

QUICKEASY 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 Switch 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 Pre-press to give feedback on a job after working through jobs already in the queue for Pre-press.
- Customer can approve a job on-line with the 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>
```

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 QEProPDTag. 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.

Compatibility

BOS Professional 22 and up.

Configuration

Split QE XML into job parts

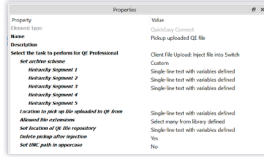
Flow: 10_QE_PICKUP_PDF_v2

Property	Value
Element type	QuickEasy Connect
Name	Output QE job parts
Description	
Select the task to perform for QE Professional	Output Job Part
Dataset name for XML to be output	partDataset
Add child nodes to part data	No

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 .
Add child nodes to part data	Yes/No		This option allows the ability to add additional nodes that are direct children of the JOB node for instances where customisation of the XML exported by QuickEasy have taken place.
Set name/s of top level node to add to part data		Multi-line text	Input the names of the nodes to be added to part data XML as multi line text, ie. any other node names that are not HEADER or PART , that need to be part of the XML dataset for job. This option is shown if the answer to ' Add child nodes to part data ' is Yes .

Pickup file uploaded to QE

Flow: 10_QE_PICKUP_PDF_v2



Element	Option	Element Type	Description
Select the task to perform for QE Professional	Client PDF Upload: Inject file into Switch	Drop Down List	Select Client PDF Upload: Inject PDF into Switch - picks up the pdf uploaded 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 number, eg. \\archive-share\W1042\ . Please note all points that send the physical file to the archive need to have as their base this format else QuickEasy will not be able to open files from the locations reported back to it from.
	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. \\archive-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 hierarchy line at each input. This hierarchy is descending. Each successive input adding to the bottom of the hierarchy. This behavior is much like the default element Set hierarchy.
Location to pick up file uploaded to QE from		Choose Folder, Single line variable	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: \FolderName\) under JDF Switch in Settings & Defaults in QuickEasy.
Allowed file extensions		Select many from library	Library of allowed extensions for files uploaded to QuickEasy
Set location of QE file repository		Choose Folder, Single line variable	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.
Delete pickup after injection		Yes/No Drop Down list	Removes uploaded file from location that Switch injects files from.
Set UNC path in uppercase		Yes/No Drop Down list	If Yes set casing of UNC path to archived files in uppercase.

Move uploaded PDF to QE Repository

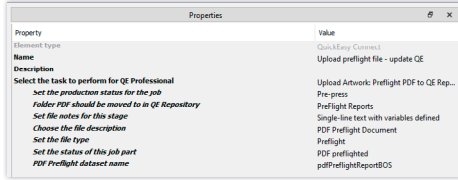
Flow: [20_QE_UPDATE_SEND_2_PREFLIGHT_v2](#)

Property	Value
Element type	QuickEasy Connect
Name	Upload file - update BOS
Description	<p>Select the task to perform for QE Professional Upload Artwork: File to QE Repository</p> <p>Set the production status for the job Pre-press</p> <p>Folder PDF should be moved to in QE Repository Original Files</p> <p>Set file notes for this stage Single-line text with variables defined</p> <p>Choose the file description Artwork File</p> <p>Set the file type Artwork</p> <p>Set the status of this job part Client file uploaded to QE repository</p>

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.
Choose the file description	Artwork PDF	Drop Down List	Populates the Description field in the JDF Switch window.
Set the file type	Artwork	Drop Down List	Provides additional information about the file.
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

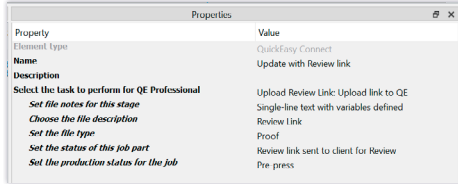
Flow: [30_QE_PREFLIGHT_UPLOAD_JOB_v2](#)



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.Name- Proper] - 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.
Choose the file description	PDF Preflight Document	Drop Down List	Populates the Description field in the JDF Switch window.
Set the file type	Preflight	Drop Down List	Provides additional information about the file.
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.

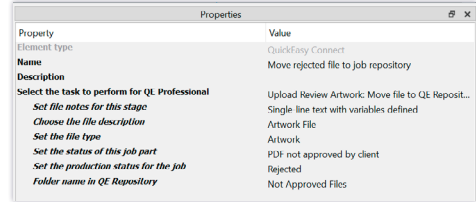
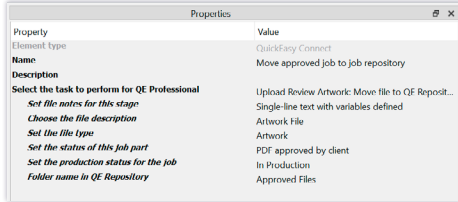
Update QuickEasy with PDF Review link

Flow: [40_QE_PDF_REVIEW_UPLOAD_JOB_v2](#)



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 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 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.
Choose the file description	Review Link	Drop Down List	Populates the Description field in the JDF Switch window.
Set the file type	Proof	Drop Down List	Provides additional information about the file.
Set the status of this job part	Review link sent to client for Review	Drop Down List	Gives additional information about the type of action performed.
Set the production status for the job	Pre-press	Drop Down List	Set status of job in QuickEasy.

Approved/Not Approved PDF Review Flow: 40_QE_PDF_REVIEW_UPLOAD_JOB_v2



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 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.
Choose the file description	Artwork PDF	Drop Down List	Populates the Description field in the JDF Switch window.
Set the file type	Artwork	Drop Down List	Provides additional information about the file.
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.
Set the production status of the job	Rejected/In production		Set status of job in QuickEasy
Folder name in QE Repository			Indicate the name of the that the artwork should be saved in the archive. Name should be relevant to the arm of the flow from Review.

QuickEasy & Switch configuration

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

QE_JDF
Location configured in QuickEasy into which QuickEasy XML is dropped for Switch to pickup.

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

Note on flows uploaded

The workflows uploaded as part of the assets for this app should 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 anyway that fits the use case.

Note on rename of artwork files to catch ampersand case

The flow has a check in to rename any ampersands in the XML to _-_. An ampersand can be present in the name of the file uploaded which breaks the integrity of the XML coming into Switch. Methodologies have been put in place to rename the artwork file flowing to its pickup folder, removing ampersands. This means that there can be changes to the name of the artwork file uploaded.

This replacement of an instance of an ampersand in the name of the uploaded artwork has been employed in the app, so that certain things can be checked with regard to the uploaded file.

The flow that contains in its name 10_QE_PICKUP_PDF should be followed as is. The folder pickup points would need to be adjusted to fit the use case.

QuickEasy documentation link for JDF Switch:

Below is a link to the QE Learning Centre page on JDF - Switch:

<https://quickeasy.clickhelp.co/articles/#!/bos-professional-learning-centre/tutorial-jdf-switch>