Connect

Description
This app is designed to work in conjunction with the QuickEasy ERP software, updating the status of a pdf uploaded to QuickEasy as it travels through Switch.

The BOS Server needs to be active so that the XML's generated by the flow can be pushed back to QuickEasy for updating the status of the job.

Your QuickEasy representative can advise on configuration and setup of QuickEasy and the BOS Server software for these updates to take place.
At the end of this document are 2 screenshots which are a very brief introduction to configuring QuickEasy and the BOS Server. A URL has been provided on the last page which links to the QuickEasy learning centre page for JDF - Switch.

Some advantages of using the Swtich QE Updater
- CSR can submit data rich jobs to Switch from within QE.
- Customer and CSR can get almost immediate feedback on the printability of the files and a preflight report of any errors, with no needing to wait for Prepress to give feedback on a job after working through jobs already in the queue for Prepress.
- Customer can approve job online with the PDF Review Server

Information on flows provided
Configured basic Switch flows have been provided for install to your Switch installation. There would need to be additional configuration for email sends, repository locations for archiving files, etc.
HTML documentation files of the configuration of the flows have been provided to indicate the details of the configuration of the flows.

The outputs from the various App elements need to be followed closely to get the correct expected result at the various update points for QuickEasy.

Private Data attached to a job
Private data is attached to the pdf as it travels through the Switch flows. The private data closely resembles the XML generated by QuickEasy. Re-contextualised for JavaScript Object Notation(JSON). The private data is updated as updates take place in Switch.

QuickEasy form of XML would be:
```
<?xml version="1.0" encoding="ISO-8859-1"?>
<JOB>
        <HEADER>
                <JOBNO>1046</JOBNO>
                ... rest of header info
        </HEADER>
        <PART>
                <PARTNO>54</PARTNO>
                ... rest of part info
        </PART>
</JOB>
```

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Private Data would be:

To access the Job #:

QEProPDTag.HEADER.JOBNO

To access Part #:

QEProPDTag.PART.PARTNO

All private data, except for the private data added by PDF Review is prefixed with QEProP-DTag. Please see the sample XML in the downloadable assets for the full structure of the XML associated with a part.
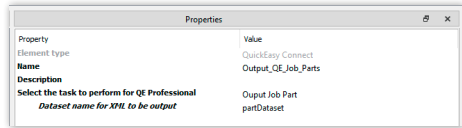
Downloadable assets

The downloadable ZIP file contains the documentation of the basic flows, the flows, an example of an XML of a part of job as output by QuickEasy and a JS file called privateDataArray.js.

privateDataArray.js shows the private data associated with a job in the Switch flows.

Configuration
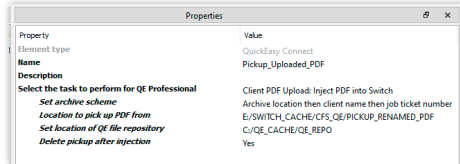## Split QE XML into job parts
Flow: 10_QE_PICKUP_PDF_v2

Switch configuration for split QE XML into job parts

Element	Option	Element Type	Description
Select the task to perform for QE Professional	Output Job Part	Drop Down List	Select Output Job Part - splits incoming QE XML into job parts per pdf file uploaded.
Dataset name for XML to be output		String	Set the name of the dataset associated with the XML output. Default name partDataset.

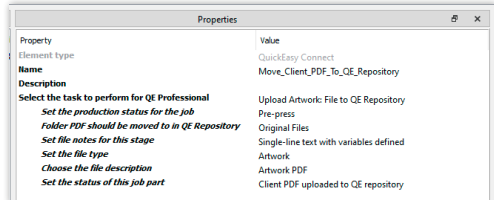## Pickup file uploaded to QE
Flow: 10_QE_PICKUP_PDF_v2

Switch configuration pickup file uploaded to QE

Element	Option	Element Type	Description
Select the task to perform for QE Professional	Client PDF Upload: Inject PDF into Switch	Drop Down List	Select Client PDF Upload: Inject PDF into Switch - picks up the pdf upload-ed to the job part & moves the pdf to the next flow.
Set archive scheme		Drop Down List	
	Archive location then job ticket number		This option will set the UNC path to archive root plus the job ticket num-ber, eg. \\archive-share\W1042\. Please note all points that send the physical file to the archive need to have as there base this format else QuickEasy will not be able to open files from the locations reported back to it from Switch.
	Archive location then client name then job ticket number		This option will set the UNC path to archive root plus the customer name plus the job ticket number, eg. \\ar-chive-share\customer name\W1041\. Please note all points that send the physical file to the archive need to have as there base this format else QuickEasy will not be able to open files from the locations reported back to it from Switch. NOTE: This is the default scheme.
	Custom		When this option is chosen 5 inputs will be shown allowing the ability to input a hierachy line at each input. This hierarchy is descending. Each successive input adding to the bot-tom of the hierarchy. This behaviour is much like the de-fault element Set hierarchy. The options for the inputs are, Inline value, Define single-line text with variables & Define script expression.
Location to pick up PDF from		Choose Folder	Set the folder that the file uploaded to QE should be picked up from. This should be the same as the value assigned to Artwork Folder (Linux: / FolderName/; Windows: \Folder-Name\) under JDF Switch in Settings & Defaults in QuickEasy.
Set location of QE file repos-itory		Choose Folder	Choose the location of the QE Repository of files. If this is on a network the IP address or of the machine, or the name of the machine on the network should be used to access the location. Ask your IT support if unsure.
Delete pickup after injection		Yes/No Drop Down list	Set to yes to remove uploaded file from location that Switch injects the QE uploaded files from.

Move uploaded PDF to QE Repository
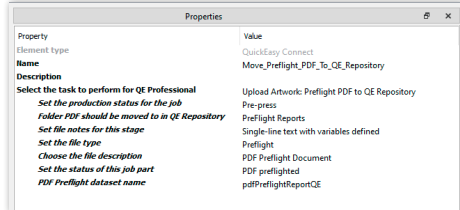### Flow: 20_QE_UPDATE_SEND_2_PREFLIGHT_v2

Switch configuration for moving uploaded PDF to QE Repository

Element	Option	Element Type	Description
Select the task to perform for QE Professional	Upload Artwork: Client file to QE Repository	Drop Down List	Select Upload Artwork: Client file to QE Repository - moves the pdf uploaded to QE to the QE Repository. Updates QE with the location of the pdf in the QE Repository.
Set the production status of the job	Pre-press	Drop Down List	Select Pre-press for this stage of the job. This parameter marks the file as blue in the QuickEasy interface.
Folder PDF should be moved to in QE Repository	'Original Files'	String	User assigned name. Should be the same as the folder name that the job will be moved into with the Create Folder app in the flow. See sample flow or flow documentation for information. This defaults to Original Files || Pre-Flight Reports. Either use one of the values supplied, for the use case, or set a custom value.
Set file notes for this stage		String	This is the information placed on the job in the folder immediately preceding the App. The folder sets the [Job.JobState] with [Job.NameProper] - PDF Uploaded To QE Repository. See sample flow or flow documentation for information. This information can be seen in the progress field of the JDF Switch window.
Set the file type	Artwork	Drop Down List	Provides additional information about the file.
Choose the file description	Artwork PDF	Drop Down List	Populates the Description field in the JDF Switch window.
Set the status of this job part	Client PDF uploaded to QE Repository	Drop Down List	Sets additional information about the status of this job part.

Move preflight PDF to QE Repository
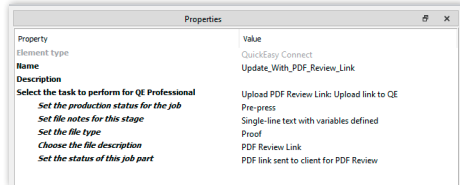### Flow: 30_QE_PREFLIGHT_UPLOAD_JOB_v2

Switch configuration for moving preflight PDF to QE Repository

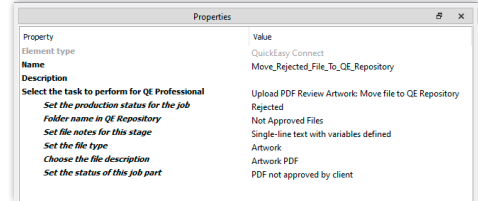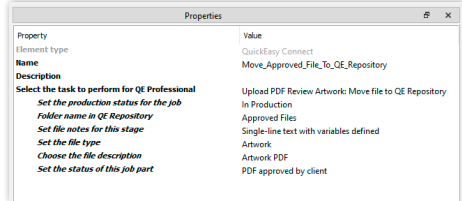| Element	Option	Element Type	Description
Select the task to perform for QE Professional	Upload Artwork: Preflight PDF to QE Repository	Drop Down List	Select Upload Artwork: Preflight PDF to QE Repository - moves the preflight pdf to the QE Repository. Updates QE with the location of the pdf in the QE Repository.
Set the production status of the job	Pre-press	Drop Down List	Select Pre-press for this stage of the job. This parameter marks the file as blue in the QuickEasy interface.
Folder PDF should be moved to in QE Repository	'Preflight Reports'	String	User assigned name. Should be the same as the folder name that the job will be moved into with the Create Folder app in the flow. See sample flow or flow documentation for information. This defaults to Original Files || PreFlight Reports. Either use one of the values supplied, for the use case, or set a custom value.
Set file notes for this stage		String	This is the information placed on the job in the folder immediately preceding the App. The folder sets the [Job.JobState] with [Job.NameProper] - PDF Preflighted: [Metadata.Text:-Dataset="QEProPreflightReport",-Model="XML",Path="/EnfocusReport/ProcessInfo/CertifiedPDFStatus"]. See sample flow or flow documentation for information. This information can be seen in the progress field of the JDF Switch window.
Set the file type	Preflight	Drop Down List	Provides additional information about the file.
Choose the file description	PDF Preflight Document	Drop Down List	Populates the Description field in the JDF Switch window.
Set the status of this job part	PDF preflighted	Drop Down List	Sets additional information about the status of this job part.
PDF Preflight dataset name	pdfPreflightReportQE	String	Set dataset name of the preflight PDF. This is the same name of the dataset associated with the out connection from the Pitstop Server process. This dataset name is used to create the preflight document that is moved over to the QE Repository. NOTE: The dataset name must be the same as the log name of the preflight data from the Pitstop Server preflight process before this point. Please reference the relevant supplied workflow for further information.

Update QuickEasy with PDF Review link
Flow: 40_QE_PDF_REVIEW_UPLOAD_JOB_v2

Switch configuration for update QuickEasy with PDF Review link

Element	Option	Element Type	Description
Select the task to perform for QE Professional	Upload PDF Review Link: Upload link to QE	Drop Down List	Select Upload PDF Review Link: Upload link to QE - uploads the PDF Review link to QuickEasy.
Set the production status of the job	Pre-press	Drop Down List	Select Pre-press for this stage of the job. This parameter marks the file as blue in the QuickEasy interface.
Set file notes for this stage		String	This is the information placed on the job in the folder immediately preced-ing the App. The folder sets the [Job.JobState] with [Job.NameProper] - PDF Uploaded to PDF Review for Client approval. See sample flow or flow documentation for information. This information can be seen in the progress field of the JDF Switch window.
Set the file type	Proof	Drop Down List	Provides additional information about the file.
Choose the file description	PDF Review Link	Drop Down List	Populates the Description field in the JDF Switch window.
Set the status of this job part	PDF link sent to client for PDF Review	Drop Down List	Sets additional information about the status of this job part.

Approved/Not Approved PDF Review
Flow: 40_QE_PDF_REVIEW_UPLOAD_JOB_v2

Switch configuration for Approved/Not Approved PDF Review. Configuration will be the same except for status of file.

Element	Option	Element Type	Description
Select the task to perform for QE Professional	Upload PDF Review Artwork: Move file to QE Repository	Drop Down List	Select Upload PDF Review Artwork: Move file to QE Repository - uploads the PDF Review link to QuickEasy.
Set the production status of the job	In Production/Rejected	Drop Down List	Select In Production(green) or Rejected(red) based on which route out of PDF Review the app is attached to.
Set file notes for this stage		String	This is the information placed on the job in the folder immediately preceding the App. The folder sets the [Job.JobState] with [Job.NameProper] - Job Approved or [Job.NameProper] - Job Not Approved. See sample flow or flow documentation for information. This information can be seen in the progress field of the JDF Switch window.
Set the file type	Artwork	Drop Down List	Provides additional information about the file.
Choose the file description	Artwork PDF	Drop Down List	Populates the Description field in the JDF Switch window.
Set the status of this job part	PDF approved by client/ PDF not approved by client	Drop Down List	Sets additional information about the status of this job part.

QuickEasy & Switch configuration

Location configured in QuickEasy to send uploaded pdf's to for Switch to pickup

Location configured in QuickEasy to send initial QuickEasy XML too for Switch to pickup.

Location configured in BOS Server to pickup XML to update QuickEasy job status.

Please liase with your QuickEasy representative for correct configuration of QuickEasy for Switch integration.
A URL link has been provided on the next page to the QuickEasy Learning Centre page for JDF - Switch

Note on flows uploaded
The workflows uploaded as part of the assets for this app shuold closely be followed with regard to the out connections from the app. These have been tested extensively to give the expected results for updating QuickEasy & moving files to the required places in the file repository for the various files output by the app.
Post the out connections from the app there is complete freedom to process the job in any-way that fits the use case.

Note on rename of pdf's to catch ampersand case
If the renaming of the pdf's post the upload to the folder specified in QuickEasy is used, the folder that the app picks up the pdf's from, at Inject Widcard, needs to be adjusted to the folder location that the renamed pdf will move too.

QuickEasy documentation link for JDF Switch:
Below is a link to the QE Learning Centre page on JDF - Switch:
https://sites.google.com/quickeasysoftware.com/bospro-learning-centrer/production/SWITCH