CtrlPrint

# Setting up your first CtrlPrint project

**Updated June 1st, 2016**

This document is designed to help new CtrlPrint users understand how to set up their first project. It is intended for all users and its aim is to help reduce potential issues.

**Contents:**

# 1. Prepare your InDesign documents

Before you add your InDesign documents to CtrlPrint you should take the time to prepare them for use in the system. We *strongly* recommend that you do the following to avoid any complications:

1. **Check which version of InDesign you should be using.** It is important that you are using the same version as the client, so your InDesign version (CS6, CC2015 etc.) needs to be the same as their InCopy version.

2. **Accept all changes** that may be present in the document - especially if it has been used in CtrlPrint previously. To do this see the instructions on our support site here.

3. **Create an IDML** of the document to remove any unnecessary code and “clean” the file. This is especially important if you are going from one version of InDesign to another. Information about how to do this can be found here.

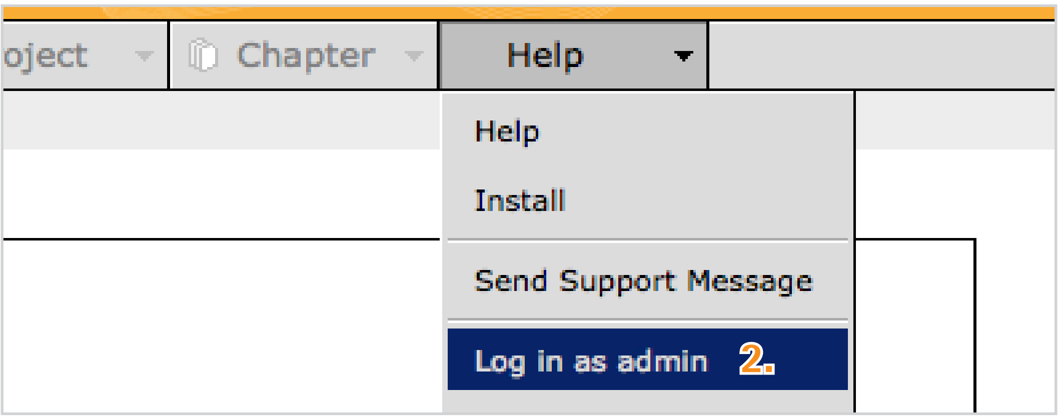
4. **Make sure you do not have any other third party plug-ins** installed before adding the document to the system – or while working with CtrlPrint.

Note that you must have an administrator's account to create projects. If you do not have an administrator's password or cannot access the company you are trying to create a project for please contact your project manager, another administrator or CtrlPrint.

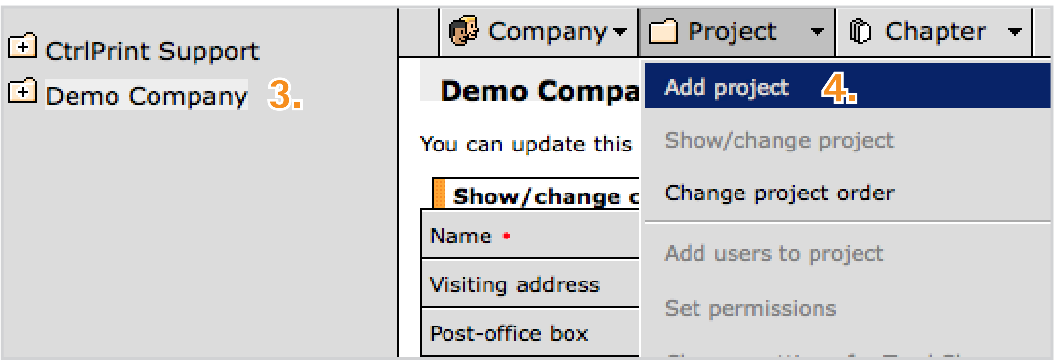
## 2. Create the project

**1**. Log in to CtrlPrint. (Information about how to do this can be found on our support site here.)

**2**. Log in as an administrator. This option is under the "**Help**" menu.

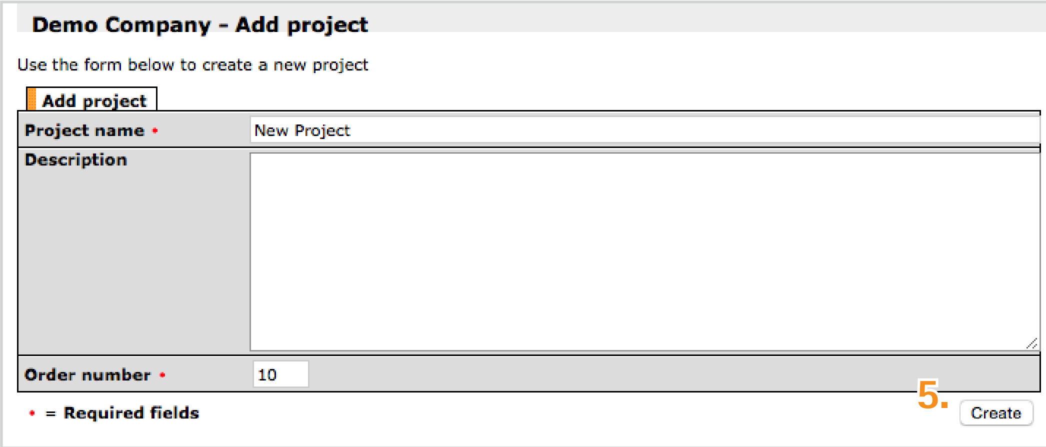



**3**. Select the company folder from the left side of the window where you want to create the project. (*Note that if you do not see the company listed here it means you are not yet an administrator for that particular company.*)



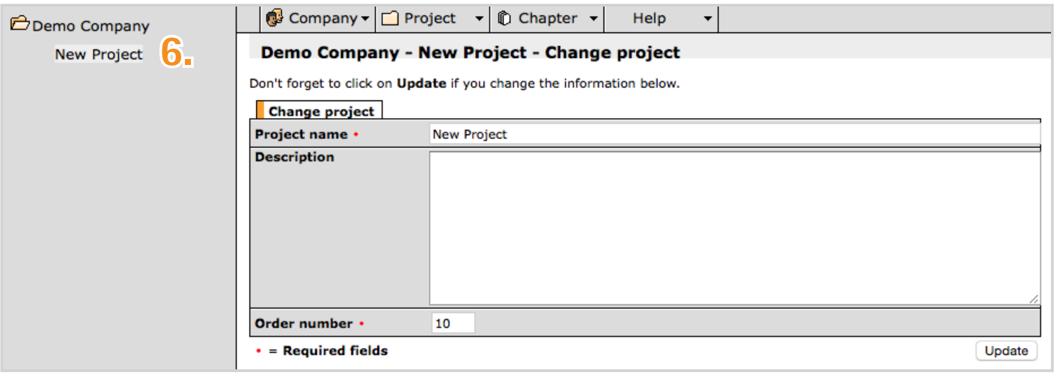

**4**. After selecting the company, click on the "**Project**" menu and choose "**Add project**".

**5**. Give the project a name and an order number and click “**Create**”.




***Order numbers*** *determine where projects appear in the list found under a company on the left side of the window. We recommend that you use increments of 10 (project one being 10, project two being 20, etc). This way you can easily add a new project between two existing projects if necessary without needing to change additional order numbers.*

**6**. You can change a project name and order number by clicking on the project name when logged in as an administrator.

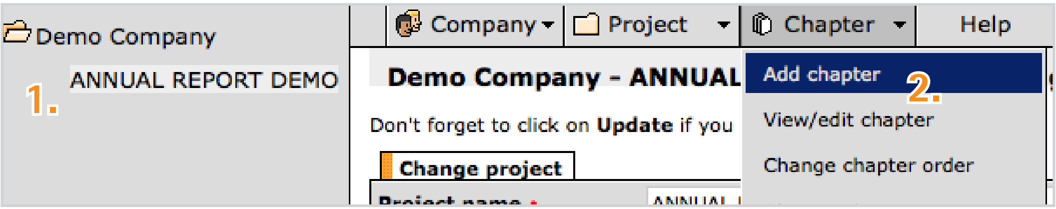


# 3. Add chapters to your project

Before you can upload your documents to your project you must first create placeholders in the form of “chapters”.

**1**. Select the project name from the list on the left side of the window.

**2**. Click on the “**Chapter**” menu and choose “**Add chapter**”.

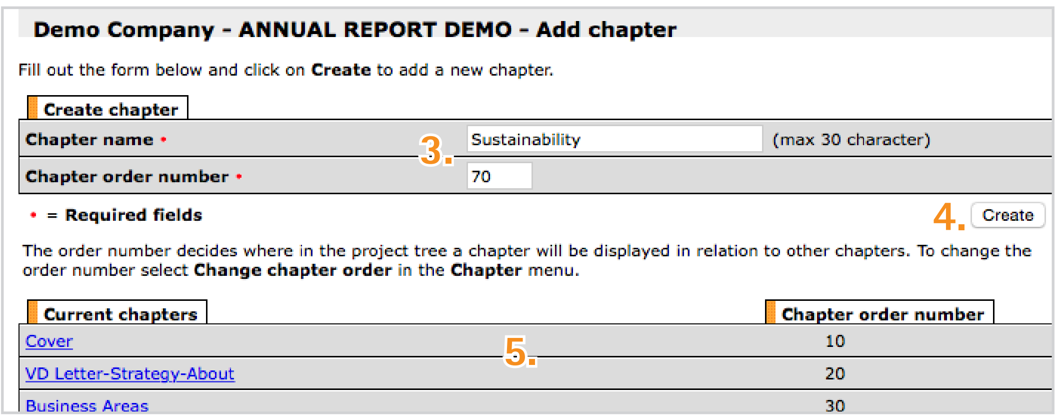



**3**. Give your chapter a name and order number. (Avoid using slashes **/** or colons **:** in chapter names.)

***Order numbers*** *determine in which order chapters appear - including the order used for combined* ***PDFs****. We recommend using increments of 10 (chapter one being 10, chapter two being 20, etc.). This way you can easily add a new chapter between two existing chapter if necessary without needing to change additional order numbers.*

**4**. Click “**Create**”.

**5**. You will also see a list of existing chapters and their order numbers.



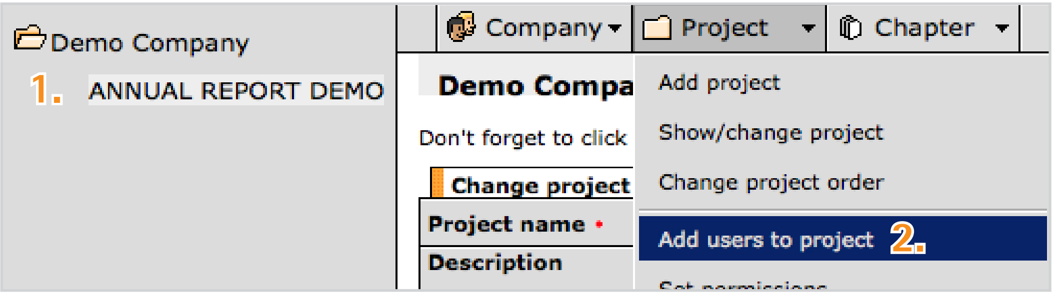
# 4. Add users to your project

After you have created your chapters you will need to add users to your project - including yourself!

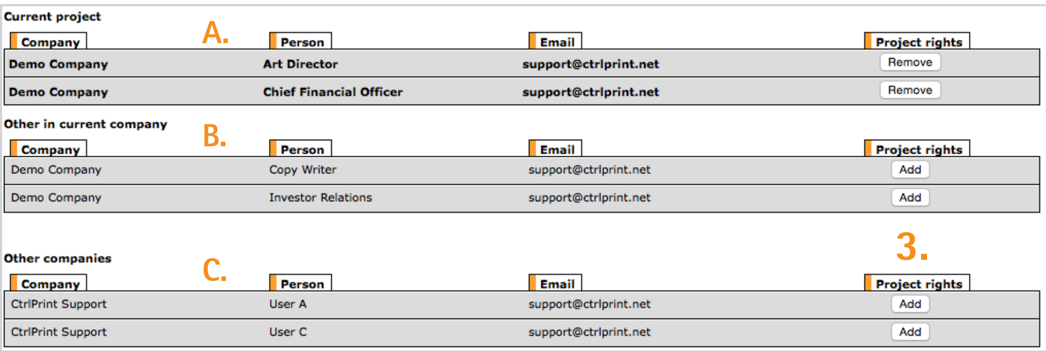
> Note that even though a user has been added to the project they will not be able to access the documents until you set their permissions. (More about this on the next page.)

**1**. Select the project name from the list on the left side of the window.

**2**. Click on the "**Project**" menu and choose "**Add users to project**".




**3**. Use the "**Add**" (or "**Remove**") buttons to set the project's users.




**A**: *The list of users who are already part of the project*
**B**: *The list of users in the selected company who are not part of the selected project*
**C**: *The list of users in other companies you administrate who are not part of the selected project.*

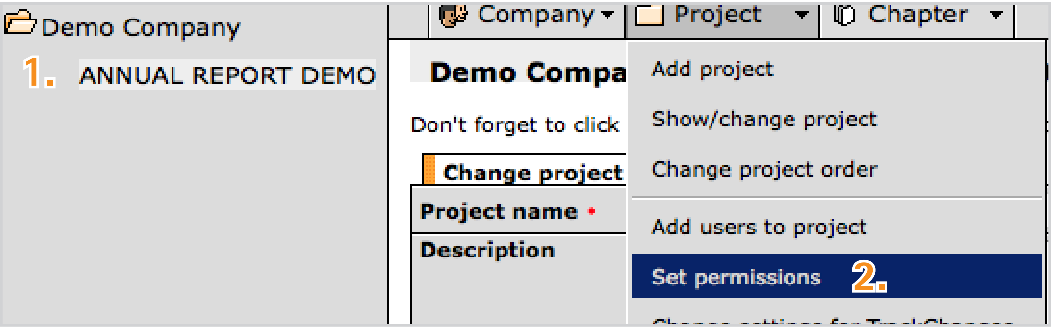
> Note that you can only add users from companies which you administrate. If there are users you cannot see listed you should contact your project manager, another administrator or CtrlPrint.

# 5. Set user permissions

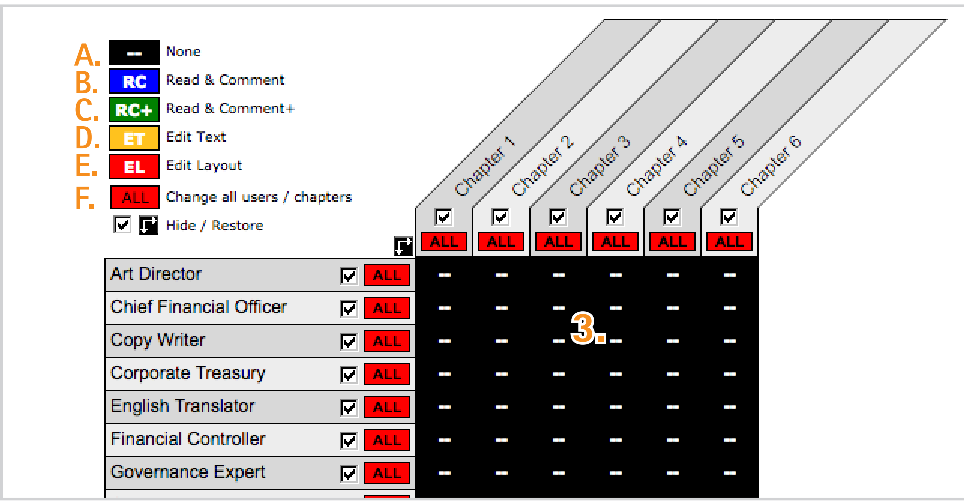
Once you have added users to your project you will need to assign their permissions which will determine if they have access to a chapter and in which application it should be opened.

**1**. Select the project name from the list on the left side of the window.

**2**. Click on the "**Project**" menu and choose "**Set permissions**".




**3**. Initially the grid where you set permissions will be black indicating that no user permissions have been set. Click on a square, or use the "**ALL**" button, to change access based on the options below:




**A.** *None: The user is part of the project but has not access to the chapter.*
**B.** *Read and comment: The document can only be opened as a PDF.*
**C.** *Read and comment+: The document can be opened as a PDF and in InCopy as read-only.*
**D.** *Edit Text: The document can be opened in InCopy for editing texts.*
**E.** *Edit Layout: The document can be opened in InDesign for typesetting.*
**F.** *ALL: Clicking here allows you to set entire rows (users) or columns (chapters).*

**4**. If your project contains a large number of chapters or users you can hide rows and columns by clicking on the check box. *Note that this will not remove the user or delete the chapter.*

**5.** To display any rows or columns that are hidden click here on the icon that looks like this:

- -- None
- RC Read & Comment
- RC+ Read & Comment+
- ET Edit Text
- EL Edit Layout
- ALL Change all users / chapters
- Hide / Restore

| | Cover | VD Letter-Strategy-About | Business Areas | Accounts | Accounts 2 | Corporate Governance | Sustainability |
|---|---|---|---|---|---|---|---|
| | ALL | ALL | ALL | ALL | ALL | ALL | ALL |
| Art Director ALL | EL | EL | EL | EL | EL | EL | EL |
| Chief Financial Officer ALL | RC | RC | RC | RC | RC | RC | RC |
| Copy Writer ALL | -- | ET | ET | RC | RC | RC | ET |
| Corporate Treasury ALL | RC | RC | RC | ET | ET | ET | RC |
| English Translator ALL | ET | RC | ET | ET | RC | ET | RC |
| Financial Controller ALL | ET | ET | ET | ET | ET | ET | ET |
| Governance Expert ALL | -- | -- | -- | -- | -- | ET | -- |
| Group Accounting ALL | ET | ET | ET | ET | ET | ET | ET |
| Investor Relations ALL | EL | EL | EL | EL | EL | EL | EL |
| Text Editor ALL | ET | ET | ET | ET | ET | ET | ET |

*A typical setup for user permissions.*

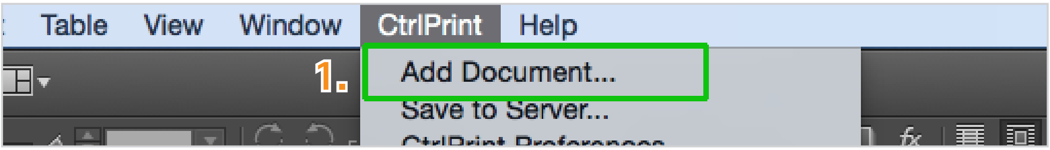
Note that it is important that users are given correct permissions based on which application they are using. If a user has **InCopy** then they must have “**ET**” (Edit Text) permissions and **InDesign** users must have “**EL**” (Edit Layout) permissions. An **InCopy** user with “**EL**” (Edit Layout) permissions will receive an error and will be unable to open the document.

IMPORTANT: If you have not downloaded a document from the system previously you will need to install our plug-ins. To do this, close InDesign and then follow the instructions here. (You will also need to install “CtrlPrint Transfer Manager” before installing the plug-ins. It can be downloaded on the page found here.)

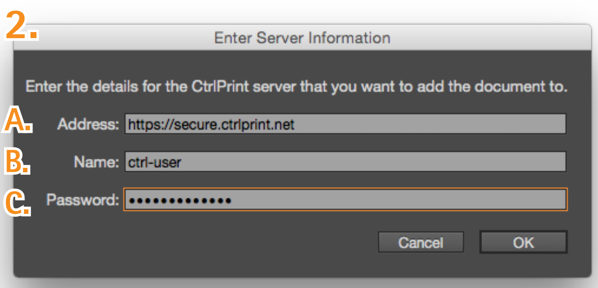
# 6. Upload your InDesign documents

After you have set user permissions - including your own - you can upload your documents from InDesign to the server.

**1.** Open one of the files you want to upload to the server in InDesign and from beneath the “**CtrlPrint**” menu select “**Add Document**”.




**2.** In the dialogue box that appears fill in the necessary fields and click “**OK**”.



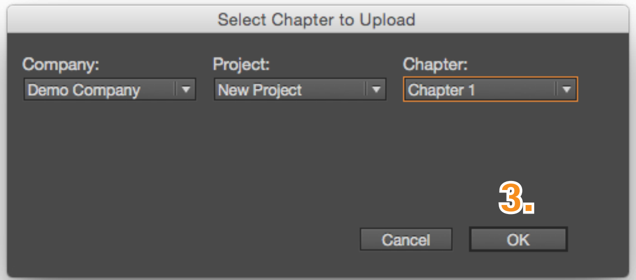

These fields are as follows:

**A. *Address:*** *This is the address you use when you log in to CtrlPrint in your web browser. Note that you must include the whole address, including https://. The address should end in “.net”*

**B. *Name:*** *This is the username you use with CtrlPrint when logging in normally in your web browser.*

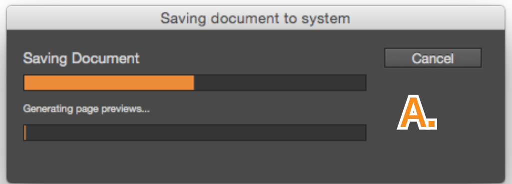
**C. *Password:*** *This is the password you use with CtrlPrint when logging in normally in your web browser. This is your user password and not your administrator’s password.*

**3.** After filling out your credentials you will be asked which company, project and chapter you would like to upload it to. Select that chapter and click “**OK**”.

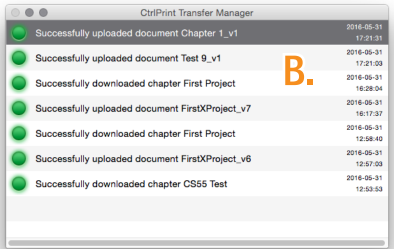



If there are no chapters available or you do not see the project or chapter you are looking for make sure that you have added yourself to the project and that your permissions have been set.

**4.** The document will now be:

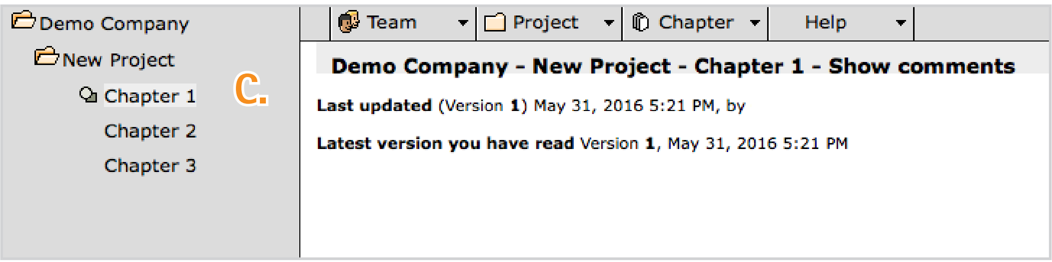



**A**. Saved locally with all of the necessary files for InCopy.




**B**. Uploaded to the server by Transfer Manager.

**C**. Available as “Version 1” on the server for users to access.



# 7. Additional settings and testing

**TrackChanges**
If you need TrackChanges activated (more information about this feature can be found here on our support site) please contact CtrlPrint support.

**Export for Word**
If you need Export for Word activated (more information about this feature can be found here on our support site) please contact CtrlPrint support.

**Additional PDF presets**
CtrlPrint uses a standard PDF with a resolution of 100dpi, if you want to add additional PDF presets (such as high resolution, spreads or with timestamps) you can do so as an administrator. (Note that a “clean” PDF preset is automatically added when TrackChanges is activated.) Information about how to add PDF presets can be found here.

**Setting permissions for TrackChanges (who can accept changes)**
For users to be able to accept (or reject) changes they will need to have this ability “enabled” in the system. As an administrator you can do this by following the steps found here.

**Fonts and testing**
It is important that all users have the correct fonts installed when working on a project. This ensures that the PDFs they create, as well as the typesetting, is correct. Missing fonts can cause overmatter and changes to design elements. It is recommended to have users check – by downloading a document – and make sure that all of the fonts are installed before working on the project. This will also ensure that all users have the correct versions of InDesign/InCopy as well as the other components used by the system.

For more help with administrating CtrlPrint please see the list of articles on our support site found on the page here.