

# Manifest Manager

Installation and User Guide

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*Manifest Manager (formerly PAM Workflow Assistant) User Guide v1.5*

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## Manifest Manager Installation Guide

Manifest Manager (MM) will run on any modern PC running Windows XT and above. Optionally the program can be configured to use and save data on a server.

You must have administrator rights to install the software.

Run the install file (Manifest Manager xxx.msi). *You may have a run as administrator option if you right click on the file.*

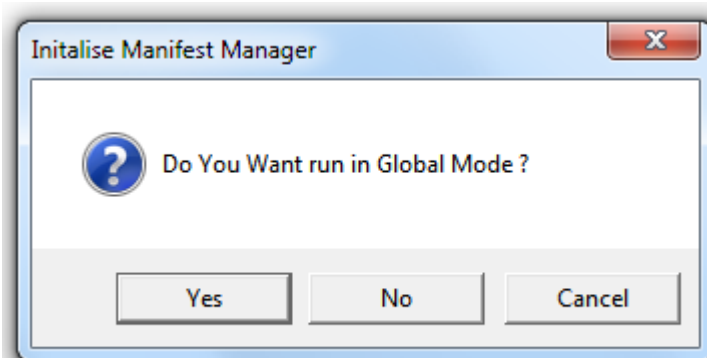
Accept all the default options and wait for the install to complete. If you don't get any errors during install then all should be OK.

When you run MM for the first time the following screens will appear.

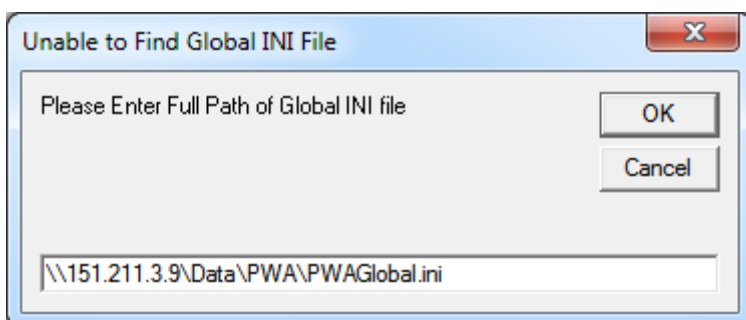
MM can run in two different modes.

The Global mode uses a single settings file and all the data is stored on a server. This allows all users to use the same settings file and the access the same data.

Local Mode runs locally on the user's PC. Data can still be stored on the server but the settings file is stored locally. Each mode requires a different licence.



The modes can be changed if required from a menu item within PWA. This option however can be turned off if needed.



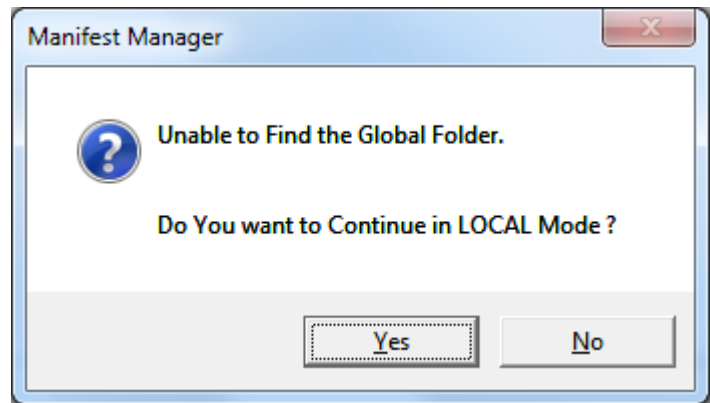
The first screen you will see is shown above. If you answer 'No' then Local Mode will be selected.

If you answer 'Yes' then MM will look for the Global ini file. If the ini file exists then then all is complete and the main screen will be shown.

If it can't find the file then you are asked to input the location.

If the path exists then the file structure the program requires and the INI file is created.

If the folder you input is not found then you have the option to continue in 'Local' mode



Because this is the first install then a license code is required to register PWA.

This is the Global License screen. Once you have entered the license all subsequent Global installs of MM will not need to be registered.



The Local Registration screen.

If the registration is successful then you will be asked to restart MM.

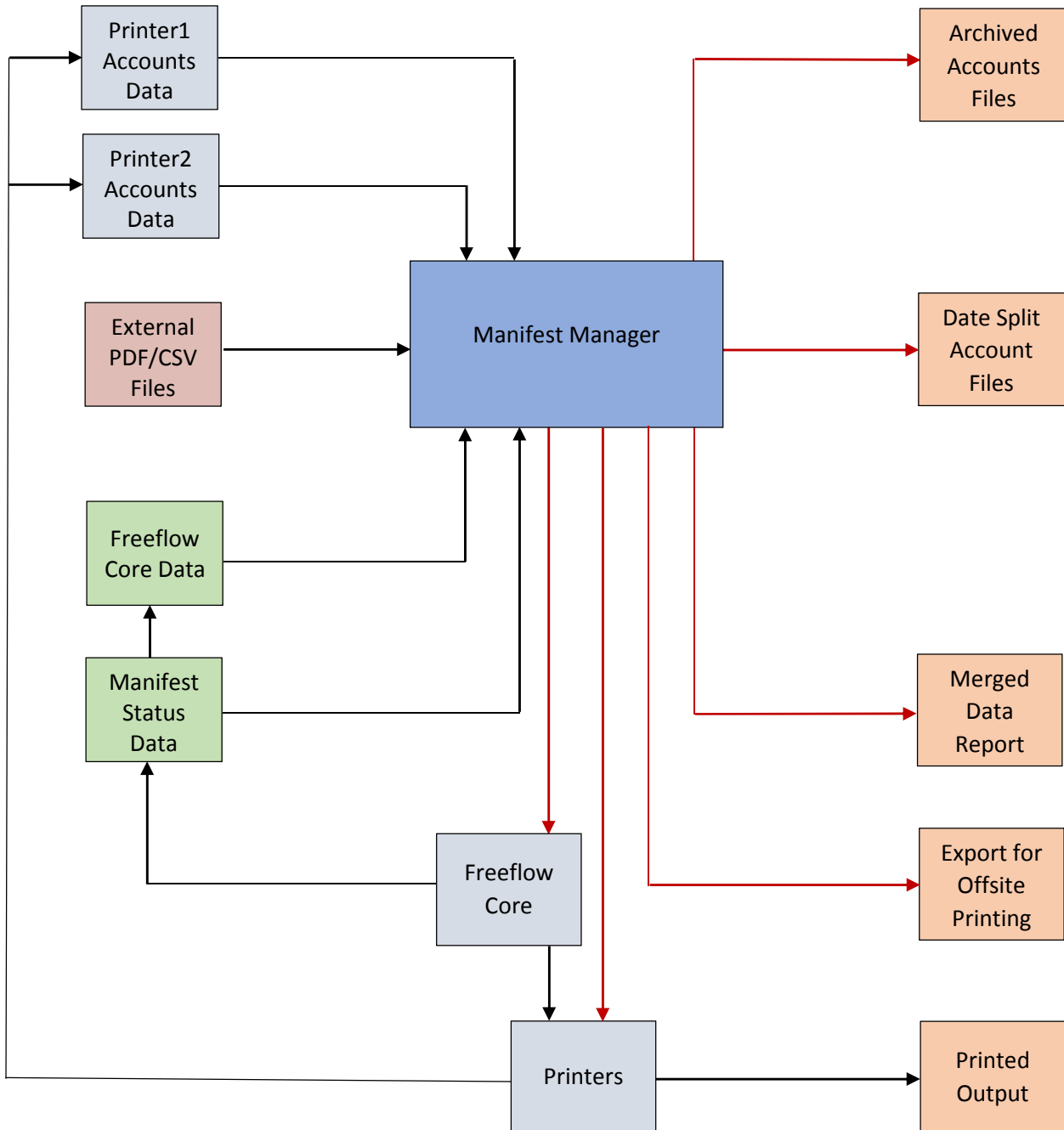


## Program Operation:

When Manifest Manager is fully configured it can carry out the following workflow/operations.

- Moves customer print and manifest files to the Freeflow Core server for processing by a Core Workflow.
- Large manifest files can be split into smaller files by a flag in the data. E.G. into specific Clinics
- Generates a report in 'Excel' showing the success or failure of Print job at various stages in the workflow.
  - Reads the manifest status file that Core produces on entry of CSV file to extract information/fault code if any
  - Reads information at the end of the Core workflow
  - Reads accounting information from the printer to confirm successful printing of the PDF
- Collects accounting information from Xerox printers which can be filtered and saved into 'Date Split' csv files depending on the date printed. The accounts data is also used to show that required documents have been printed.
- Multiple workflows can be set up can changed from the main screen
- Files saved to a 'Manual Input' folder can be printed through Core or direct to the Printer.
- Files can be joined and sent to prevent files going out of print order.
- Reprints can be ordered of previous sent documents
- MM can run either in Local or Global mode. In Global mode the data is stored on a server and multiple copies of the program can be installed on customers PC's.
- MM can also run as a Windows Service
- Export option to save PDF files with or without a job Ticket so they can be printed offsite.
- Data Search option to find information from all Logs and collected information.

## Operational Diagram:





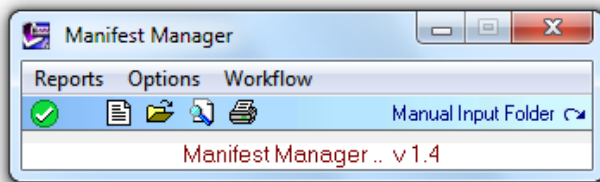
## Manifest Manager User Guide



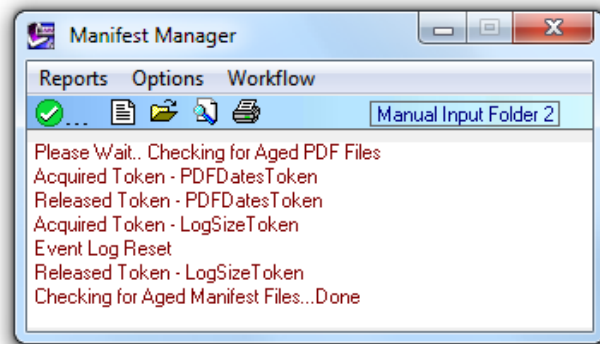
Manifest Manager (MM), compares print request data, with files processed by Xerox Freeflow Core, and printed output from Xerox Printers. It produces a report that shows success or failure of all print requests. There are options to send documents to different workflows and for reprinting. If you not using the Global Settings option then when the program is run for the first time it will ask for a registration code. This needs to be entered to proceed. The code is available by emailing the program code displayed to:

[PamHelpline@gmail.com](mailto:PamHelpline@gmail.com)

One of the two screens here can be displayed



The program will now need configuring if it is not using the Global settings file. This is done from the Program Settings screen. This can be accessed by selecting the Options/Settings menu item.



The icon on the far left shows the program status.

The other Icons are shortcuts to:

*Create Report, Open Report*

*Get External Files and Reprint Documents.*

It is also possible to change the workflow by clicking on the workflow name. The arrow on the right shows that cycle workflows is selected.

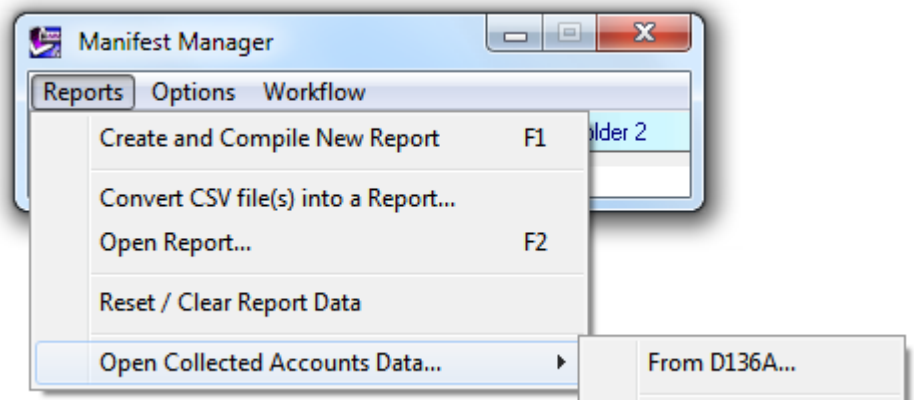
There are three menus on the main screen. **Reports, Options and Workflow**

### The Reports Menu:

*Create/Compile Report.* This will compile a new report and save it in the reports folder.  
*Convert CSV file(s).* This will open and compile the saved data (CSV) files into a new report. (If using Excel, More than one report can be selected and each is shown on a different sheet in Excel.)

*Open Report* will open an already created and compiled report.

*Open Collected Accounts Data.* If enabled this will open the printer accounts data that was processed and saved in date split files. There is a sub menu for each printer connected.



## The Options Menu:

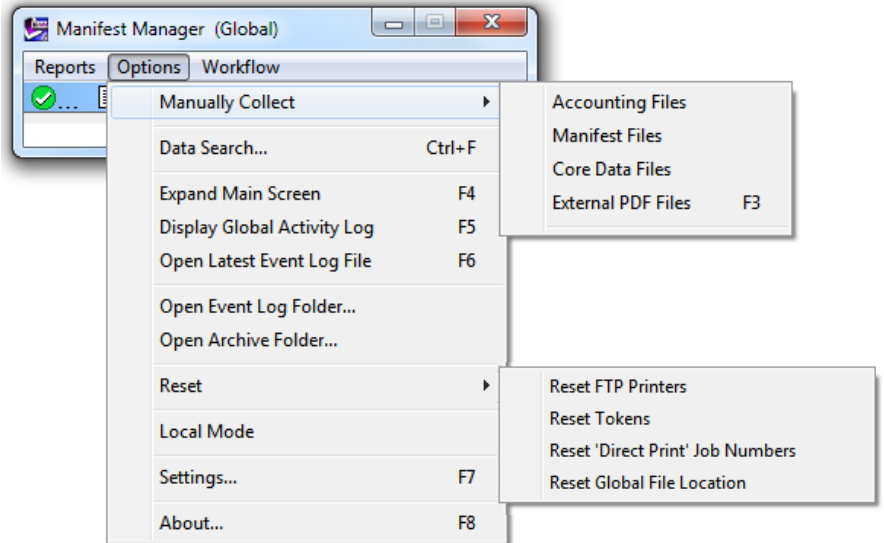
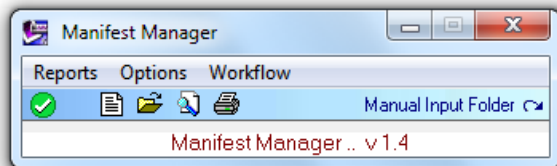
This menu has options to manually collect data for processing.

You can also access the Program Log and Archive folders.

If you have turned off collection of data from a printer by FTP (because it was not connected to the network) then this is where it can be turned back on.

*Display Latest Log File* Opens the latest log file in 'Notepad'. The older Log files reside in the Logs folder.

*Display Global Activity Log* will only be visible when in Global mode. This log will show activity from all running copies of MM. It takes a few seconds to update. This setting is in the Misc Settings section of the settings form.



On Start up the main screen opposite is displayed without the scrolling information text. Main program operations are shown on a single line. *Expand Main Screen* will show scrolling event log information.

If the program is installed on multiple PC's, Tokens can be used to stop different PC's carrying out the same tasks. There are various tokens and are issued when needed for each operation. When the task has finished the token is released. If there is a problem with token release they can be reset from here.

There is another option to use a 'Global Settings File'. This would normally reside on a server that all PC's have access to. This makes it easy to license and change settings for all copies of the program at once. If you are not using global settings then it is possible to enter the registration code here. You can swop between Local and Global mode. MM will need restarting after changing.

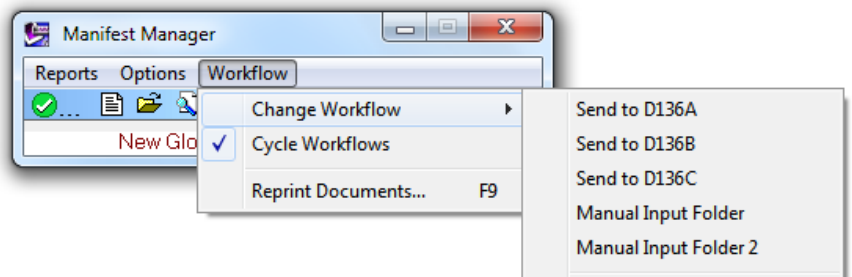
## The Workflow Menu:

This can be hidden in the settings if you don't want it to be seen.

Here you can select the workflow to send the manifest files to. In this example each workflow is for a different printer so you can load balance the printing.

*Cycle Workflows* will make the program use each workflow in turn. The workflows can be bypassed (Settings : Workflow) but at least one must be enabled

Reprint Documents allows you to reprint all or individual documents from a manifest file. More details on this are shown later in this guide.



## Settings Screens:

### General Settings:

If you are using 'Global' mode then all the folders should reside on a Server, where they can be accessed by all clients.

A new Event log is created every day. They can be removed after number the days set here.

The Reprint option can be enabled and what is listed can be configured. A blank entry will show all the fields. An entry of 0 will just show the Document name. Shown here the Doc Name and field 4 will be displayed.

The *Refresh Global Activity Log* setting controls how often the log reads the Event log to update the listing.

The file check time is the time taken to make sure a file has finished being written to.

The timing setting for *Aged Files* is for the programs internal maintenance and should not need to be altered.

### Printer Data:

These settings are for the collection of Printed Accounts information.

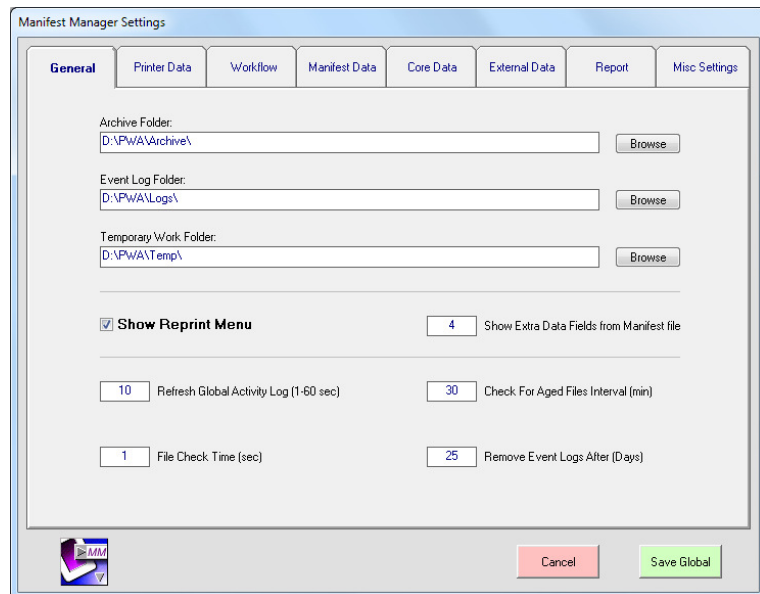
They are in three sections.

#### 1- Printer Accounts Data:

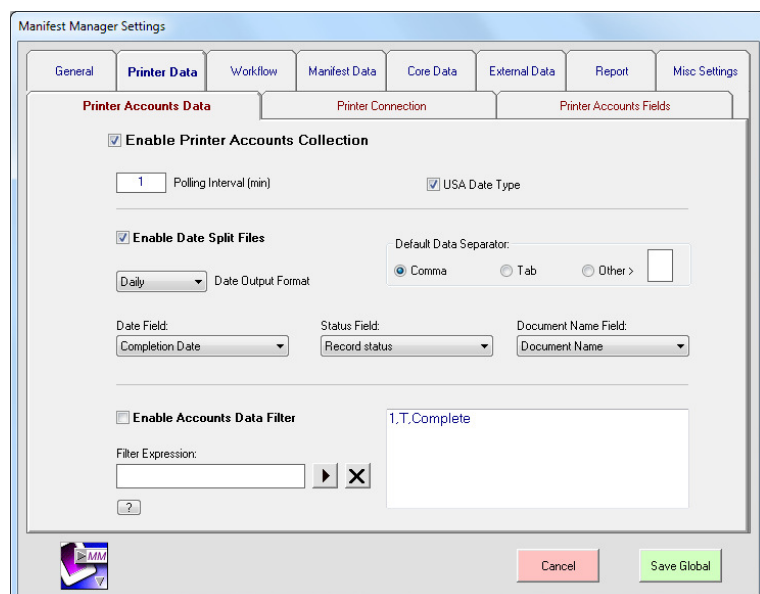
Most account files have USA style date mm-dd-yyyy.

Enabling the 'Date Split' option will create separate csv files in the selected date range based on when the documents were printed. These can be used to display usage information for each printer

The filter expressions are explained later in this document.



The screenshot shows the 'Manifest Manager Settings' dialog box with the 'General' tab selected. The 'Archive Folder' is set to 'D:\PW\Archive\' with a 'Browse' button. The 'Event Log Folder' is set to 'D:\PW\Logs\' with a 'Browse' button. The 'Temporary Work Folder' is set to 'D:\PW\Temp\' with a 'Browse' button. There are several checkboxes and numeric input fields: 'Show Reprint Menu' is checked with a value of 4; 'Refresh Global Activity Log (1-60 sec)' is set to 10; 'File Check Time (sec)' is set to 1; 'Show Extra Data Fields from Manifest file' is checked with a value of 4; 'Check For Aged Files Interval (min)' is set to 30; and 'Remove Event Logs After (Days)' is set to 25. At the bottom, there are 'Cancel' and 'Save Global' buttons.



The screenshot shows the 'Manifest Manager Settings' dialog box with the 'Printer Data' tab selected. The 'Printer Accounts Data' section has 'Enable Printer Accounts Collection' checked with a 'Polling Interval (min)' of 1 and 'USA Date Type' checked. The 'Enable Date Split Files' section has 'Daily' selected for 'Date Output Format', 'Completion Date' for 'Date Field', 'Record status' for 'Status Field', and 'Document Name' for 'Document Name Field'. The 'Default Data Separator' is set to 'Comma'. The 'Enable Accounts Data Filter' section has a filter expression of '1,T,Complete' in the text box. At the bottom, there are 'Cancel' and 'Save Global' buttons.

## 2- Printer Connection:

Changing the name of a printer and selecting 'Add/Save' will add the printer as a new printer. Any other setting will change the existing setup.

Remember to put forward slashes in the 'Remote Folder' name if using FTP.

The example opposite (A\*) will collect all files in that folder beginning with 'A'.

'Test Connection' will check that the printer and the folder exists.

The screenshot shows the 'Manifest Manager Settings' dialog box with the 'Printer Connection' tab selected. The 'Printer' dropdown is set to 'D136A'. Below it, there are fields for 'Accounts Input Folder' (C:\Users\Clive\Desktop\Accounts\), 'Date Split Folder' (C:\Users\Clive\Desktop\Months\), 'Printer Name' (D136A), 'IP Address' (192.192.192.192), 'Logon Name' (test), 'Password' (masked), 'Remote Filename' (A\*), and 'Remote Folder' (\test). A 'Test Connection' button is present. At the bottom, there are 'Cancel' and 'Save Global' buttons. A status bar at the bottom left shows the MM logo.

## 3- Printer Accounts Fields:

'Record status', 'Document Name' and 'Completion Date'\*\* are compulsory fields that can't be deleted.

All fields selected here will appear in the 'Date Split' account files.

The 'Extra Report Fields' are printer data that you want to appear in the report. Enter the field number. More than one field number must be separated by a comma (e.g. 4,5,6). The example here shows that 'Total Impressions Printed' will be included in the report.

The screenshot shows the 'Manifest Manager Settings' dialog box with the 'Printer Accounts Fields' tab selected. It features a list of fields on the left, including Job ID, Container ID, Report ID, Host Job Number, Record status, Document Name, Document Date, Sender Name, Recipient, Account, Disposition, Job Status, Report Completion Information, Interrupt Status, Print Server Name, Virtual Printer, Machine Type, Job Source, Channel Idle Time (milliseconds), Job Submission Date, Input File Size (bytes), Job Format, Start RIP Time, and Stop RIP Time. On the right, a list of selected fields is shown: Record status, Document Name, Completion Date, Total Impressions Printed, and Print Server Name. At the bottom, there is a field for 'Accounts Extra Report Fields (e.g. 4,5)' with the value '4,5'. 'Cancel' and 'Save Global' buttons are at the bottom right. The MM logo is in the bottom left status bar.

\*\*May be 'Print Completion Date' in some older accounts files. If this is the case then edit the accounts fields in either the 'Global.ini' or 'c:\programdata\PWA file' if local user.

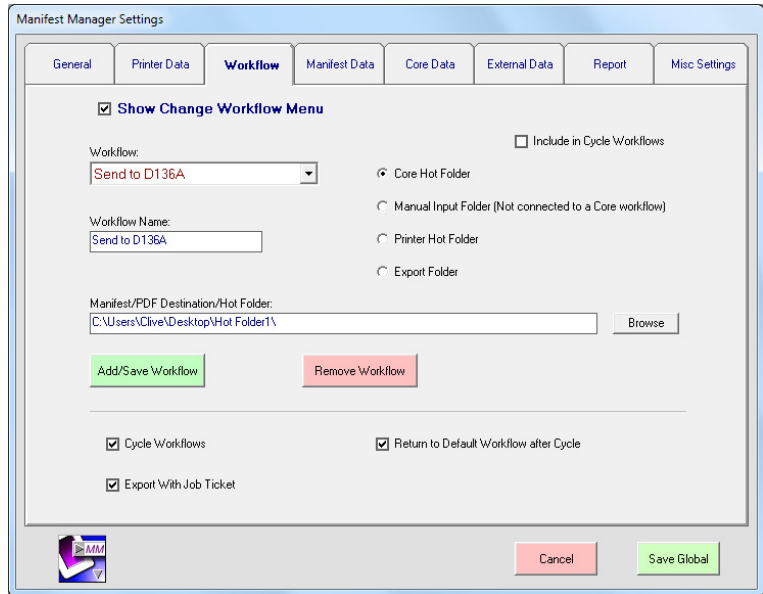
As with all the following if 'Collection' is enabled and the polling Interval is set to 0, then the data can still be collected manually from the 'Options' menu.

### Workflow:

This is where you can setup the hot folders for the manifest files. These workflows can then be selected on the main screen if the 'Show Workflows' option is ticked. These can connect to a Core Hot Folder or even a Printer Hot Folder or an Export Folder for printing offsite.

If you don't want the manifest files to go straight into a workflow then they can be moved into a 'Manual Input Folder', where they can be printed using the 'Reprint' menu option. Make your own folder for the workflow and tick the 'Manual' option box.

The Workflows can be set to cycle (change with each manifest file) and can included or excluded from being cycled. They can be set to return to the default when all manifest files are processed. One workflow must be set to be included in the cycle. If only one workflow is selected and Cycle workflow is set to on then that workflow will always be used regardless of the current selection.



### Manifest Data:

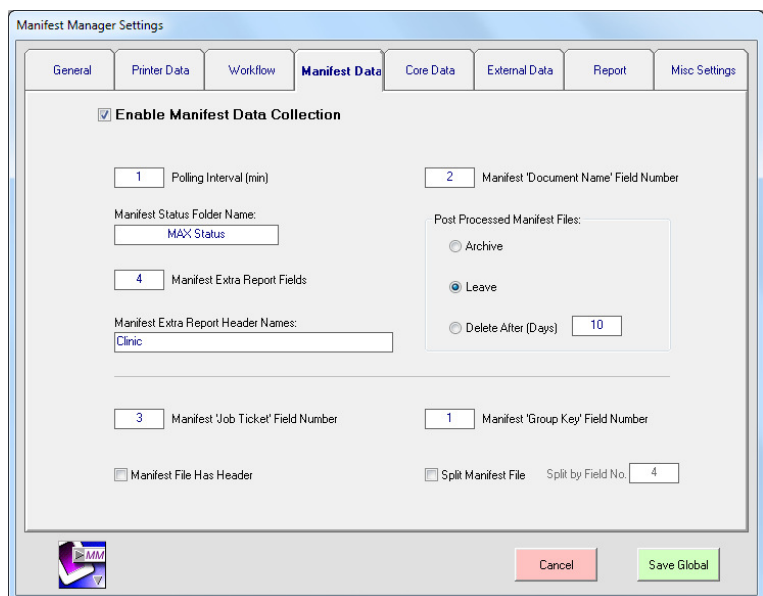
MM will look for all the processed manifest files from all configured workflows.

The 'Post' option is performed after MM has collected the information from the file.

The 'Archive' option will move the file into the predefined archive folder.

Data fields from the manifest file can be added to the report. There must be a header entry for each field, separate with commas.

*E.G. if you want fields 4 & 6 included.  
Extra report fields = 4,6 Header  
Names = Clinic,Sender*



The 'Manifest Status Folder' is the name of the folder within the workflow hot folder that Freeflow Core puts the processed manifest file. This is the standard naming convention for this folder so this setting will only have to be changed if this is renamed in a future version.

The Job Ticket field is used by MM when sending the PDF straight to the Printer, bypassing Core. The data in this field should have the same name as one of the '.jt' files in the Job Ticket Folder. If not a Default ticket is applied.

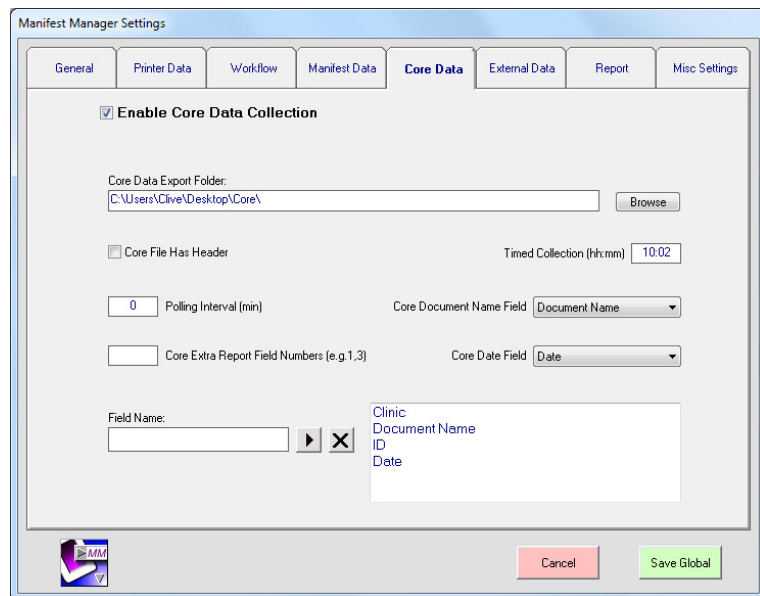
If Core uses a 'Group' key to collect PDF's then this field is used by MM when sending joined manifest files from the reprint screen.

If your manifest files are big they can be split into smaller ones by a setting in the manifest data file.

### Core Data:

As shown here, if the polling interval is set to 0, manual collection is possible, also MM will look for and collect data from Core when the report is generated. This is a better option as it prevents trying to read a file when it is open in Core. Because this file can be big, processing may take some time. If this is the case then it can be set to collect at a specific time.

To include data in the report from this file enter the field numbers in the Extra Fields box. Multiple field numbers must be separated by a comma (e.g. 1,4)



### External Data:

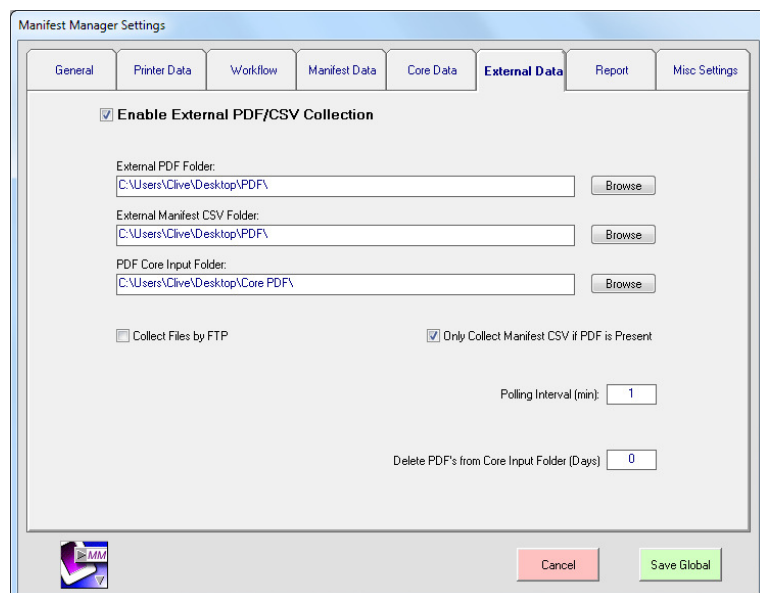
The PDF files are collected first and moved to the input folder for Core. The Manifest CSV files are then moved to the Core workflow Hot Folder for the selected workflow for processing by Core.

Core will start processing the CSV file as soon as it arrives in the Hot Folder, and the process will fail if it can't find the PDF document.

The source folders can be polled at regular intervals and/or can be searched at a set time.

The PDF files can be removed from the Core server after the days configured or if this setting is 0 they will be kept.

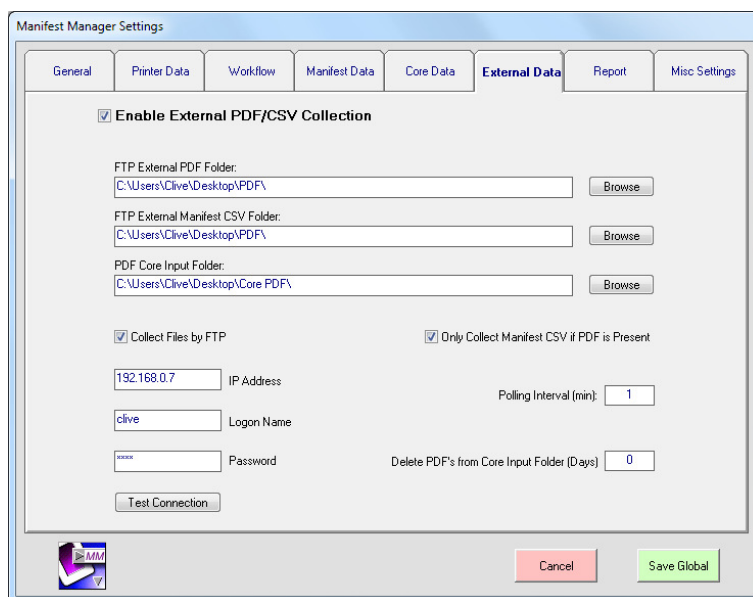
The 'Only collect CSV if PDF is present' option makes sure that the PDF files are moved before the Manifest CSV files.



### External Data by FTP:

The external files can also be collected from an FTP Server by using the FTP protocol. When 'Collect by FTP' is selected an additional box will appear in the bottom left of the form.

Here the I/P address and login details can be added. The External folders now become the folders on the FTP server. The connection can be tested using the 'Test Connection' button.

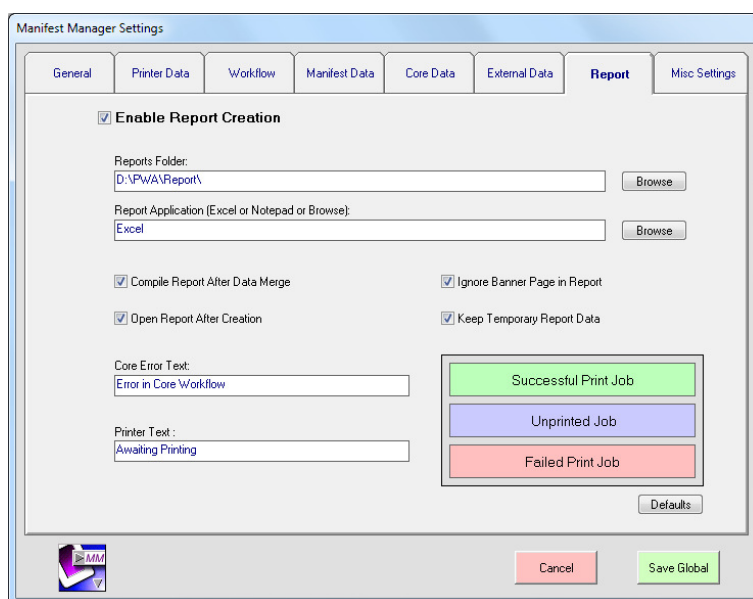


The screenshot shows the 'Manifest Manager Settings' dialog box with the 'External Data' tab selected. The 'Enable External PDF/CSV Collection' checkbox is checked. Below it, there are three text boxes for folder paths, each with a 'Browse' button: 'FTP External PDF Folder' (C:\Users\Clive\Desktop\PDF\), 'FTP External Manifest CSV Folder' (C:\Users\Clive\Desktop\PDF\), and 'PDF Core Input Folder' (C:\Users\Clive\Desktop\Core PDF\). There are two checked checkboxes: 'Collect Files by FTP' and 'Only Collect Manifest CSV if PDF is Present'. Below these are fields for 'IP Address' (192.168.0.7), 'Logon Name' (clive), and 'Password' (masked with asterisks). A 'Polling Interval (min):' field is set to 1, and a 'Delete PDF's from Core Input Folder (Days)' field is set to 0. A 'Test Connection' button is at the bottom left. At the bottom right are 'Cancel' and 'Save Global' buttons.

### Report:

The reports are saved in the reports folder in a monthly sub folder. They are initially in CSV format.

When the reports are compiled they are converted into excel files. This can be done automatically or not depending on the selected option. The folder will now contain both the CSV file and the Excel file. Jobs that have not gone through the workflow and have failed for any reason are reported and also stored in an 'error.csv' file. This can also be converted into an Excel report.



The screenshot shows the 'Manifest Manager Settings' dialog box with the 'Report' tab selected. The 'Enable Report Creation' checkbox is checked. Below it are two text boxes for folder paths, each with a 'Browse' button: 'Reports Folder' (D:\PWA\Report\) and 'Report Application (Excel or Notepad or Browse):' (Excel). There are four checked checkboxes: 'Compile Report After Data Merge', 'Open Report After Creation', 'Ignore Banner Page in Report', and 'Keep Temporary Report Data'. Below these are two text boxes for error messages: 'Core Error Text' (Error in Core Workflow) and 'Printer Text' (Awaiting Printing). On the right side, there are three colored boxes: a green box labeled 'Successful Print Job', a blue box labeled 'Unprinted Job', and a red box labeled 'Failed Print Job'. A 'Defaults' button is at the bottom right of this section. At the bottom of the dialog are 'Cancel' and 'Save Global' buttons.

The banner page can be taken out the report by selecting the 'Ignore' option. *For this to work the banner page name must end 'Banner.pdf'*. The normal operation of MM is to create the report and delete the temporary data for that report so it cannot be duplicated. If the 'Keep Temporary Report Data' option is selected then the data is keep and can be added to, so all future reports made will include previous data. This is helpful if at the end of the day you are still waiting for the final documents to print. If this is selected then the data has to be cleared at the end of day by using the menu option in the Reports menu.

Clicking on the Boxes at the bottom right or the text in the boxes, allows you to change the colours of both the text and the cells in the Excel Report. The defaults button will return the colours to the ones show here.

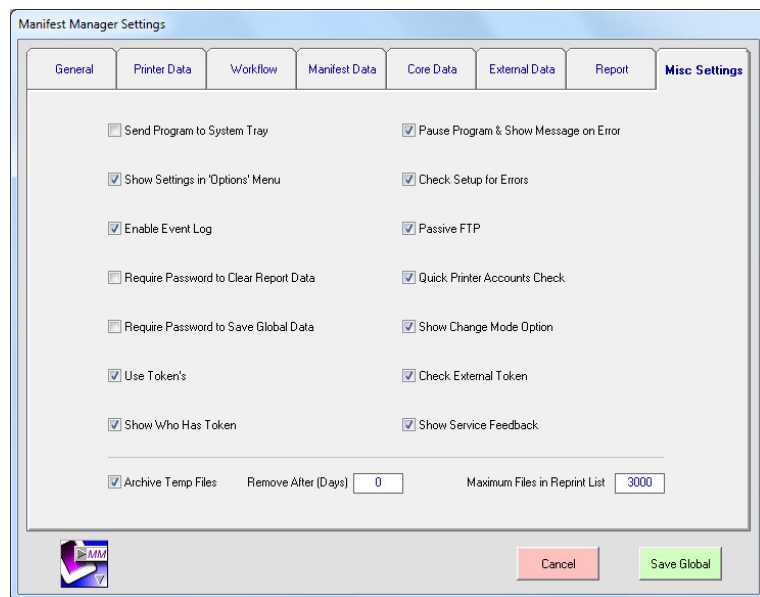
### Misc Settings:

The system Tray is the area normally at the bottom right of the Windows toolbar. MM can be forced to run from here.

If the 'Pause Program' option is not selected then any errors will only be show in the Log window & Log File and the program will keep running.

For security the Settings and Change Mode selections can be removed from the Options Menu.

The *password* settings if selected will require the administrator password to Clear Report data and save Global settings.



Passive FTP is the default for FTP operations.

The '*Quick Printer Accounts*' check only needs to be unselected if problems are encountered with the accounts file. When selected the accounts file check is considerably faster on big files.

With the '*Check for Tokens*' setting selected, Manifest Manager can be installed on multiple PC's. The tokens are issued to each copy of the program when needed so only one copy can carry out a task at once. When the task has finished the token is returned.

The '*Show Who Has Token*' setting displays information on the screen and in the Program Log on who has each token and when it is released.

The '*Check External Token*' check will force MM to look to see if the 'External Token' (Token for collection of External PDF files) is in use or is redundant. It will release if necessary.

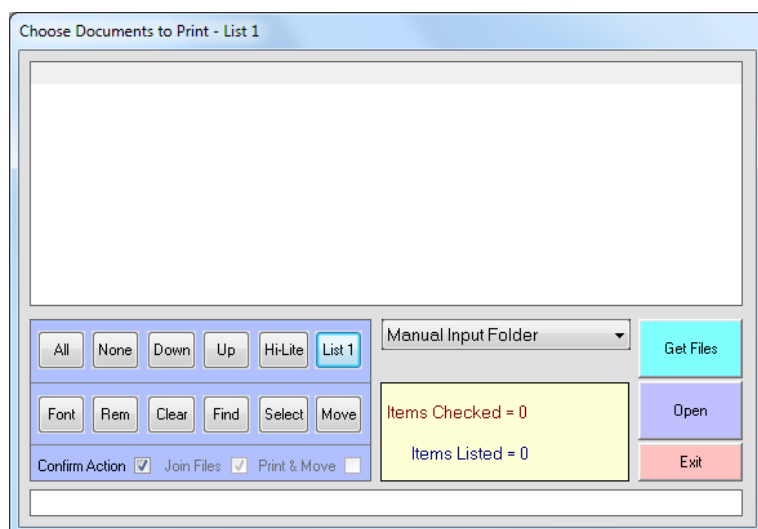
'*Show Service Feedback*' shows more log info when MM is run as a service. Normally unselected.

The '*Archive Temp file*' option is for diagnostic purposes.

'*Maximum Reprint List Files*' is for memory management. Can be anything from 100 – 99999. The most efficient setting would be just more than your largest file list.

## Reprint Documents:

This screen is displayed when you select the option from the Workflow menu. The list is blank and there are two option buttons that you can select.

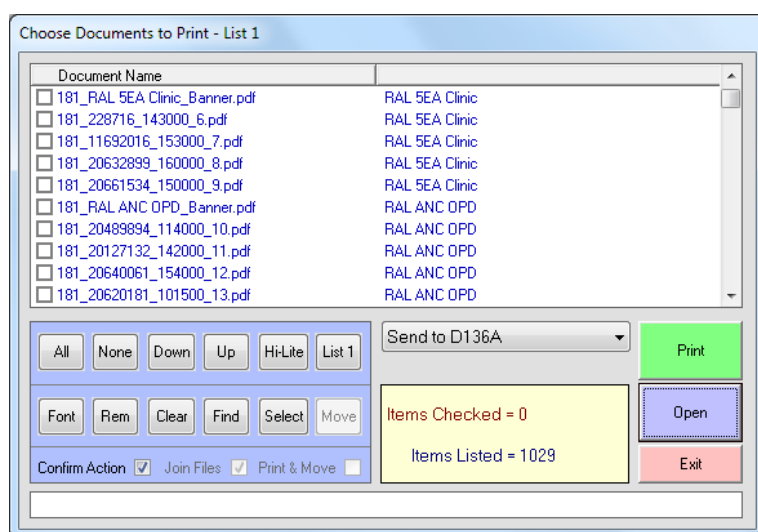


The 'Get Files' button will let you select either PDF or print ready files to print to the selected workflow. Or if it is a 'Manual Input Folder' CSV files.

The 'Open' button will open a CSV file and display the contents in the list.

If you have selected to 'Archive' the manifest files then the top archive folder will be shown. From here you will have to select the Month folder the files were processed and then the MAX folder to see the CSV files.

MM will display the selected manifest file in the list window as shown below. What parts of the manifest records you see is dependent on the setting in the report tab of the 'Settings' screen. The screen below is showing a second list of data as well as the 'Document Name'



The Grey buttons on the left allow you to select all or none of the records. You can also select individual records or select all records up or down from the highlighted record.

You can also select records in the usual windows way by using the 'Ctrl' or 'Shift' keys and clicking on a record with the mouse button. These records can then be 'ticked' by clicking on the 'Highlighted' button.

When selecting from 'Down', 'Up' or 'Highlighted' the selections are inverted. This means that if the document is ticked it will be un-ticked and if it is un-ticked it will be ticked.

Clicking on the 'Font' button will change the lists font size.

The 'Search' button will open a text input box so you can enter search text. If a document is highlighted then that is used as the default entry. Depending what mouse button you use changes the type of search.

*Left Mouse Button* = Search and highlight

*Right Mouse Button* = Find next and highlight

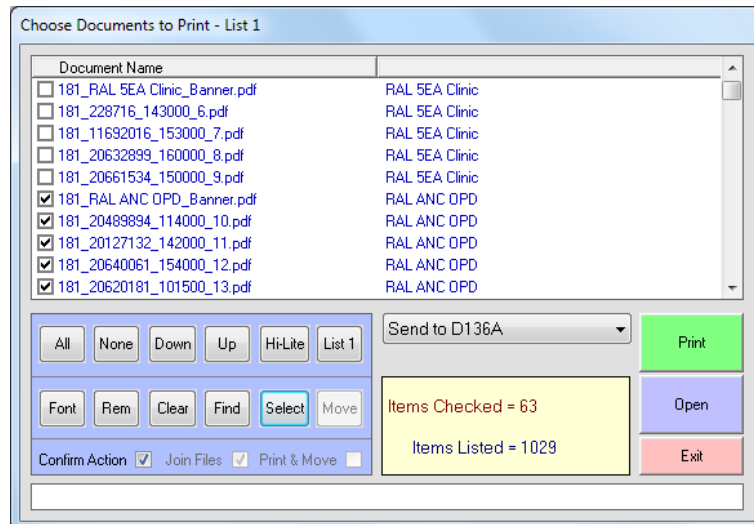
*Middle Mouse Button* = Find next and select

The 'Select' button will search and select all records in the list that match.

If there is a second column of data, like the example below, Highlighting a row and clicking with the Left Mouse Button will select all rows with that data.

Clicking with the Right Mouse Button will open a selection window with all the data from the highlighted row, as a default for you to edit.

All searches are not case dependent.

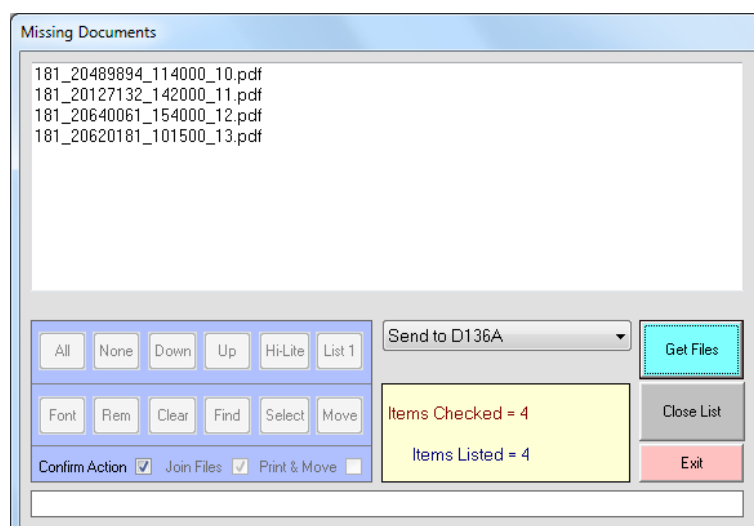


You can now select the workflow that you want to send the documents to and hit 'Print'

When you hit the 'Print' button, the selected files are checked to see if they exist in the print files folder. If all files are there the screen will close and the reprint request will be sent.

If any files are missing you will get a message asking if you want to continue with the reprint request.

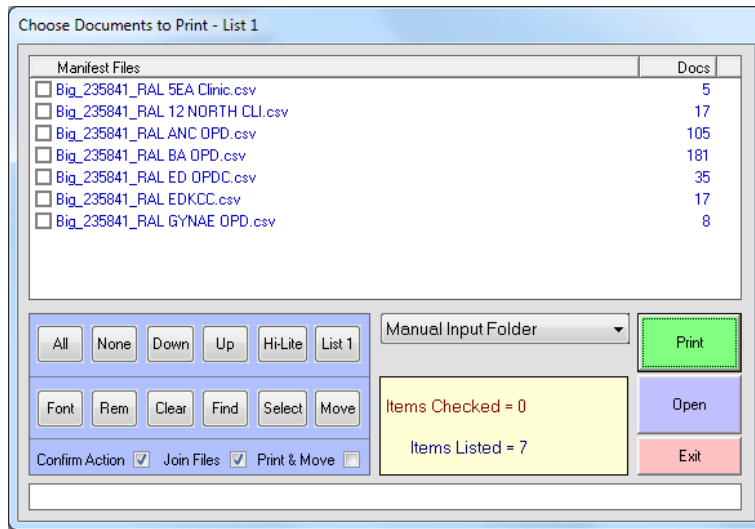
If you decline then the missing files are listed as shown below.



*It is possible to display an alternative list by selecting the 'List' button. This enables you list and print other documents without disturbing your current job list.*

The 'Open' button will allow you to choose and open any manifest file from either the normal Core workflow folders or any Manual Input Folders (Folders that aren't connected to a Core workflow but can be used to collect files to move into the Core workflows later.)

It is also possible to 'Print/Send' manifest or print ready files to a workflow without opening them. Use the 'Clear' option to clear the list and then click on 'Get Files' a browser window will open, allowing you to browse and select files. From these you can select the ones that you want to print by using the Shift or Ctrl / Click. Click on 'Open' in the browser window and the selected files will be displayed in the Main List. If the files are manifest files, the number of PDF files listed in each CSV file is displayed as shown in the screen below.



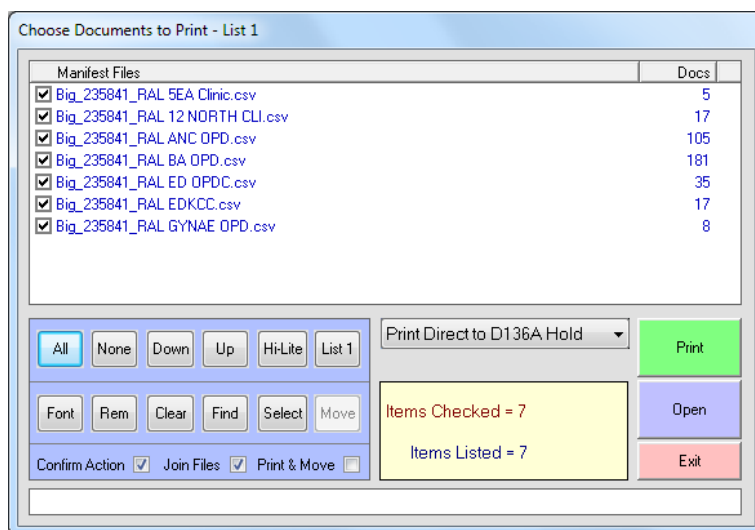
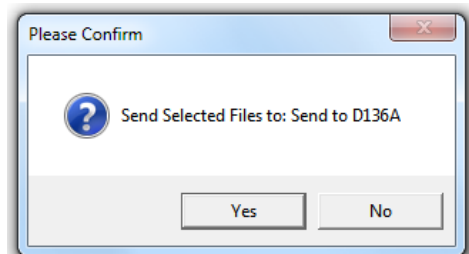
Select the files you want to print and select the workflow to send these to, and press Print. When the file has been sent it will disappear from the list so you know what is left to print. Multiple CSV files can be joined as one by selecting the 'Join Files' option

Double clicking on a file in any of the screens will display it.

If it is a PDF it will be displayed by your default PDF viewer. If it is a CSV file then it is displayed in 'Notepad'.

Selecting the 'Confirm Printing' option will open a message box asking you to confirm printing the selected files to the selected workflow.

'Move': This is only shown when a Manual Input folder is selected. This will move the files in the Manual Input Folder into a folder called 'Old Files' in the same location.



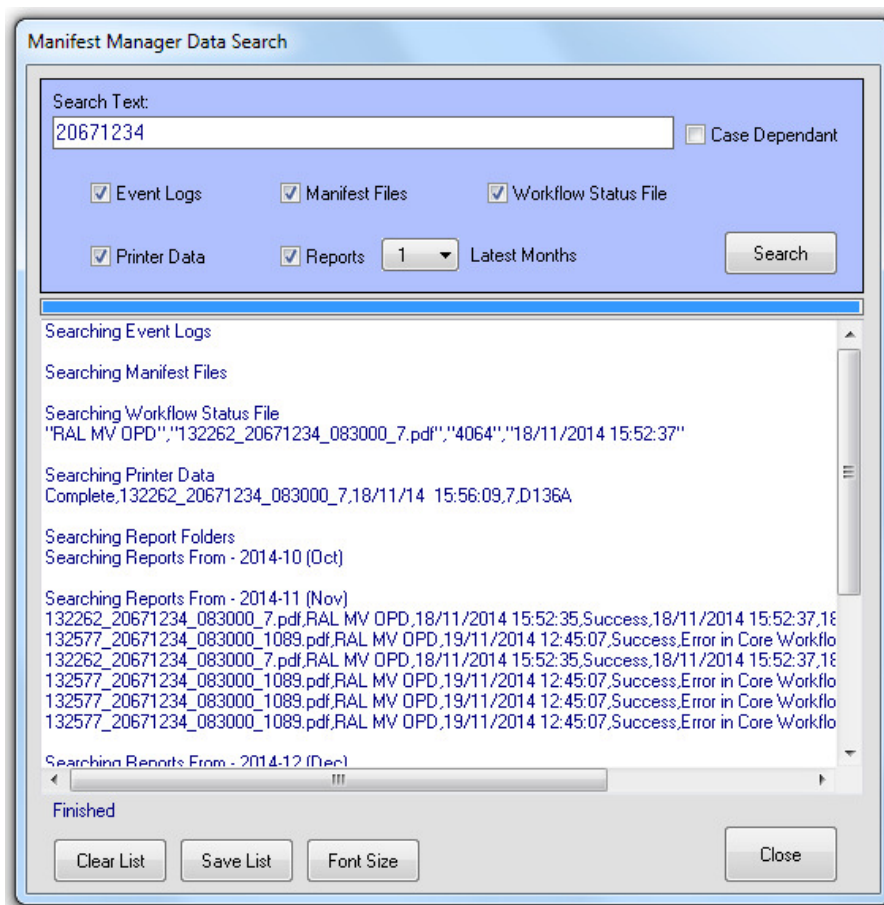
To send manifest files direct to the Printer Queue. Open a manifest CSV file and select the files. In the dropdown menu select the 'Print Direct' option and hit 'Print'.

A Job Ticket and an index number will be added to the file so they listed on the printer in the correct order. CSV files as shown in the above screen can also be sent direct to the Printer queue.

Please Note: The workflow that the files are printed to must be compatible with that type of file otherwise it will fault in Freeflow Core.

## Data Search:

From this screen you can quickly search files in various locations for specific text. For example, you may want to search to see if a particular document has been printed.



Enter the Search text and then select the file locations to search in. Some locations may not exist depending on the program settings.

All the *'Event Logs'* are searched. There is an event log created every day and the number of days is configured in the settings window.

The *'Log'* will contain information about all the files that have been found and processed by Manifest Manager.

The *'Manifest Files'* option will search the main data file which has information regarding success or failure in the Core workflow and may have information about print completion.

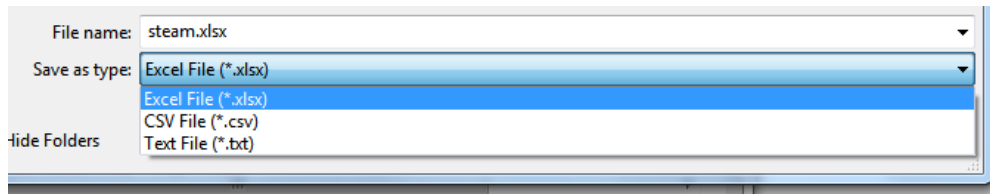
*'Workflow Status'* will contain information about the documents progress in the Core workflow

*'Printer Data'* will display the information from the printers that is configured in settings.

The *'Report's'* created by Manifest Manager are stored in monthly folders. You can configure the search to look in latest *'x'* monthly folders, where *'x'* is any number between 1 and 12 or ALL to search in all folders which will take a lot longer.

The buttons at the bottom allow you to *'Clear'* the list, *'Save'* the list and Select a different *font size*.

Click on the 'Save List' button and then select the 'Save as type' option to save as a different file type. Options are Excel, CSV or a TXT file



If saved as an Excel file the file will open and display based on the setting in the 'Reports' settings tab.

Saving as an Excel or CSV file will insert the correct header data for the 'Workflow Status, Printer Data and Report' search items.

	A	B	C	D	E	F	G	H	I
1	Workflow Status File								
2	>Clinic	Document Name	ID	Date					
3	"RAL MV OPD"	"132262_20671234_083000_7.pdf"	"4064"	"18/11/2014 15:52:37"					
4									
5	Printer Data								
6	>Record status	Document Name	Completion Date	Total Impressions Printed	Print Server Name				
7	Complete	132262_20671234_083000_7	18/11/14 15:56:09	7	D136A				
8									
9	Reports From - 2014-12 (Dec)								
10	>Document Name	Clinic	Submission Date	Submission Status	Processed by Core Workflow	Print Date	Print Status	Total Impressions Printed	Print Server Name
11	132262_20671234_083000_7.pdf	RAL MV OPD	18/11/2014 15:52:35	Success	18/11/2014 15:52:37	18/11/14 15:56:09	Complete	7	D136A
12	132577_20671234_083000_1089.pdf	RAL MV OPD	19/11/2014 12:45:07	Success	Error in Core Workflow				
13	132577_20671234_083000_1089.pdf	RAL MV OPD	19/11/2014 12:45:07	Success	Error in Core Workflow				
14									
15	Reports From - 2015-02 (Feb)								
16	>Document Name	Clinic	Submission Date	Submission Status	Processed by Core Workflow	Print Date	Print Status	Total Impressions Printed	Print Server Name
17	132262_20671234_083000_7.pdf	RAL MV OPD	18/11/2014 15:52:35	Success	18/11/2014 15:52:37	18/11/14 15:56:09	Complete	7	D136A
18	132577_20671234_083000_1089.pdf	RAL MV OPD	19/11/2014 12:45:07	Success	Error in Core Workflow				
19	132577_20671234_083000_1089.pdf	RAL MV OPD	19/11/2014 12:45:07	Success	Error in Core Workflow				
20									
21									
22									

## Job Tickets:

When Manifest Manager prints direct to the printer or when it is exporting files a Job Ticket is attached to the PDF file. (Optional with 'Export')

This tells the printer what stock to print each page on and finishing options etc.

Xerox type job tickets are included in the install, but any type of job ticket can be used as long as the following naming convention is used.

The type of job ticket used for each file should be contained in a field in the manifest file. An entry of '2' would append a job ticket called '2.jt'.

These job tickets are stored in a folder which is normally:

In Local Mode 'C:\ProgramData\PAM Workflow\Job Tickets'

In Global Mode the 'Job Tickets' folder is in the same location as the Global.INI file

If a job ticket file is not found with the required name then 'Default.jt' is used.

New Xerox style job tickets can be produced by using a Xerox print driver. Print a document to file with the required attributes. Edit the print file, deleting everything after: **</xpif>**

At the bottom of the job Ticket you should see the following lines. Change the text in Bold or just replace the lines with these.

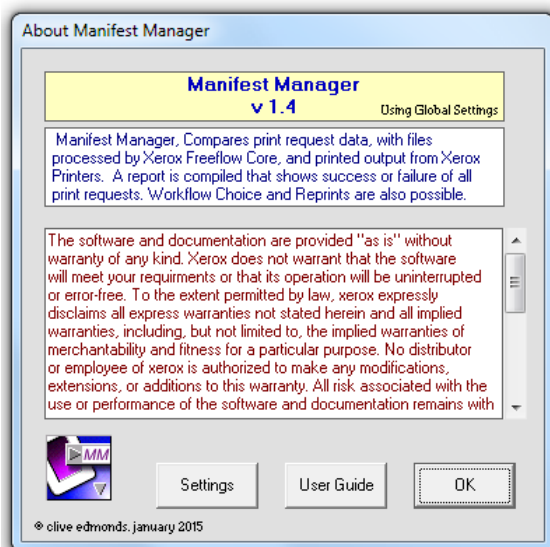
```
<document-format syntax="mimeMediaType">application/pdf</document-format>
```

```
<job-name syntax="name" xml:space="preserve">XXXJOB</job-name>
```

```
<requesting-user-name syntax="name" xml:space="preserve">Manifest Manager</requesting-user-name>
```

*If you are appending a different type of job ticket and want the document name to change, insert 'XXXJOB' in the name field of the saved job ticket.*

## About Screen:



Here you can read the operating licence information and open this 'User Guide'

If you have turned 'Show Settings in main menu' off then it is possible to open the settings screen from here. You will need to enter the administrator password to get access.

## Filters:

The accounts data from the printers contain many fields and a lot of information. By choosing the 'Printer Accounts Fields' the data can be trimmed down so only the information that you want to see is displayed.

Filters are a way of looking through the 'Collected' data and only selecting the records that match the filter expression.

Filter Expression syntax:

[Account Field Number], [Text or Numerical Field], [String1 or Operand], [String2], [S3] etc.

Examples:

2, T, Complete	shows all 'Complete' records
8, N, >5	shows all records with impressions greater than 5
6, T, Print, Save	shows all 'print' or 'save' records

All filter info must be met for the record to save

The 'Number' filters should only have one operand (< > =)

## Global Settings:

Using a global settings file makes it easier to license and change settings on all the copies of MM.

N.B. *Changes to any settings made after the extra installs will, only take effect when the programs are re-started.*

When MM is installed there is a file created in the main folder called 'Global.dat'. This file can be edited to give the program access to a 'global ini' file normally on a server. This file can be pre-edited and included in the install package.

The contents of the file are shown below:

```
[Global Settings]
```

```
Use Global INI File = True
```

```
Global INI File Location = \\151.211.0.9\Data\PAMWFAGlobal.ini
```

The Use Global setting tells the program to use the Global.ini file. This setting can be altered by the program if needed locally. *If settings is hidden in the menu then administrator password is needed to alter.*

The second line is the location and name of the settings file.

*If you are using Global Settings then ALL folder locations should be on a server that is accessible from all PC's and the users must have rights to read and write to those locations.*

## Example Excel Report:

	A	B	C	D	E	F	G	H	I	J
1	Document Name	Submission Date	Submission Status	Processed by Core	Clinic	Print Date	Print Status	Job Status	Report Completion Information	Total Impressions Printed
2	156921 Tabs and Information.rdo	26/06/2014 12:51:44	Success	13/06/2014 15:43:07	Clinic2	12/19/06 12.09.55	Complete	Completed	No Error	945
3	156921 Tabs and Information.rdo	26/06/2014 12:51:44	Success	13/06/2014 15:43:07	Clinic2	12/19/06 11.50.55	Complete	Proofed	No Error	9
4	Part IV - Pig Extension_v001.pdf	26/06/2014 12:51:44	Success	13/06/2014 15:43:07	Clinic1	12/18/06 16.48.10	Complete	Completed	No Error	944
5	A36P_QualityTraining.pdf	26/06/2014 12:51:44	Success	13/06/2014 15:43:07	Clinic1	05/11/2008 09:59	Complete	<invalid data>	No Error	6
6	A36P_QualityTraining.pdf	26/06/2014 12:51:44	Success	13/06/2014 15:43:07	Clinic1	05/11/2008 09:57	Complete	<invalid data>	No Error	6
7	A36P_QualityTraining.pdf	26/06/2014 12:51:44	Success	13/06/2014 15:43:07	Clinic1	05/11/2008 09:59	Complete	<invalid data>	No Error	6
8	A36P_QualityTraining.pdf	26/06/2014 12:51:44	Success	13/06/2014 15:43:07	Clinic1	05/11/2008 09:57	Complete	<invalid data>	No Error	6
9	156921 Tabs and Information.rdo	26/06/2014 12:51:44	Success	13/06/2014 15:43:07	Clinic2	12/19/06 12.09.55	Complete	Completed	No Error	945
10	156921 Tabs and Information.rdo	26/06/2014 12:51:44	Success	13/06/2014 15:43:07	Clinic2	12/19/06 11.50.55	Complete	Proofed	No Error	9
11	Part IV - Pig Extension_v001.pdf	26/06/2014 12:51:44	Success	13/06/2014 15:43:07	Clinic1	12/18/06 16.48.10	Complete	Completed	No Error	944
12	P1.pdf	26/06/2014 12:51:44	Success	Not Processed By Core						
13	Part X - Pig Extension_v001.pdf	26/06/2014 12:51:44	Success	13/06/2014 15:43:07	Clinic2	Not Printed Yet				
14	P3.pdf	26/06/2014 12:51:44	Success	Not Processed By Core						
15	P4.pdf	26/06/2014 12:51:44	Success	13/06/2014 15:43:07	Clinic2	Not Printed Yet				
16	P5.pdf	26/06/2014 12:51:44	Success	Not Processed By Core						
17	P7.pdf	26/06/2014 12:51:44	Success	Not Processed By Core						
18	P8.pdf	26/06/2014 12:51:44	Success	13/06/2014 15:43:07	Clinic2	Not Printed Yet				
19	P9.pdf	26/06/2014 12:51:44	Success	Not Processed By Core						
20	P10.pdf	26/06/2014 12:51:44	Failed - File Not Found							
21	P11.pdf	26/06/2014 12:51:44	Success	Not Processed By Core						
22	P12.pdf	26/06/2014 12:51:44	Success	Not Processed By Core						
23	P13.pdf	26/06/2014 12:51:44	Success	Not Processed By Core						
24	P14.pdf	26/06/2014 12:51:44	Success	Not Processed By Core						
25	P16.pdf	26/06/2014 12:51:44	Success	Not Processed By Core						
26	P17.pdf	26/06/2014 12:51:44	Success	13/06/2014 15:43:07	Clinic2	Not Printed Yet				
27	P18.pdf	26/06/2014 12:51:44	Success	Not Processed By Core						
28	P19.pdf	26/06/2014 12:51:44	Success	Not Processed By Core						
29	P20.pdf	26/06/2014 12:51:44	Success	Not Processed By Core						
30	P21.pdf	26/06/2014 12:51:44	Success	Not Processed By Core						
31	P22.pdf	26/06/2014 12:51:44	Failed - File Not Found							
32	P23.pdf	26/06/2014 12:51:44	Success	13/06/2014 15:43:07	Clinic2	Not Printed Yet				

The picture above shows the compiled report in Excel.

The **Green** records show all of the successfully printed documents.

The **Blue** records have gone through the process and have not been printed yet.

The **Red** records have failed at some stage of the workflow. These failed records are duplicated in another report called Errors. The reports are saved in the reports folder, in a sub folder that is the month they were produced.

To compile the above data MM gets feedback from three points in the workflow.

- File Submission to Freeflow Core
- Processed successfully by Core
- Printed by the Printer

The first three columns show the Document name, the submission to Freeflow Core date and if it was fully accepted.

If column three shows anything other than 'Success' then the reason why is displayed.

The document is then processed by the Core software and at the end of the workflow the result is feedback to Manifest Manager.

Column four above will show the date that Core finished processing, or an error message.

The document is now sent to the printer for printing. If it prints successfully then the record will show as **Green**.

All records that are not printed are retained for inclusion in the next report.

The extra fields at the end of the report can be user configured from the printer accounts data.

There is a lot of extra information about the printed document, such as Impressions/Sheets printed, Finishing used etc.

When you print manifest files direct to the printer the report will show 'Direct Print' because they have not been processed by Freeflow Core.

Exported Files will show as complete as they will be printed offsite.

	A	B	C	D	E	F	G
	Document Name	Clinic	Submission Date	Submission Status	Processed by Core Workflow	Print Date	Print Status
2	Core.pdf	RAL ATC	13/02/2015 11:54:51	Success	13/06/2014 15:43:07	23/08/15 09:06:34	Complete
3	006503-hsbc isa.pdf	RAL ATC	13/02/2015 11:30:38	Direct Print	Direct Print	23/08/02 09:09:03	Complete
4	006506-Smart.pdf	RAL BA OPD	13/02/2015 11:30:38	Direct Print	Direct Print	23/08/02 08:40:35	Complete
5	006502-FreeFlow Core Help.pdf	RAL ATC	13/02/2015 11:30:38	Direct Print	Direct Print	Awaiting Printing	
6	006504-PS Implementation Locations.pdf	RAL BA OPD	13/02/2015 11:30:38	Direct Print	Direct Print	Awaiting Printing	
7	006505-Royal Free Hospital FF Core - Operations Guide.pdf	RAL BA OPD	13/02/2015 11:30:38	Direct Print	Direct Print	Awaiting Printing	
8	006507-Storeflow config.pdf	RAL BA OPD	13/02/2015 11:30:38	Direct Print	Direct Print	Awaiting Printing	
9	006508-StoreFlow_training_Guide_Student_v.8.0_r.1.3.pdf	RAL BA OPD	13/02/2015 11:30:38	Direct Print	Direct Print	Awaiting Printing	
10	006509-FreeFlow Core Help.pdf	RAL ATC	13/02/2015 11:30:38	Exported File			
11	006510-hsbc isa.pdf	RAL ATC	13/02/2015 11:30:38	Exported File			
12	006511-PS Implementation Locations.pdf	RAL BA OPD	13/02/2015 11:30:38	Exported File			
13	006512-Royal Free Hospital FF Core - Operations Guide.pdf	RAL BA OPD	13/02/2015 11:30:38	Exported File			
14	006513-Smart.pdf	RAL BA OPD	13/02/2015 11:30:38	Exported File			
15	006514-Storeflow config.pdf	RAL BA OPD	13/02/2015 11:30:38	Exported File			
16	006515-StoreFlow_training_Guide_Student_v.8.0_r.1.3.pdf	RAL BA OPD	13/02/2015 11:30:38	Exported File			
17	Core123.pdf	RAL ATC	13/02/2015 11:54:51	Success	Error in Core Workflow		
18	Core123456.pdf	RAL ATC	13/02/2015 11:54:51	Error File not Found			

The example above shows the different stages each file goes through in the workflow.

'Direct Print' files although bypassing Core still need confirmation from the printer that they have been printed.

*The colours of the text and the background for the three states can be configured in the 'Report' section of the settings screen.*

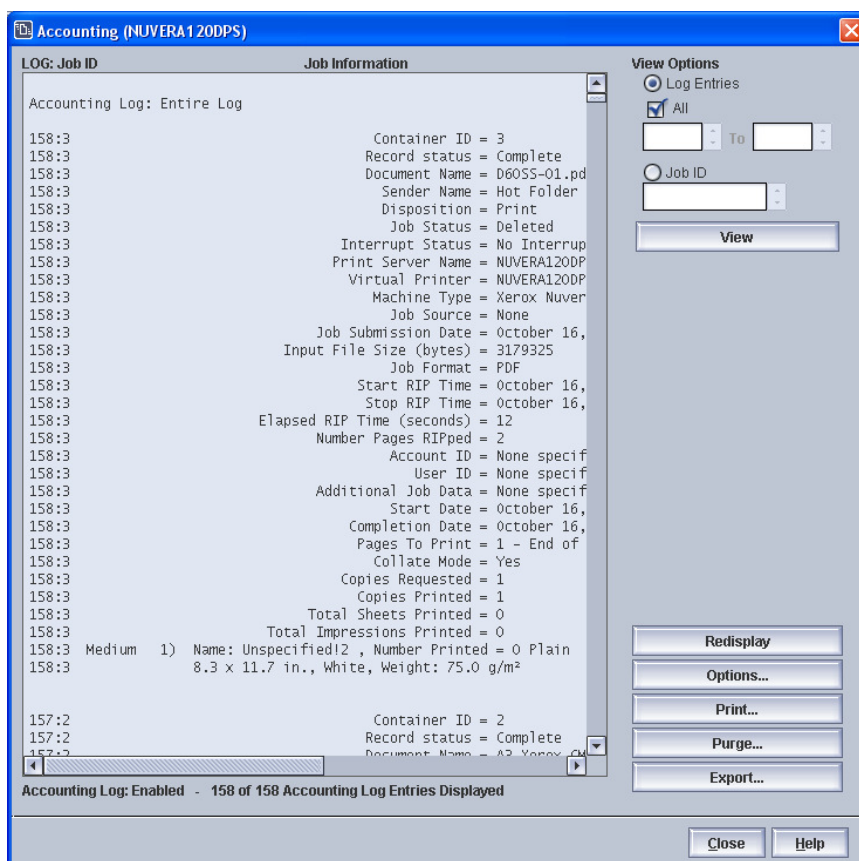
*The text messages shown above: 'Error in Core Workflow' and 'Awaiting Printing' can also be changed in the same section.*

## Exporting Freeflow Print Server Accounting Data:

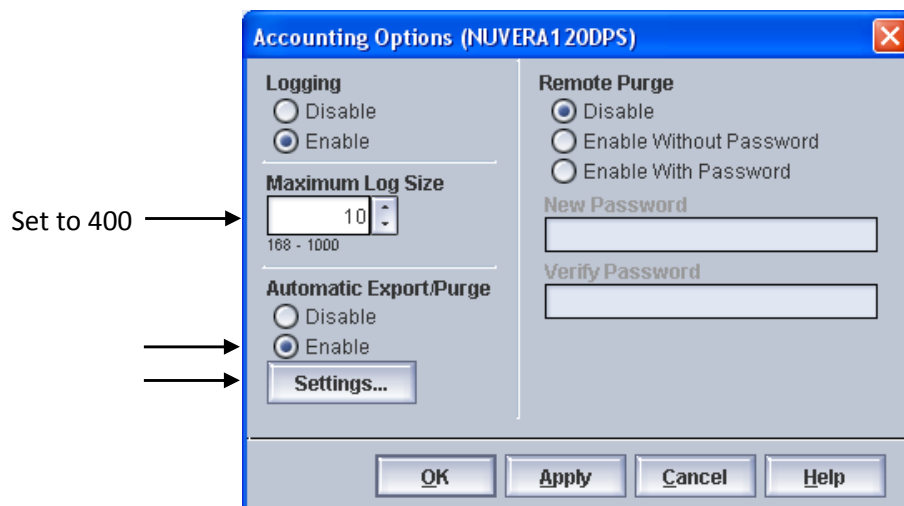
### Automatic Export and Purge

Setup Freeflow accounting to automatically export and purge account information.

- Open the Accounting screen and select the 'Options' button.



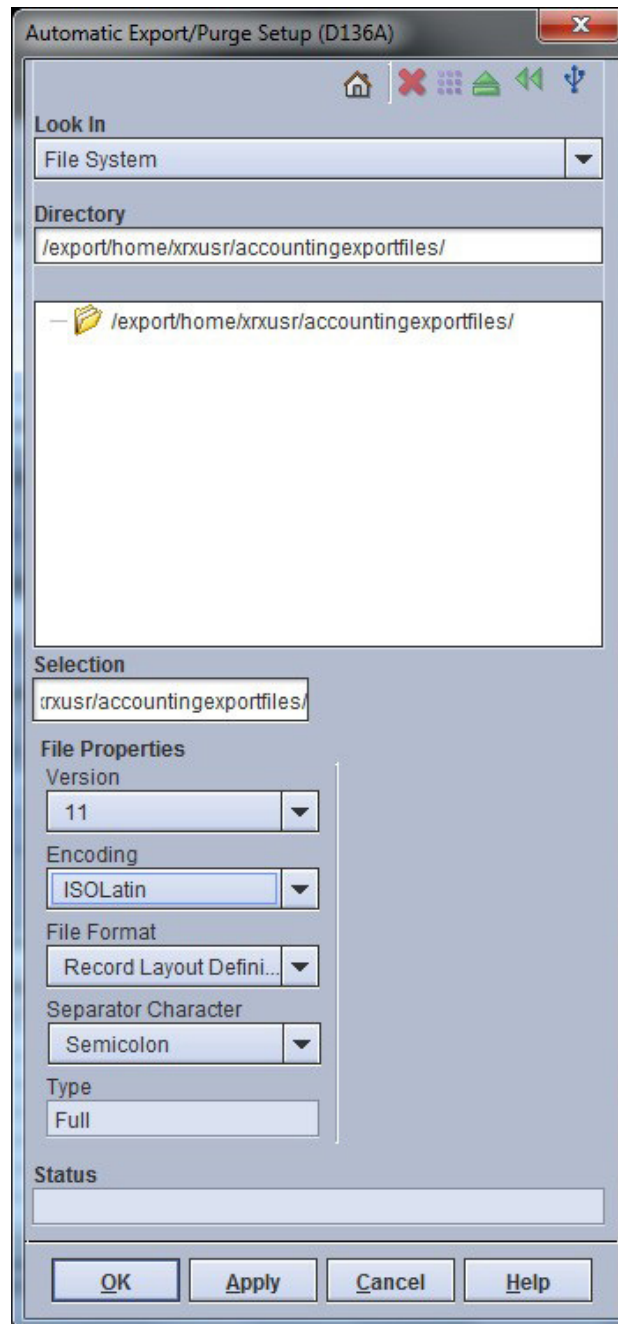
- On the 'Options' screen Select 'Enable' in the 'Automatic Export/Purge' section, and click on the 'Settings' button.



*Configure the data export settings*

- Choose the highest version of accounts file E.G. **11.0** or **11.1**
- Select the File Format to 'Record Layout Definition'

The directory entry should default to the shown folder



- Click on '**OK**' button to return to the 'Options' screen

- Set the Maximum Log Size

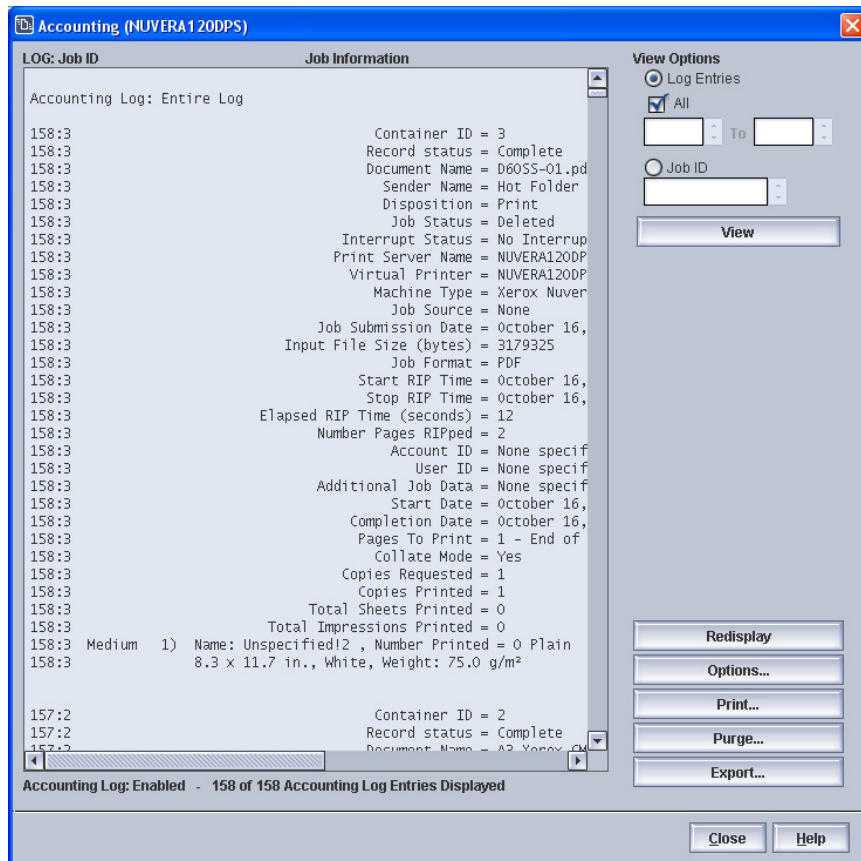
On the 'Options' screen set the maximum log size to **400\*\*** records. This will dump files every 320 print records so the latest exported record is up to date. (Setting this number higher will produce less accounting files but they won't be as current as a lower number)

If you cannot set the log size to 400 then you will have to manually export and purge the current accounting file (see last page), this is because the minimum log size is always the amount of records in the file plus 10.

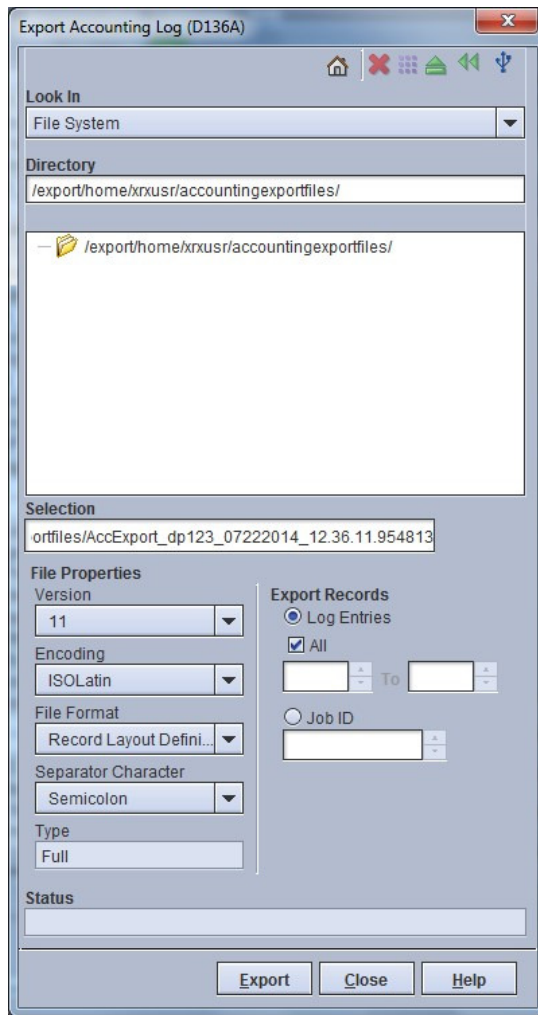
Alter the attributes of the accounting folder.

**Chmod 777 /export/home/xrxusr/accountingexportfiles**

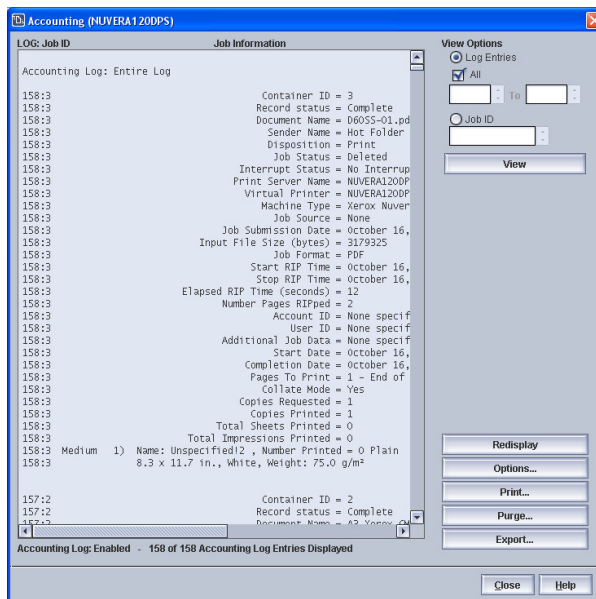
**Manually export and purge accounts data**



- Select 'Export' and manually export the accounts data to the '/export/home/xrxusr/accountingexportfiles' folder.



Select Export



Select 'Purge' and remove all accounting records.

## Sharing Folders Using Samba: (Advanced User only)

The accounts data can be collected using FTP from Manifest Manager. This requires a login and password to be set up when the Printer is created. An alternative is to use the file sharing software in unix called 'Samba'

Setting up Samba to share the '/export/home/xrxusr/accountingexportfiles' folder, but don't require a login.

**If samba is already running** open samba config file and add the following entry to the end of the file.

Use 'dtpad' to edit the file or VI if you are feeling confident:

```
/usr/dt/bin/dtpad /etc/sfw/smb.conf
```

```
[Accounts]
```

```
comment = DocuSP Account Records
```

```
path = / export/home/xrxusr/accountingexportfiles
```

```
only guest = yes
```

```
public = yes
```

```
writable = yes
```

```
printable = no
```

*If samba is not running then enable, but be careful as this procedure re-writes the config file so back up first.*

To enable logon as root

```
cd /opt/XXnps/bin
```

```
./setEnableSambaShare on
```

To enable the accounts files to be moved from their folder by PAM the folder properties need to be changed

**Chmod 777 /export/home/xrxusr/accountingexportfiles**

PAM can now access the shared folder by using the following in the 'Data Source Folder' box in the Printer Setup section.

```
\\Printer_IP_Address\Accounts
```

## Running Manifest Manager as a Service

*These instructions assume that MM is installed in the default folder on a 64 bit PC*

MM can be installed to run as a service, which means that you don't have to logon to the PC to start it. The Service uses a local system account to log on.

Check and Edit if needed the following files in the install folder

**PWAS.ini**            CommandLine = 'Install Folder\PWA Service  
default =            (CommandLine = C:\Program Files (x86)\ PAM Workflow\PWA Service.exe)

WorkingDir = 'Install Folder'  
default =            (WorkingDir= C:\Program Files (x86)\ PAM Workflow)

**ServiceLoad.bat**            'Install Folder\PWS.exe -i  
default =            ("C:\Program Files (x86)\ PAM Workflow \PWAS.exe" -i)

**ServiceUnLoad.bat**        'Install Folder\PWS.exe -u  
default =            ("C:\Program Files (x86)\ PAM Workflow \PWAS.exe" -u)

- Run '**ServiceLoad.bat**' by double clicking on it

*The batch file below may have to be run with 'Administrator' rights*

- Right click on Toolbar and select 'Start Task Manager'
- On Services tab find 'PAM WFA' service right click and Start Service

The 'PAM WFA' service should now run automatically every time the Server/PC is restarted. The settings for the service can be changed in the Windows/Services screen.

Goto Start/Run and type 'Services.msc', right click on the 'PAM WFA' service and choose properties.


*Please Note:*

You will have to have another instance of MM running normally, to be able to carry out all the other tasks, such as collecting data from printers and Freeflow Core and for producing reports.

You will have to now restart the service for the changes to take effect.

To test if the service is running correctly. Open the data folder normally 'c:\programdata\Pam Workflow' and make a file called 'Service.test'. When the service runs it will look for this file and produce a file called 'Service.passed'. This information will be fed back to the program log.

## Program Info/Notes:

Manifest Manager can be configured to run in the 'system tray', normally bottom of the screen, right side of the toolbar. Right Clicking on the icon will open a menu. 

The Report menu has options to Create or display an existing report, Display the accounts data collected from each configured printer and Display the latest Log file.

The Options menu has options to manually collect data and to Reset FTP printers. *If the data is collected from a printer by the FTP protocol and the printer is offline then you may temporary disable checking to that printer. This resets this option*

The Xerox printers need to be configured to automatically export their accounts data. This is explained in detail later in this document. This will need to be set up by a Xerox analyst because there are a number of security changes that have to be made to the Freeflow print server.

The data from the printer needs to set up to export as an RLD file preferably in the latest version. At the present time this is version 11. It doesn't matter if version 11.0 or 11.1 is used.

Different program operations features can be turned on or off by editing the Settings. For example by just turning on the accounting file collection and the date split options will make 'Manifest Manager' behave like the full 'Printer Accounts Manager' program but without all the advanced features like costing etc.

If the 'Date Split' feature is enabled then the collected accounts data is processed and stored in date related files. These files can be in Daily, Weekly, Monthly, Quarterly or Yearly intervals.

All files are stored in the individual Printer 'Output Folder'. If you have more than one printer then there is no reason why this folder cannot be the same for each printer. Depending on which type of file you have chosen they are stored in a slightly different way.

Yearly files are stored straight in the output folder. Weekly, Monthly and Quarterly files are saved in their own Year folder. Daily files are saved in a monthly folder.

To set 'Manifest Manager' to manually poll the selected folders, set the polling interval to 0. You can now use the menu option on the main screen to collect the data.

Excel is the default application used to produce the reports. This has to be loaded on the PC where 'Manifest Manager' is installed. The Excel reports can create multiple reports and show each one as a separate sheet. The reports will show lines of records in different colours depending on the status of the print job. There is an example of a spreadsheet later in this document.

To use another application the full path name for the app must be entered in the reports section of the settings screen.

There are a number of compulsory fields that must be included in the required fields section of the PWAss.ini file. These are the *Record Status*, *Document Name* and *Date Printed* fields.

The workflow menu (which can be hidden) gives access to 'Change Workflow' and 'Reprint' Options.

*Tokens* can be enabled in the settings file to enable more than one PC to run the program at the same time.

A Global settings file can be set on a server up so all copies can be licensed and setup from one file

## Potential Issues:

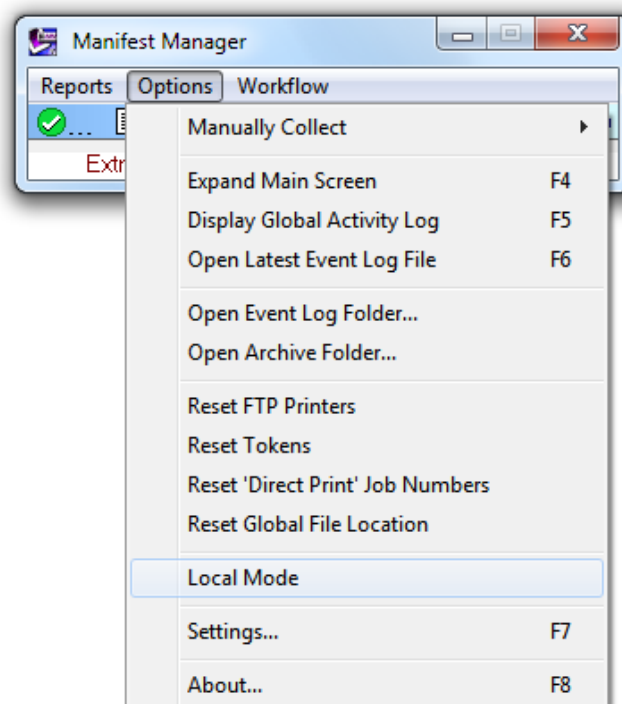
Manifest Manager can be installed on any PC with administrator rights that has access to the Core Server, and when it is run in 'Global Mode' it will automatically register and configure. If for some reason the software can't find the server the program will ask for the location (as shown in the Install section).

If the 'Core Server' is not available then Manifest Manager can be changed to run in 'Local Mode'. This will use a predefined and installed configuration file that will change the settings automatically.

The new setup will use the EDRM Server where the PDF's are produced to store and run the Printing operations. This will ensure that the days printing is completed on time if the server has to be reloaded/restored.

If the EDRM Server is not working then Manifest Manager can be re-configured to collect files from an alternative source.

Problems with the 'Core' Server or software can be fixed by restoring the 'Server Image'. Restoring the Server will restore the configuration file and all the folders Manifest Manager needs to operate. Manifest Manager can then be returned to 'Global' mode.



To change to 'Local Mode' select 'Local Mode' from the 'Options' menu.

If both the Xerox Printers are unable to print, then Manifest Manager can export the pdfs to a desired location with the correct Xerox Job Ticket attached. They can then be collected and sent to be printed offsite on a printer with a Freeflow RIP.

## Licence Agreement:

Xerox

Manifest Manager

Software License Agreement (“Agreement”)

This is a contract between you and **Xerox Limited** (“we” or “us”), whose registered office is Bridge House Oxford Road, Uxbridge, UB8 1HS, Company Registration Number 575914

### WHEREAS

The parties wish to conclude an agreement for the licence of Xerox's and Xerox licensor's software Manifest Manager (“**the Software**”).

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