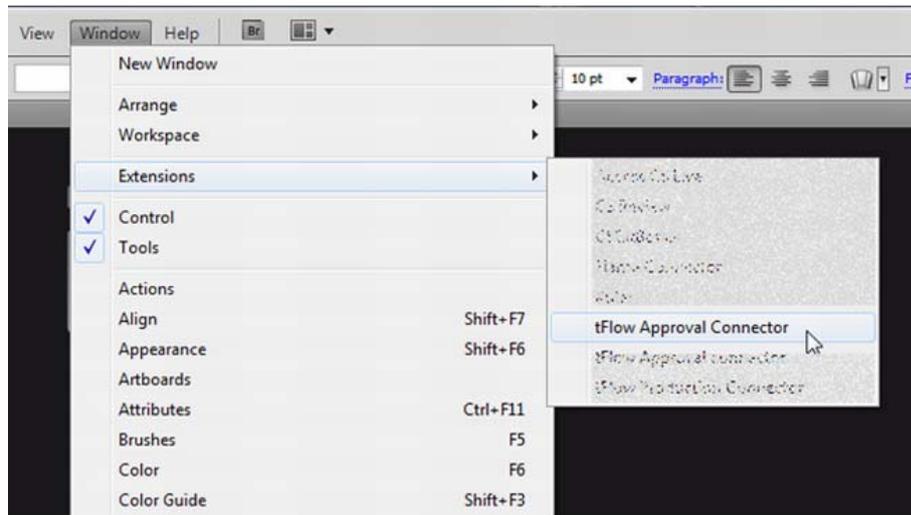


To uninstall run “Adobe Extension Manager” then select the extension in the list and press “Remove”.

First run

Run InDesign and go to “Window” in the main menu, from the list select “Extensions” and now press on “tFlow Approval Connector”.

By default the new extensions are not displayed.



This command will display the Extension. It is possible now to add it to the “Panels group”.

Settings

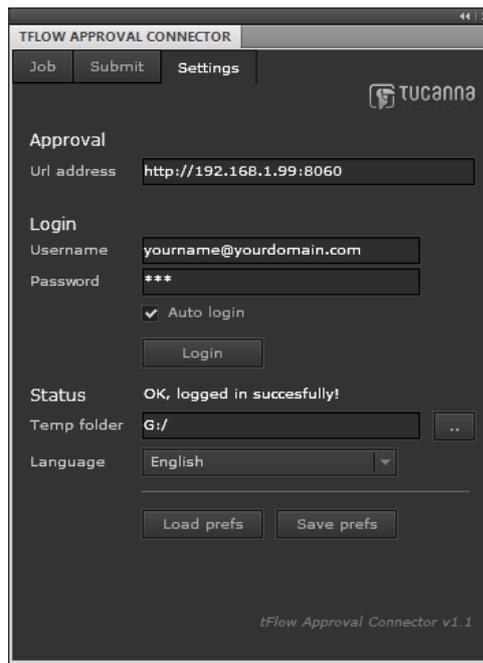
Click on “Settings” tab of the extension and here enter:

Url Address: The Server url (same url address used to connect to server using a web broser). Make sure to include <http://> and the port (:8060 or whatever the port in use is)

Username: The username used to log in from a web browser

Password: The password used to log in from a web browser

Press the Login button and verify the connection to the server can be established.



In case of errors please make sure that url and credentials are correct and that any firewall or personal firewall like LittleSnitch or similar are blocking the communication on the specified url (ip:port).

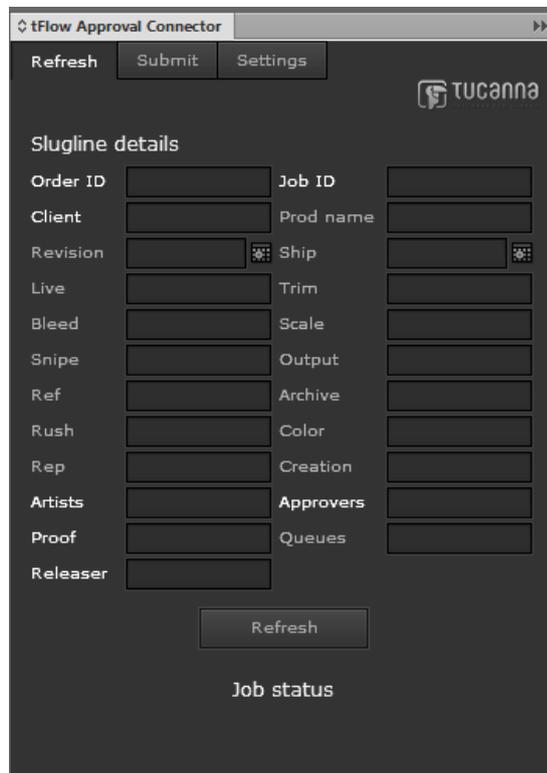
When connected to the server then check the “auto login” and press “Save prefs”.

The “auto login” option instruct the Extension to automatically login into Approval at startup and every time a connection is needed.

Note: it is recommended to set a temporary folder too, by default the extension uses the desktop folder. This folder is used to save the PDFs and all the temp files.

Slug line automatic scanning

The extension is projected to automatically scan the document slug line fields. The displayed fields on the Job tab are read-only containers that are automatically refreshed when the user load, close or change the active document in InDesign.



The screenshot shows the 'tFlow Approval Connector' window. At the top, there are three buttons: 'Refresh', 'Submit', and 'Settings'. The Tucanna logo is in the top right corner. Below the logo is the section 'Slugline details'. This section contains a grid of input fields for the following fields: Order ID, Job ID, Client, Prod name, Revision, Ship, Live, Trim, Bleed, Scale, Snipe, Output, Ref, Archive, Rush, Color, Rep, Creation, Artists, Approvers, Proof, Queues, and Releaser. Each field is represented by a dark rectangular box. At the bottom of the form is a 'Refresh' button and the text 'Job status'.

To make possible the automatic recognition of all the slug line data the fields in the InDesign doc must be tagged, read below for further details on tagging procedure.

When a document containing valid (tagged) fields is loaded or becomes the active document then the edit fields in the extension are automatically refreshed and populated with the values set in the slug.

It is always possible to force a manual refresh pressing the button “refresh”.

This is required for example after a manual editing of the slug line.

Hint: clicking on the tFlow logo on first tab (job) will load an InDesign doc with a demo slug line.

Slug line tagging – Adobe InDesign

All the data fields present on the slug line that contain the job specific values (that should be scanned) must be tagged.

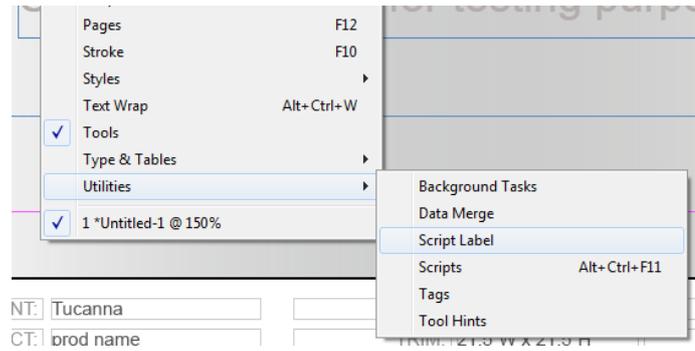
CLIENT:	Tucanna	LIVE:	19.5"W x 19.5"H	SHIP:	06/13/2015
PRODUCT:	prod name	TRIM:	21.5"W x 21.5"H	OUTPUT:	Digital
JOB ID:	Test extension1	BLEED:	22"W x 22"H	REF:	New
ORDER ID:	Extension1	SCALE:	100%	ARCHIVE:	na
ARTIST(s):	t.AP	SNIP:	Psm	RUSH:	N
APPROVER(s):	t.AP	REV:	03/11/2015	COLOR:	4C
RELEASER(s):	t.AP			REP:	ML
PROOF UPL(s):	t.AP	TFLOW QUEUES:	196:Full Color; 196:CMYK		

How to build the slug line

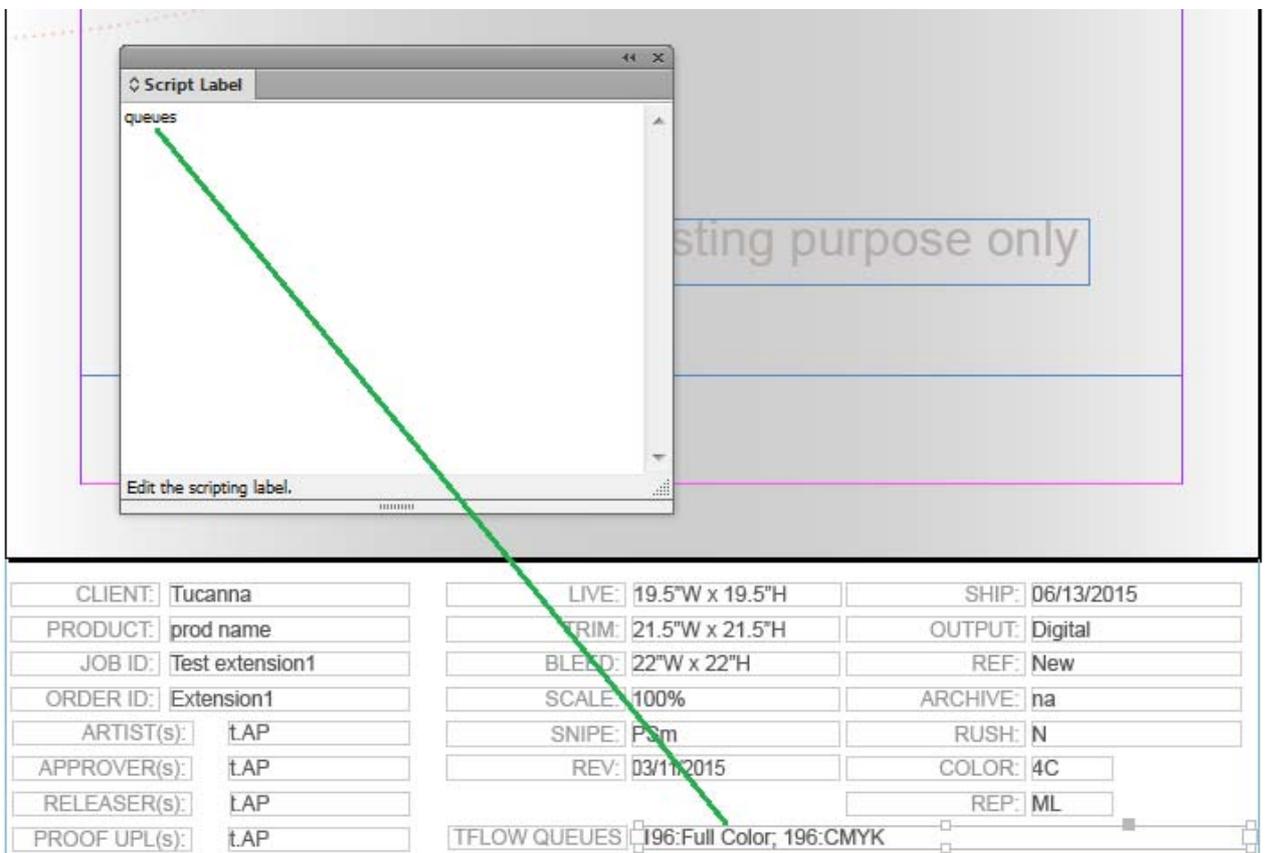
- All the fields to scan must be single Textframe objects
- To each Textframe field a specific fixed tag must be assigned
- The fields and the slug line elements cannot be grouped
- The fields and the slug line elements can be placed on a separate document layer and can also be locked or invisible
- Make sure the content of each text field fits in the frame, press the command “Fit frame to content” or adjust manually in order to fix.

How to TAG the fields

- Select the Textframe field to tag
- From the Window main menu select “Utilities/Script Label” command



Assign to the Script Label the proper tag, the list of valid tags is showed in the following table.



Slug Field	Tag value (Script label)
Order ID (Sales Order)	orderid
Job ID	jobid
Live	live
Trim	trim

Bleed	bleed
Scale	scale
Snipe	snipe
Artist	artist
Rev	rev
Ship	ship
Output	output
Ref	ref
Archive	archive
Rush	rush
Color	color
Rush	rush
Rep	Rep
Approver	approver
Releaser	releaser
Proof upl	proofer
tFLOW Queues	queues

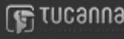
Table 1.1

The Tag is not case sensitive, the tags “slug” and ”SLUG” are equivalent.

When a document (tagged as showed above) is loaded into InDesign then the extension is able to automatically scan and get the values from the tagged fields.

⏪ tFlow Approval Connector ⏩

Refresh
Submit
Settings



Slugline details

Order ID	Extension1	Job ID	Test extension1
Client	Tucanna	Prod name	prod name
Revision	03/11/2015	Ship	2015-06-13
Live	19.5"W x 19.5"H	Trim	21.5"W x 21.5"H
Bleed	22"W x 22"H	Scale	100%
Snipe	PSm	Output	Digital
Ref	New	Archive	na
Rush	N	Color	4C
Rep	ML	Creation	2015-04-15
Artists	t.AP	Approvers	t.AP
Proof	t.AP	Queues	
Releaser	t.AP		

Refresh

Job status

Upload artwork

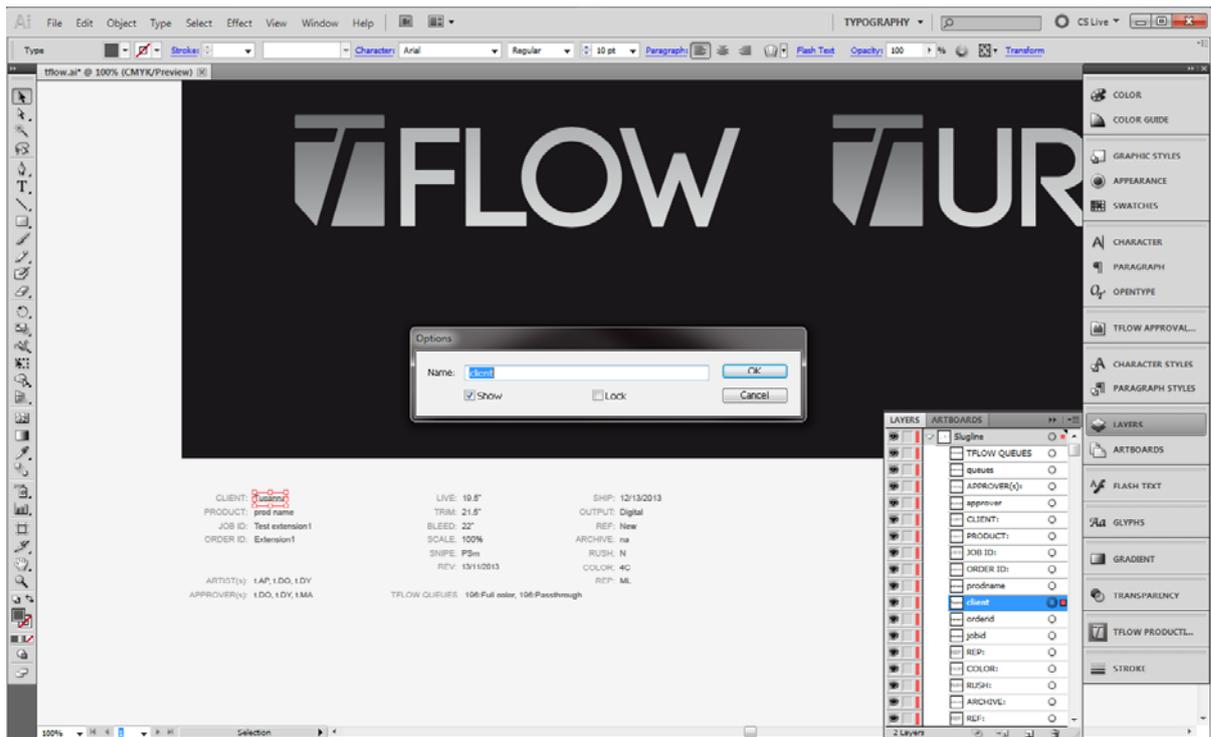
Slug line tagging – Adobe Illustrator

The procedure to tag the fields from within Illustrator are similar to InDesign. The fields must be Textframes.

Once all the fields are placed into the ArtBoard then click on "Layers".

Here you will find all the textframes you added.

Now click on each field you want to tag and assign to that field as a name the Tag values as shown in the Table 1.1



When done, simply save the document and Refresh the values in the Extension to check all fields are properly tagged.

Slug line tagging rules

In the case the Artist uploads an artwork to a non-existing order ID or Job ID then some special fields in the slug line are used to create the containers on server (Order or job).

The slug line fields needed to successfully complete this action are:

- **Client**
The client in the slug line must exist in the Approval database.
In case of mismatching or empty field a warning message is shown in the Job status field.
This field is case sensitive.
- **Artist(s)**
List of Artist(s) involved. For each artist it needs to be listed the shortname as assigned in Approval user list. The Artist(s) must exist in Approval.
This list must be comma (,) separated no other separation symbols are recognized
This field is case sensitive
Each artist needs to have the right to “Upload Artwork” in Approval user settings
example: t.AP, t.DO, Tom
- **Approver(s)**
List of Approver(s) involved. For each artist it needs to be listed the shortname as assigned in Approval user list. The Approver(s) must exist in Approval.
This list must be comma separated – no other separation symbols are recognized
This field is case sensitive
Each artist needs to have the right to “Approve_Job” in Approval user settings
example: t.DO, t.DY, t.MA
- **Proof(s)**
List of users with right to upload proof. For each artist it needs to be listed the shortname as assigned in Approval user list. The Proof uploader(s) must exist in Approval.
This list must be comma separated – no other separation symbols are recognized
This field is case sensitive
Each proof user needs to have the right to “Upload_proof” in Approval user settings
example: t.DY, t.MA
- **Releaser(s)**
List of users with Release right. For each releaser it needs to be listed the shortname as assigned in Approval user list. The Releaser(s) must exist in Approval.
This list must be comma separated – no other separation symbols are recognized
This field is case sensitive

Each releaser needs to have the right to “Release_Job” in Approval user settings
example: t.DY, t.MA

- **Queues**

List of shared tFlow input hotfolders with the following syntax:

turbineID:QueueName for example: *196:Full color*

This field is not case sensitive

This list must be comma separated

- **Ship (date)**

the ship date in format: MM/DD/YYYY

Make sure to enter the full year value! 2015 is ok, 15 is not.

In case of error(s) during the slug scan an error message is reported in the job status field of the extension.

Approval queries and job status

After a document has been loaded into InDesign a query is sent to Approval (if successfully logged in) to get the job status.

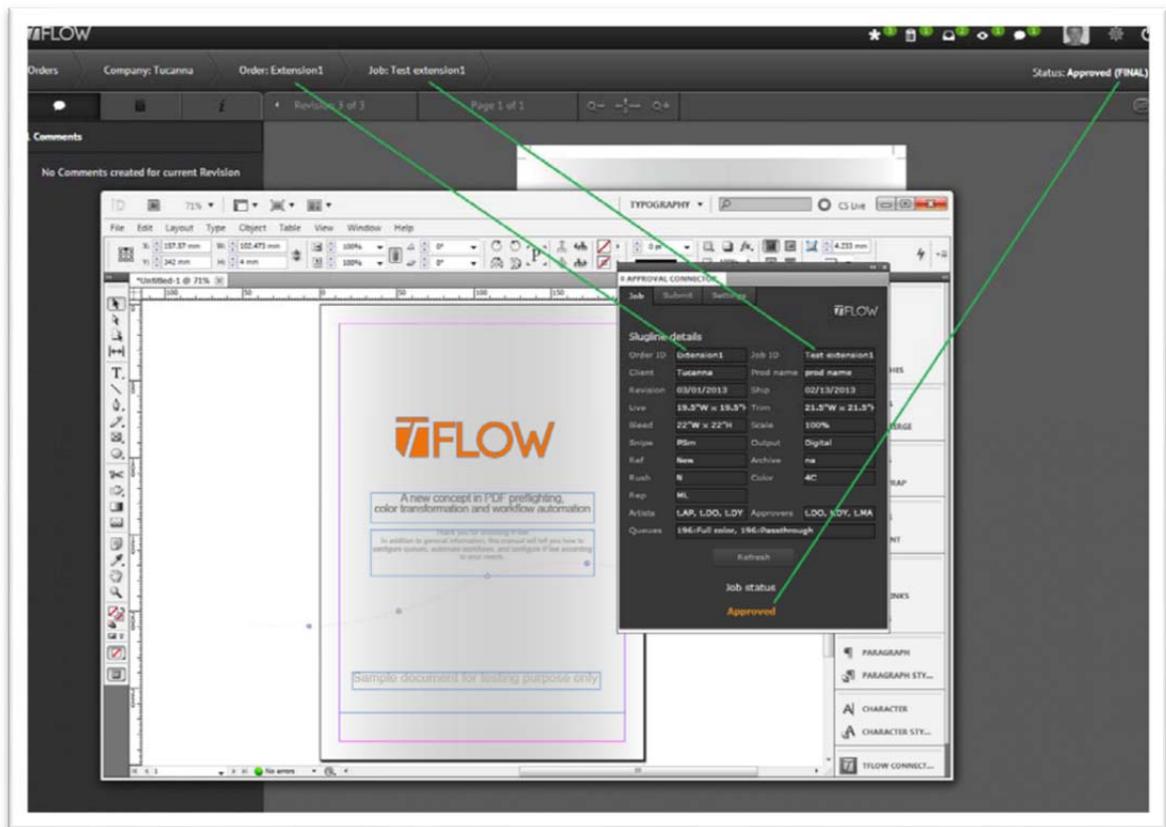
To correctly identify the job in the Approval archive the couple “OrderID” and “JobID” are used.

For this reason the orderid and the jobid fields are mandatory.

If a job with those specific values exists then Approval returns the job status and the extension will show the status in the bottom area of the main window.

If a job with those specific values does NOT exist then the extension will scan the additional fields needed to create the order or the job and will report in case of errors else will enable the artwork upload.

In The picture a case where a job has been Approved.



The Status of a job are:

- Approved
- Rejected (Cancelled)
- Waiting for Approval
- Waiting for Revision
- Preflighting
- Upload Proof

PDF creation and artwork upload

When the editing phase is completed then it is time to make the PDF, review it and finally to upload the PDF to Approval.

Before doing this the artist needs to make sure the status of the current job is in one of the 2 following states:

“Upload revision”: this is shown when the specified ORDER and JOB ID exist on server. It means that a job with that ID exists in such specific Order and that it is waiting for a revision.

TFLOW APPROVAL CONNECTOR

Job Submit Settings

TUCANNA

Slugline details

Order ID	Extension1	Job ID	Test extension4
Client	Tucanna	Prod name	prod name
Revision	13/11/2013	Ship	12/13/2013
Live	19.5"	Trim	21.5"
Bleed	22"	Scale	100%
Snipe	PSm	Output	Digital
Ref	New	Archive	na
Rush	N	Color	4C
Rep	ML	Creation	2013-10-15
Artists	t.AP, t.DO, t.DY	Approvers	t.DO, t.DY, t.MA
Queues	196:Full color, 196:Passthrough		

Refresh

Job status

Upload revision

“Upload artwork” : this is shown when the specified ORDER or the JOB ID do not exist on server.

Flow Approval Connector

Refresh Submit Settings

TUCANNA

Slugline details

Order ID	Extension1	Job ID	Test extension2
Client	Tucanna	Prod name	prod name
Revision	03/11/2015	Ship	2015-06-13
Live	19.5"W x 19.5"H	Trim	21.5"W x 21.5"H
Bleed	22"W x 22"H	Scale	100%
Snipe	PSm	Output	Digital
Ref	New	Archive	na
Rush	N	Color	4C
Rep	ML	Creation	2015-04-15
Artists	t.AP	Approvers	t.AP
Proof	t.AP	Queues	
Releaser	t.AP		

Refresh

Job status

Upload artwork

The PDF creation is really simple. In the Tab “Submit” are present a selector to choose the wanted PDF presets and a button to make and preview the PDF document.

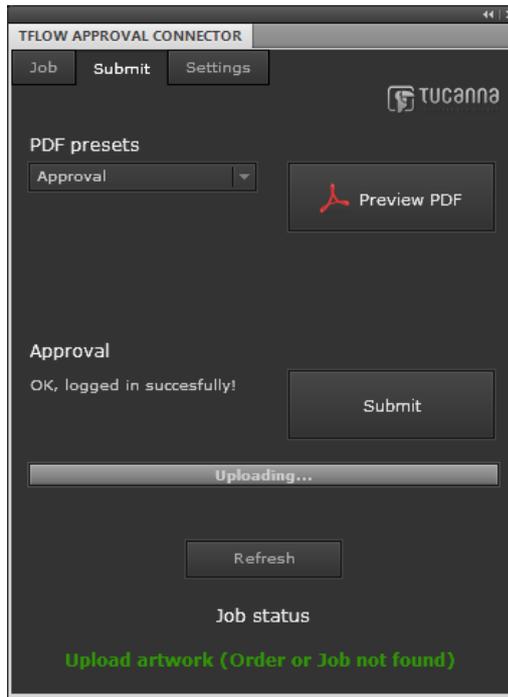
A checkbox allows to open the Presets selection before the PDF creation.

It is possible to define a specific workflow preset, for example including the slug line in the PDF, wedges, crops and so on.

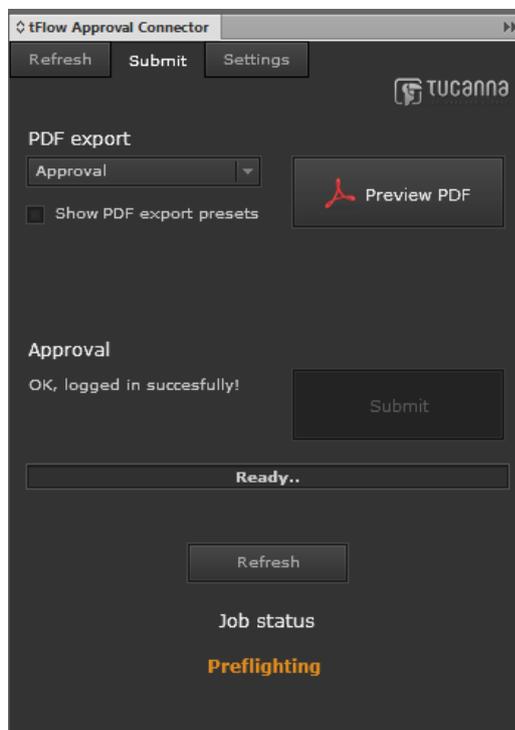
The selection is remembered and used as the default until a different preset will be used.

Note: the extension always previews the PDF using the predefined PDF viewer (Acrobat) so it is recommended to exclude the “View after exporting” option in the preset to avoid the PDF is opened 2 times.

When the PDF has been generated then the Submit button will be enabled.
After the PDF has been reviewed and OK'ed simply pressing the "Submit" button will start the upload of the PDF artwork to Approval.

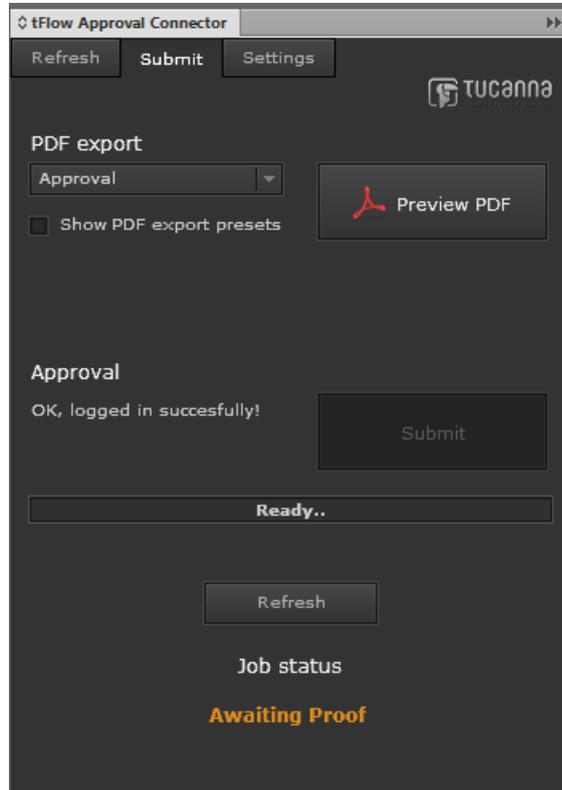


If the upload will be completed successfully then the user is informed with a message:



else an error message will be showed.

Note: If after adding a new PDF preset the list in extension is not automatically refreshed simply then restart InDesign and the list will be reloaded.

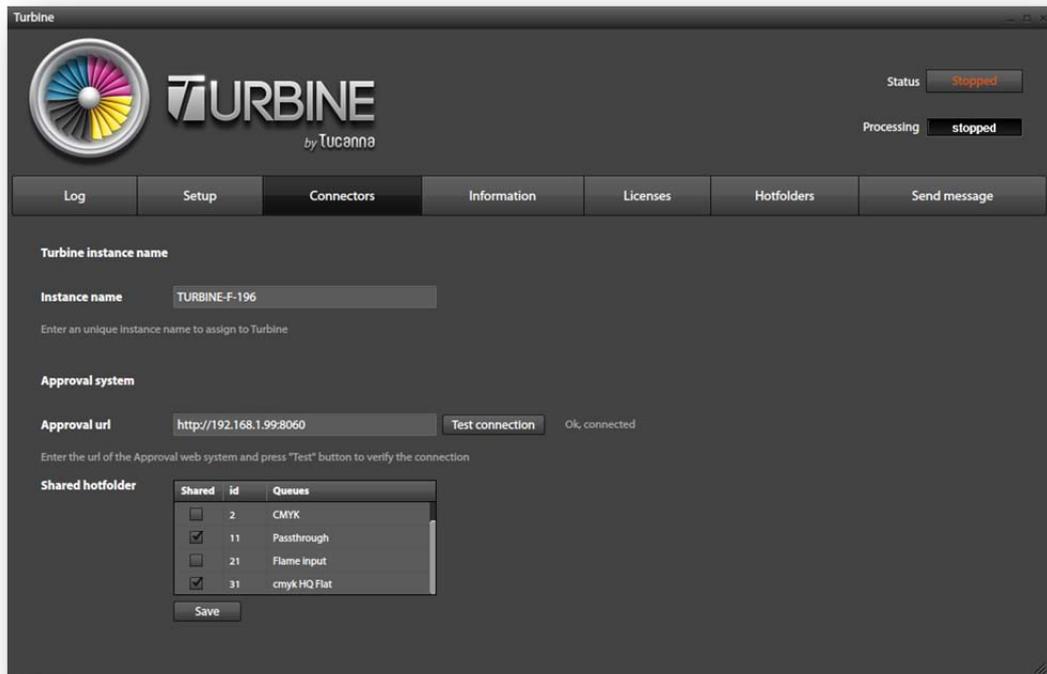


Turbine Approval connector

Starting from version 1.7 of tFlow it is possible to connect Turbine to Approval web system to fully automate the workflow.

In the new version of Turbine is present a new tab where it's possible to set the url of Approval and where to choice the input queues to publish.

This configuration is optional.



The fields in Connectors tab are:

Instance name

This is the name of the Turbine system to display in Approval. This functionality isn't yet implemented in Approval. Enter a symbolic name or, if a default value is present, leave that.

Approval url

The address of Approval system you want to connect Turbine to. Please enter a fully qualified address including http:// and the port number. It is the same url you need to enter in a web browser when connecting in a normal Approval web session.

Press Test button to establish a connection to the entered url and check the result is "OK, connected".

Shared hot folders

Select the input queues you want to publish into Approval.

Important: remember to press “Save” button at end of the configuration.

In order to apply any change to the Connectors remember to put the Turbine offline else this page will remain disabled.

The last thing needed to connect the 2 systems is to include the license number of your Turbine in the Approval configuration files.

This is needed to authorize your Turbine to connect and to share and get the approved Pdfs. If your Turbine ID is not yet included in the licensed list of Approval then you will get an error during the connection which will be listed in the Log.

To request the authorization for your Turbine please send the license# of your Turbine (the highlighted string in the following picture, in the sample is TURBINE-F-196) to support@tucanna.com.

Turbine

TURBINE
by Tucanna

Status **Stopped**

Processing **stopped**

Log Setup Connectors Information **Licenses** Hotfolders Send message

1. Enter Information

Company: Tucanna
Name: Piero Win
Email: apizzeghella@tucanna.com
Address: verona
ZIP/City: Verona
Country: Italy
Phone: 6556767
Web site:
Dealer: TUCANNA_GLOBAL
Dealer email: sales@tucanna.com

2. Request License

TURBINE
 Upgrade to 4 Simultaneous Processes
 Advanced Profiles PACK
 tFlow Clients 1

If you have any questions please contact sales@tucanna.com with **TURBINE-F-196** in the Subject line

Request Trial Request offer

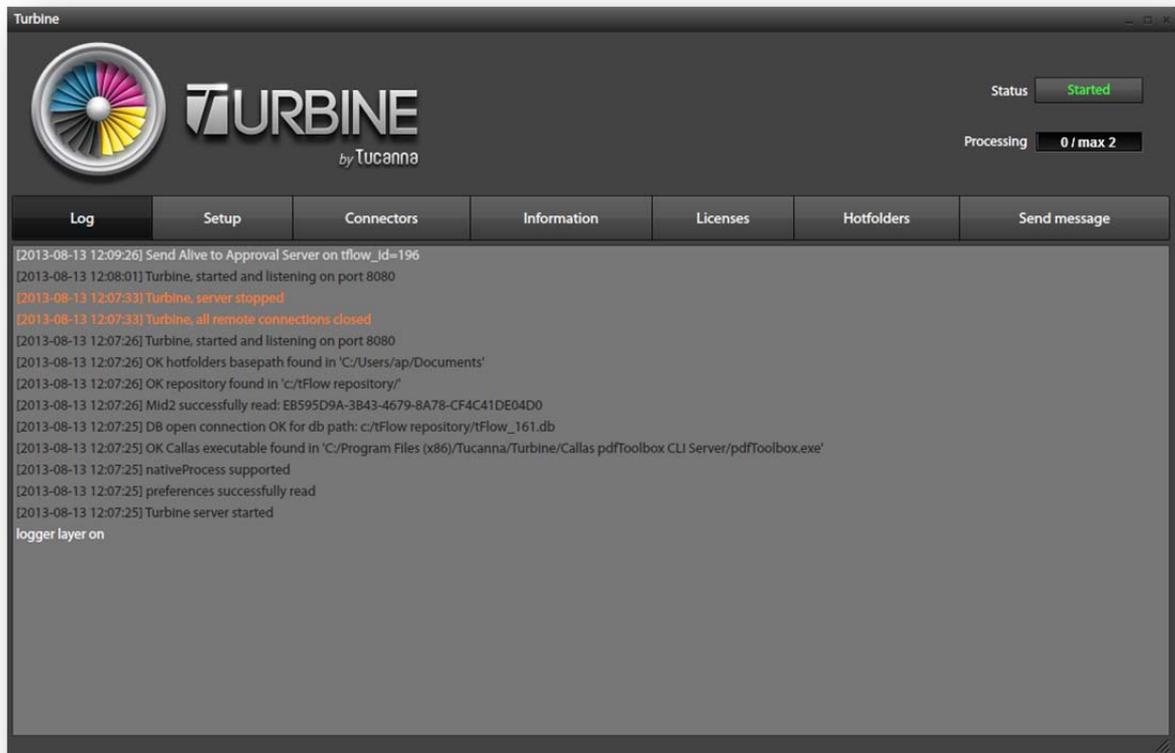
3. Activation

Licensed

Full License
tFlow Clients: 5
Simultaneous Processes: 4
Licensed to: Tucanna
+ extended profile pack

Activate

When correctly configured you can put the Turbine online and now every 2 minutes the application will send an alive data packet to Approval including the list of the published queues.

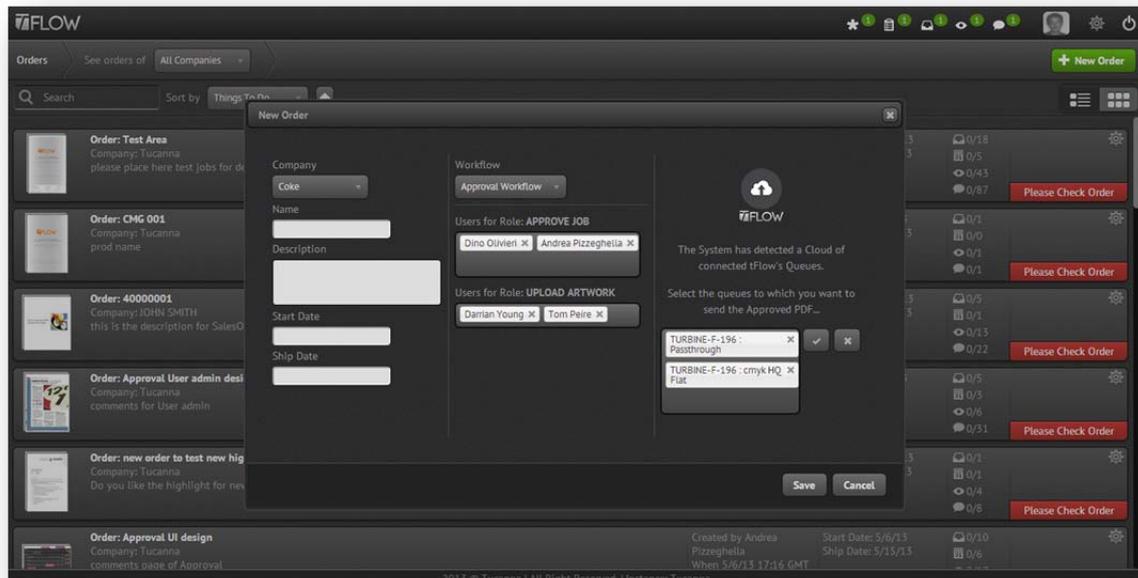


Please check the Log tab to verify all is ok and that any connection error is reported here.

Approval and tFlow's queues

In the order and in the job creation window you will find on the right side the list of published input queues together the Turbine instance number.

By default the system will select here all the shared queues but you can select/unselect depending on the job destination.



When a Job will be approved then the PDF will be automatically routed to the selected tFlow's input queues triggering all the preflithing fixups, color conversion, etc.. set in tFlow for the queues.

Notes:

- Turbine checks for pending (approved) PDFs to download every 2 minutes (during the “send alive” session) and so the download is not in realtime.
- If Turbine for whatever reason will be offline when a job is approved then Approval will keep that pdf in the “list to deliver” for 30 days. Once Turbine will reconnect then the PDF will be delivered else after 30 days of inactivity it will be discarded.
- Approval can support unlimited Turbine instances and unlimited number of queues.

