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# POLKADOTS SOFTWARE

## Using Move-it 2.x

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### *Move-it User Guide*



# Table of Contents

<b>INTRODUCTION .....</b>	<b>5</b>
OVERVIEW .....	5
USER GUIDE VERSION .....	6
INSTALLING MOVE-IT .....	6
<i>Important note about Move-it v.2.1.2.4 (or higher) &amp; PrePage-it .....</i>	<i>8</i>
MOVE-IT 1.X VS. MOVE-IT 2.X .....	9
<b>CHAPTER 1 - INTERFACE &amp; GLOBAL CONFIGURATION .....</b>	<b>10</b>
1.1 VIEW SETTINGS .....	10
<i>Status view.....</i>	<i>10</i>
<i>Design view .....</i>	<i>10</i>
<i>Report view.....</i>	<i>11</i>
1.2 SERVER SETTINGS .....	12
<i>General.....</i>	<i>12</i>
<i>Mail Settings.....</i>	<i>13</i>
<i>Default Error Handling.....</i>	<i>14</i>
When can an error occur?.....	15
<i>Administrative Alerts .....</i>	<i>16</i>
<i>Predefined Variables.....</i>	<i>17</i>
<i>User Logins .....</i>	<i>18</i>
Default User .....	19
Adding a New User .....	19
1.3 CONFIGURING MOVE-IT TO ACCESS REMOTE FOLDERS .....	20
<b>CHAPTER 2 - WORKFLOWS .....</b>	<b>22</b>
2.1 BASICS.....	22
<i>Workflows toolbar .....</i>	<i>22</i>
New workflow .....	23
Start/Stop workflow .....	24
Edit workflow layout.....	24
Edit workflow properties.....	24
Duplicate/Delete workflow .....	26
<i>Exporting/Importing workflows.....</i>	<i>26</i>
<i>Polkadots Backup .....</i>	<i>27</i>
Backup .....	28
Restore .....	29
2.2 INPUTS.....	32
<i>Download FTP file .....</i>	<i>33</i>
FTP Source.....	33
Monitoring .....	34
Schedule.....	35
Advanced .....	36
<i>Wait For File .....</i>	<i>36</i>
Folder To Monitor .....	37
Authentication .....	37
Monitoring method.....	38
<i>Input via Polkadots Printers.....</i>	<i>38</i>
2.3 ROUTE FILTERS (ARROWS).....	40
<i>Filtered files .....</i>	<i>41</i>
<i>Filtering conditions .....</i>	<i>41</i>
AND and OR conditions .....	42
<i>Special-purpose route filters .....</i>	<i>44</i>
Symbolic Link .....	44
Load Balancing route filters .....	45
Load Balancing Route Filters vs. Load Balancing module.....	45
2.4 ACTIONS .....	46
<i>Compress File.....</i>	<i>47</i>
<i>Copy To Folder .....</i>	<i>47</i>
Existing File .....	48

Authentication .....	49
<i>Copy To LB Folder</i> .....	50
<i>Create PDF</i> .....	50
PDF Conversion Configurations.....	51
PDF Conversion Options.....	57
<i>Crop PDF</i> .....	58
<i>Delete File</i> .....	60
<i>Extract File</i> .....	60
<i>Parse File</i> .....	60
Configuring the File Parser .....	60
How to define a field .....	63
Literal text .....	64
Skip Field.....	64
<i>PitStop Server</i> .....	65
<i>Planner</i> .....	66
Planner workflow overview.....	67
How to configure a Planner workflow.....	68
<i>PrePage-it Web</i> .....	73
PrePage-it Web Properties.....	74
Sample configurations .....	75
<i>Rename File</i> .....	78
Renaming using filename template.....	78
Renaming using character replacement .....	80
<i>Run Process</i> .....	80
<i>Send e-mail</i> .....	80
Mail Recipient & Address book .....	81
<i>Split PDF</i> .....	82
Adding page numbers (using Page Labels).....	83
Plabel, pindex & pnumber .....	83
Adding page numbers (using Auto-Increment).....	86
Split PDF options .....	87
<i>Upload To FTP Folder</i> .....	88
Output to Unix / Mac OS X server .....	89
2.5 FIELDS .....	90
<i>Field types</i> .....	92
File .....	93
Static .....	93
Date&Time.....	95
<i>Inserting and formatting fields</i> .....	95
Trim Characters.....	96
Padding .....	97
Case Conversion.....	98
2.6 GUIDELINES FOR BUILDING WORKFLOWS .....	98
<i>Workflow Samples</i> .....	99
<b>CHAPTER 3 - LOAD BALANCING</b> .....	<b>100</b>
3.1 WHAT IS LOAD BALANCING? .....	100
<i>How Load Balancing works</i> .....	100
<i>How errors are handled</i> .....	101
<i>Multi-server vs. single-server</i> .....	101
<i>Load balancing vs. Actions</i> .....	101
3.2 GENERAL SETTINGS.....	102
<i>Error folder</i> .....	102
<i>Extensions to include / exclude</i> .....	103
3.3 CREATING A LOAD BALANCING GROUP.....	103
3.4 EDITING LOAD BALANCING GROUPS .....	107
3.5 SENDING FILES TO THE LOAD BALANCING FOLDER .....	108
<i>Dropping job files directly</i> .....	108
<i>Printing job files</i> .....	109
<i>Sending job files from a Move-it workflow</i> .....	109
3.6 SCALING A LOAD BALANCING GROUP.....	110
<b>APPENDIX</b> .....	<b>111</b>
WINDOWS XP PRO LIMITATION.....	111



# Introduction

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## Overview

Move-it 2.x is a software application which allows you to automate tasks and procedures so that they are carried out “in the background” on a continual basis, with little or no user intervention. It can be used to automate file management and file conversion tasks, as well as file transfer and verification. The main tasks that can be automatically performed by Move-it 2.x include:

- moving files between local/network folders
- downloading/uploading files on FTP sites
- renaming files
- deleting files (housekeeping)
- creating PDFs (from input PS or PDF files)
- splitting multi-page PDFs into individual PDF page files
- sending e-mails (including files attachments)
- launching external processes (programs, batch files)
- verifying PDFs through a PitStop Server
- uploading files to PrePage-it Web
- compressing and extracting files
- parsing /filtering files
- redirecting files to the appropriate queue based on their colorspace (works in conjunction with the Publication Planner for newspaper workflows)
- cropping PDFs

In addition, Move-it offers a configurable load balancing module for your workflow, allowing jobs to be equally distributed in a multi-RIP environment.

The Move-it Manager provides a user-friendly, intuitive interface which lets you create and configure automated tasks, referred to as workflows. While in Design mode, you can create workflows,

adding as many Inputs and Actions as required to build a complete workflow. Once configured, Move-it will monitor an input folder or ftp site for incoming files. When files arrive, they will be processed according to the Actions specified in the workflow. A workflow can consist of one or several actions, cascaded one after the other. Arrows indicate the direction of the workflow.

It should be noted that Move-it 2.x includes numerous features, several of which are optional and require dongle activation in order to be functional. In fact, some features do not appear at all in the Move-it interface unless they are dongle activated.

This manual provides instructions and guidelines for configuring and using Move-it 2.x.

## User Guide Version

This *Move-it 2.x User Guide* is based on the version 2.1.2.4 of Move-it. This edition of the user guide (*August 2010*) has been revised from the original edition (*March 2009*) to correct an error in the description of Load Balancing route filters. The corrected description can be found in the sections [Load Balancing route filters](#) on p.45 and [Load Balancing Route Filters vs. Load Balancing module](#) on p.45.

For information on Move-it builds newer than v.2.1.2.4, refer to the *Move-it 2.x Release Notes*, available from the *Polkadots Software* FTP site or from your *Polkadots* dealer.

## Installing Move-it

Move-it 2.x is installed by running the Move-it 2.x Setup.

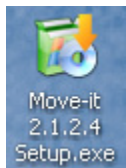


Figure 1 Installer

### Note

If you already have the Move-it 1.x application installed, see the section [Move-it 1.x vs. Move-it 2.x](#) on p.9 before installing Move-it 2.x.

The Move-it 2.x Setup **Installation Wizard** will guide you through the installation steps.

When prompted to select the Move-it modules you want to install, check the required modules. If in doubt, you can install them all. Only the ones that you are licensed to use will be available after installation.

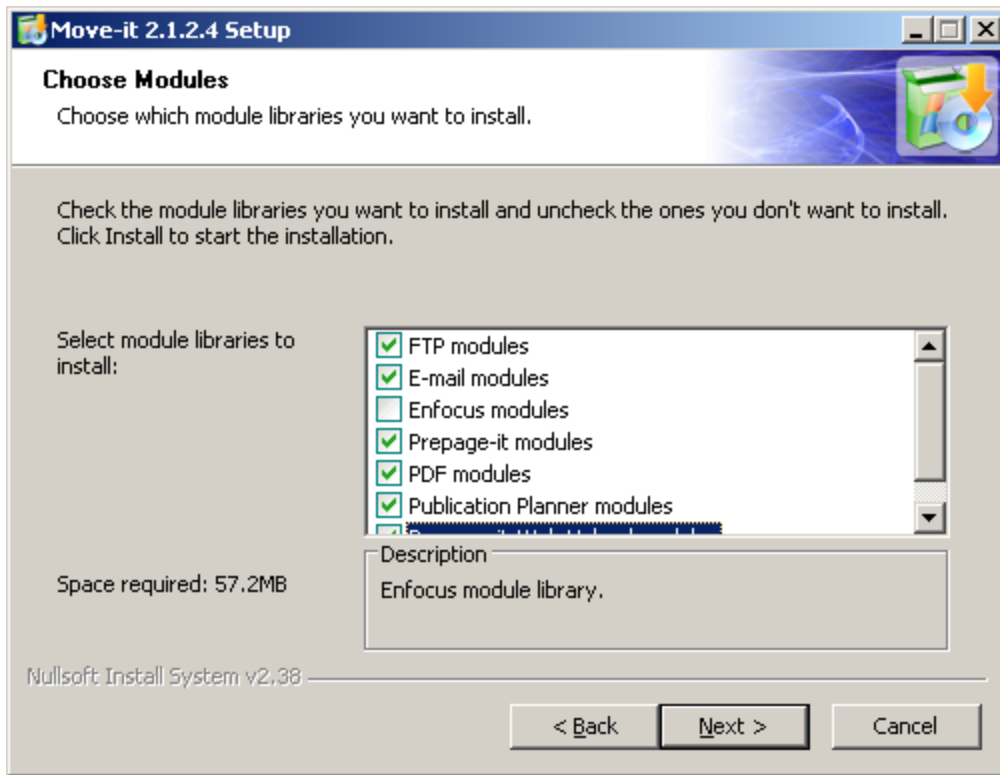


Figure 2 Installation Wizard I

When prompted, choose a default directory for your data (input & output). This can be changed after installation from the menu **Server > Settings > Predefined Variables**.

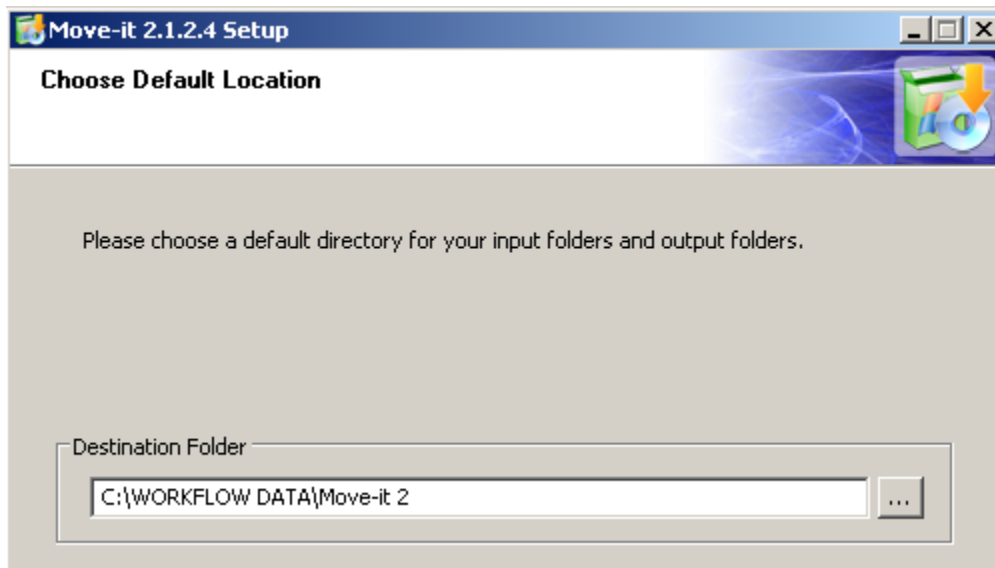


Figure 3 Installation Wizard II

Next, select a Windows user account which has user rights/permissions to access all the remote drives where Move-it will need to input and output files. See section [1.3 Configuring Move-it to access remote folders](#) on p.20 for details about remote drive configuration.

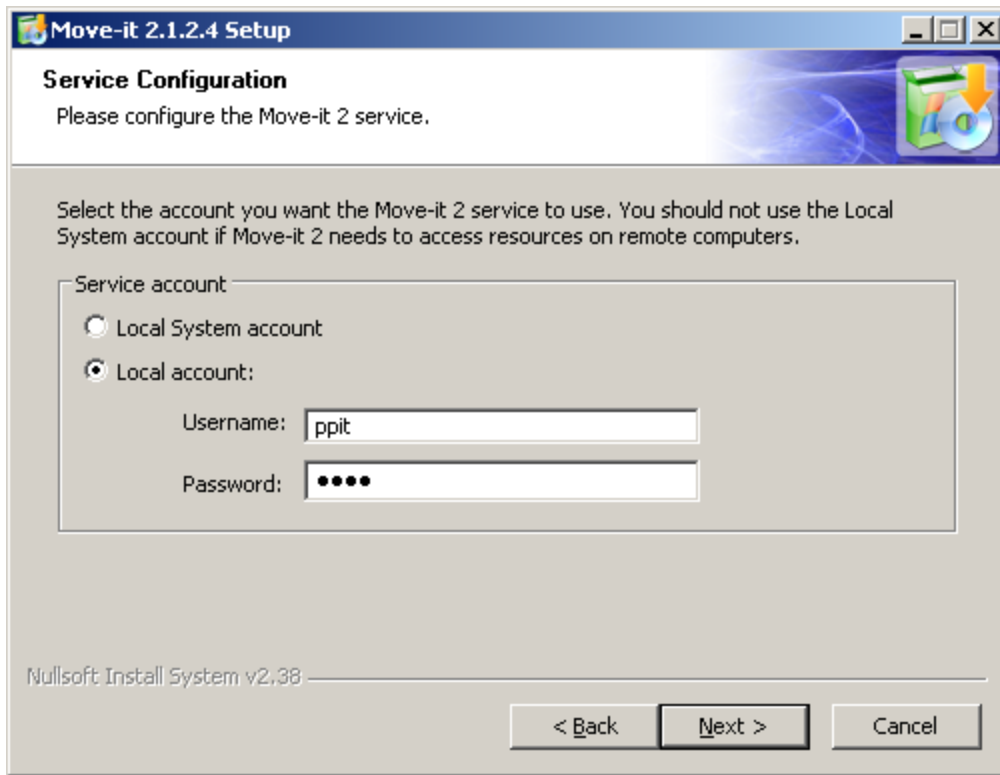


Figure 4 Installation Wizard III

After the installation has been completed, a **Move-it Manager** shortcut will be added both to your desktop and in the menu **Start > Programs > Polkadots > Move-it 2**.



Figure 5 Desktop Shortcut

Double-click the **Move-it Manager** shortcut to launch Move-it.

#### Important note about Move-it v.2.1.2.4 (or higher) & PrePage-it

A new JDF library has been added to several Polkadots applications which enhances all JDF-related functionality. These Polkadots applications include Move-it v.2.1.2.4, PrePage-it v.6.2.3.1, PrePage-it v.7.0.2.2 and PrePage-it 09 v.02042009. If you install/update one of your Polkadots applications to the versions mentioned above, you must also update/install all your other Polkadots applications to the appropriate versions, as listed above. The specific details are summarized in the following note.



**Important**

If your workflow includes the PrePage-it 09 software bundle and you install or update to Move-it v2.1.2.4 or higher, you must also update PrePage-it 09 to v02042009 or higher. If you do not have PrePage-it 09, but you have PrePage-it Viewer v6.x or 7.x and you install or update to Move-it v2.1.2.4 or higher, you will have to update your PrePage-it Viewer to v6.2.3.1 (or higher) or v7.0.2.2 (or higher), respectively. Failure to do so will cause some or all applications to not start up when you launch them.

More information about this topic can be found in the tech note *Incompatible JDF Libraries in PrePage-it and Move-it*.

## Move-it 1.x vs. Move-it 2.x

Move-it v2.x is a significant departure from Move-it v1.x. The configuration is much more graphical and the workflows are a lot easier to follow when seen in Design View. At the same time, Move-it 2.x is a great deal more flexible and sophisticated. For example, you can parse a file once, create variables from this, and then re-use these variables in many other places in your workflow. Also, some setups in Move-it v1.x which required 4 or 5 workflows can now be configured in Move-it 2.x using a single workflow. For all these reasons and more, Move-it 1.x and Move-it 2.x are regarded as two different applications and therefore upgrading is not possible. The installer for Move-it 2.x cannot be used to upgrade from Move-it 1.x, it must be used to make a fresh installation.

**Important**

It is not possible to upgrade from Move-it v.1.x to v.2.x.

When you install Move-it 2.x, you may, if you wish, continue to use Move-it 1.x - they will work as independent applications. However ensure that your dongle is activated for whichever version(s) of Move-it you wish to use.

**Note**

If Load Balancing is configured in your Move-it 1.x setup and you want to keep those settings, do not check the option **Load Balancing** when installing Move-it 2.x. Checking this installer option will override the Move-it 1.x load balancing configuration with the new Move-it 2.x default settings. Please see [Chapter 3 - Load Balancing](#), starting on p.100, for detailed information about load balancing.

# Chapter 1 - Interface & Global Configuration

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## 1.1 View Settings

The main Move-it 2.x window can be viewed in either **Design** view (also called **Editor** mode), **Report** view (also called **History** mode) or **Status** view. The viewing mode can be changed either by clicking the corresponding toolbar buttons or through the **View** menu.

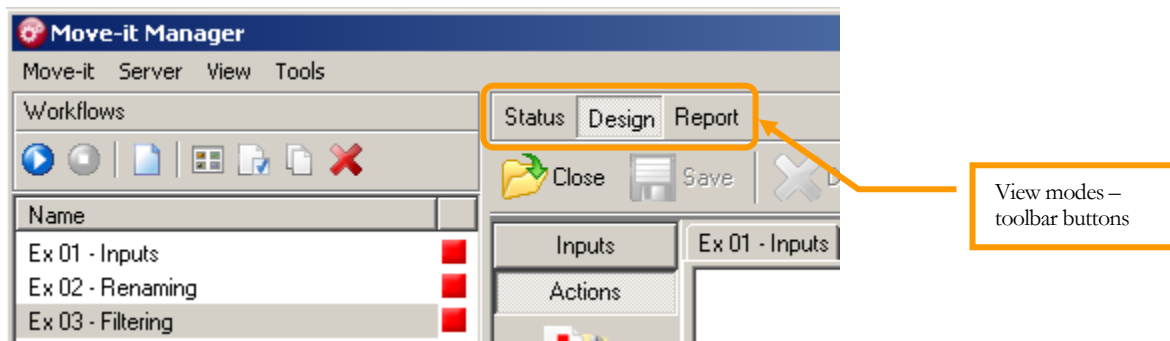


Figure 6 View modes

### Status view

In Status view you can see some detailed information about jobs in progress, including what stage within the workflow the job is currently passing through. When no jobs are being processed, the **Status** window is empty.

### Design view

Design (or Editor) view is used to create or modify a workflow. In this view, the following toolbar will also be visible in the top right corner.

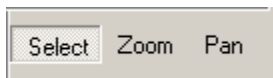


Figure 7 Select toolbar

Use **Select** to be able to select a workflow object. Once an object is selected, you can move it, delete it, etc.

Click **Zoom** to zoom in on an area of the workflow that is currently outside your visible window.

Click **Pan** to move the workflow within the Move-it window.

## Report view

Report (or History) view shows a list of jobs that have been processed. For each job, it also displays information such as the **Workflow** used to process the job, the **Date/Time** the job was processed and the number of **Warnings/Errors** for that job.

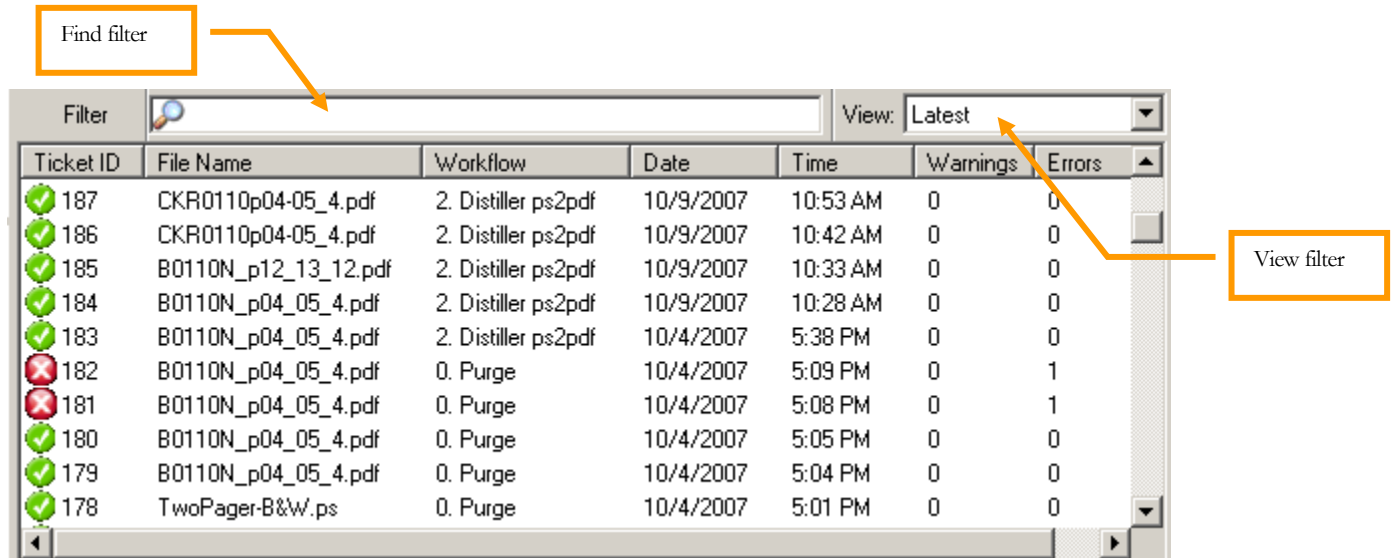


Figure 8 Report View

This mode also includes filters for searching or viewing only specific jobs. The **Find** filter lets you type a filename (partial or complete) that you are searching for and displays (only) the matching files.

Another way to filter jobs is by clicking on the word **Filter** itself. This will display a special menu where you can select one of three choices: **Succeeded**, **Cancelled** and **Failed**.

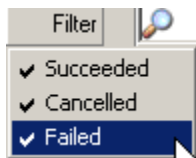


Figure 9 Filter menu

In addition, the top right side of the window has the **View** filter or dropdown list, which allows you to choose files processed on specific dates e.g. **Today** or **Last Week**.

Double-clicking on a job opens a window which shows more information about the job. This applies both to completed jobs and also jobs in progress. If you double-click on the job ticket during processing, it will show you information about the job progress and will auto-refresh every 5 seconds. Note that when multiple files are submitted, the files are not necessarily processed FIFO i.e. the first file that begins processing is not necessarily the first to be completed.

### Tip

The Move-it interface is used mainly to configure workflows and to view job status and reports. When Move-it is processing jobs, it uses services which work in the background. Therefore the Move-it interface does not need to be open when jobs are being processed – you can keep it closed if you wish, jobs will be processed as usual.

## 1.2 Server Settings

Global configuration settings can be set in the **Server > Settings** menu. You can configure the following types of settings: **General**, **Mail Settings**, **Default Error Handling**, **Administrative Alerts**, **Predefined Variables** and **User Logins**. Whenever you change a setting and click the **OK** button, the Move-it 2 Service is automatically restarted.

### General

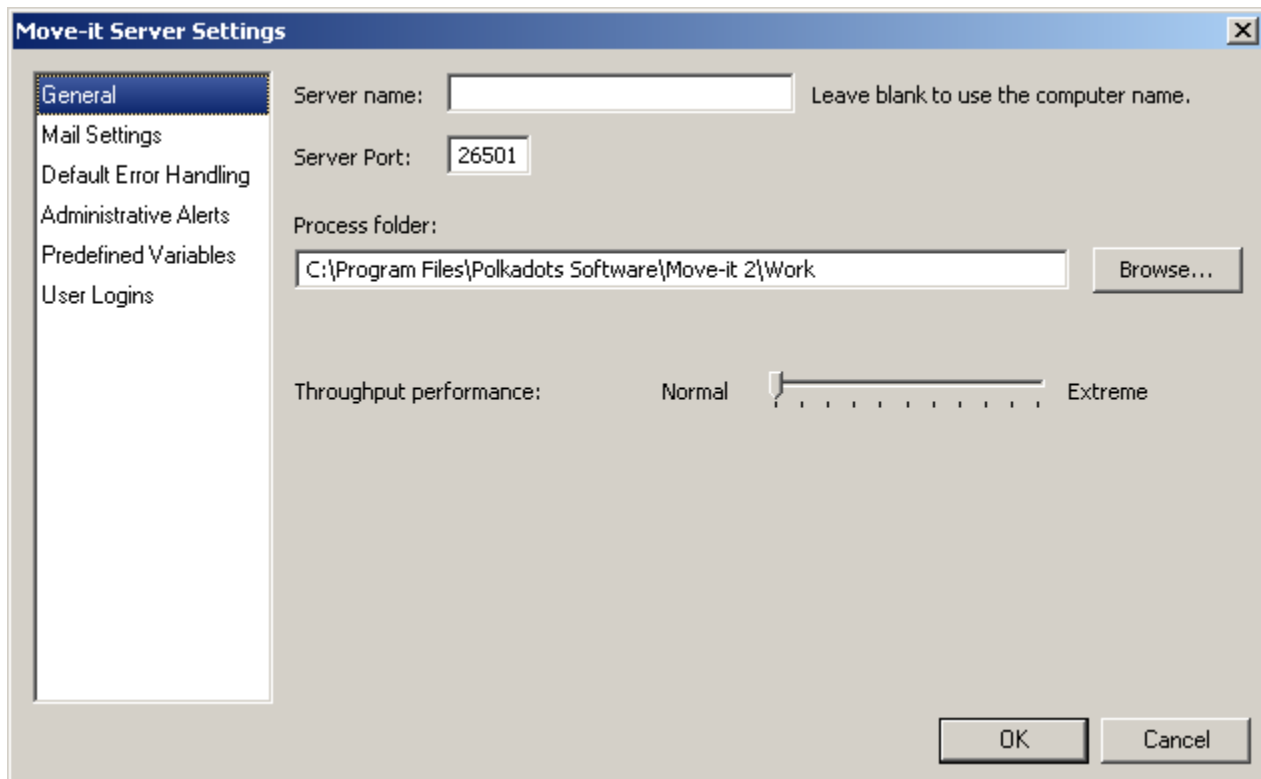


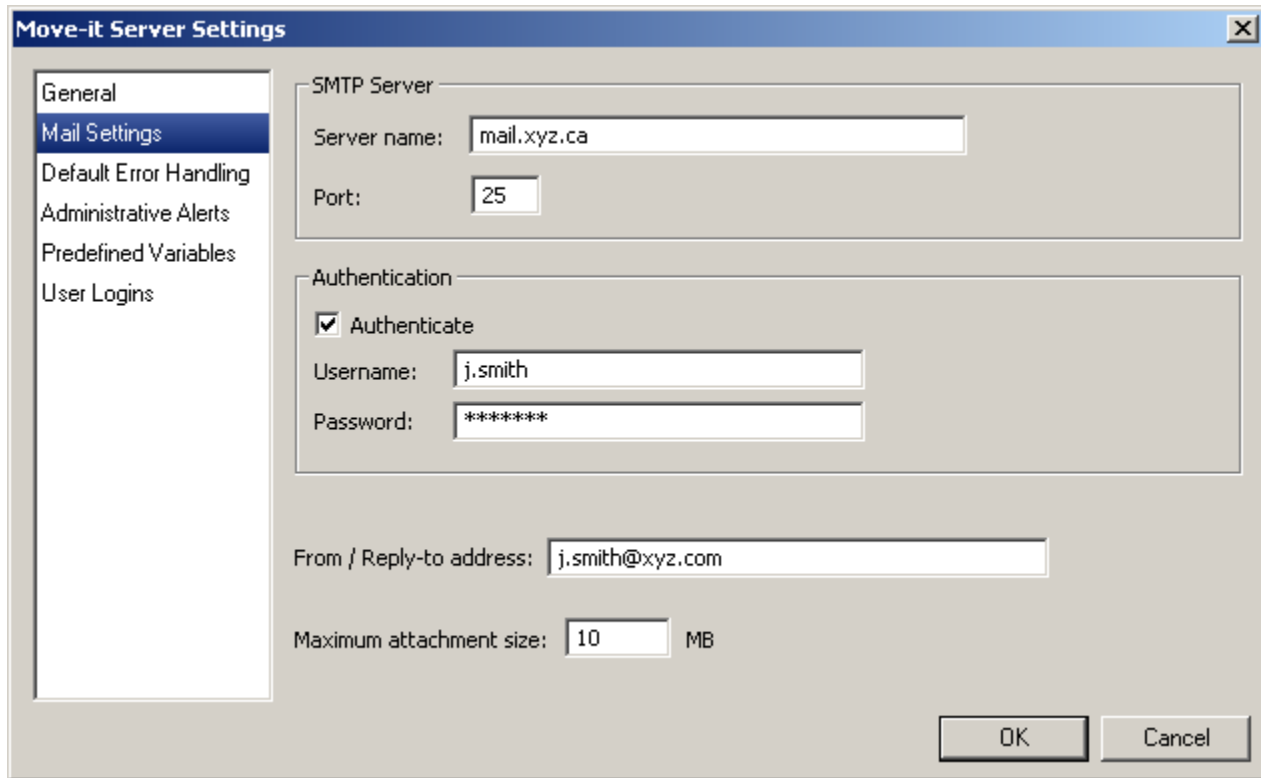
Figure 10 Server Settings - General

**Server Port:** Leave at its default setting unless instructed otherwise by a Polkadots specialist.

**Process Folder:** This is the folder that Move-it uses to store temporary files, especially while processing jobs. It is also sometimes referred to as the working folder or scratch folder. This folder is specified during the installation procedure, but can be changed here.

**Throughput performance:** Leave this setting at **Normal** unless instructed otherwise by a Polkadots specialist.

## Mail Settings



The screenshot shows the 'Move-it Server Settings' dialog box with the 'Mail Settings' tab selected. The left sidebar contains a list of settings: General, Mail Settings (selected), Default Error Handling, Administrative Alerts, Predefined Variables, and User Logins. The main area is divided into sections for SMTP Server and Authentication. The SMTP Server section has fields for 'Server name' (mail.xyz.ca) and 'Port' (25). The Authentication section has a checked 'Authenticate' checkbox, fields for 'Username' (j.smith) and 'Password' (masked with asterisks), and a 'From / Reply-to address' field (j.smith@xyz.com). At the bottom, there is a 'Maximum attachment size' field (10 MB) and 'OK' and 'Cancel' buttons.

Figure 11 Server Settings – Mail Settings

If you define workflows which will be sending e-mails, you need to specify your e-mail settings here. Specify your mail server (**Server name**) and a valid e-mail account (click **Authenticate**, then enter a **Username** and **Password**). The default **Port** number is 25.

You may optionally enter a return e-mail address (**From / Reply-to address**), which recipients can use to reply to the e-mails sent by Move-it. You may also impose a limit on the size of e-mail attachments sent by Move-it.

## Default Error Handling

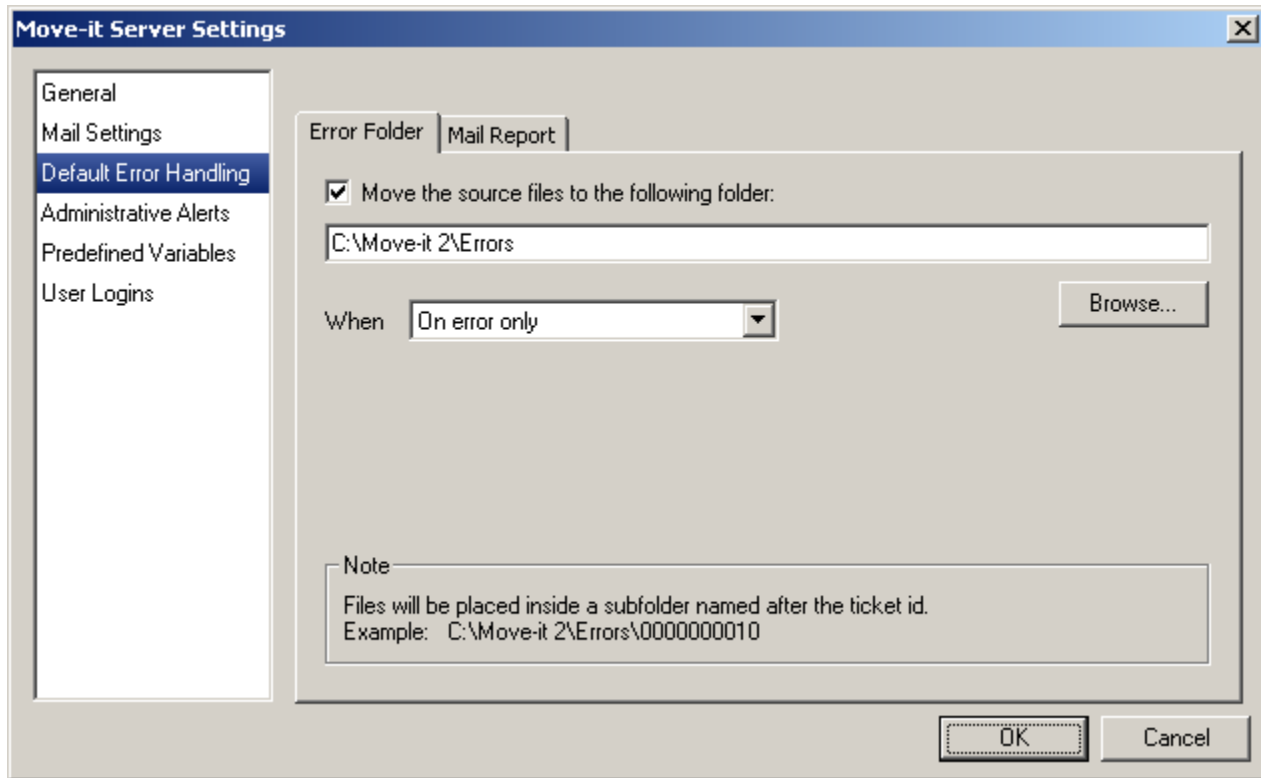


Figure 12 Server Settings – Default Error Handling

Error Handling can be configured on a per-workflow basis (to know how, refer to the section [Edit workflow properties](#) on p.24). However you may specify a **Default Error Handling** which will apply to all your workflows except those where you’ve configured a customized error handling.

In case a file causes an error when sent to Move-it, you may specify:

- (i) that the input file goes to an error folder (by clicking the checkbox **Move the source files to the following folder** and then clicking **Browse** to select it)
- (ii) whether an input file should go to an error folder only when errors occur (click **When > On error only**) or for warnings and errors (click **When > On warning or error**)
- (iii) that an e-mail be automatically sent to recipient(s) when an error or warning occurs (this is configured in the **Mail Report** tab by adding the e-mail addresses of all intended recipients)

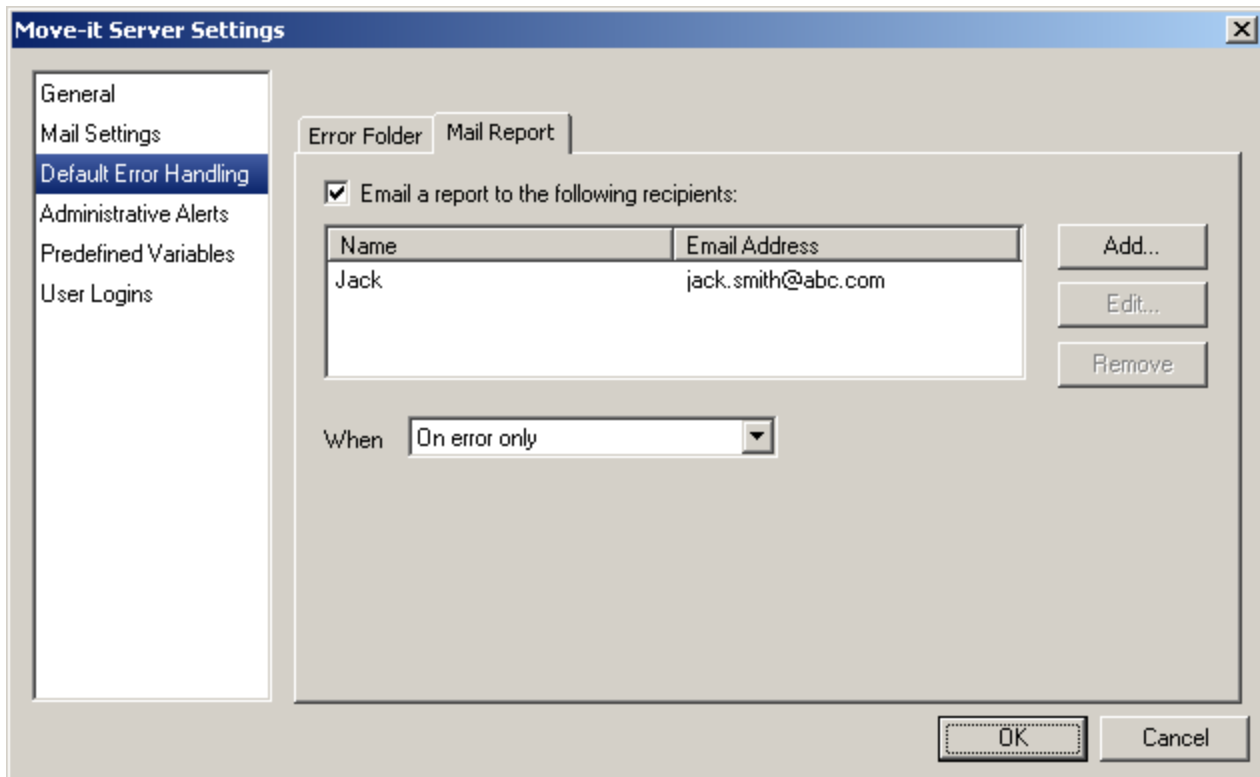


Figure 13 Server Settings – Default Error Handling (Mail Report)

### Important

If none of the above **Default Error Handling** options are enabled, a file which errors out will be deleted.

When can an error occur?

An error may occur as soon as a file arrives and attempts to enter a Move-it workflow. This may happen because the file fails to meet the required conditions for entering the workflow, for example, a PS file that was sent to a PDF-only workflow. An error may also occur while the file is making its way through the workflow. For example, a 20-page PDF is being split into individual PDF pages, but pages 6 and 14 are not successfully split.

In the case where a file successfully enters a Move-it workflow but encounters an error while in the process of going through the workflow, the error will be handled in the following way:

- if the error occurs with one file, Move-it it will generate an *error*
- if the error occurs with one or several files in a “group” (e.g. one or several pages from a split PDF, one or more files from a decompressed zip), a *warning* will be issued by Move-it
- if the error occurs with an entire “group” of files (e.g. all split PDF pages, all files in a decompressed zip), an *error* will be generated

## Administrative Alerts

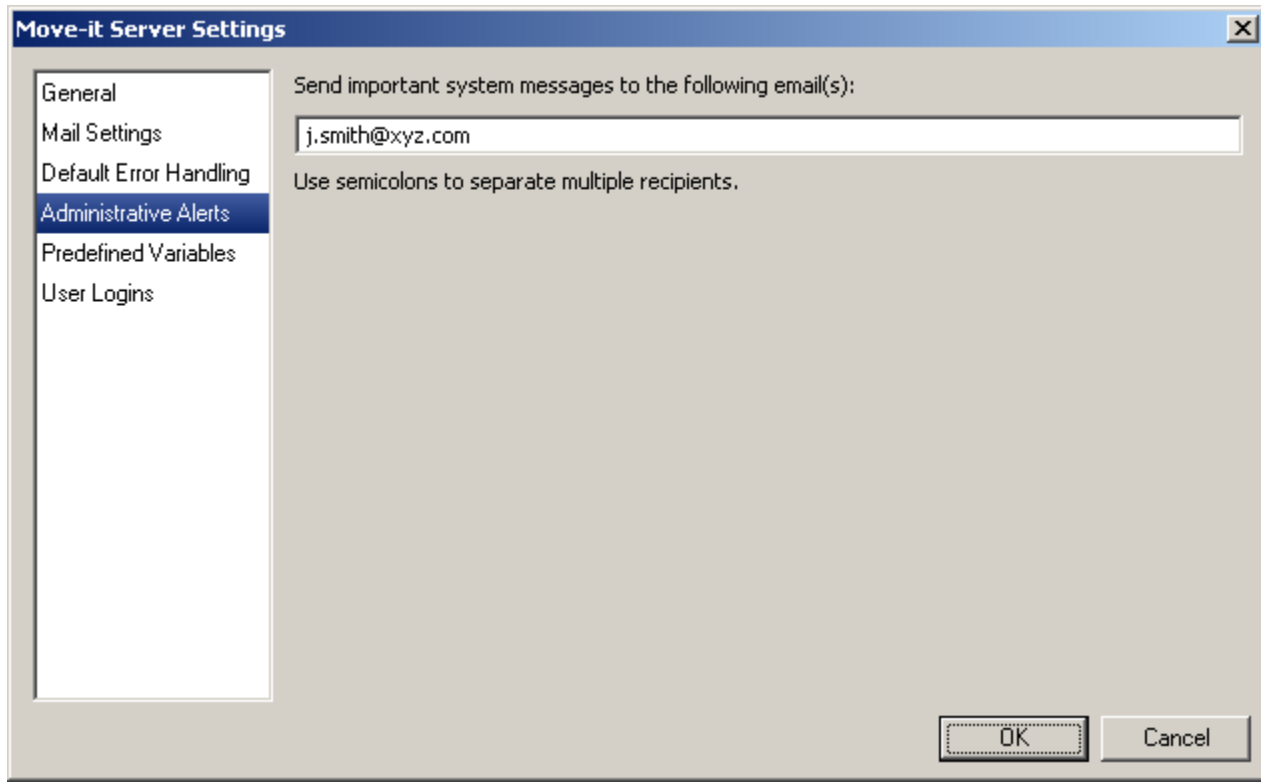


Figure 14 Server Settings – Administrative Alerts

The **Administrative Alerts** setting automatically sends important system messages to all e-mail addresses that you specify here. Separate multiple e-mail addresses with semi-colons.



## Predefined Variables

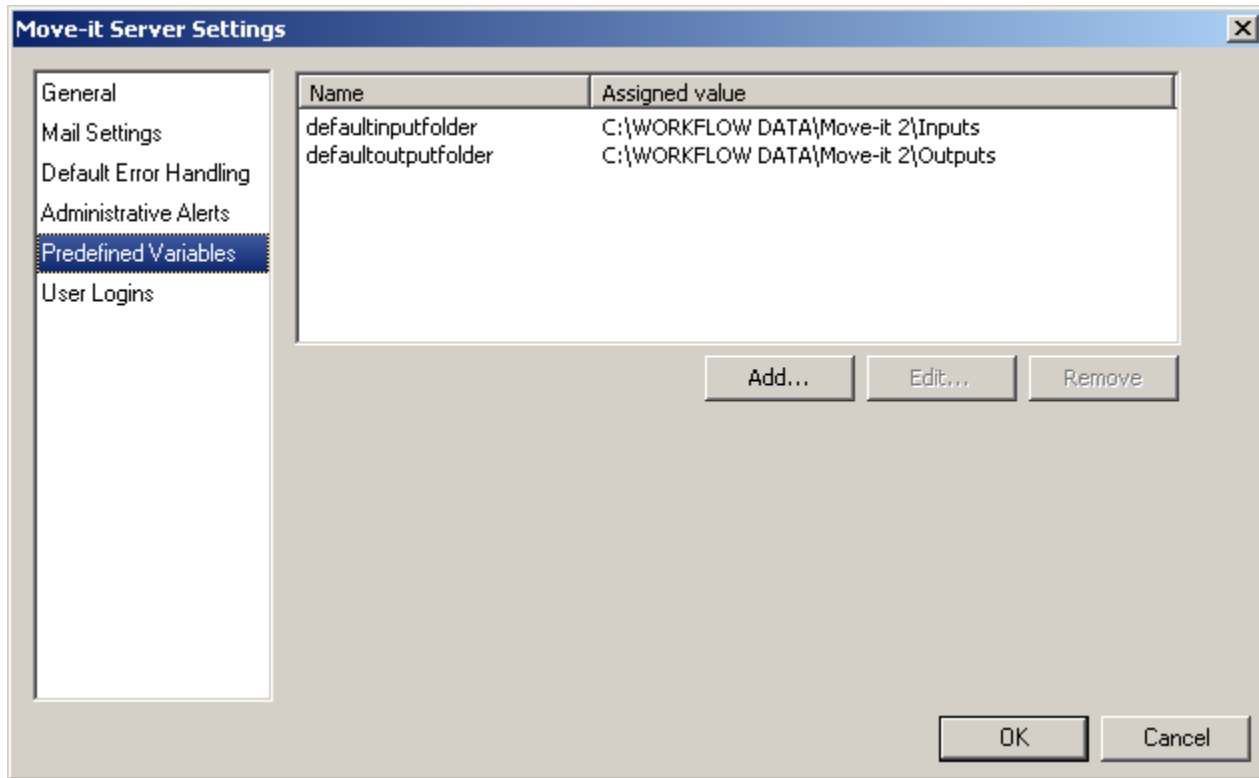


Figure 15 Server Settings – Predefined Variables

Move-it offers the possibility of defining your own variables, which can then be used in your workflows. The **Predefined Variables** window allows you to create new variables and assign values to them. These variables will then be listed in the **Available Fields** list and can therefore be used in your workflows. Turn to section [2.5 Fields](#), starting on p.90, to understand how fields can be used to configure Actions such as Rename File, Copy To Folder, Send Email and others.

By default two predefined variables are created during the installation process, defaultinputfolder and defaultoutputfolder, which cannot be deleted. These two variables are automatically included when you create inputs (Wait For File) and outputs (Copy To Folder) in order to facilitate and standardize their creation.

To create a new variable, click **Add** and give the field a **Name** and **Value**. You may later **Edit** or **Remove** the variable by clicking the respective buttons.

## User Logins

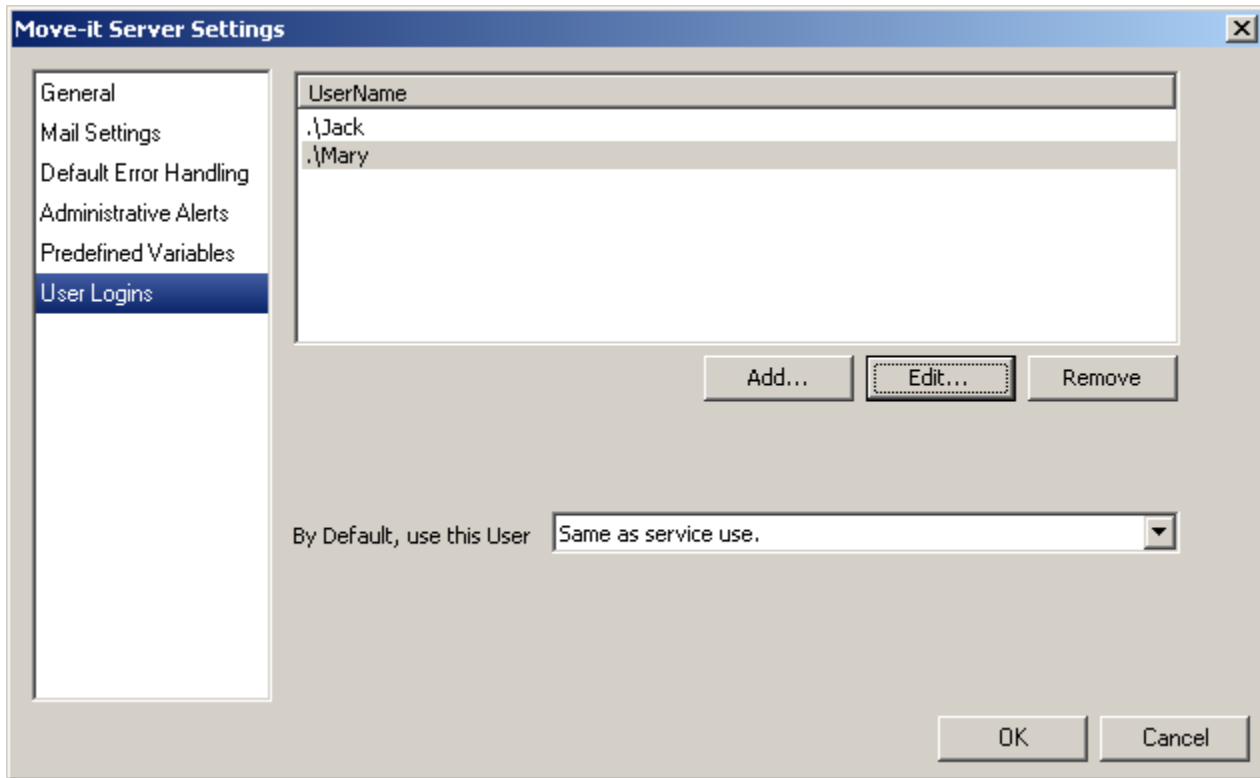


Figure 16 Server Settings – User Logins

The **User Logins** preference is where you can create a database of user accounts. The user accounts defined here may be Windows users, PrePage-it Web users, etc. This is only a database of existing users – these user accounts must already have been created somewhere else in order to have any power in Move-it.

The database of user accounts you create here will then be available to be selected in various dropdown lists inside the Move-it interface. Mainly, it will allow you to configure any Move-it Input (**Wait For File**) and Output (**Copy To Folder**) to log on to a remote folder with one of these user accounts. To specify that a Move-it input or output should log on with a pre-defined user account, select the required user from the **Authentication Username** dropdown list inside a **Wait For File** or **Copy To Folder** dialog box (see figure below and the section [Authentication](#) on p.37 for more information).

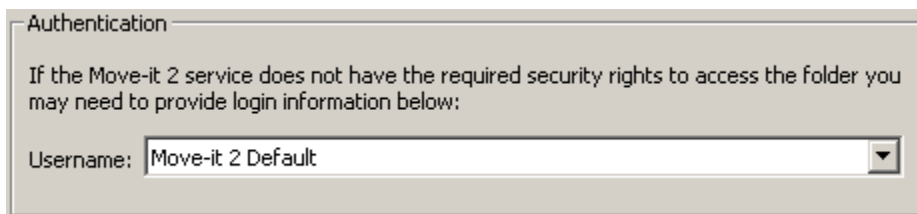


Figure 17 Authentication dropdown list

In the case of inputs and outputs, the user accounts you define are Windows users that you've created on the server machine.

In addition to inputs and outputs, users defined in the **User Logins** preference may also be used in some other actions, such as **PrePage-it Web**. In this case, the user accounts will be used to configure a **PrePage-it Web** action, which will automatically log on to a PrePage-it Web account and submit files to a RIPPING queue. The **PrePage-it Web** action is explained in the section [PrePage-it Web](#) on p. 73.

Note that all passwords provided by you when adding a user account will be encrypted.

#### Default User

You can specify which default user account Move-it will use when it needs to access remote folders. The Move-it 2 Default User is selected from the **By Default, use this User** dropdown list.

In most cases, selecting the option **By Default, use this User = Same as service use** is adequate. This will instruct Move-it to use the user account configured in the Move-it 2 Service, which is how previous versions of Move-it were configured. This is usually sufficient because the default user account selected for the Move-it 2 Service is typically configured to have access to all local and remote input and output locations. However, if it is more suitable for your workflow, you may choose a different user account from the **By Default, use this User** dropdown list.

#### Adding a New User

New users are added by clicking the **Add** button and providing the required information.

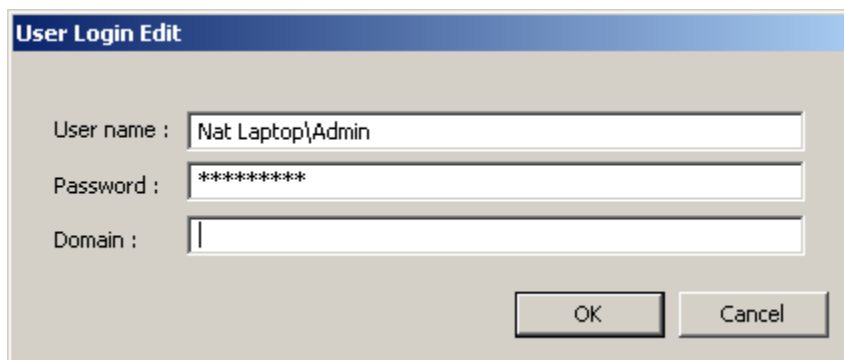

 A screenshot of a Windows-style dialog box titled "User Login Edit". It contains three text input fields: "User name :" with the text "Nat Laptop\Admin", "Password :" with masked characters "\*\*\*\*\*", and "Domain :" which is empty. At the bottom right, there are two buttons: "OK" and "Cancel".

Figure 18 User Logins - New User

In addition to the username and password, you may optionally include a comment or note with each user account that you create. This may be useful to:

- create 2 or more users with the same username
- help organize usernames in alphabetical order
- help identify a user

To add a comment/note while a new user is being created: type the comment/note in the **User** text box, followed by a back slash, then followed by the username.

You may also specify a **Domain**, if required.

## 1.3 Configuring Move-it to access remote folders

The procedure below provides some important guidelines for configuring Move-it to have the necessary permissions to input/output files to remote drives and folders.

1. Create a user with Administrator rights on the Move-it server machine and also every machine where Move -it needs to input/output files:
  - the user account (username/password) must be identical on every machine
  - this user account must have a password (it cannot be blank)
  - password is case-sensitive
2. Make sure the Move-it 2 Service logs on with this user account.
3. In the menu **Server > Settings > User Logins**, select: **By Default, use this User = Same as service use.**

### Tip

If step 1 is already done before Move-it is installed, you can provide the user account you created (with Administrator rights) as the **Local Account** when prompted during the installation (see figure below). The installer will then automatically perform steps 2 and 3 for you. Refer to [Installing Move-it](#) on p.6 for details about the installation.

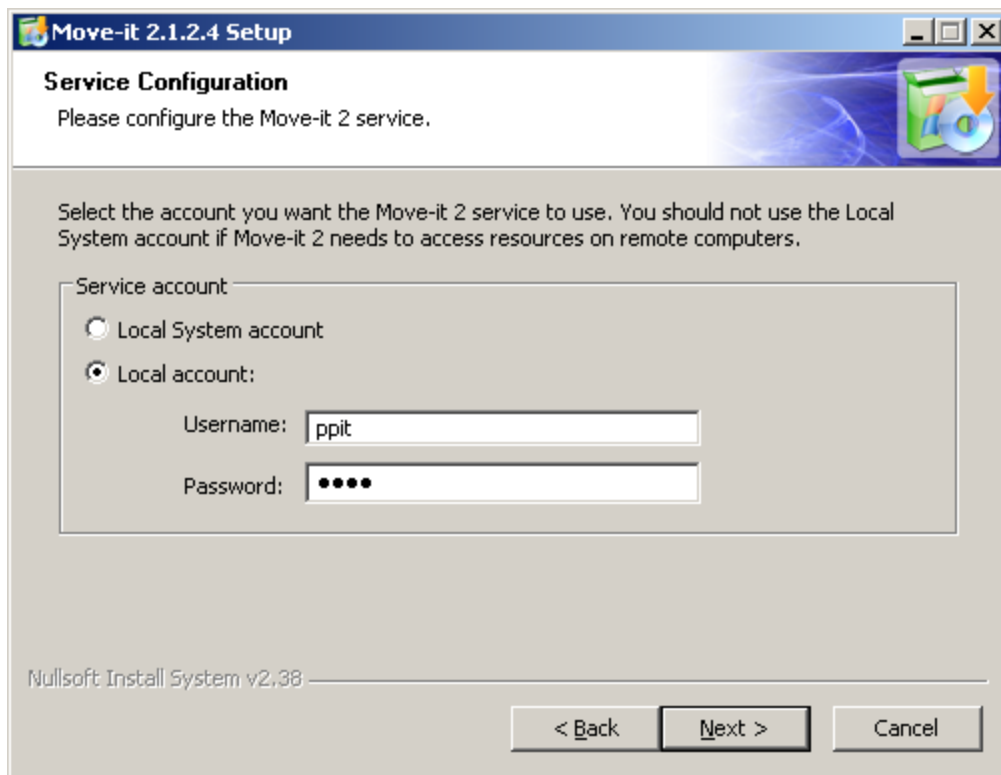


Figure 19 Installation – User Account

# Chapter 2 - Workflows

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## 2.1 Basics

With Move-it, you can create workflows which input files, processes them and outputs them at a location which you specify. A workflow consists of one or more inputs and actions, connected to each other by route filter arrows. These three workflow building blocks are covered in detail in this chapter, in the following sections: [2.2 Inputs](#) on p.32, [2.3 Route filters \(arrows\)](#) on p.40 and [2.4 Actions](#) on p.46.

### Workflows toolbar

The **Workflows** toolbar shown below contains buttons which allow you to create a new workflow, stop/start a workflow, edit the workflow layout or properties, and also to duplicate and delete workflows.

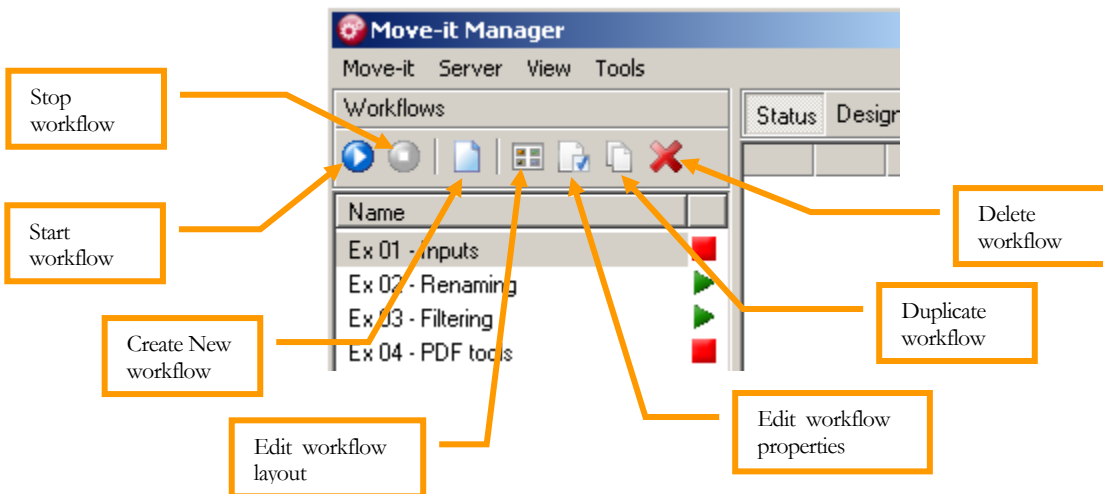


Figure 20 Workflows toolbar

Most of the tools contained in the **Workflows** toolbar can also be accessed by right-clicking on a workflow name. This will display the following contextual menu:

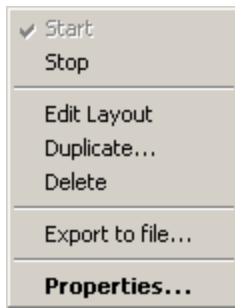


Figure 21 Workflows contextual menu

The **Export to file** tool is only found in the contextual menu shown above and is explained in the section [Exporting/Importing workflows](#) on p. 26. The remainder of the tools in the **Workflows** toolbar are explained next.

New workflow



When you click the **New workflow** button, the **Properties** window appears, prompting you to give the new workflow a name.

Figure 22 New workflow

After specifying a name and clicking **OK**, you may begin building your workflow. There are also other properties (e.g. **Error Handling**) that can be specified in the **Properties** window, either when

creating a new workflow or any time later by clicking the **Edit workflow properties** toolbar button. These properties are explained in the section [Edit workflow properties](#) on p. 24.

Start/Stop workflow



After a workflow has been created, you need to start the workflow in order to activate it so that it processes jobs. To do this, select the workflow name and click the **Start workflow** button. If you wish to de-activate it so that it doesn't process any more jobs, select the workflow name and click **Stop workflow**.

Edit workflow layout



The workflow layout refers to the workflow that you have built up consisting on inputs, actions and route arrows. If you need to modify or simply view a workflow after it has been built and saved, you may open the workflow in design view by either (i) double-clicking on the workflow name or (ii) selecting the workflow and clicking the **Edit workflow layout** button.

While you are editing a workflow layout, an additional toolbar appears, as shown below.



Figure 23 Workflow Edit toolbar

After making changes to a workflow layout, it must be saved by clicking the **Save** button. When you are finished editing the layout, you may close it using the **Close** button.

The **Delete** and **Properties** buttons refer to an individual object in the layout (i.e. an input or action), not the entire workflow as a whole. You may delete an object by selecting it and then either (i) clicking the **Delete** button or (ii) pressing the delete key on keyboard. To view the properties of an object, you can either (i) select it and click the **Properties** button or (ii) double-click the object.

Edit workflow properties



The workflow properties window can be configured when you create a new workflow or any time later by clicking the **Edit workflow properties** button.

The **Workflow Properties** dialog box shown below displays some information about the workflow and also lets you specify some general settings.



The screenshot shows a Windows-style dialog box titled "WF2 Properties". On the left is a vertical tab bar with two tabs: "General" (which is selected and highlighted in blue) and "Error Handling". The main area of the dialog is light gray and contains the following fields and controls:

- Workflow name:** A text box containing the text "WF2".
- Description:** A large, empty text box.
- Creation date:** A label followed by the text "11/10/2006 3:52:06 PM".
- Statistics:** A section containing a table with two columns, "In:" and "Out:". The "In:" column has the value "1" and the "Out:" column has the value "0".
- Enable debugging mode:** A checkbox that is currently unchecked, followed by the text "(Disable for normal usage)".
- Buttons:** "OK" and "Cancel" buttons are located at the bottom right of the dialog.

Figure 24 Workflow Properties - General

The **General** properties show you the **Workflow Name**, **Creation Date**, **Statistics**, etc. You can also rename the Workflow by modifying the existing name.

By default, the **Error Handling** property is set to **Use Error Default Handling**. This instructs Move-it to handle errors as specified in the global settings (click **Server > Settings**). However, if you want to customize the error handling for a workflow, uncheck the **Use Error Default Handling** option. This will display the various options available for Error Handling.

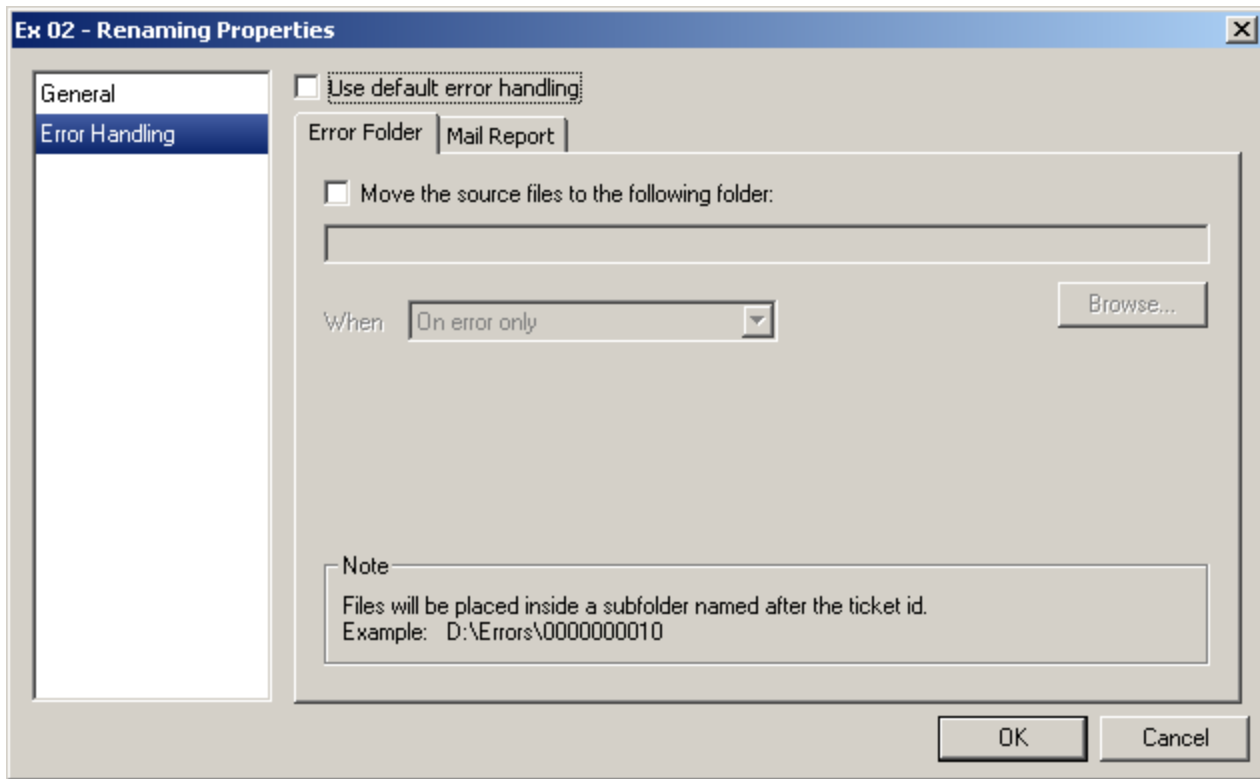


Figure 25 Workflow Properties – Error Handling

For an explanation of the various Error Handling options, refer to the section [Default Error Handling](#) on p. 14.

Duplicate/Delete workflow



You may quickly create similar workflows by making a duplicate of an existing workflow, giving it a different name and modifying it as required. Duplicates are made by selecting a workflow and clicking the **Duplicate workflow** button.

Workflows may be deleted using the **Delete workflow** button.

Exporting/Importing workflows

The **Export to file** tool can be accessed by right-clicking on a workflow name. This will display the following menu:

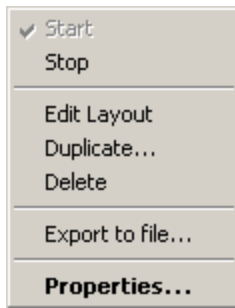


Figure 26 Workflows contextual menu

The **Export to file** tool exports a workflow i.e. it saves the configuration of the selected workflow. The workflow is saved as a file with the .aflow extension, for example, PDF\_Splitter.aflow.

A saved workflow can be imported into any Move-it 2.x Manager using the **Server > Import Workflow** menu command.

This tool provides a convenient way for making backups of workflows or for copying workflows from one Move-it 2.x application to another.

### Polkadots Backup

A backup utility called Polkadots Backup is now installed with Move-it. This utility can perform backups and restores of various Polkadots applications (e.g. Move-it, PrePage-it Viewer, PrePage-it Web) installed on a machine. The utility is accessed via the menu **Start > Programs > Polkadots > Polkadots Backup**.



Figure 27 Polkadots Backup

### Backup

The backup can be performed immediately (**Backup Now**) or at scheduled intervals (**Schedule Backup Task**). Either way, all saved data from all Polkadots' applications is saved in a single backup file. This backup file is required whenever you want to restore any settings. The filename is identified by the day/time of the backup and has a .polk extension.

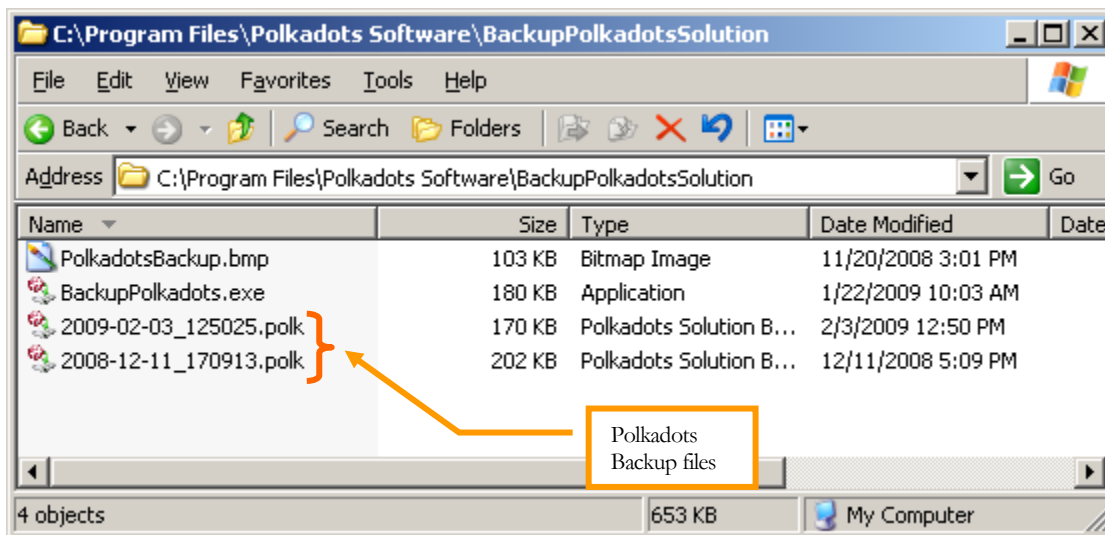


Figure 28 Backup File

To do a backup of Move-it on a regular basis, click the **Schedule Backup Task** button. Then in the dialog box that opens, check the **Enable Schedule** checkbox and provide the required information.

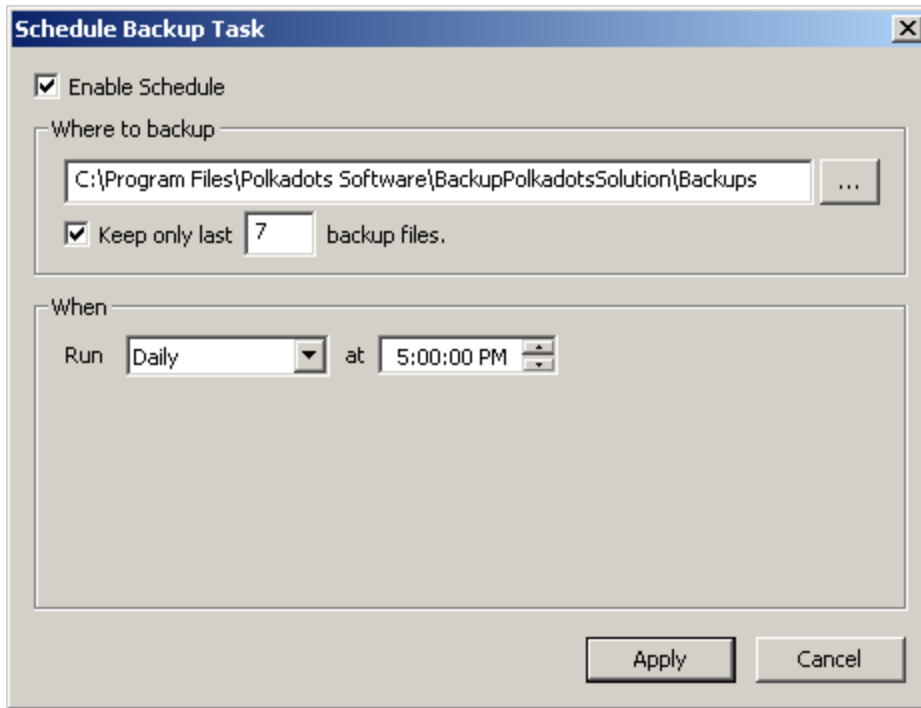


Figure 29 Schedule Backup Task

To avoid the accumulation of backup files, enable the setting **Keep only last x backup files**, where x is the maximum number of previous backup files you want to keep. If this option is not checked, all backups files will be preserved in the specified backup folder.

#### Restore

The restore process allows you to restore data of the segments or modules that you select e.g. PrePage-it, Move-it, etc. The **Restore** dialog box will present you with a list of all the Polkadots modules that you can restore on your particular machine.

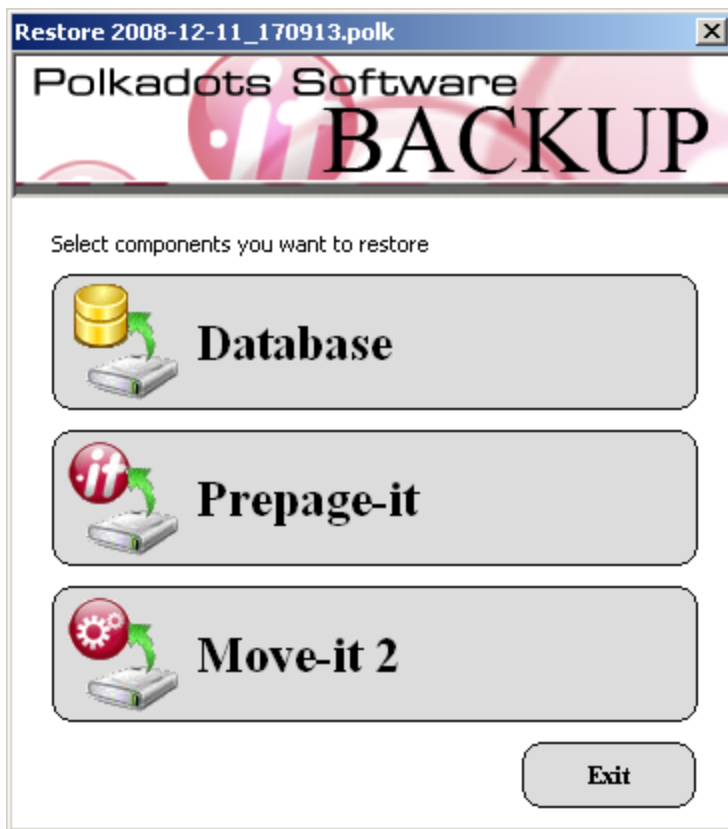


Figure 30 Polkadots Restore

Click on **Move-it 2**. This will open the following window.

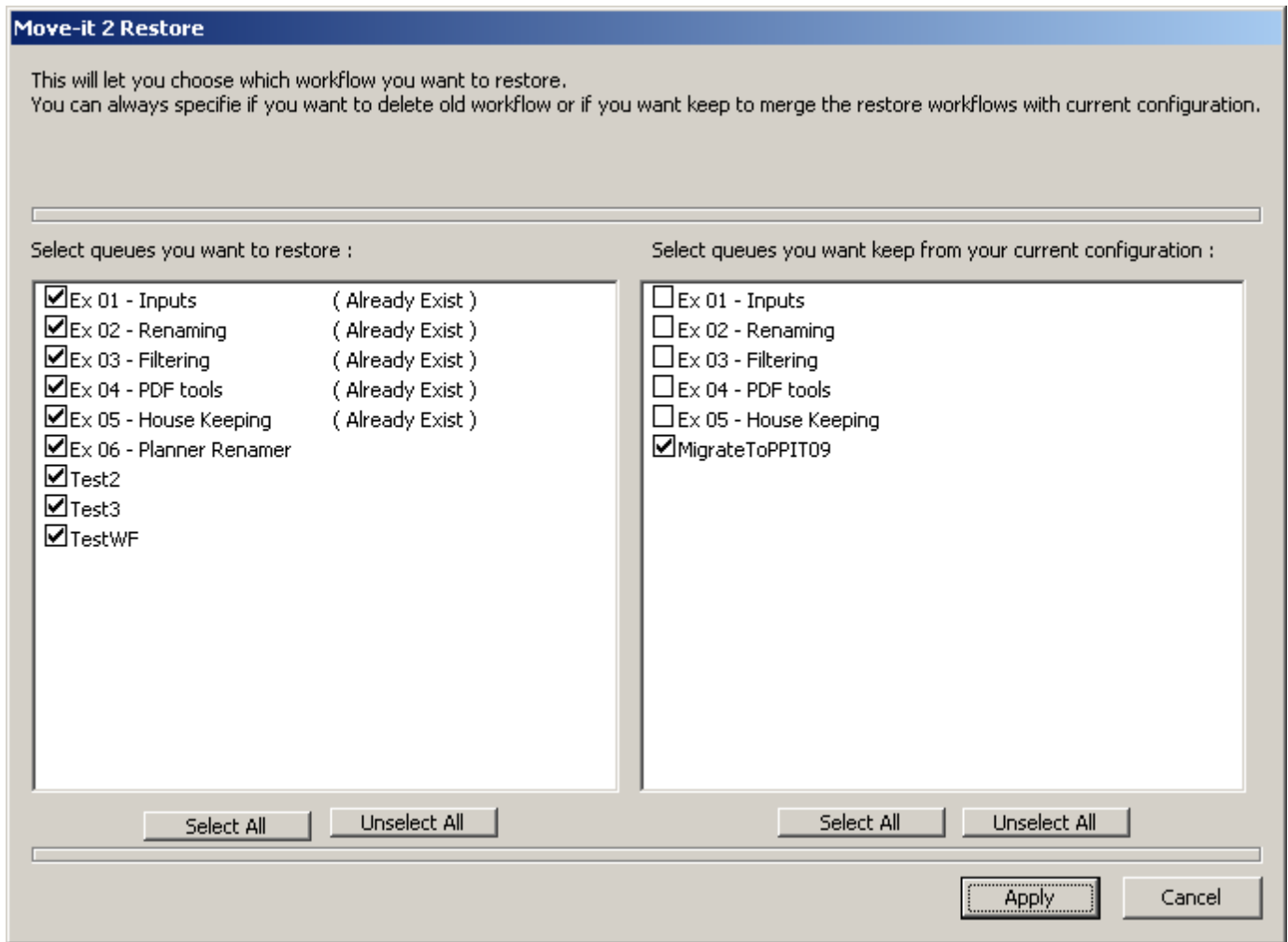


Figure 31 Move-it 2 Restore

In the **Move-it 2 Restore** window shown above, select which Move-it workflows you want to restore. The window consists of two queue lists: the left side are the workflows from your backup and the right side is your current Move-it configuration. All the workflows that you select from both queue lists will be restored. Note that if the same workflow name is listed on both the left and right side, you will not be allowed to select both - you must choose which of the two you want to keep in your Move-it setup.

## 2.2 Inputs



Figure 32 Inputs toolbar

Inputs provide ways to automatically bring job files into a workflow so that they can be processed. To add an Input into a workflow, open the workflow in **Design View** by double-clicking the workflow name or by clicking the **Edit workflow layout** button, then drag the desired input icon unto the workflow layout window. Two types of inputs can be added to Move-it workflows: **Wait For File** or **Download FTP file**.

Once an Input has been added to a workflow, it can be configured through its **Properties** dialog box. To access it, either double-click the Input icon that you've added into the workflow or right-click it and select **Properties** from the menu that appears.

An input can also be removed from a workflow layout either by selecting it and pressing the **Delete** key on the keyboard or by right-clicking the input and selecting **Delete** from the dropdown menu.



## Download FTP file

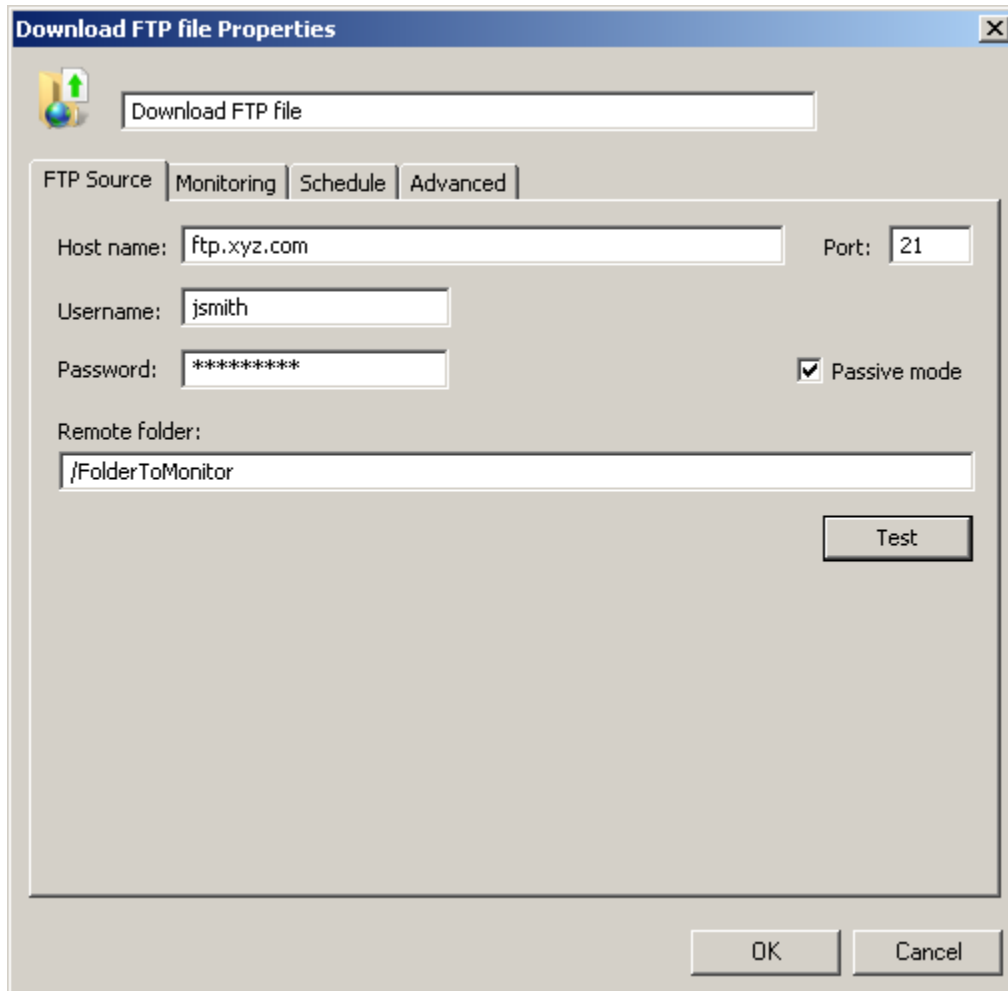


Figure 33 Download FTP file - Properties

The Download FTP file monitors an ftp folder for incoming files. In addition to indicating the FTP source, there are a number of other settings that can be specified which will determine how the ftp folder will be monitored, what to do with the original files, whether the monitoring of jobs should be restricted to certain days/hours, etc. All these settings are described next.

## FTP Source

During configuration, an ftp **Host name** (i.e. ftp address such as ftp.xyz.com), **Username** and **Password** need to be specified to allow Move-it access to the ftp site. Then the ftp folder (**Remote folder**) that you want to monitor should be specified. In most cases the **Port** number is 21, unless specified otherwise by your system administrator.

The **Test** button allows you to immediately know whether Move-it will be able to access this ftp folder, by displaying a pop-up window saying either "Connection was successful!", "Connection failed!" or another similar message.

The **Passive mode** option transfers files to the ftp server in Passive FTP mode, reducing the risk of interference due to firewalls. Leaving this option unchecked sends files in regular ftp mode, sometimes referred to as Active FTP mode. Depending on the FTP server and client, file transfers may work well in active mode, passive mode or both.

To complete the ftp input setup using the default settings, give the input a name and click **OK** to save it. The following sections explain how to customize the ftp input settings.

#### Monitoring

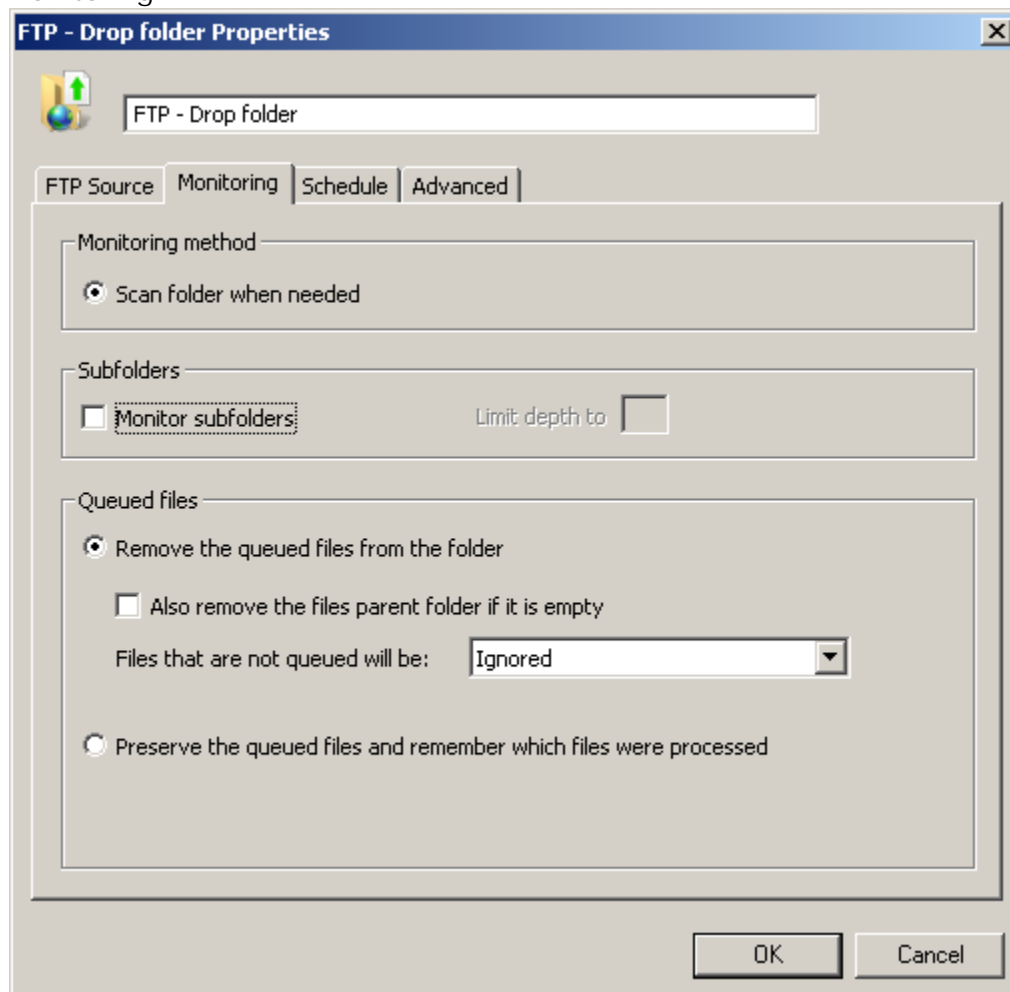


Figure 34 Download FTP file - Monitoring

The **Monitoring** tab gives you the option of **Monitoring subfolders**. Leave this unchecked if you only want to scan the root of the **Remote folder** specified in the **FTP Source**.

**Limit depth to** will limit the level of subfolders that are monitored. Leave this unchecked if you want to scan all subfolders.

In addition, you can decide whether files picked up by Move-it should then be removed from the ftp folder (**Remove the queued files**) or kept there (**Preserve the queued files**).

## REMOVE THE QUEUED FILES

If you decide to **Remove the queued files**, then you must instruct Move-it on what it should do with files that are not queued. This refers to all files that are not picked up by Move-it, either because they do not satisfy the filter conditions or for other reasons. **Files that are not queued** can be set to be **Ignored** (i.e. left there) or **Deleted**.

## Tip

In the typical setup, files that are not picked up by Move-it are ignored i.e. just left in the input folder. To be alerted that a file has not been picked up by Move-it or has otherwise errored out, you can activate the **Error Handling** feature. This feature can automatically move the file to an Error folder and/or send an e-mail to alert operators about the error. More about Error Handling is found in the section [Default Error Handling](#) on p.14.

In addition, when you set **Remove the queued files from the folder**, you can set it to **Also remove the files parent folder if it is empty**. This option is desirable in some situations but not in others, so the decision of whether or not to use it should be made with care.

## Schedule

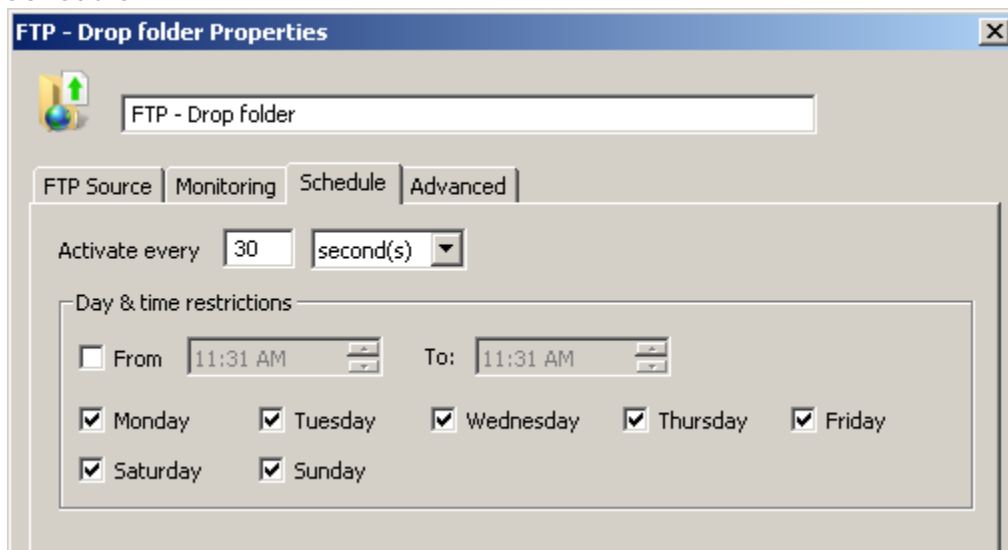


Figure 35 Download FTP file - Schedule

The **Schedule** tab lets you set how often the ftp folder should be scanned. For example, setting it to **Activate every 5 minutes** means Move-it will monitor the folder once every 5 minutes for new files.

In addition, it allows you to restrict the day / time when the ftp folder will be monitored. By default it is always monitored, as shown in the figure above.

## Advanced

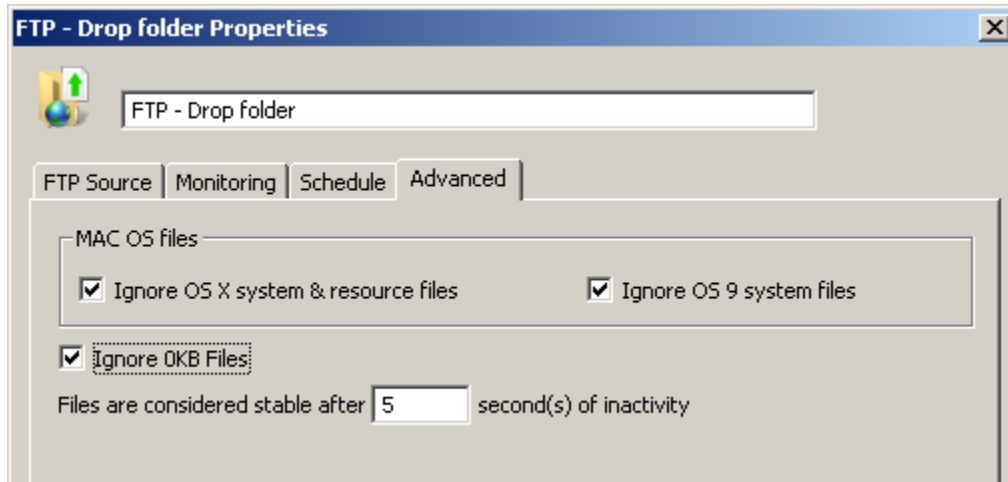


Figure 36 Download FTP file - Advanced

The **Advanced** tab contains several options concerning the stability of files that are about to be input by Move-it. Included is the support of **Mac OS files** and also empty files (i.e. **Ignore 0KB Files**).

The **Mac OS files** options prevent resource or hidden Mac files from being picked up by Move-it.

**Ignore 0KB Files** likewise prevents empty or 0 KB files from being picked up by Move-it, for example, files that have been held up while trying to be transferred across a network.

## FILES ARE CONSIDERED STABLE AFTER X SECONDS OF INACTIVITY

**Files are considered stable after x seconds of inactivity** is an important setting regarding the stability of incoming files. This option, where x can be set to any number of seconds, determines how long Move-it will wait before picking up a file. More specifically, it determines how long a file has to be unaltered (not changing in file size) before Move-it takes the file.

This setting sometimes needs to be tweaked in situations where a file is being picked up from a remote drive or computer across a network, due to the fact that the file transfer may be slow or occasionally interrupted. If the file transfer halts for more than the specified number of seconds, Move-it will consider the file stable and pick it up. This means an incomplete file will be introduced into the workflow, which will error out during processing. In these cases, increasing the setting from 5 to 10 seconds (or a little more) will give the file enough time to stabilize when network interruptions occur and may therefore resolve the problem.

## Wait For File

A Wait For File input is essentially a hot folder that will be monitored for incoming files. It is configured and works similarly to a Download FTP file input. You will find detailed explanations about how to configure most of the Wait For File settings in the section [Download FTP file](#), starting on p. 33. This section focuses on settings that are specific to the Wait For File input only.

## Folder To Monitor

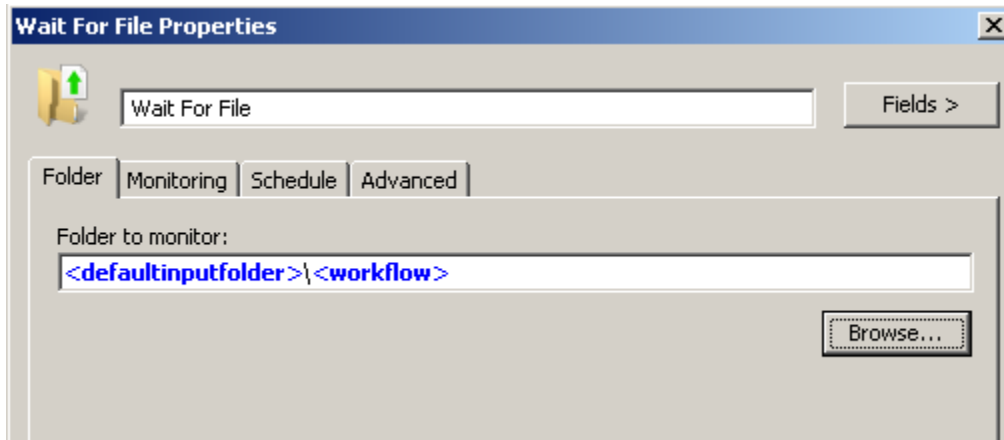


Figure 37 Wait For File – Default Folder

The **Folder to monitor** is the hotfolder that Move-it will be scanning for new files. It may have a default setting specified, such as `<defaultinputfolder>\<workflow>`. This facilitates and standardizes the creation of inputs (see [Predefined Variables](#) on p. 17 for more information about this topic). You may keep this default or specify another folder by typing its pathname or clicking the **Browse** button.

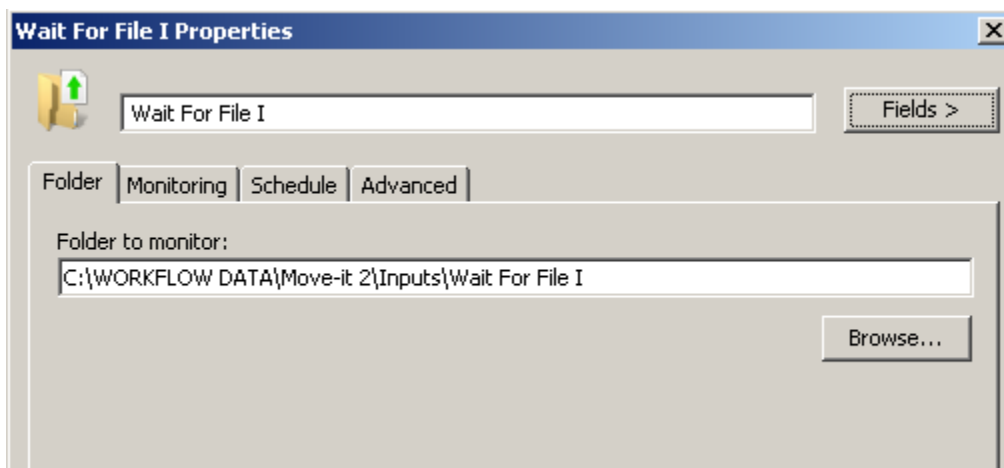


Figure 38 Wait For File – Specified Folder

## Authentication

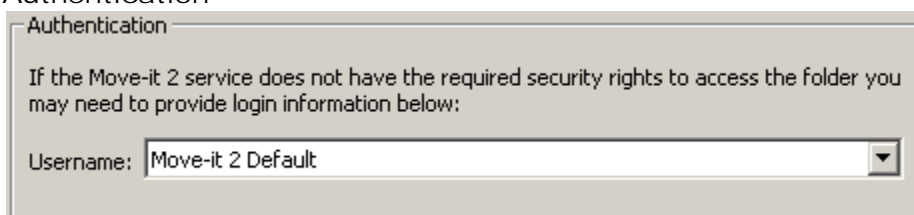
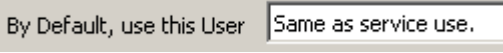


Figure 39 Authentication dropdown list

When Move-it needs to access remote folders, permission to access these folders is typically achieved by:

- specifying an appropriate user account as the Move-it 2 **Default User**, as set in the **Server Settings > User Logins > Default User** → 
- selecting **Authentication > Username = Move-it 2 Default** (as shown in [Figure 39](#) above)

This is sufficient in most cases because the default user is typically configured to have access to all local and remote input and output locations. If for some reason a folder that Move-it needs to access requires different user rights than what the default user has, then select a different user from the **Authentication > Username** dropdown list.

The users that are listed in the **Username** dropdown list are those that have been created in the **Server Settings > User Logins**. For more information about **User Logins** and authentication, see [User Logins](#) on p. 18.

#### Monitoring method

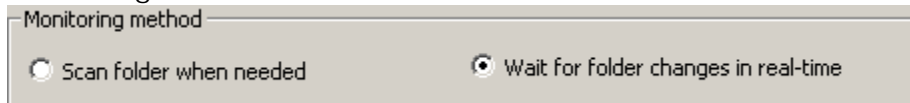


Figure 40 Monitoring method

Another difference with Wait For File inputs is that you can choose between 2 monitoring methods in the **Monitoring** tab. A folder may be monitored periodically (for e.g. once every 30 seconds) by selecting **Scan Folder when needed** or continuously in real-time by selecting **Wait for folder changes in real-time**.

In the periodic method (**Scan Folder when needed**), you need to specify the interval of time between scans in the option **Activate every x seconds/minutes** located in the **Schedule** tab (see [Schedule](#) on p. 35 for details). Note that this is the only monitoring method available when scanning FTP folders.

The real-time method will pick up new files as soon as they arrive in the folder. For real-time monitoring (**Wait for folder changes in real-time**) there are no scheduling options that need to be set – the **Schedule** tab will display the message No options available.

#### Input via Polkadots Printers

If your workflow includes PrePage-it Viewer 6.x or higher, it is possible to create a printer for each Move-it queue. This gives you the added option of *printing* a file from any of your software applications to a Move-it queue. Nothing needs to be done in Move-it to set up this printer – the configuration is performed in the PrePage-it Viewer, as described next.

Move-it queues/hotfolders are now visible in the PrePage-it **Printer Manager**. Therefore it is possible to create a Polkadots Printer for a Move-it queue in the same way as you do for a PrePage-it queue.

To create a Polkadots Printer, launch the **Printer Manager** in one of the following ways:

- click **Start > Programs > Polkadots > Printer Utilities > Printer Manager**  
*or*
- open the PrePage-it Viewer and click the menu **Tools > Printer Manager**

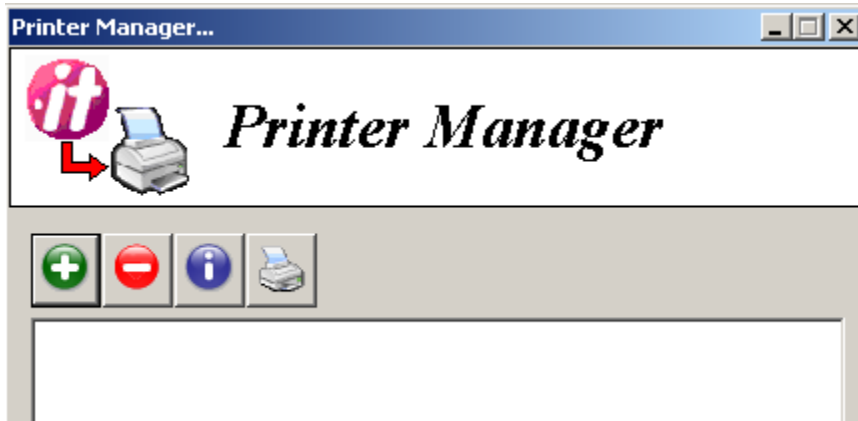



Figure 41 Printer Manager

In the **Printer Manager**, click the **Add** button  and follow the wizard for creating a **Polkadots Printer**. The following window will appear, listing all Move-it and PrePage-it queues in your network.

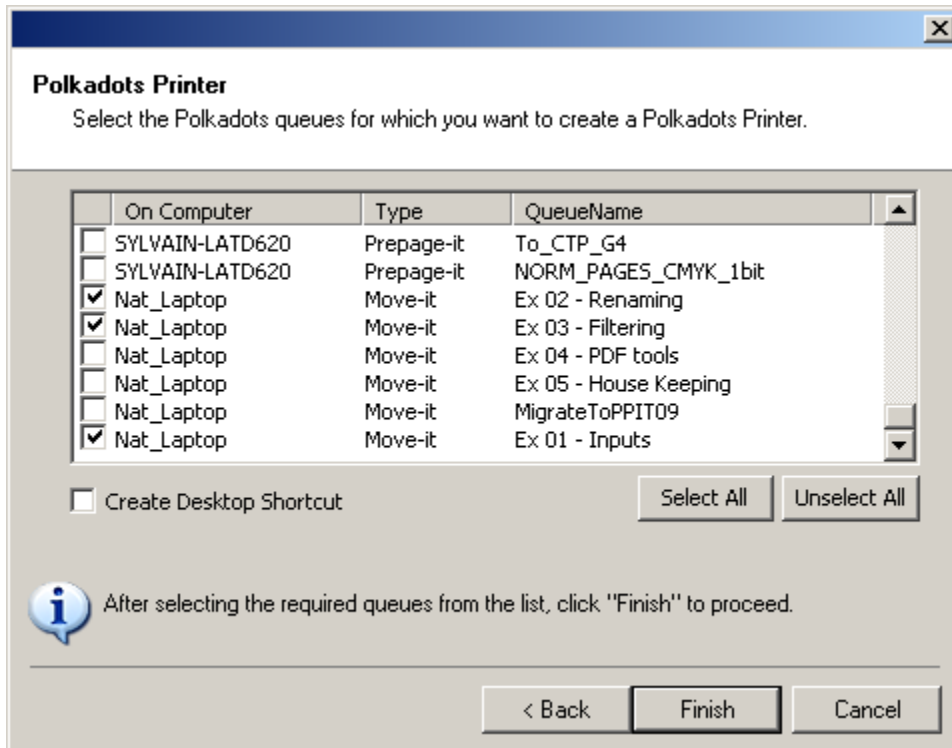


Figure 42 Polkadots printers for Move-it queues

In the window shown above, select all the Move-it queues for which you would like to create a printer, then click **Finish**. **Create Desktop Shortcut** is optional.

All selected printers will be created and available in the **Printer** dropdown list next time you want to print from one of your applications.

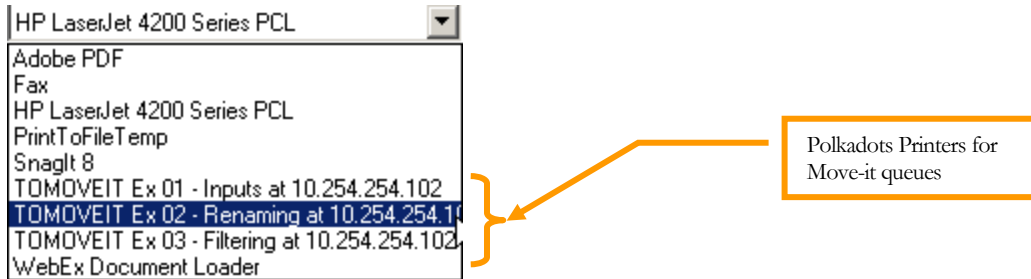


Figure 43 Printer dropdown list

More information about Polkadots Printers can be found in the *PrePage-it 6.x User Guide*.

#### Note

Only one Polkadots Printer can be associated with a Move-it queue. When a printer is created for a Move-it workflow with more than one input folder, the printer will send files to the first input folder in the workflow. The “first” input folder refers to the first one that you add to a workflow when you’re building your workflow.

## 2.3 Route filters (arrows)

Route filters refer to arrows that connect the various elements (i.e. Inputs and Actions) in your workflow. These arrows serve two purposes: (i) they direct the workflow and (ii) they can also act as filters. They route the workflow by indicating the direction of the workflow, that is, what path the file will follow (through the various processing actions) after it has been input. In addition, you can specify filtering conditions which will permit certain types of files to go through to the next action, while others do not. Filtering is explained in the following sections, [Filtered files](#) and [Filtering conditions](#).

The end of this section describes some [Special-purpose route filters](#) (see p.44). The Symbolic Link can be used to send a file outside the Move-it workflow for external processing and then brought back into the workflow while preserving all the associated variables. The Load Balancing route filter allows you to create an “internal” load balancing between one input and several outputs.

To draw an arrow that connects 2 workflow elements (i.e. Inputs or Actions), drag the mouse from one object to another *while holding down the **Shift** key*. To remove an arrow, right-click on the arrow and select **Delete** from the dropdown menu.



## Filtered files

When a filter is specified in a route filter arrow, the files that match the filter's criteria will go on to the next step in the workflow while the other files will get filtered out. What happens when a file is filtered out depends on where it occurs in the workflow. There are two possibilities: (i) the file can be filtered out at the input of a workflow or (ii) after it has already entered the workflow.

A file can be filtered at the input when a route filter arrow following an Input (i.e. Wait For File or Download FTP File) has a filter specified. In this case, Move-it will check the file against the filter criteria and if it does not comply, then the file will not enter the workflow at all. Instead, the file will either be deleted or just left there, depending on which option is selected for the setting **Files that are not queued will be** (**Ignored** or **Deleted**), found in the Input's **Monitoring** tab.

The other possibility is when a file is filtered out sometime after it has already entered the workflow. If a file has started to move through the workflow and it is filtered out at any point afterwards, it will be considered an error and will stop being processed. To know more about how errors are handled, refer to the section [Default Error Handling](#) on p.14.

## Filtering conditions

To set filtering conditions, either double-click an arrow or right-click the arrow and then select **Properties** from the dropdown menu. The **Route Properties** window will be displayed.

To add a filtering condition, click the “+” button. A number of dropdown menus will appear, as shown below.

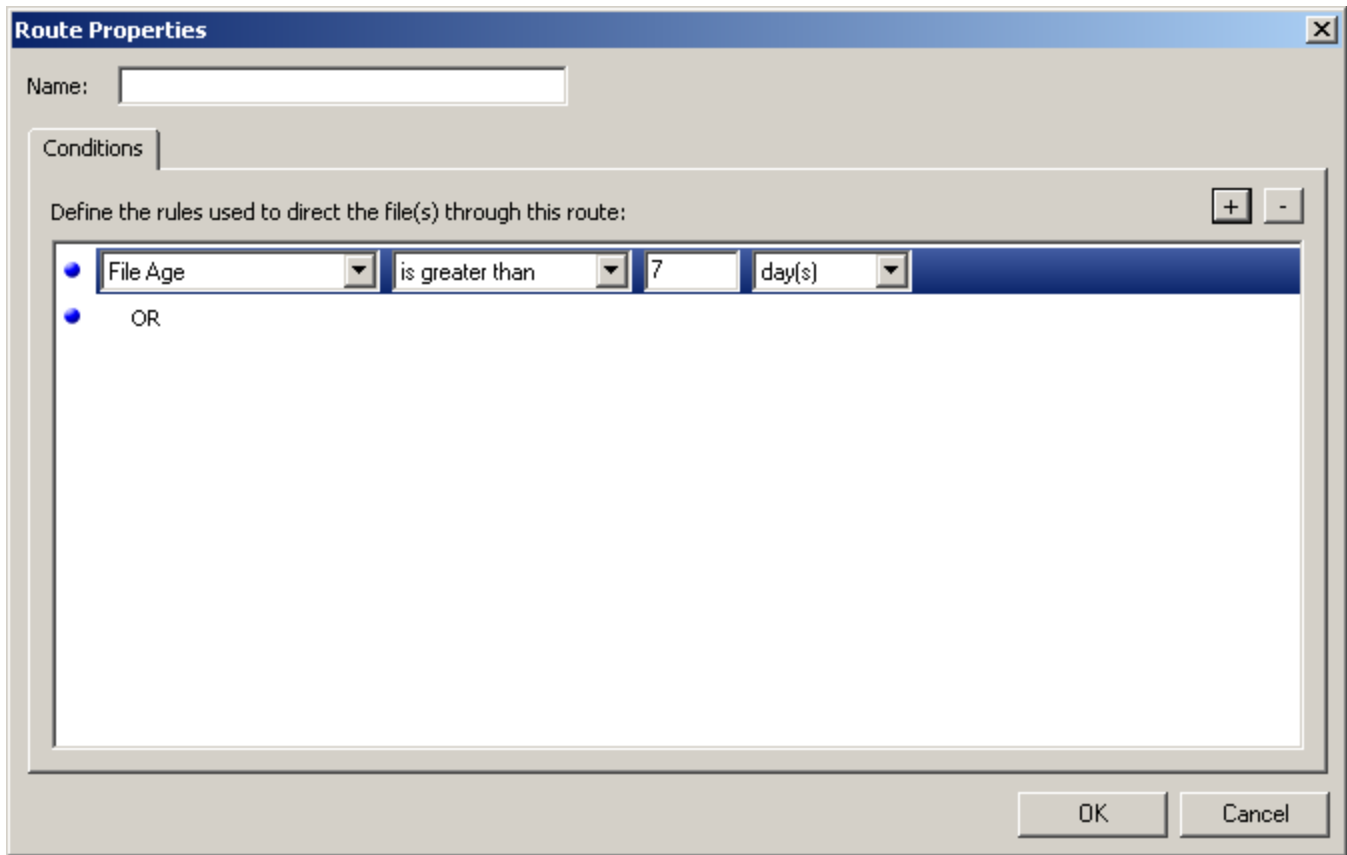


Figure 44 Route Filter - Properties

As an example, we've created a filtering condition which lets through all files that are older than 7 days. Files that are less than 7 days old will not make it past this route filter and therefore will not go on to the next action. This type of filter can be used in a workflow that archives or trashes all files more than 1 week old.

There are numerous criteria that can be used to create filtering conditions, as listed in the dropdown menus. Note that the criteria listed in the dropdown menus will change depending on what Inputs and Actions have been defined in the workflow, especially leading up to the Route Filter arrow.

It is also possible to specify 2 or more conditions for the same route filter. Just click the "+" button again to add more conditions. For more information about multiple filtering conditions, see the section [AND and OR conditions](#) below.

To remove a filtering condition, select it and click the "-" button.

If you wish, you may optionally give the route filter a name.

#### AND and OR conditions

When you add multiple filtering conditions to a route filter, by default a file will have to correspond to *all* the conditions in order to be valid and hence pass through this route. These types of multiple filtering conditions are known as AND conditions. An AND condition is

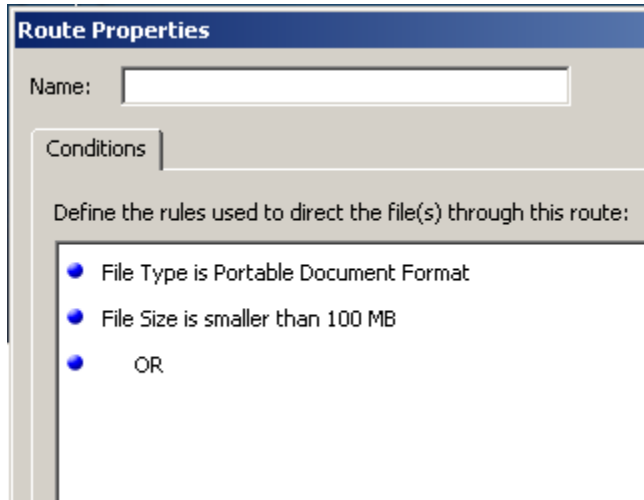
represented by 2 criteria listed one below the other without the word **OR** in between them. An example of this is shown below on the left side of [Figure 45](#).

It is also possible to create multiple filtering conditions known as OR conditions, where only one of the conditions needs to be met in order to pass through the route filter. To configure OR conditions, you must take the word **OR** which is located at the bottom of the list of conditions and drag it with your mouse so that it lies *in between* 2 conditions. As an alternative, you can drag the condition itself lower down until it is below the word **OR**.

To move the word **OR** or a condition that you've defined up or down, do the following:

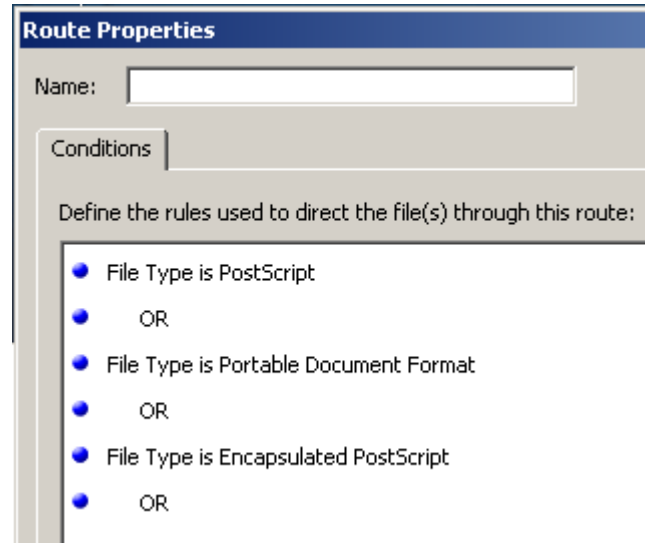
- place your mouse over one of the blue dots at the left of the window until the mouse cursor looks like a hand
- drag up or down until you see a line indicating where it will go, then release the mouse button

Shown below are examples of both AND and OR conditions. Note that the last **OR** at the bottom of the list is always there and has no effect on the filtering. Note also that in the OR conditions shown on the right side of Figure 45, there is an **OR** in between every condition, therefore only one of the conditions listed has to be met.



AND conditions

Figure 45 Multiple filtering conditions



OR conditions

If you configure multiple filtering conditions with a mix of AND and OR conditions, the AND conditions will have priority over the OR conditions in the process of determining which files will be accepted past the route filter.

## Special-purpose route filters

There are two special-purpose route filter arrows that apply to certain situations and serve a specific purpose: the Symbolic Link and Load Balancing route filters, explained next.

### Symbolic Link

The Symbolic Link can be used to send a file outside the Move-it workflow for external processing and then to bring it back into the workflow while preserving all the associated field variables. The figure below shows a representative symbolic link workflow.

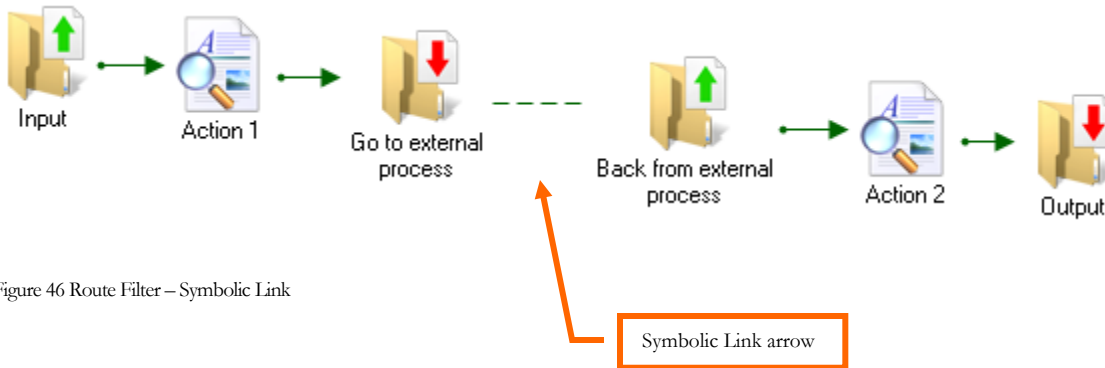


Figure 46 Route Filter – Symbolic Link

Figure 46 illustrates how a file can be input and processed by Move-it, and then sent to an external process. An example of an external process is sending a PostScript file to Acrobat Distiller to be converted to a PDF. In this example, after becoming a PDF, the file is then picked up by Move-it once again (Back from external process) and continues the workflow as usual. Any field variables associated with the file when it is sent to the external process are preserved after the file re-enters the Move-it workflow.

The symbolic link route filter is represented by a green dotted line. You create this dotted line by drawing a connecting arrow going from an output (Copy To Folder) to an input (Wait For File) *while holding down the **Shift** key*. Normally this would create a regular route filter, but when the arrow goes from an output to an input, Move-it will create a symbolic link. There is nothing to configure for this route filter arrow.

When configuring a symbolic link chain, the Go to external process action typically outputs the file to the hotfolder of an external process. This way it is automatically picked up and processed by an external process such as Acrobat Distiller. In this example, if complete automation is desired, Acrobat Distiller could be configured to output the PDF directly to the input folder of the Back from external process input.

Note the following restrictions on the external process: in order for the associated field variables to be preserved, the external process:

- cannot rename the file
- cannot change the folder structure (for example, move the file into another subfolder)

### Load Balancing route filters

The Load Balancing route filter allows you to create a simple “internal” load balancing between one input folder and several output folders. The load balancing occurs in a round-robin fashion. [Figure 47](#) illustrates a sample load balancing between 1 input folder and 2 output folders. In this setup, if 10 files are dropped into the Wait For File input, the 1<sup>st</sup> file will go to Folder 1, the 2<sup>nd</sup> file will go to Folder 2, the 3<sup>rd</sup> to Folder 1, the 4<sup>th</sup> to Folder 2, and so on. This evenly distributes the input files between all the output folders. The configuration must have one input folder, but can have two or more outputs.

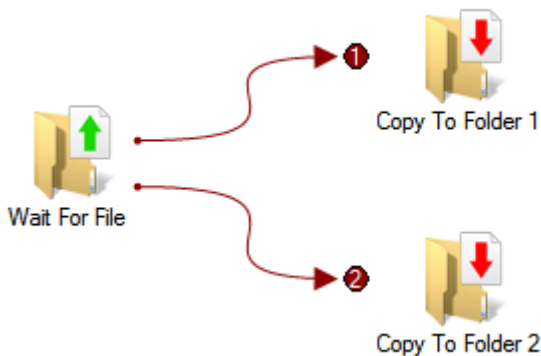


Figure 47 Route Filter – Load Balancing

### Warning

When you use Load Balancing route filter arrows, you must **NOT** configure them with the filtering condition **Destination Folder is empty** - this will not work. In fact, filtering conditions should generally not be used in this type of setup.

When configuring a load balancing route filter setup, observe the following guidelines:

- draw a route filter arrow from an input to an output *while holding down the CTRL key* - this will create a burgundy arrow with a number
- always set the input folder to periodic monitoring i.e. select **Scan folder when needed** and specify the scanning interval **Activate every x minutes or seconds**

### Load Balancing Route Filters vs. Load Balancing module

Move-it has an optional feature called the Load Balancing module, which performs load balancing specifically between PrePage-it queues and is typically configured within a multiple-server setup. This independent module has no relation to load balancing route filters, which evenly distribute an input file between several output folders. The Load Balancing module is

explained in detail starting on p.100 (see [Chapter 3 - Load Balancing](#)).

These two load balancing mechanisms sound similar but there are some important differences between the two. The main differences between the load balancing route filters and the independent module are summarized next via an example.

#### COMPARISON EXAMPLE

**Load balancing route filters** If you send 20 files to a load balancing route filter setup (as shown in [Figure 47](#) on p.45), it will divide the files 1-2-1-2 until there are 10 files in Folder 1 and 10 files in Folder 2. However if Folder 1 already contained 3 files beforehand, this will not be taken into account - that is, the end result will be 13 files in Folder 1 and 10 files in Folder 2. Also, let's say that after a few minutes all the files in Folder 2 have cleared out (because they processed more quickly) but there are still several remaining in Folder 1 (because these files require more processing time). In this case, the remaining files will not be re-distributed – that is, Folder 2 will remain inactive even though it is free to process files. Said differently, there is no monitoring to see if the output folders are empty before sending files over – the files are simply divided evenly between all the output folders, regardless of other factors.

**Load Balancing module** If you send the same 20 files to the Load Balancing module, it will copy one file to PrePage-it queue 1 and another file to PrePage-it queue 2 (note that PrePage-it queue 1 and PrePage-it queue 2 are typically identical queues, but on two different servers). It will then keep monitoring the two PrePage-it queues until one is idle, meaning it has finished RIPping a job and is waiting for a new job. Only then will it copy another file to the free PrePage-it queue. It does not send files to queues in a round robin fashion, but rather waits and monitors until a RIP queue is free. Even if a PrePage-it hotfolder is empty, it will not send a new file there until the previous job has finished the complete RIPping cycle. This assures the most efficient use of the two PrePage-it server machines.

## 2.4 Actions

Actions provide a variety of ways to automatically process job files. They are shown in the figure below and described in this section.

To add an Action into a workflow:

1. Open the workflow in **Design View** by double-clicking the workflow name or by clicking the **Edit workflow layout** button.
2. Drag the desired action icon (e.g. **Split PDF** or **Send e-mail**) unto the workflow layout window.

Once an Action has been added to a workflow, it can be configured through its **Properties** dialog box. To access it, either double-click the Action icon that you've added into the workflow or right-click it and select **Properties** from the menu that appears.

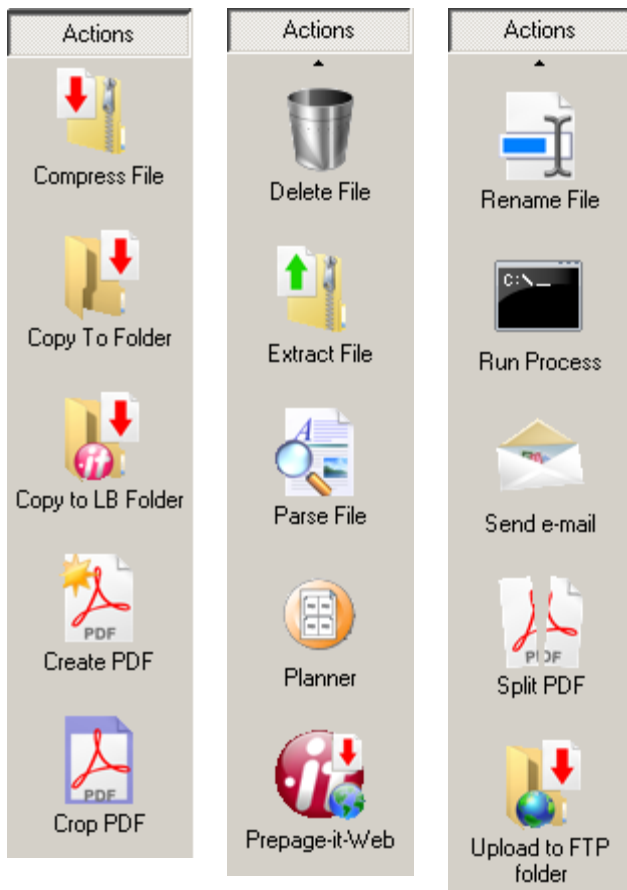


Figure 48 Actions toolbar

## Note

This user guide gives an overview of all Move-it 2.x Actions, however some of these are payable options which are not included in the standard Move-it 2.x application. These options must be purchased and dongle-activated in order to be visible and functional within the Move-it interface. Payable options include actions such as Create PDF, Crop PDF and Split PDF.

## Compress File

This action will compress a file in the zip format. There are no properties to set.

Each file that is submitted to this action will be compressed into a separate zip file. Therefore each compressed zip will always contain only one file – multiple-file zips are not supported.

## Copy To Folder

This action copies a file to the **Destination folder** that you specify in the **Properties** window. The folder may be local or remote. If remote, Move-it will need permission to access this folder (see [Authentication](#) on p.49 for details).

The **Destination folder** may have a default setting specified, such as `<defaultoutputfolder>\<workflow>`.

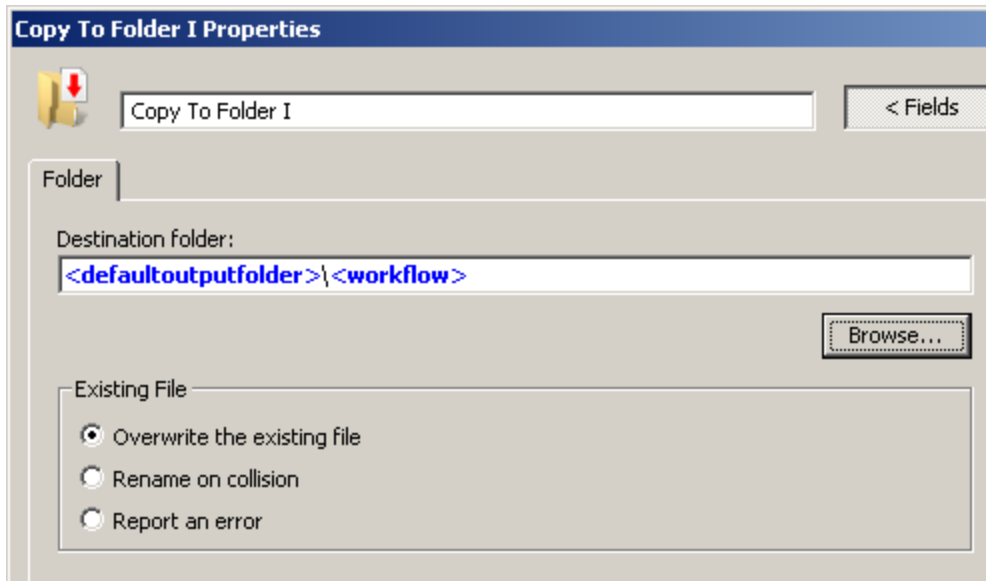


Figure 49 Copy To Folder properties

This facilitates and standardizes the creation of outputs (see [Predefined Variables](#) on p. 17 for more information). You may keep this default or specify another folder by typing its pathname or clicking the **Browse** button.

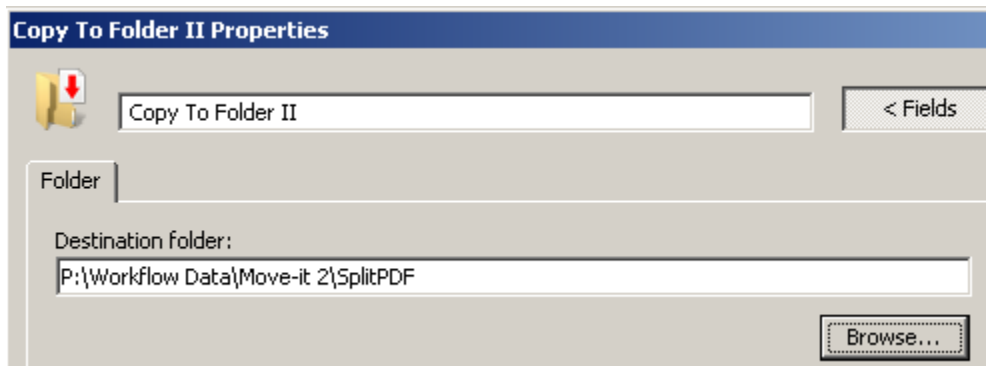


Figure 50 Specified Destination Folder

When specifying your own **Destination folder**, the path may also include field variables, in which case Move-it will create subfolders based on the fields you specify. Information on field variables, including what their use is and how to insert them into a text box, can be found in the section [2.5 Fields](#), starting on p.90.

#### Existing File

In the case where Move-it tries to copy a file that already exists in the destination folder, you can instruct Move-it on how to handle this situation. The choices are shown in [Figure 49](#) above. They are:



- **Overwrite the existing file:** the new file will replace the old file
- **Rename on collision:** one of the files is renamed so that both are kept
- **Report an error:** the situation is treated as an error and an error message is generated

#### Authentication

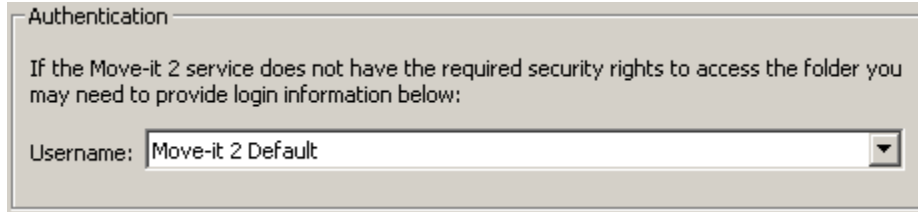


Figure 51 Authentication dropdown list

When Move-it needs to access remote folders, permission to access these folders is typically achieved by:

- specifying an appropriate user account as the Move-it 2 **Default User**, as set in the **Server Settings > User Logins > Default User** → **By Default, use this User**
- selecting **Authentication > Username = Move-it 2 Default** (as shown in [Figure 51](#) above)

This is sufficient in most cases because the default user is typically configured to have access to all local and remote input and output locations. If for some reason a folder that Move-it needs to access requires different user rights than what the default user has, then select a different user from the **Authentication > Username** dropdown list.

The users that are listed in the **Username** dropdown list are those that have been created in the **Server Settings > User Logins**. For more information about **User Logins** and authentication, see [User Logins](#) on p. 18.

## Copy To LB Folder

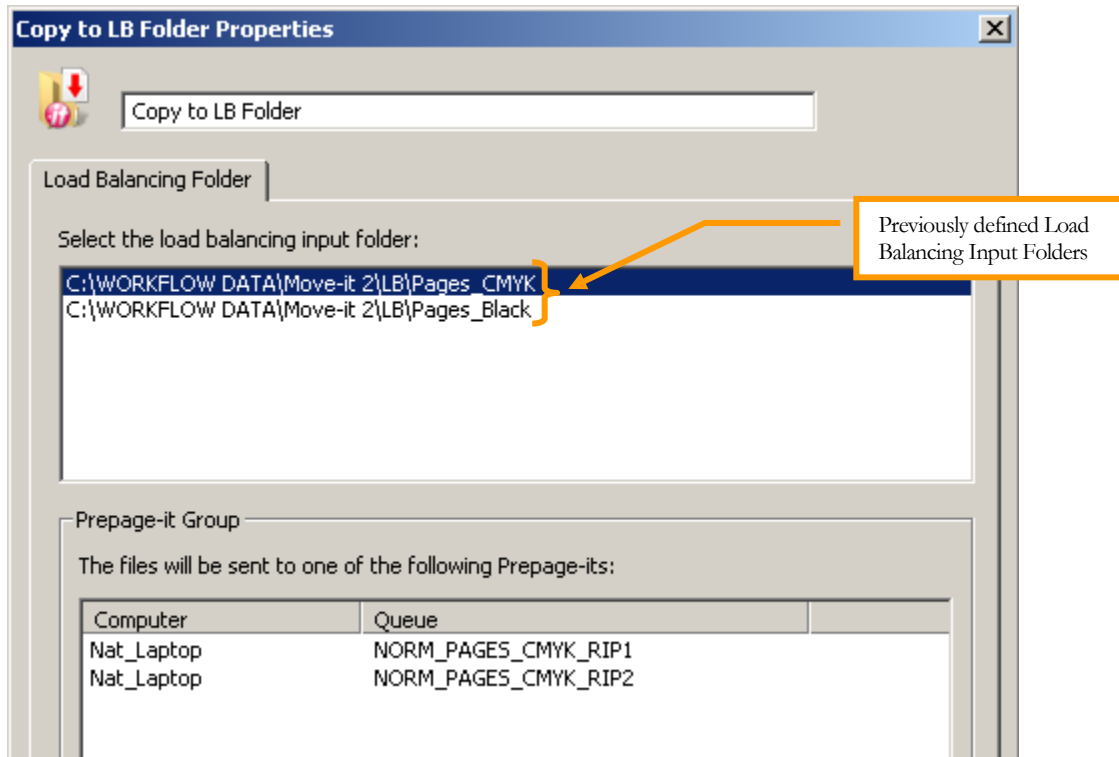


Figure 52 Copy To LB Folder

This action lets you choose a **Load Balancing Input Folder** so that the job is introduced into a load balancing workflow. The choices available are the ones previously defined in the menu **Tools > Configure Load Balancing**. Note that load balancing inputs cannot be configured here. This action simply allows you to send a file to a load balancing input folder.

Detailed information about the Load Balancing module can be found in [Chapter 3 - Load Balancing](#), starting on p.100. Note that the Load Balancing module is a payable option and will not work unless it is dongle-activated with the appropriate license.

## Create PDF

This action creates a PDF file. The input is generally a PostScript file which is then converted to the PDF format. This action can also perform a PDF In→ PDF Out, which is useful for changing the format of the PDF. For example, you can change the PDF version, resolution or other properties. In either case, the PDFs are created according to the **PDF Conversion Configuration** (e.g. **Press Quality**, **Print Quality**) that you've selected by placing a checkmark next to it.

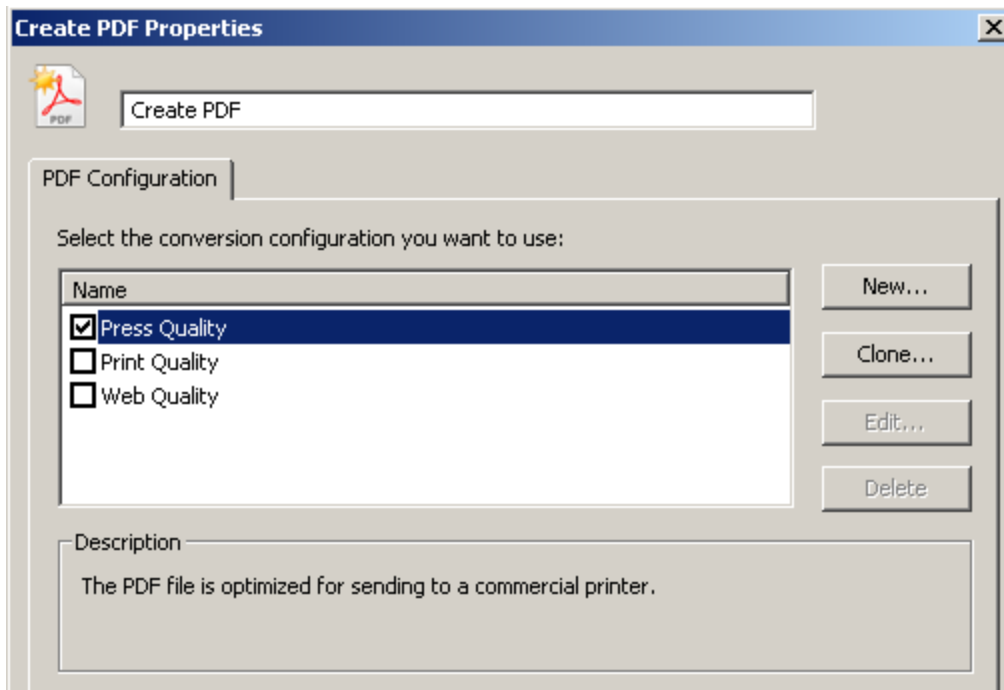


Figure 53 Create PDF properties

By default 3 PDF Conversion Configurations are pre-defined, which cannot be deleted or edited. You can, however, duplicate them using the **Clone** button and then customize them to suit your needs. This is usually sufficient to accommodate most scenarios.

You can also create a new PDF Conversion Configuration by clicking the **New** button and then adjusting each setting from scratch. This requires a detailed knowledge of each option and is not usually necessary since tweaking the default configurations gives good results in most cases. New or cloned configurations can be modified or tweaked at any time by selecting them and clicking the **Edit** button.

#### PDF Conversion Configurations

In the **Create PDF Properties** window, if you create a new PDF Configuration or edit an existing one, a dialog box will be displayed where you can configure numerous details about how a PDF will be created. These include resolution, version, image compression, font embedding and more. The configuration dialog box is divided into 5 tabs: **Name**, **General**, **Compression**, **Fonts** and **Advanced**. Details regarding all these options are described next.

#### NAME

The **Name** tab allows you to specify a name for the configuration and a short description.

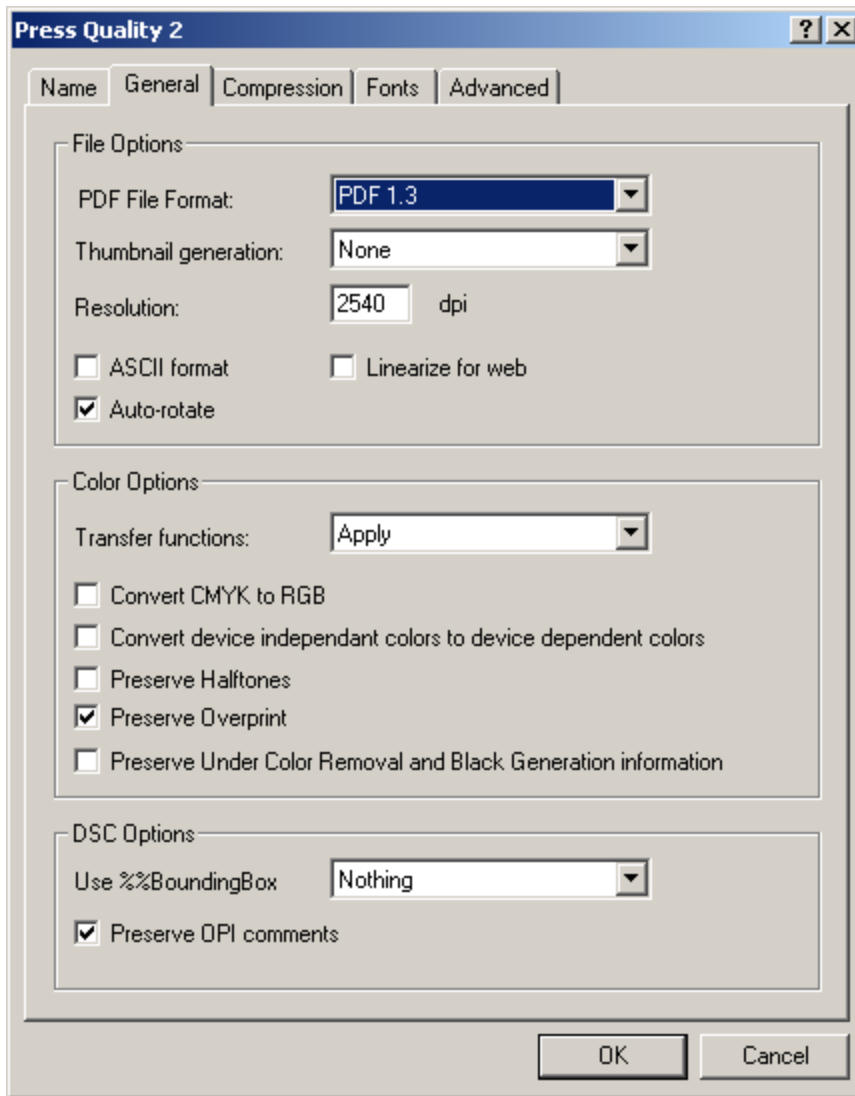


Figure 54 PDF Configuration - General

## GENERAL

The **General** tab (shown in [Figure 54](#) above) contains the following configuration options:

**PDF File Format:** Use this option to create either PDF 1.3, PDF 1.4 or PDF 1.5 files. PDF 1.3 files are compatible with Acrobat Reader v4.0 or higher, PDF 1.4 files are compatible with Acrobat Reader v5.0 or higher and PDF 1.5 files are compatible with Acrobat Reader v6.0 or higher.

**Thumbnail generation:** Choose whether to generate thumbnail images of each page, which can be either monochrome or color.

**Resolution:** Enter the resolution desired. If the PDF file is intended for printing, you should set the resolution to be the same as the resolution of the intended final output device. Otherwise, you should only change the resolution if you experience poor quality output with pages containing patterns or graduated fills.

ASCII format: This makes it safe to transmit your PDF pages by e-mail, but will increase the size of your PDF file.

Auto-rotate: When this option is checked, it will attempt to rotate a page, if necessary, so that the text is always viewed and printed upright.

Linearize for web: This option optimizes a file for fast web viewing, therefore it should be activated when you create PDF files that will be distributed via the web. The result is a PDF document whose file size is usually significantly reduced and that downloads faster.

Transfer functions: The **Transfer functions** dropdown list provides the option of preserving, applying or removing transfer functions from an input PostScript file.

Convert CMYK to RGB: This option only applies to color images. If it is enabled, any four-color CMYK images in the PostScript language input file are converted to RGB images in the PDF output. This can result in a smaller PDF file that displays more quickly. You should enable this if your documents are intended for on-screen viewing only, and disable it if they are intended for printing.

Convert device-independent colors to device-dependant colors: This option produces PDF files which display more quickly. If this option is left unchecked, colors are converted into a device-independent calibrated RGB color space. This produces PDF files which render more slowly, but whose colors are more constant across properly set up output devices.

Preserve Halftones: Check this option to preserve halftones on PDF files that will be printed. Disable it when producing PDF files for on-screen viewing only.

Preserve Overprint: Check this option to preserve any overprinting contained in the original file after it is converted to PDF.

Preserve Under Color Removal and Black Generation information: Check this option to preserve Under Color Removal and Black Generation information after the file is converted to PDF.

Use %%BoundingBox: The **Use %%BoundingBox** dropdown list displays the three following choices: **Nothing**, **Page Size** and **Crop box**. Choosing **Page Size** instructs Move-it to create a PDF page that will take on the size of the bounding box. Choosing **Crop Box** uses the bounding box for the optional page cropping box. If you do not wish to use the bounding box for anything, selecting **Nothing**.

Preserve OPI comments: Choose whether to keep any OPI comments that are present in the original postscript file. The result is that when the PDF file is sent to be printed, the low-resolution onscreen images in the file are replaced by their corresponding high-resolution images, provided they are available.

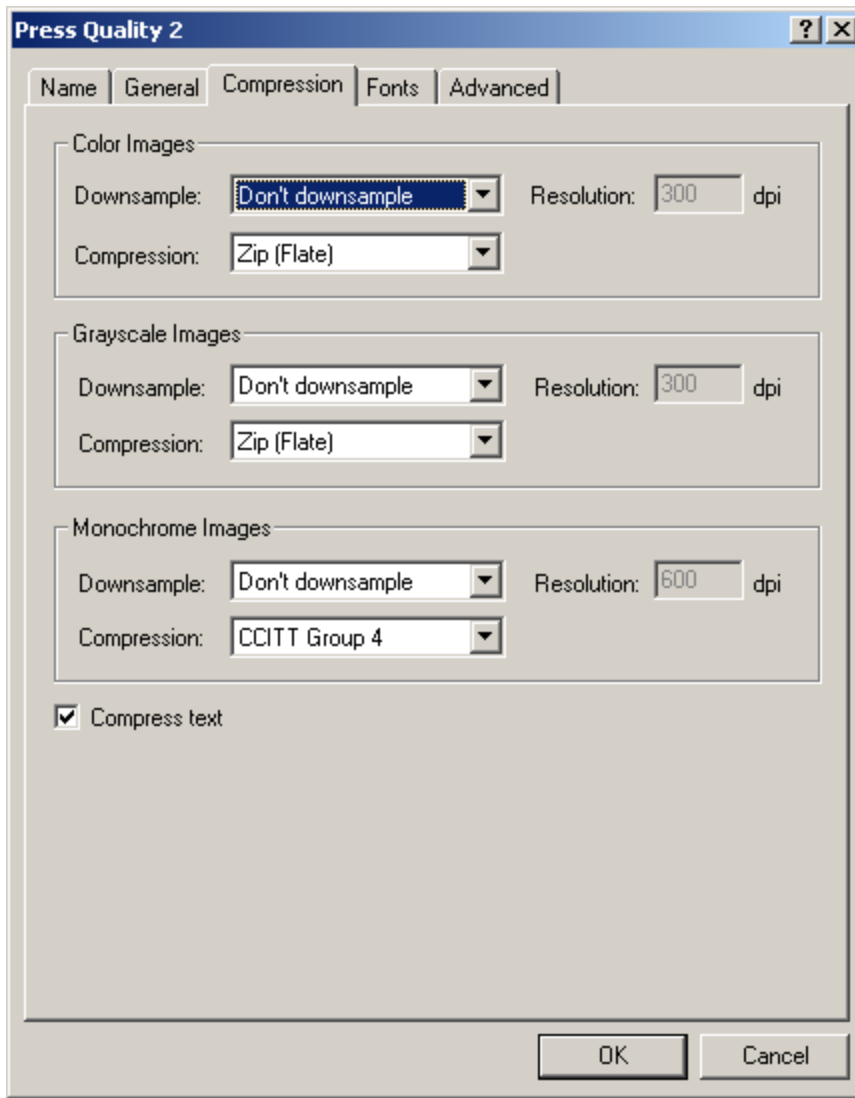


Figure 55 PDF Configuration - Compression

## COMPRESSION

The **Compression** tab (shown in [Figure 55](#) above) allows you to set the downsampling and compression of color images, grayscale images and monochrome images separately. You also have the option of compressing text.

Downsampling can be used to reduce the size of a file in cases where high quality images are not necessary, such as when a PDF will only be viewed onscreen. Note that whenever a downsampling option other than **Don't downsample** is selected, a resolution must also be selected from the **Resolution** text box, so that Move-it knows exactly what resolution to downsample the images to.

The Downsample options are set separately for color, grayscale and monochrome images. The options are:

Don't downsample: Select this option from the **Downsample** dropdown list if your documents are intended for printing.

Average: Select this option for good quality results. **Average** is not available with monochrome images.

Subsample: Choose **Subsample** to reduce the resolution of the image by dropping pixels.

Bicubic: Choose this option to generate more pleasing results, although the PDF will be slower to generate. **Bicubic** is not available with monochrome images.

Choose a compression filter to help reduce the file size of an image. The Compression options are set separately for color, grayscale and monochrome images. The three main options are:

Zip (Flate): The **Zip (Flate)** and **Zip with Predictor (Flate)** options use a lossless compression technique and normally produce good compression ratios. The Predictor algorithm can further improve the compression for some classes of images.

JPEG: **JPEG High**, **JPEG Medium** and **JPEG Low** use a lossy algorithm (which irretrievably discards data), but they produce excellent compression ratios on photographic images. This compression is not available for monochrome images.

CCITT: The **CCITT Group 4** filter uses standard fax compression and is only applicable to bitmap images. This compression is only available for monochrome images.

Automatic: Select this option to let the software decide how to compress images. This option is not available for monochrome images.

Compress text: This option compresses text using Zip compression.

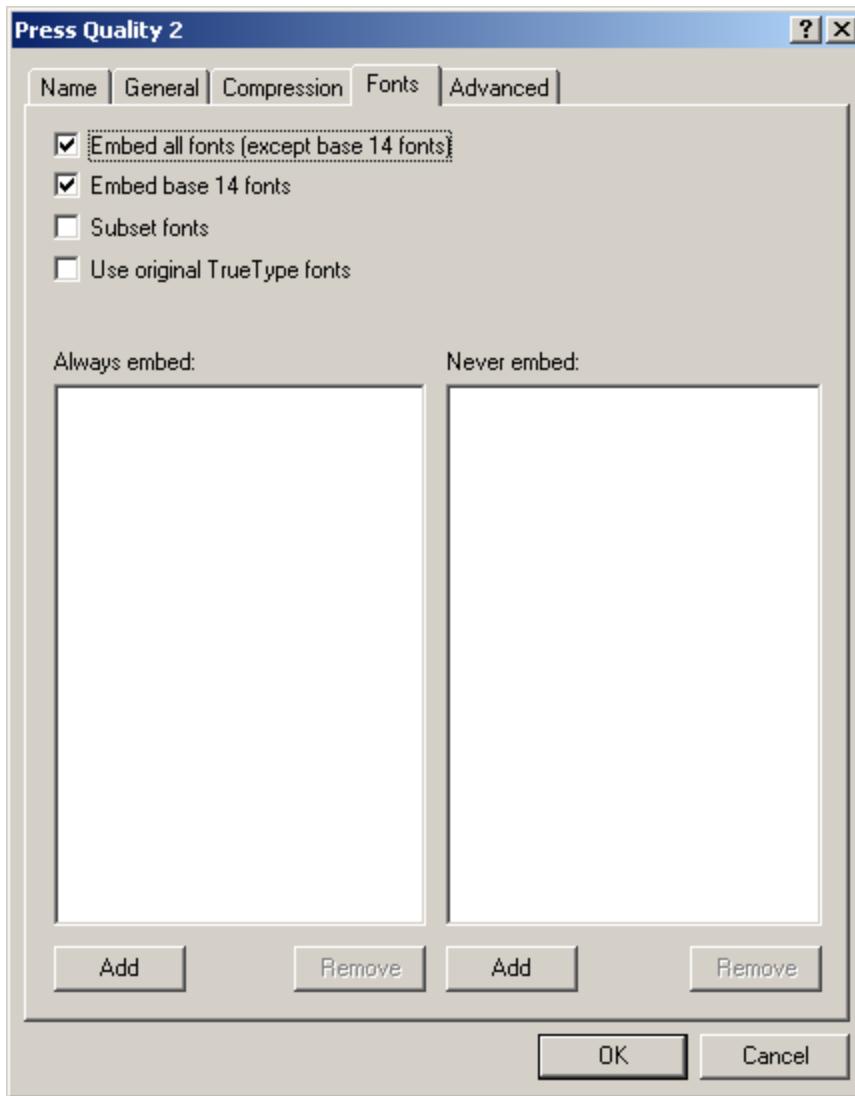


Figure 56 PDF Configuration - Fonts

## Fonts

The **Fonts** tab allows you to set if and how fonts are embedded within the PDF. The Fonts options are:

**Embed all fonts (except base 14 fonts):** When this option is selected, all fonts present in the document except base 14 fonts are embedded (i.e. included) in the output PDF file.

**Embed base 14 fonts:** If this is selected, all base 14 fonts present in the document are embedded in the output PDF file.

**Subset fonts:** With this option selected, only subsets of the original fonts are embedded in the PDF file. This has the advantage of producing smaller files. However, selecting Subset fonts prevents you from subsequently using Acrobat plug-ins or other tools that allow text editing within a PDF file, as not all characters from the embedded fonts are available for use.



Use original TrueType fonts: The Windows PostScript printer driver replaces TrueType fonts with bitmaps and outlines. If this feature is selected, Move-it will attempt to substitute the fonts generated by the printer driver with the original TrueType font.

Always Embed: Specify fonts that should always be embedded into the PDF file by clicking the **Add** button and selecting the desired font(s) from the list in the **Installed Fonts** dialog box. Delete fonts from the **Always Embed** list by clicking the **Remove** button.

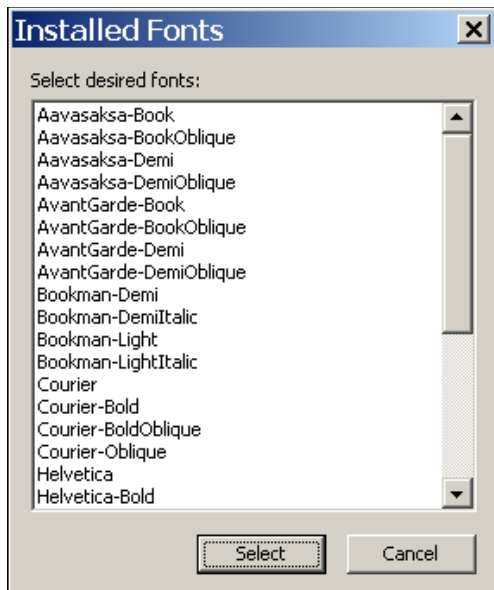


Figure 57 – Installed Fonts

Never Embed: Specify fonts that should never be embedded in the PDF file by clicking the **Add** button and selecting the desired font(s) from the list in the **Installed Fonts** dialog box. Delete fonts from the **Never Embed** list by clicking the **Remove** button.

#### ADVANCED

The **Advanced** section allows you to use custom made prologues to instruct the file to be processed according to certain criteria. Prologues should only be configured with the assistance of a qualified Polkadots specialist.

#### PDF Conversion Options

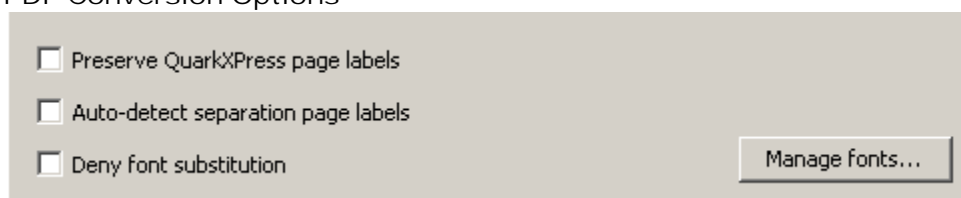


Figure 58 – PDF Conversion options

**Manage Fonts** opens a pop-up window where you can add fonts to the PDF library or remove them. Adding a font makes it available when Move-it has to create a PDF.

**Deny font substitution** to prevent font substitution from occurring.

**Preserve QuarkXPress page labels** instructs Move-it to detect page labels created in QuarkXPress and to include them in the PDF file. As a result, each page in the PDF file that is generated will include a page number and prefix, provided they were present in the source file.

QuarkXPress page labels contain information which may help to identify a page. Typically they include the page number and in some cases, also a prefix indicating the color separation. For example, when a Quark file is printed in separations, the page label may be used to identify the color separation contained in each page. More information about page labels can be found in the section [PDF Page Label \(plabel\)](#) on p. 84.

If you do not check this option, Move-it will only extract and keep page numbers (without the prefix) from the QuarkXPress source file.

**Auto-detect separation page labels** is a feature used when you are inputting pre-separated PS files produced by *Adobe* (formerly *Macromedia*) Freehand (or a similar application) which generates PostScript where pages and color separations are not clearly identified. Selecting this feature will cause Move-it to parse an incoming file before it is converted to PDF, in order to detect for itself where each new page and each new color separation begins.

## Crop PDF

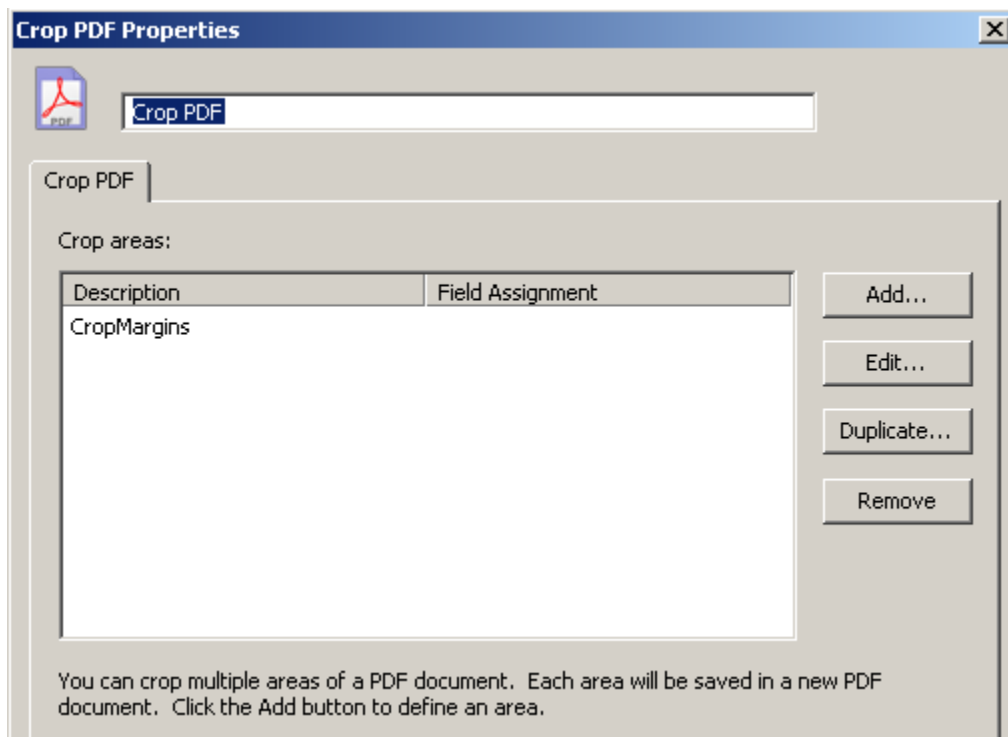


Figure 59 – Crop PDF properties

The **Crop PDF** tool allows you to crop or trim an incoming PDF and creates a new, cropped PDF file. This tool can be used to trim a page which has too much margin, for example, or it can be used to extract a particular area of a page.

For each crop area that you want to define, click the **Add** button and fill in the required information in the **Crop Area Properties** dialog box.

Figure 60 – Crop Area Properties

To define the crop area, you specify the starting point (**X**, **Y**) and the size of the area (**Width**, **Height**). In the vertical direction, specify whether the starting point **Y** should be measured from the **bottom of page** or **top of page**. In the horizontal direction, the **X** value always starts from the left side.

If you wish that this cropped PDF have a different name from the original PDF, then add a **Rename File** action after the **Crop PDF** tool. Depending on how you're renaming the file, you may also need to include a **Parse File** action before the **Crop PDF** tool.

Finally, provide a **Crop Description** (i.e. a name) for this crop configuration before clicking the **OK** button.

If you wish to define multiple crop areas, repeat the same procedure described above for each crop area, naming each one with a different **Crop Description**.

## Delete File

Sends files to the trash i.e. deletes them. There is nothing to configure for this action.

The **Delete File** action is typically used for housekeeping. For example, a simple workflow can be created which removes all RIPPed pages which are more than 1 month old from the hard disk. This type of housekeeping queue can be configured by specifying a filter condition in the route filter arrow *before* the **Delete File** action. How to specify a filter condition is explained in the section [Filtering conditions](#) on p.41.

## Extract File

This action will extract or unzip a file that was compressed using the zip format. It will not extract other compression formats such as Rar, Stuff-it, etc. There is nothing to configure for this action.

## Parse File

The **Parse File** action analyses the input filename and extracts information from it. The information that it extracts depends on the parsing template that you define. The parsing template provides a way of breaking up the input filename into several distinct pieces and storing them as Fields (also referred to as field variables). The main purpose for extracting this information and storing them as field variables is that the variables can then be used to configure the rest of your workflow and perform other functions. Typical uses for extracted field variables are renaming files, filtering input according to specified criteria, and retrieving information such as page number, section, side, signature, date or any other data that has been put into the incoming filename.

To define a parsing template, you must know the filenames convention that is being used for the input files. This means the input files sent to a **Parse File** action must always be named using the same filenames structure, otherwise Move-it will not be able to parse the file.

### Configuring the File Parser

To configure the file parser, double-click the **Parse File** action, then click the **Edit** button.

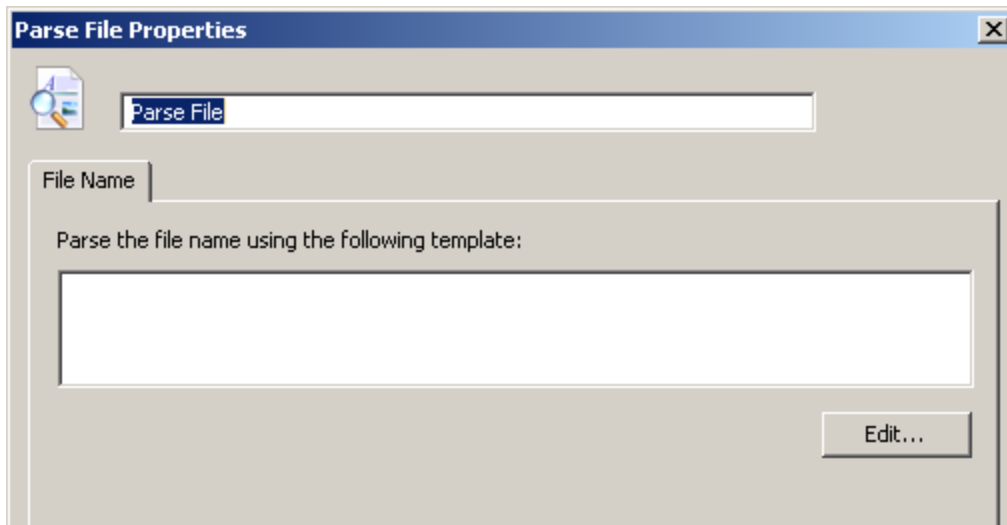


Figure 61 Parse File Properties

Clicking the **Edit** button will display the following window.

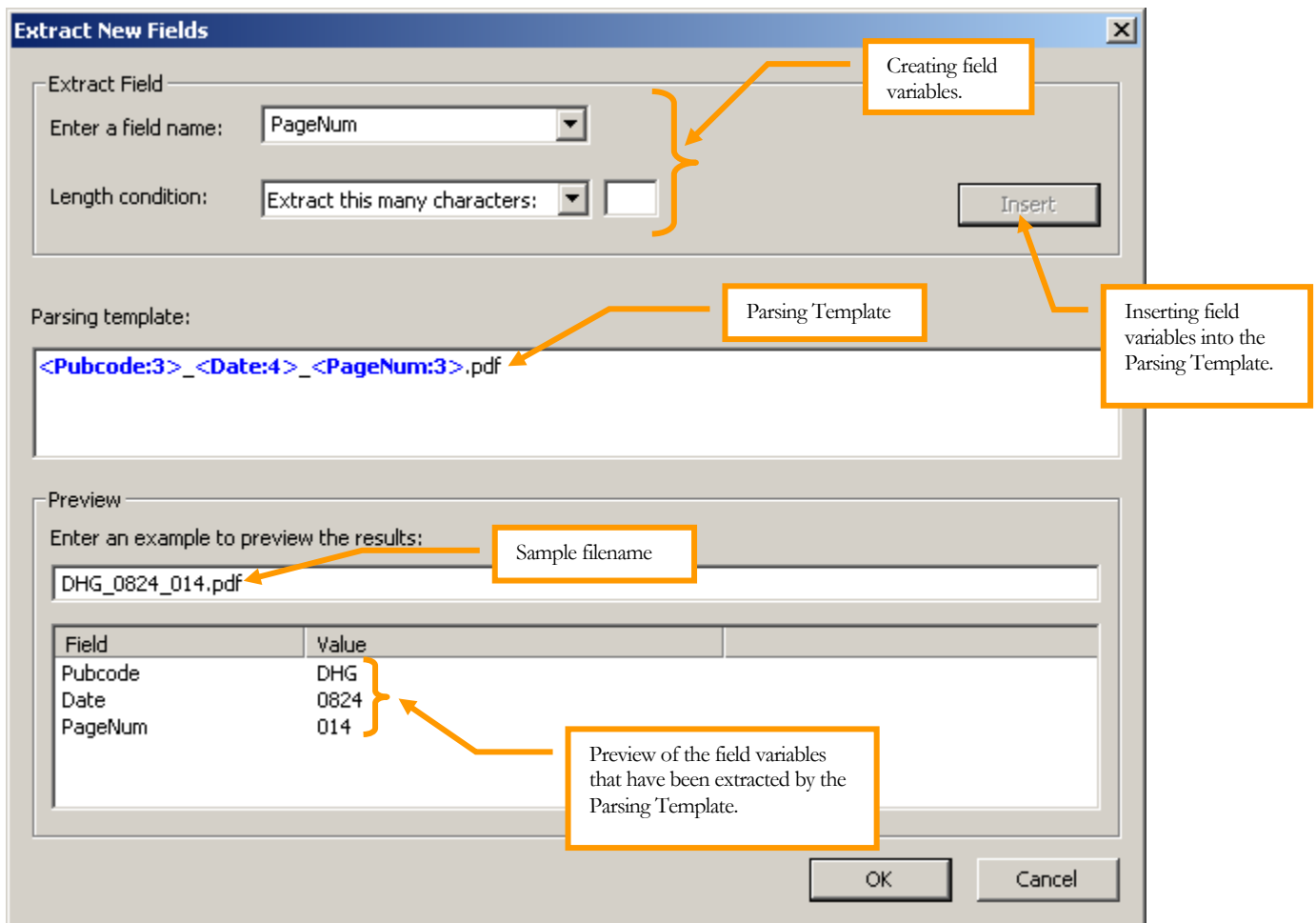


Figure 62 Field Extractor

The above window is where you define the fields which you expect to find in the incoming filenames. You then include those fields into the parsing template as you build it.

In the parsing template example shown in [Figure 62](#), we are expecting the incoming filename to have:

- a 3-character code or abbreviation for the publication name, followed by an underscore
- a 4-digit date, followed by another underscore
- a 3-digit page number, followed by the filename extension .pdf

In the **Preview** section located below the **Parsing Template**, [Figure 62](#) shows how Move-it has correctly parsed a sample filename (DHG\_0824\_014.pdf) and identified the different fields contained in the file. How were the fields for this parsing template created? The **Extract Field** frame at the top of the window acts as a wizard which helps you to easily create the fields that you will use to build the parsing template.

The basic procedure for creating a parsing template is:

1. Obtain a sample filename of the type of file you want to process through a given Move-it queue.
2. Optionally, type (or copy and paste) this sample filename into the **Preview** text box, as shown in [Figure 62](#) (sample filename DHG\_0824\_014.pdf). The **Preview** window is a great aid since it immediately shows you, as you build your parsing template, how a sample filename will be parsed.
3. Click in the **Parsing Template** text box at the location where you want to insert a new field.
4. Create the new field (see the section [How to define a field](#) on p.63 for details) and click the **Insert** button to add it to the parsing template.
5. Repeat steps 3 and 4 for each new field you want to add.
6. If required, add literal characters (e.g. underscore, dash, etc.) or the SKIP field in the appropriate location(s) within the parsing template. More on literal characters and the SKIP field can be found in the sections [Literal text](#) on p. 64 and [Skip Field](#) on p. 64, respectively.
7. Optionally, as you create the parsing template or when you have completed it, verify the **Parsing Preview** window to see if Move-it has correctly parsed your sample filename.

Parsing template:

<Pubcode:3>\_<Date:4>\_<PageNum:3>.pdf

Preview

Enter an example to preview the results:

DHG\_0824\_014.pdf

Field	Value
Pubcode	DHG
Date	0824
PageNum	014

Figure 63 shows a parsing template configuration window. It includes a 'Parsing template' section with a text field containing the template '<Pubcode:3>\_<Date:4>\_<PageNum:3>.pdf'. Below this is a 'Preview' section with a text field for a sample filename 'DHG\_0824\_014.pdf' and a table showing the parsed values for 'Pubcode' (DHG), 'Date' (0824), and 'PageNum' (014). Orange arrows point from labels to the corresponding fields: 'Parsing template' points to the template text, 'Sample filename' points to the sample filename text, and 'Parsing Preview' points to the table.

Figure 63 Parsing template example

- When you've completed the parsing template, click the **OK** button. The **Parse File Properties** window will display the completed parsing template.

Parse File Properties

Parse File

File Name

Parse the file name using the following template:

<Pubcode:3>\_<Date:4>\_<PageNum:3>.pdf

Edit...

Figure 64 shows the 'Parse File Properties' window. It has a title bar with a close button. Below the title bar is a 'Parse File' text field. Underneath is a 'File Name' tab. The main area contains the text 'Parse the file name using the following template:' followed by a text field containing the completed template '<Pubcode:3>\_<Date:4>\_<PageNum:3>.pdf'. At the bottom right is an 'Edit...' button.

Figure 64 Parsing template - completed

How to define a field

The **Extract Field** frame (see figure below) provides a tool for creating the fields that you need in order to build a parsing template.

Extract Field

Enter a field name:

Length condition:  Extract this many characters:

Extract this many characters:  
Extract up to this character:  
Extract the remaining text

Insert

Figure 65 shows the 'Extract Field' frame. It has a title bar. Below the title bar is a section with 'Enter a field name:' followed by a text field. Below that is a 'Length condition:' section with a dropdown menu showing 'Extract this many characters:' and a text field. To the right of the dropdown is an 'Insert' button. Below the dropdown menu are three options: 'Extract this many characters:', 'Extract up to this character:', and 'Extract the remaining text'.

Figure 65 Defining a field

You define a field by giving it a name and indicating how long the field is, or in other words, “where should the field end?” After typing a name for the field in the **Enter a field name** text box, you need to specify a **Length condition** by (i) selecting one of the 3 options in the dropdown menu and (ii) entering a character or digit in the small text box to the right when required.

#### LENGTH CONDITION

The **Length condition** dropdown menu contains the following three choices:

- Choose **Extract this many characters** if you know exactly how many characters should be included in a field. You must also specify the exact number by entering it in the text box to the right. For example, if you know the incoming filename will contain a four-digit date, then specify **Extract this many characters 4**.
- Use the **Extract up to this character** option when you want to define a field which should include everything up to a specified character, for e.g., a period “.” or a dash “-”. The character which you specify in the text box to the right marks the end of the field. Note that this character will not be part of the field, only what comes before it.
- **Extract the remaining text** defines a field consisting of everything until the end of the filename.

#### Literal text

If you are certain that an incoming filename will contain specific characters, such as an underscore “\_”, a dash “-”, or a filename extension like .pdf or .ps, you can type these directly into the **Parsing template** text box. This is referred to as literal text. Note, however, that if an incoming filename does not include the specified literal character(s), the file will not be parsed correctly or an error will occur.

#### Skip Field

If the incoming filename contains one or more characters which do not contain any useful information, insert the SKIP field at the appropriate location in the parsing template and indicate how many characters you would Move-it to skip. This will cause Move-it to ignore or skip the specified number of characters before extracting the next field. SKIP is typically used for parts of a filename that do not contain any relevant or important data and hence will not be used anywhere else in the workflow.

Inserting a **SKIP** field into a parsing template is done in the same way as inserting any user-defined field. This means you must specify a **Length condition** for it. The only difference is that the **SKIP** field is pre-defined and therefore automatically listed in the **Enter a field name** dropdown menu.



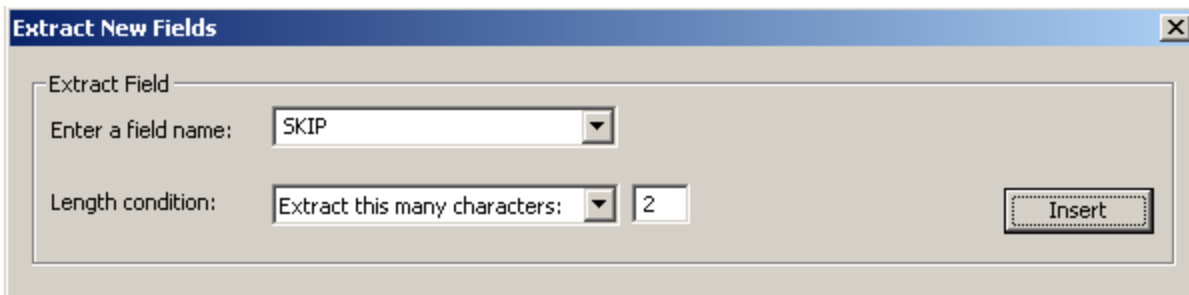


Figure 66 SKIP field

## PitStop Server

This action will send a file to an Enfocus PitStop Server, where it will be processed according to your PitStop configuration settings. The main functions and benefits of this action are:

- you can configure a Move-it workflow to input files, then have them automatically go to a PitStop Server for preflighting and processing, and finally have them come back to work their way through the remainder of the Move-it workflow
- you can set the PitStop Profiles and Actions directly from the Move-it interface

Note that this action will only work if a PitStop Server application has been installed and configured. Also, since the PitStop Action is an optional feature, it must be activated in the Polkadots dongle in order to be functional.

Starting from Move-it build 2.0.1.8, PitStop Servers v3.5 and v4.0 are both supported. With Move-it 2.1.0.4 or higher, PitStop Server 2008 is also supported, even though the Move-it icon will continue to display PitStop v4.0. After the PitStop Server application is installed and this option is activated in the Polkadots dongle, a **PitStop Action** icon will appear in the **Actions** toolbar.

Within Move-it, you can add PitStop actions into your workflow. Then from the **PitStop Properties** window, you can select existing pre-defined PitStop Actions and Profiles (e.g. converting RGB to CMYK, pre-flighting, etc.). When a file is introduced into this workflow, it will be sent on a “detour” to the PitStop Server, where it will be processed according to the PitStop Actions/Profiles you’ve selected. Finally, the file will be sent back to Move-it to continue its route through the remainder of the workflow.

### Note

When PitStop 4.x is installed, it does not always store its profiles and actions in the same location on the hard disk. Therefore Move-it sometimes cannot find where the PitStop 4.x Profiles/Actions are installed and so it doesn't list them in the Move-it interface. Details on how to properly install PitStop 4.x with Move-it is explained in the tech note *Installing Move-it 2.x & PitStop Server 4.x*.

Note that the Report generated by a PitStop v4.x Action is assigned a relative path. This allows you to have the report in one folder and the PDF file in a different folder; however they must both be stored on the same drive.

#### Tip

If you upgrade from PitStop 4 to PitStop 2008, you should re-save the Move-it workflow queues after installing PitStop 2008.

### Planner

The Planner action automates the process of directing page files to the appropriate PrePage-it queue according to the color space of the page. That is, it detects the color space (black & white, process or spot) of an incoming file and redirects it to the appropriate queue for processing. This module is designed to work in a page-pairing workflow which includes the Publication Planner. It will not appear in the Move-it interface unless the NEWSflo software, including Pair-it and the Publication Planner, has been installed.

In order for Move-it to automatically identify the color space of a submitted page and re-route it to the appropriate PrePage-it queue, the following requirements must be met:

- the page's color space must first be specified in the Publication Planner (i.e. before a page is submitted for RIPping)
- the filename of the incoming page must be named correctly i.e. according to a pre-established filenaming convention

Once a Planner workflow is configured, all pages that are being submitted for RIPping are sent to the same hotfolder. Move-it will then pick up the pages from this monitored folder and redirect them to the appropriate queue, where the pages are RIPped and later paired up according to the specs of your publication. In this type of setup, operators will even be able to submit files remotely, for example to an ftp folder, and have the files picked up and redirected to the appropriate queue for processing, provided the files are named correctly.

#### Note

Detailed information about the Publication Planner application can be found in the *Publication Planner 2.x User Guide*.

## Planner workflow overview

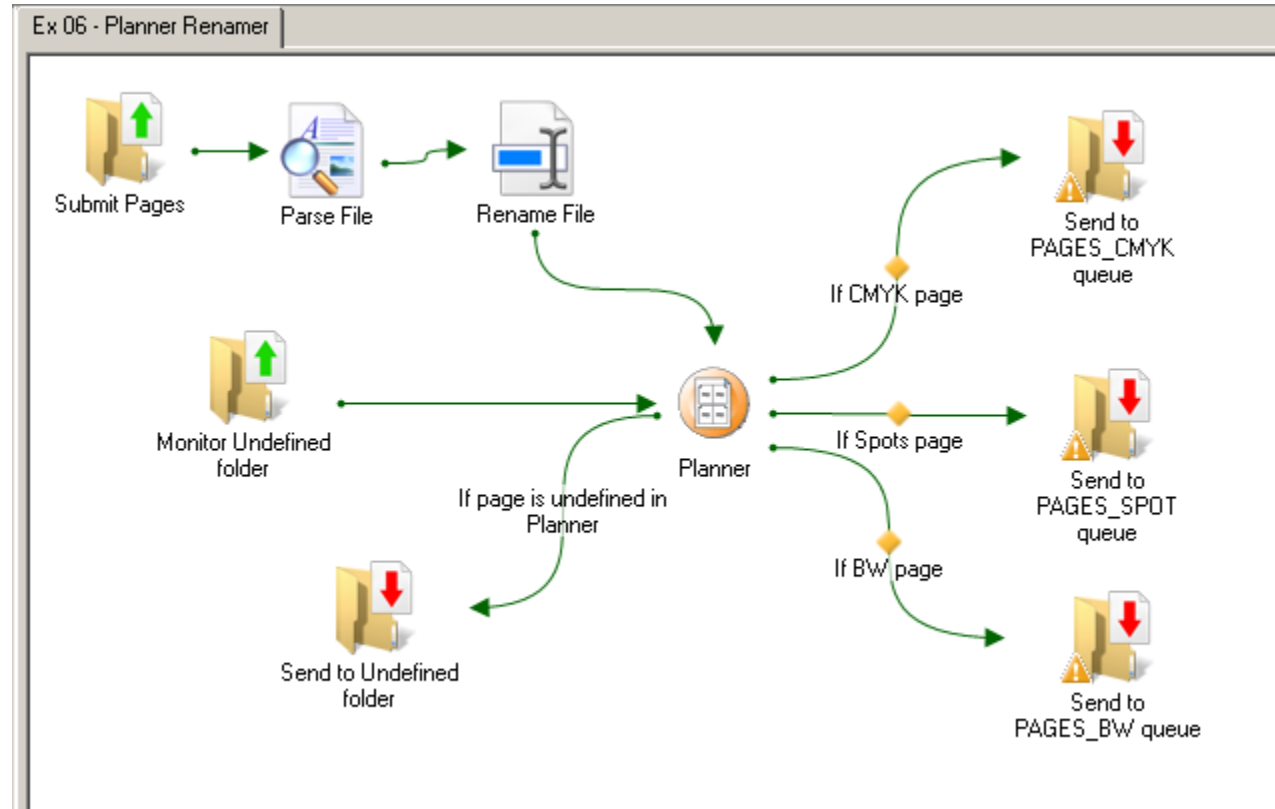


Figure 67 Planner workflow

The figure above illustrates a sample Planner workflow (formerly referred to as a Planner Renamer workflow). We will use this sample to get an overview of how this type of workflow functions.

### Note

Your Planner workflow may need to be modified or may be a variation of the one shown in [Figure 67](#). The Planner configuration always needs to be customized to your workflow and your version of NEWSflo (i.e. Move-it, Publication Planner, etc.).

The way the sample workflow shown in [Figure 67](#) works can be summarized as follows:

- All pages are submitted to the same hotfolder, called **Submit Pages**.
- The **Parse File** action parses the incoming page. It extracts information such as which publication the page belongs to, what is its page number, etc., and stores this information in field variables. In order for a page to be properly parsed, the filename must conform to a pre-established filenaming convention – see the sections [Parse File](#) on p.68 or [Parse File](#) on p.60 for more information.
- The page can be renamed in the **Rename File** action if it is required by the NEWSflo setup. Renaming is not required for color identification and page re-routing.

- Next, the page goes to the **Planner** action, where the page is identified. Move-it figures out the color space, page number, section, etc., of the page.
- The page is then sent to one of three PrePage-it queues, depending on its color space: **Pages\_CMYK**, **Pages\_Spot** or **Pages\_BW**.
- If the page has not been defined in the Publication Planner, then it's color space cannot be identified, so it is sent to a folder called Undefined. Move-it will periodically scan this folder. When the page is defined in the Publication Planner, Move-it will then be able to identify it and send it to the appropriate PrePage-it queue.

How to configure a Planner workflow

This section explains how to configure the main elements of the Planner workflow.

#### PARSE FILE

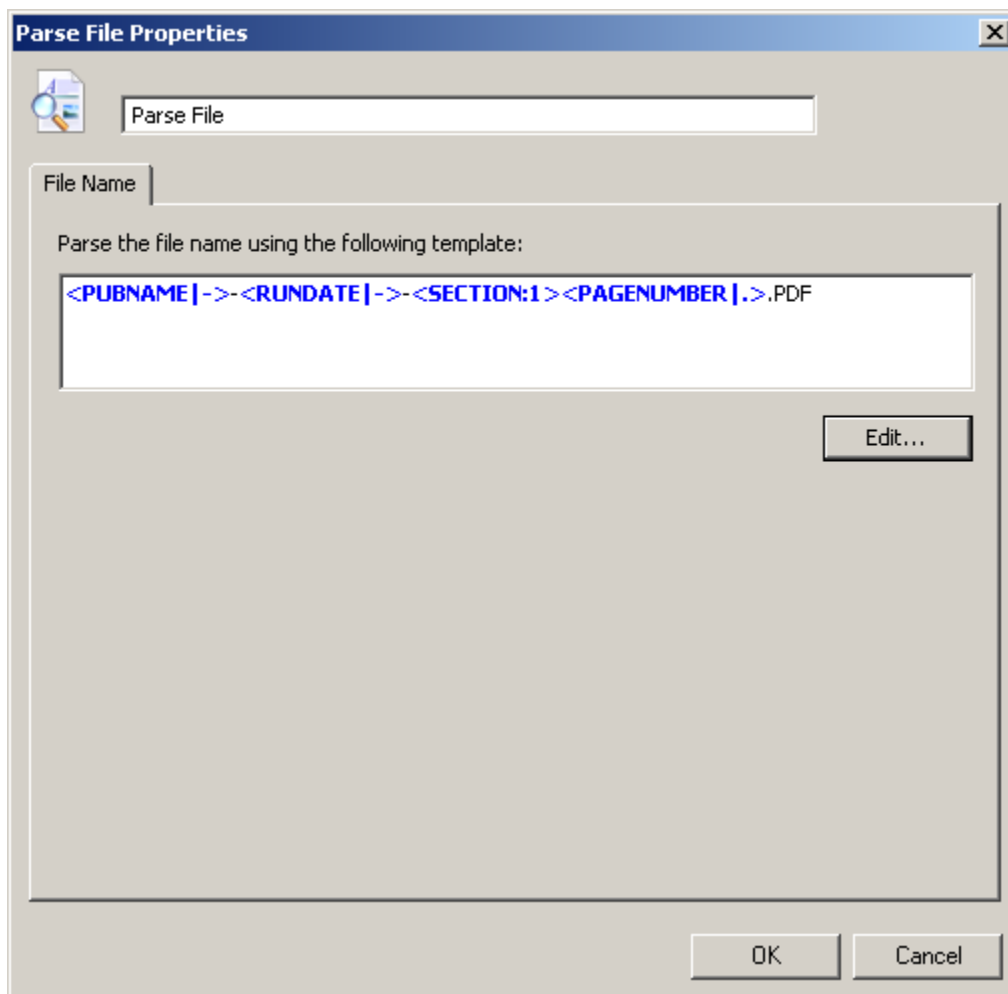


Figure 68 Parse File sample

The **Parse File** action parses the incoming page. It extracts information from the filename and stores this information in field variables. The information is used later by the **Planner** action to

identify the page. In the sample shown in [Figure 68](#), the information extracted from the page's filename is (i) the name of the publication where the page belongs, (ii) the run date of the publication issue, (iii) the section where the page belongs, and (iv) the page number.

In order for a page to be properly parsed, Move-it requires that incoming files conform to a pre-established filenames convention which matches the parsing template. Note that the parsing template shown in [Figure 68](#) is only an example – parsing templates are generally customized for each production environment. Detailed information about setting up parsing templates can be found in the section [Parse File](#) on p.60.

#### PLANNER ACTION

As mentioned earlier, the **Planner** action uses the information that was extracted in the **Parse File** action to identify a page. Typically the **Parse File** action is configured to extract the following information about a given page: the publication code, run date, section, page number and if applicable, the zone. Since this information is extracted and stored in field variables, all you have to do in the **Planner** action is specify the required fields.

The image shows a 'Planner Properties' dialog box. It has a title bar with a close button. Below the title bar is a tab labeled 'Planner' and a text field containing 'Planner'. To the right of the text field is a button labeled 'Fields >'. The main area of the dialog contains five rows of labels and text boxes: 'PUBCODE Template : <PUBNAME>', 'DATE Template : <RUNDATE>', 'SECTION Template : <SECTION>', 'PAGE Template : <PAGENUMBER>', and 'ZONE Template :'. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

Figure 69 Planner configuration

Double-clicking the **Planner** action opens the **Properties** dialog box shown in [Figure 69](#) above. As shown in the screenshot, we have provided all the information necessitated by the **Planner** action by specifying all the required pre-defined fields (this example does not include zones). All the pre-defined fields are listed in the **Available Fields** box, which can be accessed by clicking the **Fields** button (see [Figure 70](#) below).

Following our example, the publication name/code was extracted in the **Parse File** action and stored in a field called PUBNAME ([Figure 68](#)). Now in the **Planner Properties** window ([Figure 69](#)), we have specified the field PUBNAME to be the **PUBCODE Template**. In doing so, we are informing the Planner to look in the PUBNAME field for the publication code.

Since the PUBNAME field was previously defined, it will be listed in the **Available Fields** box in the **Planner Properties** window (click the **Fields** button to see it). Therefore this field and all other previously defined fields can be inserted into the **Planner Properties** window by selecting them and clicking the **Insert** button.

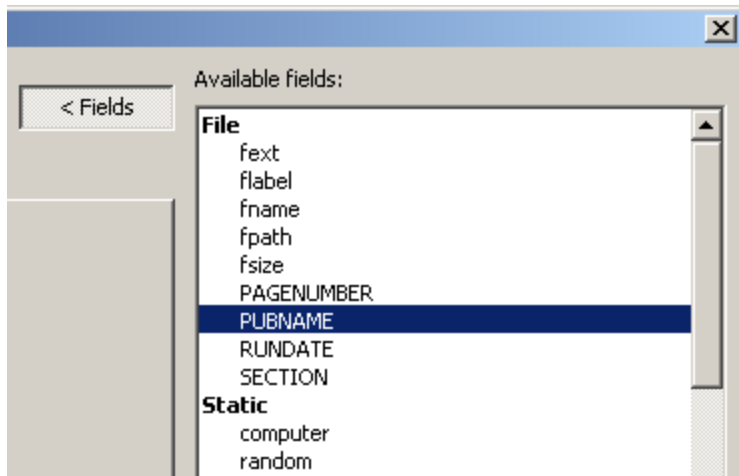


Figure 70 Planner – list of Available Fields

Once we have configured all the necessary Planner properties, Move-it will be able to identify all these properties for each incoming file. By knowing the publication, date, section and page number of an incoming file, it will be able to automatically determine the color space of that page.

#### FILTERING PAGES ACCORDING TO COLOR SPACE

The final major step is to direct the page files to the correct PrePage-it hotfolder through the use of filters. In the **Planner** action, the color space of a page is identified. From there, 3 route filter arrows point to three different PrePage-it hotfolders (see [Figure 67](#) on p.67). Each route filter has a different filter condition defined, ensuring that the page will only go to one of the three queues.

For example, to direct all the black & white pages to a PrePage-it Pages\_Black queue, you would configure it as follows:

- first add a **Copy To Folder** action which specifies the PrePage-it hotfolder for the Pages\_Black queue
- then insert a route filter arrow going from the **Planner** action to the **Copy To Folder** action
- finally in the filter arrow, specify a filter that accepts only black and white pages

Route filter arrows adapt to their setting and therefore contain some special options if they are placed immediately after a **Planner** action. As can be seen in the following figure, there is an option called **Planner ColorSpace**, which can be set to **BK** (Black & White), **COLOR** (Process CMYK) or **SPOT** (CMYK + Spots).

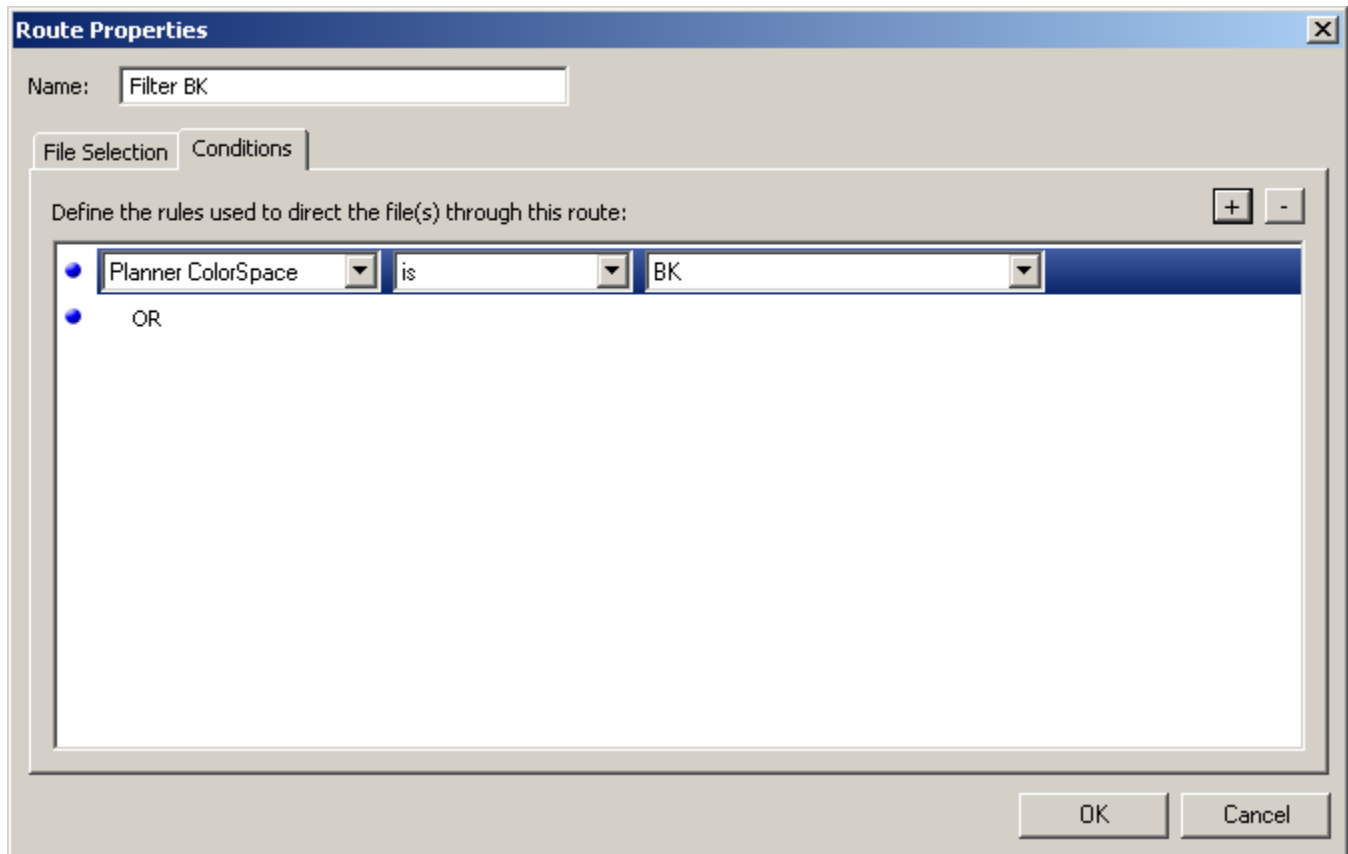


Figure 71 Planner - Route Filter

This combination of using a route filter arrow to filter incoming pages according to colorspace and then using a **Copy To Folder** action to send it to the matching PrePage-it queue must be configured once for each colorspace that you use in your publications.

If your setup requires you to send single-pages and double-trucks (i.e. center spreads) *to different queues*, additional configuration is required. First, an extra filtering condition called **Planner Attribute** needs to be added which specifies that a page must be **SINGLE** or **DOUBLE-TRUCK**. Then, other **Copy To Folder** actions need to be added which point to different PrePage-it queues.

## HANDLING UNDEFINED PAGES

If pages that have not yet been defined in the Publication Planner are submitted to Move-it's Planner workflow, Move-it will not be able to identify their color space and re-route them to a PrePage-it queue. Therefore the sample workflow in [Figure 67](#) on p.67 includes a way to handle these undefined pages. It simply sends them to a folder called Undefined. Move-it will periodically scan this folder. When the page is defined in the Publication Planner, Move-it will then be able to identify it and send it to the appropriate PrePage-it queue.

Move-it is capable of knowing whether or not a page has been defined and can therefore filter it accordingly. To set up this kind of filtering condition, double-click a route filter arrow which follows the **Planner** action. You will see an additional tab called **File Selection**.

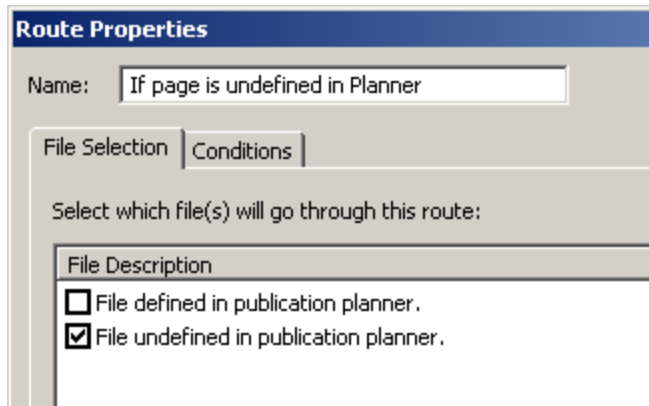


Figure 72 Planner Filter – Undefined Page

This tab contains 2 filtering options regarding whether or not a page file has been defined in the Publication Planner. To divert undefined pages to the Undefined folder, choose the option **File undefined in Publication Planner**.

In our sample workflow in [Figure 67](#) on p.67, the folder Undefined is monitored periodically by the input folder **Monitor Undefined Folder**, so that as soon as a page is defined, it is sent off to the RIP for processing.

Note that all route filters originating from the **Planner** action have the **File Selection** tab set to the default option **File defined in Publication Planner**. This is important when you want defined pages to go to PrePage-it queues - unchecking this option will prevent all defined pages from being RIPped.



## PrePage-it Web

Figure 73 PrePage-it Web Properties

This action provides an alternative way of uploading files to the PrePage-it Web application. It has no use in a workflow without PrePage-it Web.

PrePage-it Web is a separate application which provides users with a centralized web-based interface where they can manage their workflow. It lets you upload files to the RIP, view softproofs, print proofs, generate 1-bit TIFFs and output them to CTP. PrePage-it Web already includes a number of methods for uploading files.

The **PrePage-it Web** action included with Move-it provides an additional, convenient way of uploading files to the PrePage-it Web application. There are several benefits to uploading files to PrePage-it Web via a Move-it workflow:

- file uploading becomes automated
- files can go through various processing stages within the Move-it queue before being uploaded to PrePage-it Web

- there is no need to log on to PrePage-it Web and select a queue and job folder each time a file is uploaded

#### PrePage-it Web Properties

In the **PrePage-it Web Properties** dialog box shown in [Figure 73](#) above, you stipulate where a file should be uploaded by specifying the following:

**Server:** The IP address of the server machine where PrePage-it Web is installed.

**Port:** The default port number is 80, which works well in most cases. Only change if necessary.

**Login:** The user account you would like to log into PrePage-it Web with. This refers to a PrePage-it Web user account, not a Windows user account. Files will be considered to have been uploaded by this user, as if he had uploaded the files himself manually.

There are 2 ways to specify the **Login** user account:

**Select a user from Move-it 2 Settings** will display a dropdown list of all users that you've defined in the Move-it **Settings > User Logins** (see [User Logins](#) on p.18 for more information).

**Type and use fields value** is a text box where you can either manually type a PrePage-it Web user name or you can insert a field variable which contains the user name.

**Queue:** The queue where the file should be RIPped.

Again, there are 2 ways to specify the **Queue**:

**Select existing queue** will display a dropdown list of all queues that are found on the server whose IP address you specified in the **Server** text box (see [Figure 73](#) on p.73).

**Type and use fields value** is a text box where you can either manually type a PrePage-it queue or you can insert a field variable which contains the queue name.

**Job:** The job into which the file should be uploaded.

Here again there are 2 ways to specify the **Job**:

**Select existing job** will display a dropdown list of all jobs that have been created in PrePage-it Web.

**Type and use fields value** is a text box where you can either manually type a PrePage-it Web job name or you can insert a field variable which contains the job name.

The following section illustrates some sample configurations for the **PrePage-it Web** action.

Detailed information about the PrePage-it Web application can be found in the *PrePage-it Web QuickStart Guide*.

#### Sample configurations

Shown below are two sample configurations. They include configurations which specify fixed values for the **Login**, **Queue** and **Job** settings, as well as configurations whose values are specified dynamically through the use of field variables. In addition, the examples below show how field variables can extract information from both (i) the input filename and (ii) the parent/grandparent folders of the input file.

#### CASE I

This case sample has the incoming filenames parsed in order to extract the job name. Therefore in this workflow, the job name must be included in all uploaded filenames.

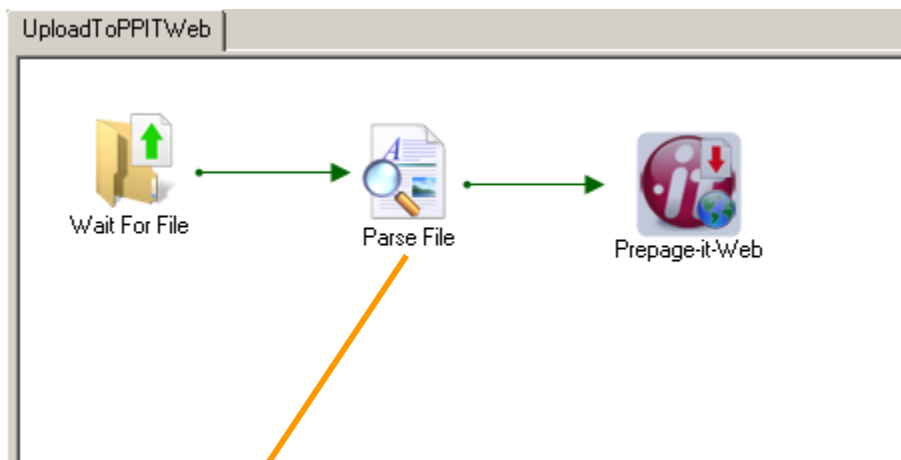


Figure 74 PrePage-it Web Sample – Workflow

Parsing template:

```
<JobName|_|>_<PageNum|. >.pdf
```

Preview

Enter an example to preview the results:

ABC\_023.pdf

Field	Value
JobName	ABC
PageNum	023

This sample filename includes the job name ABC, which is extracted and stored in the field JobName.

Figure 75 PrePage-it Web Sample – Parse File

After parsing the input files, the workflow then uploads the files to PrePage-it Web. By referring to the figure below, we can see that the job name where it will be uploaded is determined by the field variable `JobName` that we extracted from the input filename. However the user and queue have been selected from dropdown lists and are fixed, not variable. That is, every file submitted to this workflow will always go to the same queue, logged on as the same user.

The screenshot shows the 'Prepage-it-Web Properties' dialog box. It has a title bar with a close button. Below the title bar is a tab labeled 'Prepage-it-Web' and a 'Fields >' button. The main area is divided into three sections: 'Server', 'Login', and 'Queue'. The 'Server' section has a 'Server:' label and a text box containing '10.254.254.102', and a 'Port:' label and a text box containing '80'. The 'Login' section has two radio buttons: 'Select an user from Move-it 2 settings:' (selected) and 'Type and use fields value:'. The selected radio button is followed by a dropdown menu showing '.\jack'. Below this is a note: '\* Must be in Move-it 2 settings.'. The 'Queue' section has two radio buttons: 'Select existing queue :' (selected) and 'Type and use fields value:'. The selected radio button is followed by a dropdown menu showing 'NORM\_PAGES\_CMYK'. Below this is a note: 'Select a queue from the dropdown list.'. The 'Job' section has two radio buttons: 'Select existing job :' (unselected) and 'Type and use fields value:' (selected). The selected radio button is followed by a text box containing '<JobName>'. Below this is a checkbox labeled 'Create job if not exists' which is checked. At the bottom are 'OK' and 'Cancel' buttons. Four orange arrows point from text boxes to specific fields: one to the IP address, one to the user dropdown, one to the queue dropdown, and one to the job name text box.

Specify the IP address of the PrePage-it 09 server.

Select one of the users you defined in the Move-it User Logins Settings.

Select a queue from the dropdown list.

Specify the job name by specifying fields (usually) extracted from a Parse File action inserted prior to this PrePage-it Web action.

Figure 76 PrePage-it Web Sample I – Web Properties

## CASE II

In this workflow, the user, queue and job name are all extracted dynamically, either from the filename itself or from the folder it was submitted into. To achieve this, an input folder structure needs to be set up which includes distinct folders for each user and queue in the workflow.

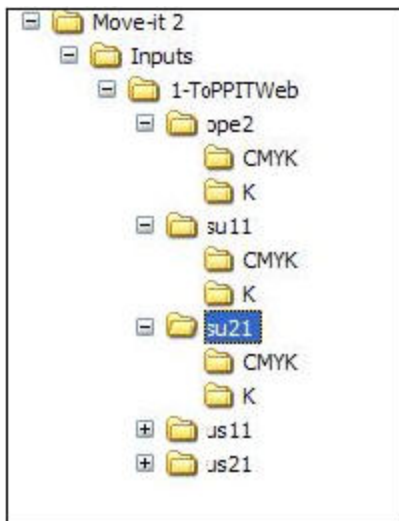


Figure 77 Input folder structure

In the figure above, the users are called ope2, su11, su21, us11, etc. There are only two queues, which are referred to as CMYK and K. In order for Move-it to know where a job should be uploaded, it extracts information about the folders where the job file was input. That is, when a job is dragged and dropped into one of these input folders, e.g. su11\CMYK, the field variables iparent2 and iparent1 are used to extract the user and the queue name, respectively.

The job name is extracted from the input filename, just like in the sample Case I. Therefore we need to set up a workflow with a **Parse File** action, just like in the previous sample shown in [Figure 74](#) (p.75) and [Figure 75](#) (p.75).

Finally we configure the **PrePage-it Web** action as shown in [Figure 78](#) below. As we can see from this figure, the files will be uploaded to NORM\_PAGES\_<iparent1>, where <iparent1> will either be CMYK or K, depending on which folder the input file is copied into. The user with which the file will be uploaded is extracted from the grandparent folder (2 levels up), such as ope2 or su21.

Prepage-it-Web Properties

Prepage-it-Web

Server: 10.254.254.102 Port: 80

Login

☐ Select an user from Move-it 2 settings:

☒ Type and use fields value: <iparent2>

\* Must be in Move-it 2 settings.

Queue

☐ Select existing queue :

☒ Type and use fields value: NORM\_PAGES\_<iparent1>

Job

☐ Select existing job :

☒ Type and use fields value: <JobName>

☒ Create job if not exists

OK Cancel

The user is extracted from the grandparent folder iparent2 (2 levels up).

Files will be uploaded to the queue NORM\_PAGES\_K or NORM\_PAGES\_CMYK

As in sample Case I, the job name is specified with a field that is extracted directly from the input filename.

Figure 78 PrePage-it Web Sample II – Web Properties

## Rename File

There are 2 ways in which files can be renamed in Move-it: using a Filename Template or using Character Replacement. These 2 methods are explained next.

### Renaming using filename template

Move-it can be configured to rename files according to what you specify in the **New filename template**. This naming template can be built using any available fields, as listed in the **Available Fields** box (see Figure 79), along with literal characters. Literal characters refers to alphanumeric letters, numbers and other characters such as “-”, “\_”, “!”, etc. The **Available Fields** box consists of pre-defined fields, which are included with the Move-it application, as well as user-defined fields. User-defined fields are those that have been defined in a previous Parse File action. Therefore a workflow with a Rename File action is usually preceded by a Parse File action.

Fields are described in more detail in the sections [Parse File](#) (starting on p. 60) and also [2.5 Fields](#) (starting on p.90).

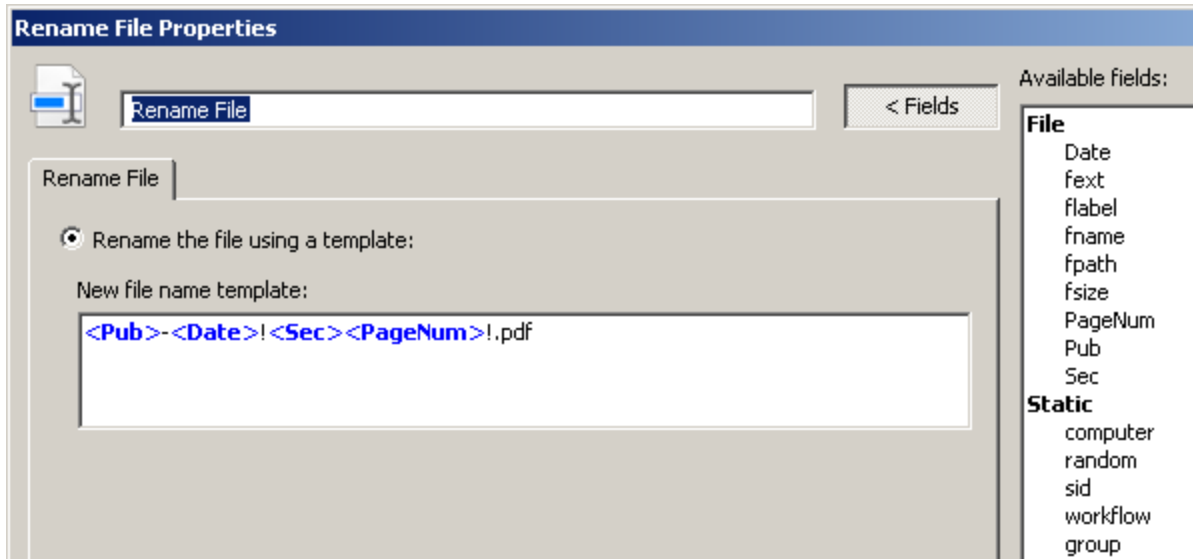


Figure 79 Rename File (New filename template)

To create a new filename template, you add the pieces (i.e. fields and literal characters) one at a time in the desired order.

To add a field:

1. Click in the **New Filename Template** text box at the location where you want to insert the field.
2. In the **Available Fields** box, click the field that you want to insert.
3. Click the **Insert** or **Format and Insert** button (located under the **Available Fields** box).

#### Tip

The **Format and Insert** feature lets you configure a field so that the new filename (after being renaming) is formatted in a particular way. How to format fields is explained in the section [Inserting and formatting fields](#) on p. 95.

To add literal characters:

1. Click in the **New Filename Template** text box at the location where you want to insert the literal character(s).
2. Type the character(s).

The example shown in [Figure 79](#) was built using a combination of fields and literal characters. The fields used in the example are user-defined fields – they were defined in a **Parse File** action that preceded the file renamer. The literal characters are the exclamation marks “!” and the filename extension .pdf.

### Renaming using character replacement

In addition to renaming a file using a **New filename template**, you can also rename by simply asking Move-it to replace one or more characters in the input filename. It is also possible to completely remove a character from the filename.

☒ Remove or replace characters:

Replace the character(s):  with

Characters	Replacement
f	g
abc	xyz

Figure 80 Rename File (Replace characters)

In the example above, incoming files will be renamed by replacing all the characters f with g and all strings abc with xyz. So an incoming file called abc\_0724\_f004.pdf will be renamed xyz\_0724\_g004.pdf.

You instruct Move-it to replace characters by specifying them in the **Replace the character(s)** box and the **with** box, then clicking the **Add** button. Any character replacement that you add can later be removed by selecting it and then clicking the **Remove** button.

If you specify a character in the **Replace the character(s)** box and type nothing in the **with** box, Move-it will delete that character from a filename.

### Run Process

This is an advanced action only used in special cases. It will run a process defined by a qualified technician or programmer. The process may be a DOS command, batch file or other executable file. The Run Process action should only be configured by a qualified Polkadots specialist.

### Send e-mail

Lets you output an e-mail to one or more recipients. In the configuration, you need to specify the typical elements of an e-mail message: (i) the **Recipients** e-mail addresses, (ii) the **Subject**, and (iii) the **Body** message you want to communicate. In addition, the **Attach files** option sends your job file as an e-mail attachment. Note that in addition to regular text, the **Body** message can also include any fields listed in the **Available Fields** box (see section [2.5 Fields](#) on p.90 for details about fields).



### Mail Recipient & Address book

Recipient's e-mail addresses are specified from the **Mail Recipient** window. In addition, you may also add e-mail addresses to the Address Book permanently. This is useful for those e-mail addresses that you plan to use in more than one workflow. Recipient addresses that are added permanently to the Address Book will then become available in any Move-it workflow that includes the Send E-mail action.

To specify an e-mail recipient for the current e-mail and to optionally add him to the Address Book permanently, open the **Mail Recipient** dialog box by clicking the **Recipients** → **Add** button.

The screenshot shows the 'Mail Recipient' dialog box with three main sections: 'New entry', 'Address book', and 'Recipients'.

**New entry section:** Contains text boxes for 'Name:' and 'Email:', and two buttons: 'Add to address book and recipients' and 'Add to recipients only'.

**Address book section:** Highlighted with an orange border. It contains a table with two columns: 'E-mail Address' and 'Name'.

E-mail Address	Name
Joe	joe@xyz.com
Sue	sue@abc.com

Below the table are three buttons: 'Add to recipient', 'Edit', and 'Delete'.

**Recipients section:** Contains a table with two columns: 'Name' and 'E-mail Address'.

Name	E-mail Address
------	----------------

Below the table is a 'Delete' button.

At the bottom of the dialog are 'OK' and 'Cancel' buttons.

An orange arrow points from a label 'Address Book' to the 'Address book' section.

Figure 81 Address Book

Begin by specifying the e-mail recipient by typing the person's name and e-mail address in the **New Entry: Name** and **E-mail** text boxes. Then, if you wish to include this e-mail recipient to receive the current e-mail without being added to the Address Book, click the **Add to recipients**

**only** button. If you also wish to add the e-mail recipient to the Address Book, click the **Add to address book and recipients** button.

The Address Book is located in the middle of the dialog box, as shown in the figure above. Names that are listed in the Address Book can afterwards be added to the **Recipients** list (bottom of dialog box in [Figure 81](#) on p.81) by selecting them in the Address Book and clicking the **Add to recipient** button. Multiple addresses can be selected simultaneously by pressing Shift+click or CTRL+click on the keyboard. An entry in the Address Book can be edited or deleted by selecting it and clicking the **Edit** or **Delete** button, respectively.

## Split PDF

The PDF Splitter splits each multi-page PDF file into individual PDF page files. When this occurs, multiple files are generated from each single input file. Therefore a renamer must be configured so that each output file is named differently, otherwise the output files will overwrite and replace each other. In fact, a workflow with a Split PDF action is typically configured with a Parse File action preceding it and a Rename File afterwards. The Parse File action extracts the parts of the filename that you want to keep after the file is renamed. The Rename File action instructs Move-it on how to name the split PDF pages. The filenames of the split PDF pages should always include the page number, since this is what distinguishes the different files and prevents them from having identical names, hence overwriting each other.

Different ways of adding page numbers to the split PDF filenames are described in the next few sections. Following that, in the section [Split PDF options](#) on p.87, you will find a more detailed explanation of the options in the **Split PDF Properties** dialog box.

There are 2 common ways in which the page number can be added to the split PDF filenames. The most common way is to have Move-it extract the page number from the original input PDF by activating the option **Try extracting the page number from the label**. Once extracted, it will be stored in a field and can then be inserted into the split PDF filenames by configuring it in the Rename File action that follows the Split PDF action. Since this is the most common method, the option **Try extracting the page number from the label** is activated by default in the **Split PDF Properties** dialog box (see [Figure 82](#) on p.83). A detailed explanation of this method is given in the section [Adding page numbers \(using Page Labels\)](#) on p.83. The second method is using an Auto-Increment value. In this method, Move-it has to first extract the starting page number of the original input PDF. Then it is configured to increment this value for each subsequent page. This method is described in the section [Adding page numbers \(using Auto-Increment\)](#) on p. 86.

## Adding page numbers (using Page Labels)

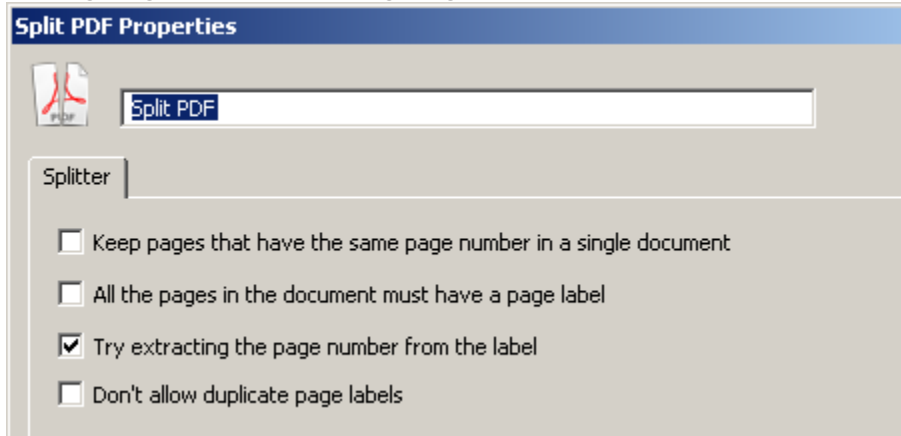


Figure 82 Split PDF Properties dialog box

For most PDF files, the page label extraction feature (i.e. **Try extracting the page number from the label**) can automatically extract the page numbers contained inside the PDF file. Then when the files are renamed in the Rename File action, the extracted page numbers can be inserted into the new filenames using the pre-defined field pnumber. When a workflow consists of a Split PDF action followed by a Rename File action, the pnumber field will be listed in the **Available Fields** box of the **Rename File Properties** window.

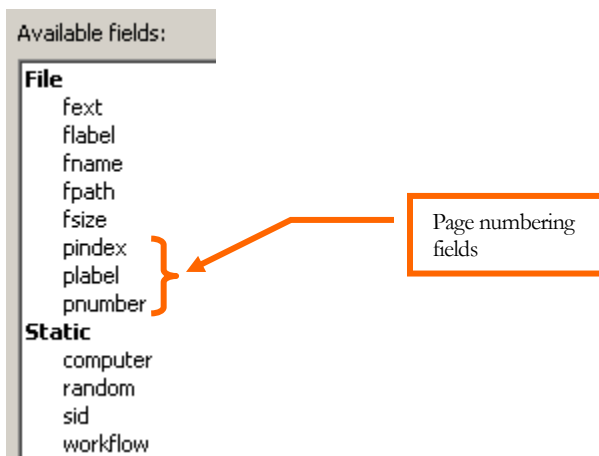


Figure 83 Rename File Properties – Available Fields

In fact, there will also be two other fields listed: plabel and pindex. These three fields (plabel, pindex, pnumber) are all related to the page number of a PDF file. Although any of these three fields can be used to name a split PDF page, the pnumber is most commonly used. The subtle difference between these three fields is explained in detail in the following section. More general information on fields can be found in section [2.5 Fields](#) on p.90.

## Plabel, pindex &amp; pnumber

As already mentioned, when a workflow consists of a Split PDF action followed by a Rename File action, the **Available Fields** box of the **Rename File Properties** window will list the fields plabel, pindex and pnumber. In addition, the Route Filter arrow connecting the Split PDF to the Rename File action

will list the fields **PDF Page Label**, **PDF Page Index** and **PDF Page Number**. These refer to the same thing, as explained below.

#### PDF PAGE INDEX (PINDEX)

The PDF page index is what you would normally refer to as a page number in most applications. Every PDF page has an index, which is typically displayed at the bottom of the Acrobat Reader window (see [Figure 84](#) and [Figure 85](#)). The index always numbers pages as 1, 2, 3, etc., whether the PDF is composite or pre-separated.

#### PDF PAGE LABEL (PLABEL)

The PDF page label is another way of identifying a PDF page, but with a prefix and a number. Often, pre-separated PDF pages contain page labels such as Cyan:2, Magenta:2, Yellow:2, etc., where Cyan:2 is the Cyan separation of page 2, Magenta:2 is the Magenta separation of page 2, and so on. The number part of the page label is what we refer to as the PDF Page Number (pnumber). The pindex and plabel usually differ in a pre-separated PDF page, whereas in composite PDFs they are often identical.

It is important to be aware that some PDF page labels only include the prefix or only the number, while some PDF files do not contain any labels at all. Ultimately, whether and what type of page labels are included in a PDF depends on a number of factors, including which application generated the PDF.

If a PDF page has a label, it is typically displayed at the bottom of the Acrobat Reader window and also in the **Pages** or **Thumbnails** tab of Adobe Acrobat (see [Figure 84](#) and [Figure 85](#)).

The following figures show examples of typical page labels and indexes in a pre-separated PDF ([Figure 84](#)) and a composite PDF file ([Figure 85](#)). Note that in the pre-separated PDF, index 7 (the 7<sup>th</sup> page of the PDF file) is actually the Yellow separation of page 2.

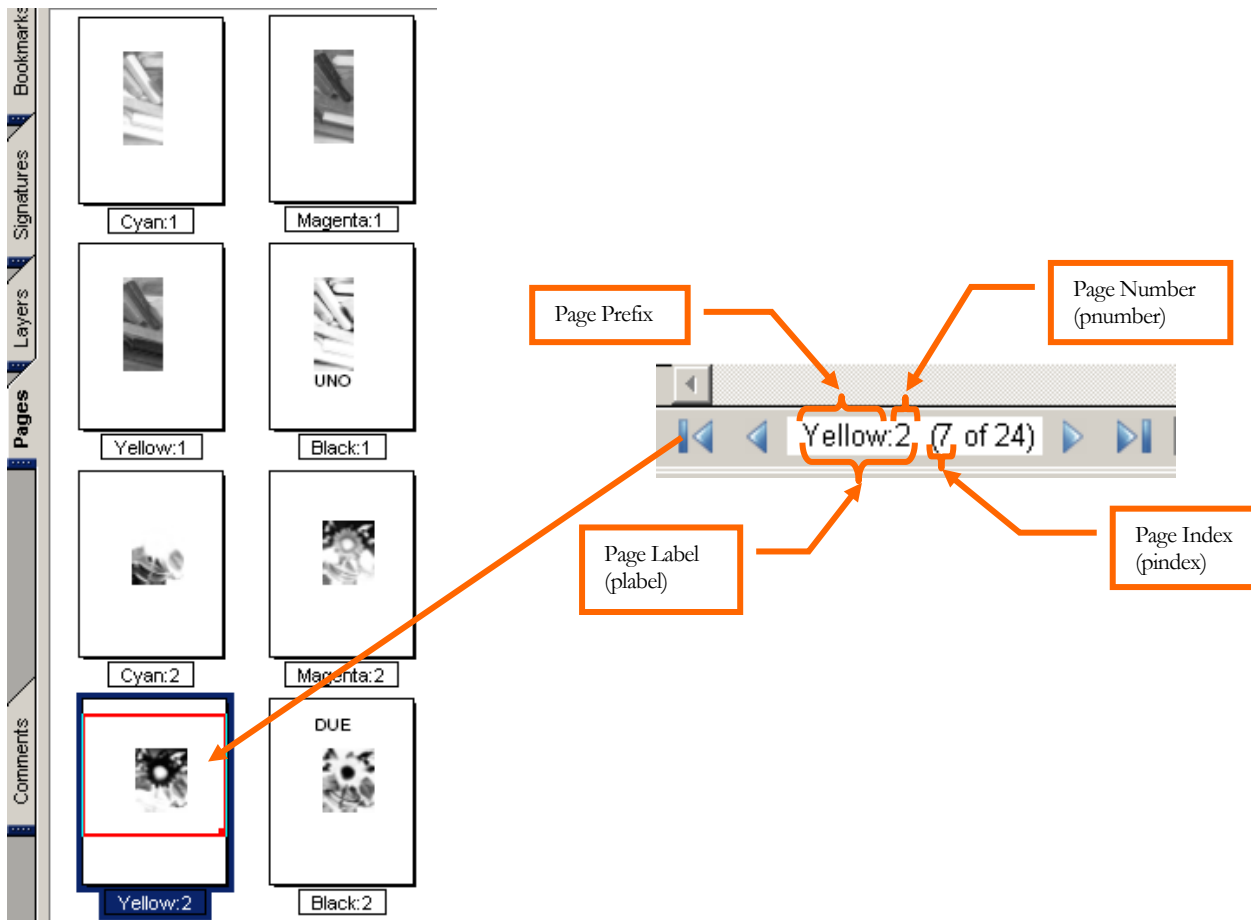


Figure 84 – Sample pre-separated PDF pages

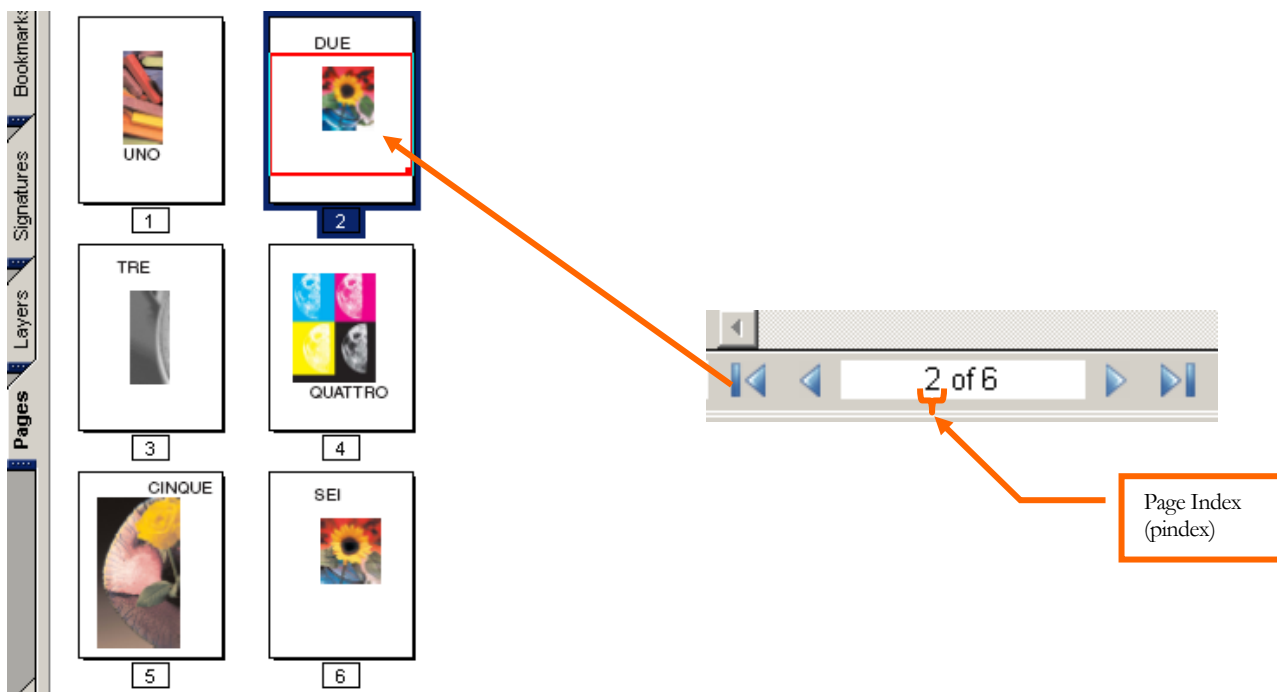


Figure 85 – Sample composite PDF pages

## Reminder

Depending on how the original PDF was generated and how it is split, if you insert the **plabel** field into a **New Filename Template**, Move-it will either add the entire page label, only the prefix, only the number or nothing at all.

### Adding page numbers (using Auto-Increment)

The second method in which the page number can be added to the split PDF filenames is with the **Auto-increment value**. This is more commonly used when Move-it is incapable of extracting the page number automatically from a PDF, although some prefer to use this method all the time. In this method, the starting page number of a multi-page PDF file must be included in the filename itself. Then Move-it has to be configured to extract this information from the filename and automatically increment it for each consecutive split PDF page.

To configure this, a user-created field must be defined in the Parse File action that precedes the Split PDF action. This field should extract the starting page number of the input PDF file. Then in the Rename File action coming after the Split PDF, this user-created field must be added to the **New Filename template**. In addition, the **Auto-increment value** option must be activated in order to increment the starting page number for each new split PDF page. These two things are actually configured at the same time, that is, the **Auto-increment value** option needs to be activated at the moment that you add the user-created field (containing the starting page number) to the **New Filename template**. To summarize the procedure:

1. Select the user-defined numerical field in the **Available Fields** box of the **Rename File Properties** window.
2. Click the **Format and Insert** button. This opens the **Format Field** dialog box.

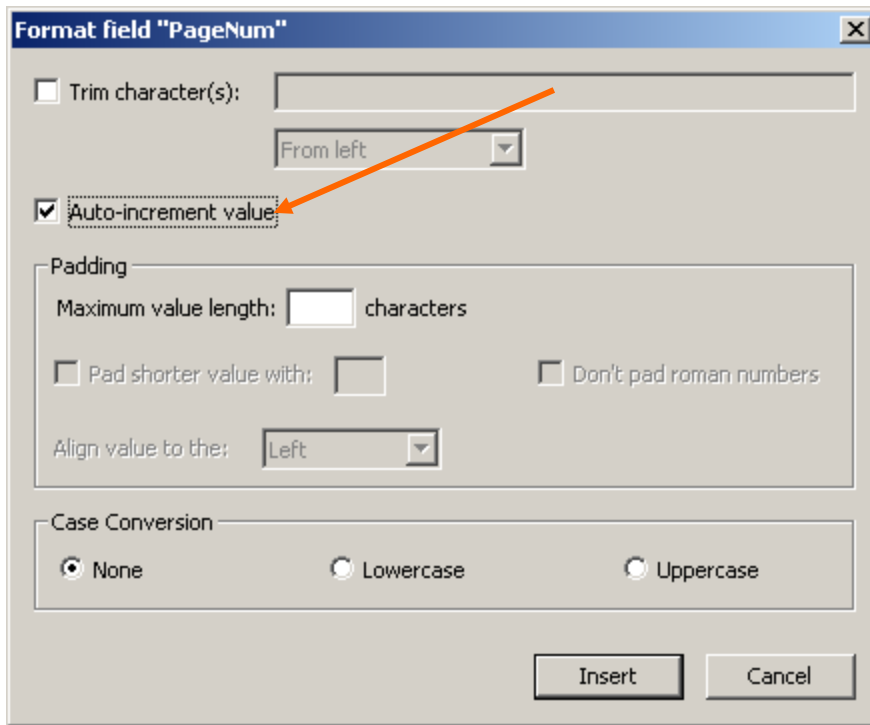


Figure 86 Format Field dialog box

3. In the **Format Field** dialog box (shown above), enable the **Auto-increment value** option.

#### Note

The **Auto-increment value** is designed to take a user-created numerical variable and automatically increment it each time a file is renamed, typically when PDFs are being split and renamed. In order for this option to be visible in the **Format Field** dialog box (as in Figure 86), you need to configure: (i) a Parse File action with a user-created field variable preceding the PDF Splitter, (ii) a Split PDF action and (iii) a Rename File action after the PDF Splitter, where you will insert the user-created field.

#### Split PDF options

The **Split PDF Properties** dialog box, shown in the figure below, allows you to set options regarding how PDFs are split and how the split pages are numbered.

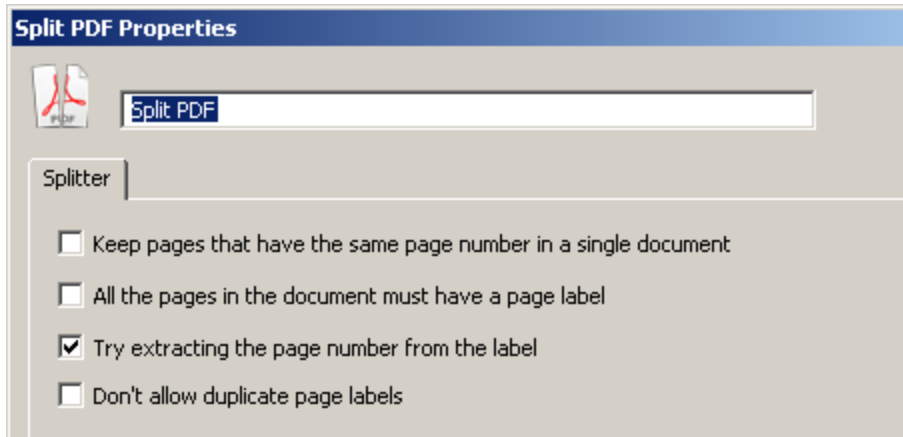


Figure 87 Split PDF Properties - options

The following options can be set:

**Keep pages that have the same page number in a single document** – this option applies to pre-separated PDFs, it has no effect on composite PDFs. When left unchecked, this option generates a separate document for each color separation in a PDF file. For example, a 4-color pre-separated PDF job containing 8 pages will be split into 32 separate documents, one for each color separation.

When checked, this option groups all the separations of a page into a single document. Therefore, a 4-color pre-separated PDF job containing 8 pages will be split into 8 separate documents, where each document will include all the color separations of one page.

**Try extracting the page number from the label** – by default this option is active, which instructs Move-it to extract the page number from the Page Label inside the PDF file. The extracted page numbers can later be used to name the split PDF pages. This is accomplished by configuring the Rename File action, more specifically, by inserting the pre-defined field **pnumber** into the new filenames. The process for doing this is explained in detail in the section [Adding page numbers \(using Page Labels\)](#) on p. 83. Note that some PDF files do not contain page labels and therefore Move-it cannot extract any page number information from these PDFs.

The options **All the pages in the document must have a page label** and **Don't allow duplicate page labels** both do verifications of an incoming PDF file to make sure it complies with the stated conditions. If an incoming PDF file does not meet the specified conditions, then the PDF will not be split. In fact, the job will stop being processed and it will error out.

### Upload To FTP Folder

This action lets you output files to a folder on an ftp site. You configure this action by specifying an ftp **Host name** (i.e. ftp site address such as ftp.xyz.com), **Username**, **Password**, and the **Remote folder** where you would like your files to be output. In most cases the **Port** number is 21, unless specified otherwise by your system administrator.



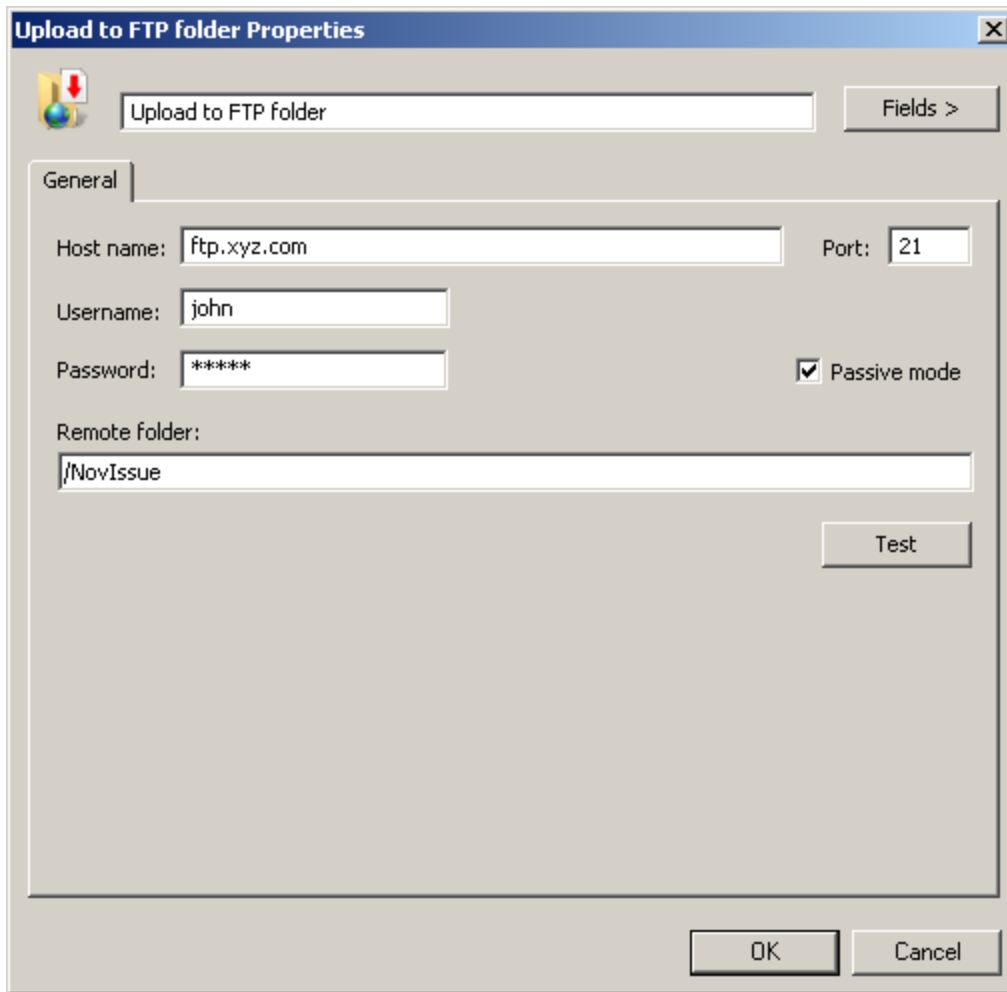


Figure 88 Upload to FTP folder

The **Passive mode** option transfers files to the ftp server in Passive FTP mode, reducing the risk of interference due to firewalls. Leaving this option unchecked sends files in regular ftp mode, sometimes referred to as Active FTP mode. Depending on the FTP server and client, file transfers may work well in active mode, passive mode or both.

After configuring this FTP action, you can test whether Move-it can log on to the ftp host by clicking the **Test** button. As a result, Move-it will display a pop-up window saying either "Connection was successful!", "Connection failed!" or another similar message.

#### Output to Unix / Mac OS X server

For FTP servers running on Unix or Mac OS X, you can specify the following types of Unix paths as the Move-it Output Folder:

- You can specify a path that points directly to an actual folder. Specify this **Remote folder** by typing the path and folder without a front slash at the beginning i.e. path/folder.
- You can also specify a path that points to an Alias folder. When you do this, Move-it will first copy files to the root of the FTP, then the files will automatically be moved to the

Alias folder, which refers to a folder that a particular user account is authorized to access. To specify this **Remote folder**, add a front slash before the path and folder i.e. /path/folder.

## 2.5 Fields

Some Actions (Rename File, Copy To Folder, Send Email and others) can be configured with the aid of Fields. The **Properties** windows of these actions include a **Fields** button, which displays the list of fields that are available to be used for that action. As an example, the figure below shows the **Properties** window for a Rename File action, with the corresponding **Available Fields**.

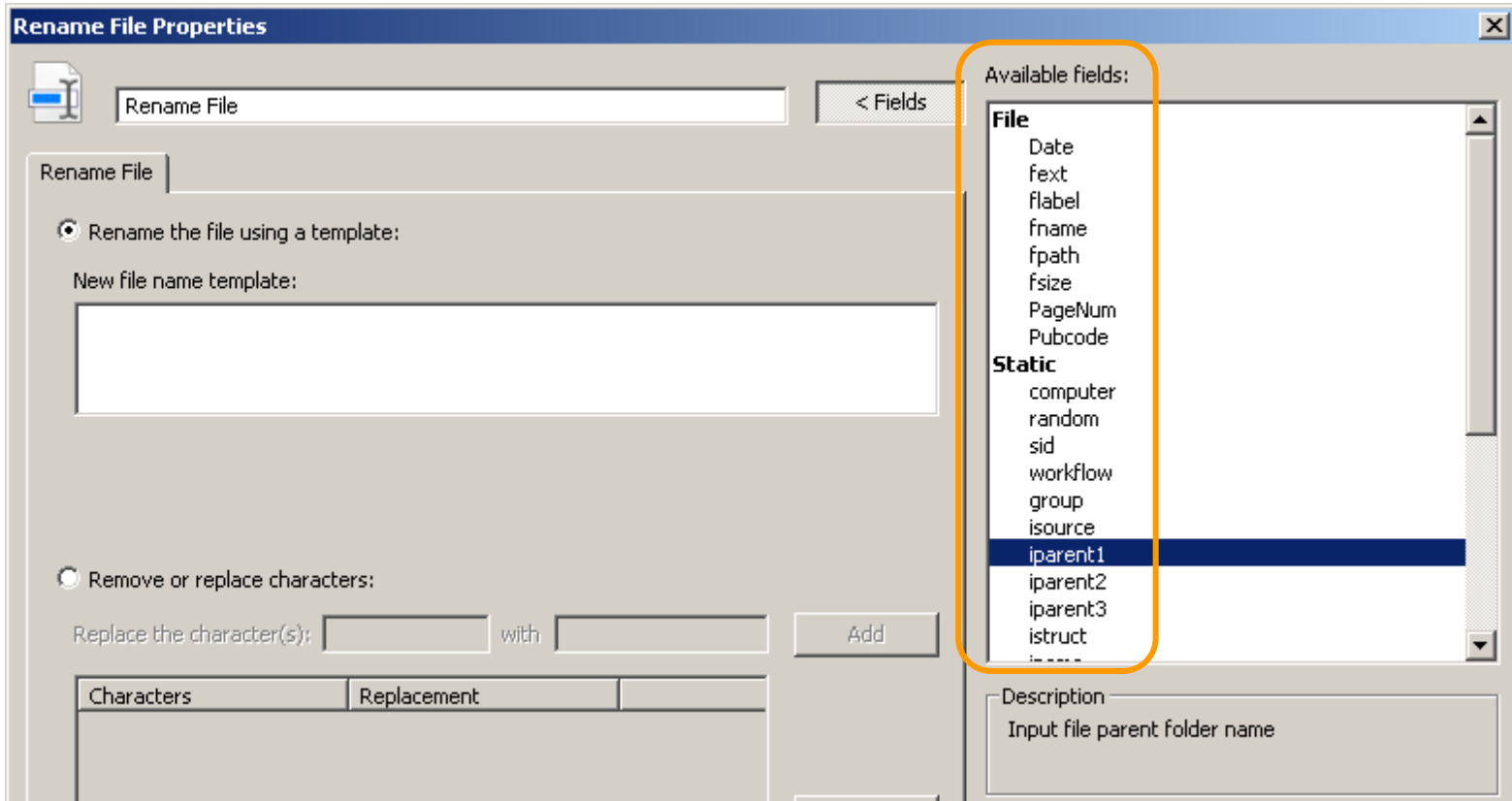


Figure 89 Available Fields (Rename File)

Fields are variables that can be used in a variety of ways. In a Rename File action, you can use fields to specify how an output file should be named. For example, you can configure the **New Filename Template** so that it includes the fields ilabel and iext. This will automatically extract the filename label (ilabel) and extension (iext) from the source file and insert it into the output filename.

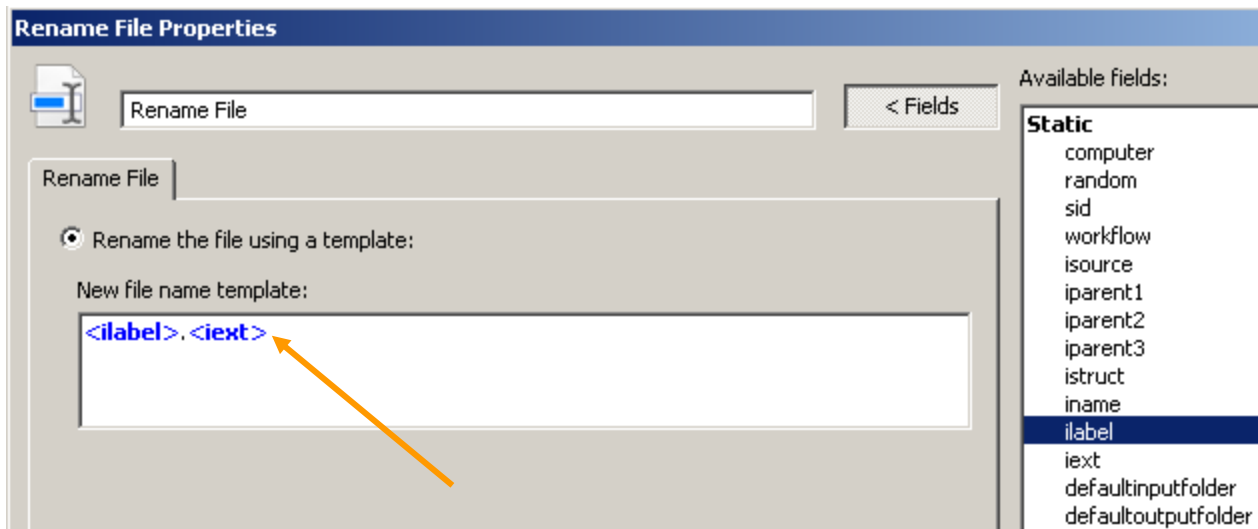


Figure 90 Field example (Rename File)

In a Copy To Folder action, you can use fields to specify the output folder name and/or path. For example, you can give the output folder a name which includes the date (dateSTR), time (timeSTR), computer name (computer) or workflow name (workflow). Therefore you can specify the **Destination Folder** to be C:\Move-it\<workflow>\_<dateSTR>\_<timeSTR>. Every time a file is output to this Destination Folder, a new subfolder will be created inside C:\Move-it, whose name will be derived from the workflow name, date and time.

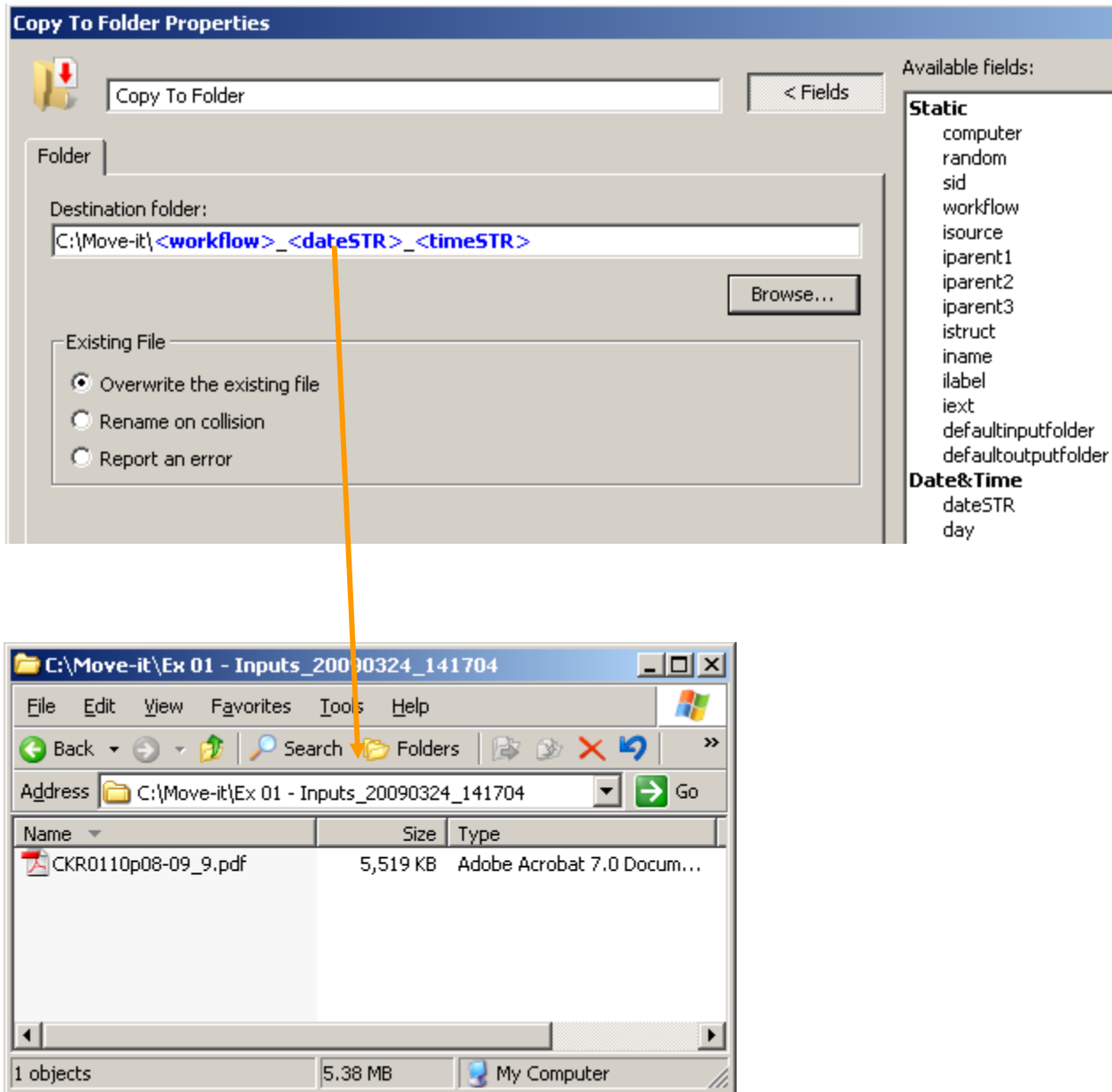


Figure 91 Field example (Copy To Folder)

Selecting a field name in the **Available Fields** list displays a short description of that field. [Figure 89](#) on p.90 shows the field **iparent1** selected, along with the accompanying description **Input file parent folder name**, meaning that this field will give you the parent folder of the input file.

The following sections further explain the different types of fields available and how they work.

### Field types

Most of the fields listed in the **Available Fields** box are pre-defined fields that are included with the Move-it application. However if you have created your own fields in a previous part of a workflow, these user-defined fields will also be listed in the **Available Fields** box within that workflow. A typical example would be when renaming a file. In this type of workflow, you would

first create a Parse File action to extract some information from the input file. This information is extracted and stored in user-defined fields that you create. Later on in the workflow, you would use these same user-defined fields to rename the file. That is, in the Rename File action, these user-defined fields would be listed in the **Available Fields** box and you could insert them into the **New Filename Template**. The following figure shows a renaming template which includes three user-defined fields.

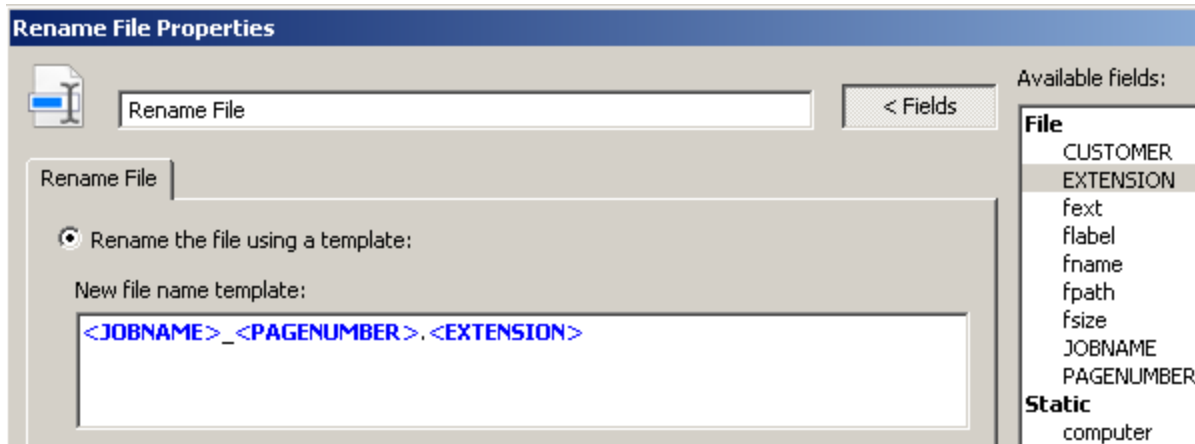


Figure 92 Field example (User-defined fields)

Note that some fields, both pre-defined and user-defined, are not always listed in the **Available Fields** box of an action. This listing of fields is context-sensitive, that is, which fields are listed depends on the context that the action is in. In other words, some fields will not appear in the list if they cannot be used at a particular point in the workflow.

The **Available Fields** box divides fields into 3 categories: **File**, **Static** and **Date&Time**.

#### File

The File category includes “dynamic” fields, that is, fields that change as a file makes its way through a workflow. Since fields are variables that can change value as they go through a workflow, this type of field captures the current value while a file is going through a specific action. For example, let’s say an input file is called `brochure_original.ps`. Then after it goes through a Create PDF and Rename File action, its name is changed to `brochure_renamed.pdf`. In this case the `fname` field (current filename) will have a different value at different parts of a workflow, depending on whether it’s inserted before the Rename File action or afterwards. Before the file goes through the Rename File action, the value of the `fname` field is `brochure_original.ps`. After the file goes through the Rename File action, the value of the `fname` field will be `brochure_renamed.pdf`.

Fields beginning with `f` represent a current field, such as `fname` (current filename) or `fpath` (current file path).

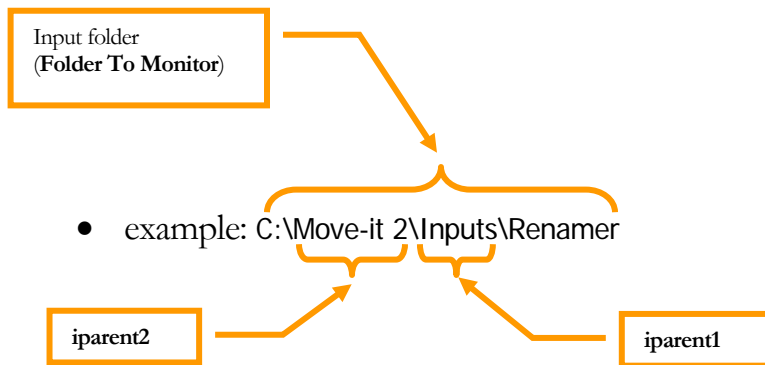
#### Static

The Static category includes static fields, that is, fields which do not change as a job file goes from one part of a workflow to another. Examples of static fields are `computer` (the computer name) and `workflow` (the workflow name). All fields beginning with `i` (such as `iname`, `ixext`) refer to the

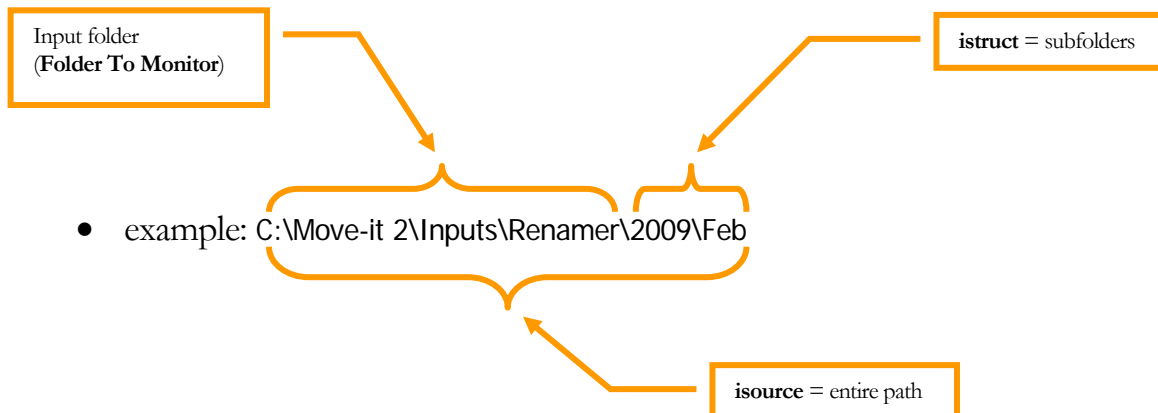
source filename. Since a filename can change as it goes through a workflow, iname refers specifically to the source filename, that is, what the file was called when it entered a workflow. Similarly, the field text refers to the filename extension of the source filename.

Several fields listed as **Static** are self-explanatory. Listed below are descriptions of some of the fields that may not be.

- iparent1/iparent2/iparent3: the parent folders of the input file (up to 3 levels)



- sid: the **Ticket ID**, a unique ID number, as seen in the **Reports** window (see [Report view](#) on p.11 for more information)
- isource & istruct: two fields that can be used in Inputs (**Wait For File**, **Download FTP File**) where the option **Monitor Subfolders** has been activated
  - isource will extract the entire path of a file that has been submitted, including all subfolders after the specified input folder
  - istruct will extract a partial path of a file that has been submitted, including only the subfolders after the specified input folder



### Date&Time

The Date&Time category includes numerous fields related to date and time. For example, dateSTR gives the full date string (e.g. 20081124), year gives only the year (e.g. 2008), and others give similar results (e.g. day, hour).

Note that the dateSTR field has replaced the date field from previous Move-it versions, and now provides the complete date string. Similarly, timeSTR has replaced the time field from Move-it versions.

### Inserting and formatting fields

To insert a field into a text box in a given Action, begin by selecting the text box. Then either double-click the field name or select the field and click the **Insert** button.

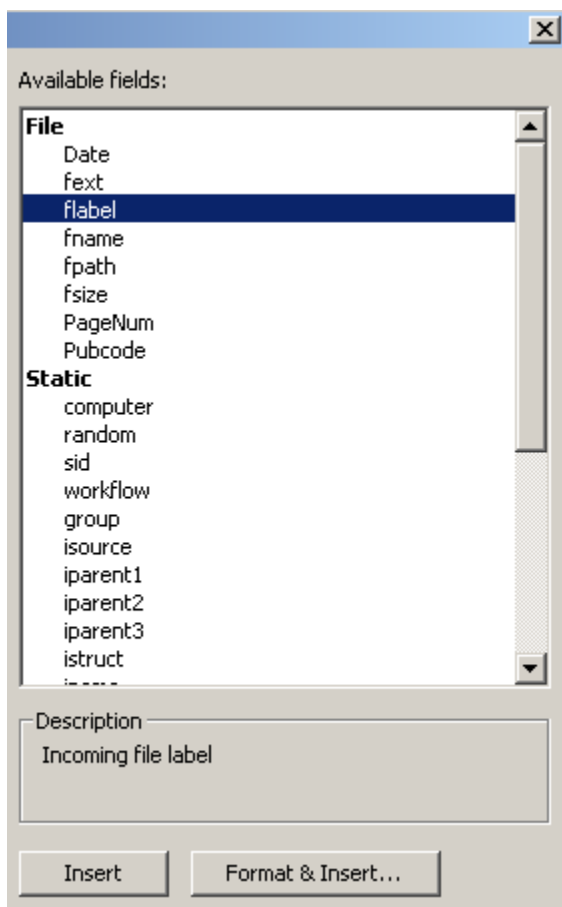
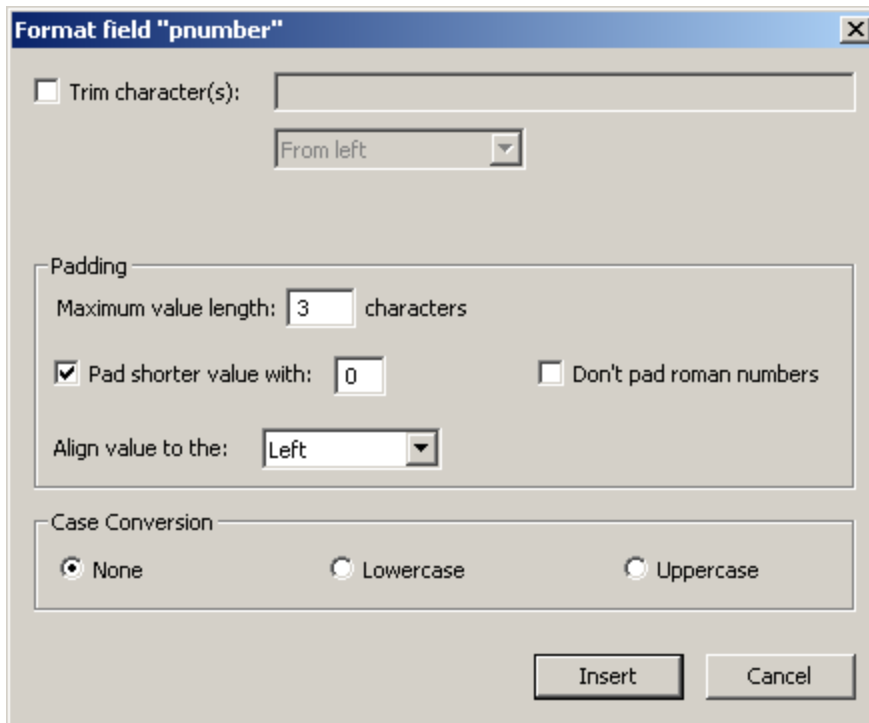


Figure 93 Inserting Fields

If you need to format the field, select the field and click the **Format & Insert** button. This will open the **Format Field** dialog box, which allows you to specify a formatting for the field.



**Format field "pnumber"**

☐ Trim character(s):

**Padding**

Maximum value length:  characters

☒ Pad shorter value with:  ☐ Don't pad roman numbers

Align value to the:

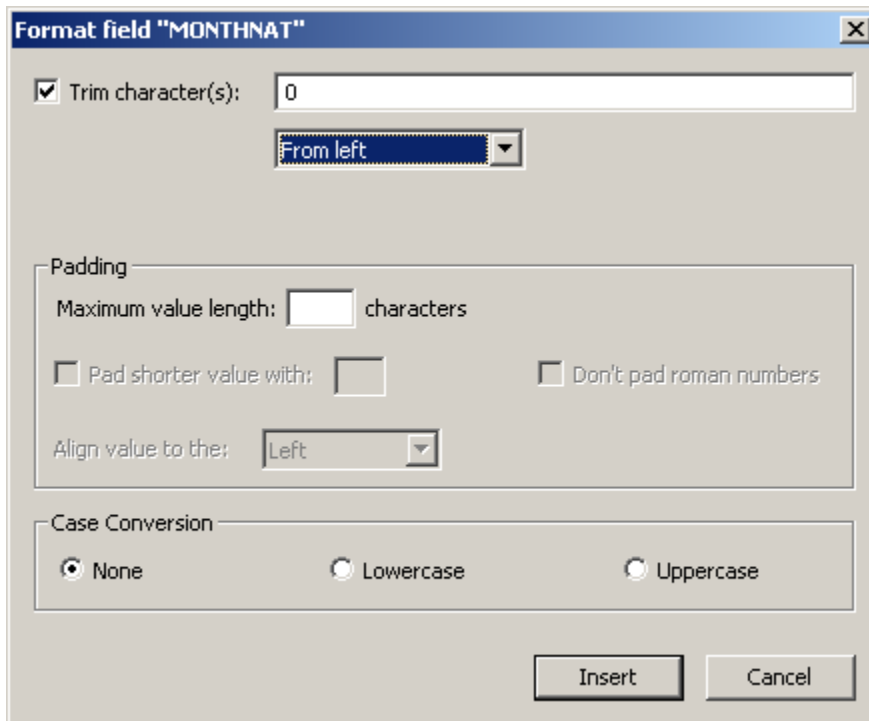
**Case Conversion**

☒ None ☐ Lowercase ☐ Uppercase

Figure 94 Formatting Fields I

### Trim Characters

The **Trim characters** option can be configured to remove or strip a specified character from the field. A typical use of this option is to remove leading zeros from a string of characters. [Figure 95](#) on p.96 shows this configuration.



**Format field "MONTHNAT"**

☒ Trim character(s):

**Padding**

Maximum value length:  characters

☐ Pad shorter value with:  ☐ Don't pad roman numbers

Align value to the:

**Case Conversion**

☒ None ☐ Lowercase ☐ Uppercase

Figure 95 Formatting Fields II



It is set to trim the character 0 from the left side of a string. This means it will remove as many consecutive zeros as it finds, starting from the left side of a character string. The table below illustrates some sample strings before and after the trim, based on the configuration shown in [Figure 95](#) on p.96.

Trim Characters - Examples	
Configuration: Trim Character = 0 (From Left)	
Before Trim	After Trim
005	5
03	3
10	10

Table 1 Trim Characters

Note that the number 10 is not trimmed since there are not zeros on the left side.

In general, you configure this option by specifying:

- which character you want to trim
- whether you want to trim the character **From Left**, **From Right** or **From Both Sides** of the string

#### Padding

Padding is the opposite of trimming. Here we configure Move-it to automatically add a specified character until the string reaches the desired length. A typical use for this feature is to add leading zeros at the beginning of a number.

As an example, let's say you want to insert a numeric field containing a page number which must always be 3 digits. To achieve this, you would like all numbers with less than 3 digits to be padded with zeros. [Figure 94](#) on p.96 illustrates the configuration required to produce this result. Here you are instructing Move-it to make the numeric field always be 3 digits, and to pad it with zeros if the number itself is less than 3 digits. So the number 127 will be output as 127, but the number 8 will be formatted and then output as 008.

In general, you configure this option by specifying:

- **Maximum value length** i.e. the (maximum) number of digits or characters in the output string
- **Pad shorter value with** i.e. the character that will be used when it is necessary to pad the string
- **Align value to the: Left or Right** i.e. will the padding character be added on the left or right side of the output string

#### Case Conversion

Configure Move-it to automatically change the filename's letter case so that all output filenames are uniform. Filenames can be converted to all **Lowercase** or all **Uppercase**, as configured in the **Case Conversion** panel.

## 2.6 Guidelines for building workflows

As mentioned earlier on, Move-it workflows input files, process them and then output them at a location which you specify. Therefore every workflow consists of one or more inputs and actions, connected to each other by route filter arrows. Detailed information about these three building blocks can be found in sections [2.2 Inputs](#) on p.32, [2.4 Actions](#) on p.46 and [2.3 Route filters \(arrows\)](#) on p. 40.

Here are some basic guidelines to keep in mind when building Move-it 2.x workflows:

- Every workflow must have at least one Input and one Action, and in the majority of cases you must specify an output location.
- Input locations can either be an input folder / hotfolder (**Wait For File** Action) or an FTP folder (**Download FTP File** Action).
- Output locations can be an output folder (**Copy To Folder**), FTP folder (**Upload to FTP Folder**), a Load Balancing folder (**Copy To LB Folder**), or the Trash (**Delete File**); in addition, a file can also be sent to a **Run Process** action in order to be processed by a custom-made application or batch file, it can be sent as an e-mail attachment (via the **Send E-mail** action) or it can be uploaded to the PrePage-it Web application (via the **PrePage-it Web** action).
- Route Filter arrows connect the various Inputs and Actions in a workflow. In fact, they determine two important aspects of a workflow: (i) the direction or route of the workflow and (ii) whether files are filtered according some criteria, which in turn decides if they will pass to the next step in the workflow.
- Workflows that depend on information that is contained in the input filename will usually require a **Parse File** action to extract this information and store it in field variables – this is typically required in workflows which include a Rename File, Split PDF, Planner, etc.

## Workflow Samples

There are several sample workflows that are installed with the application and which you use to familiarize yourself with some typical workflows. In addition, they can also be used as a basis for creating your own workflows, by duplicating them and then adjusting their configuration as required.

The sample workflows appear in the Windows **Start** menu and can be imported into the Move-it application simply by clicking their name from:

**Start > Programs > Polkadots > Move-it 2 > Workflow Samples.**

As well, a **ReadMe** document describes the sample workflows.

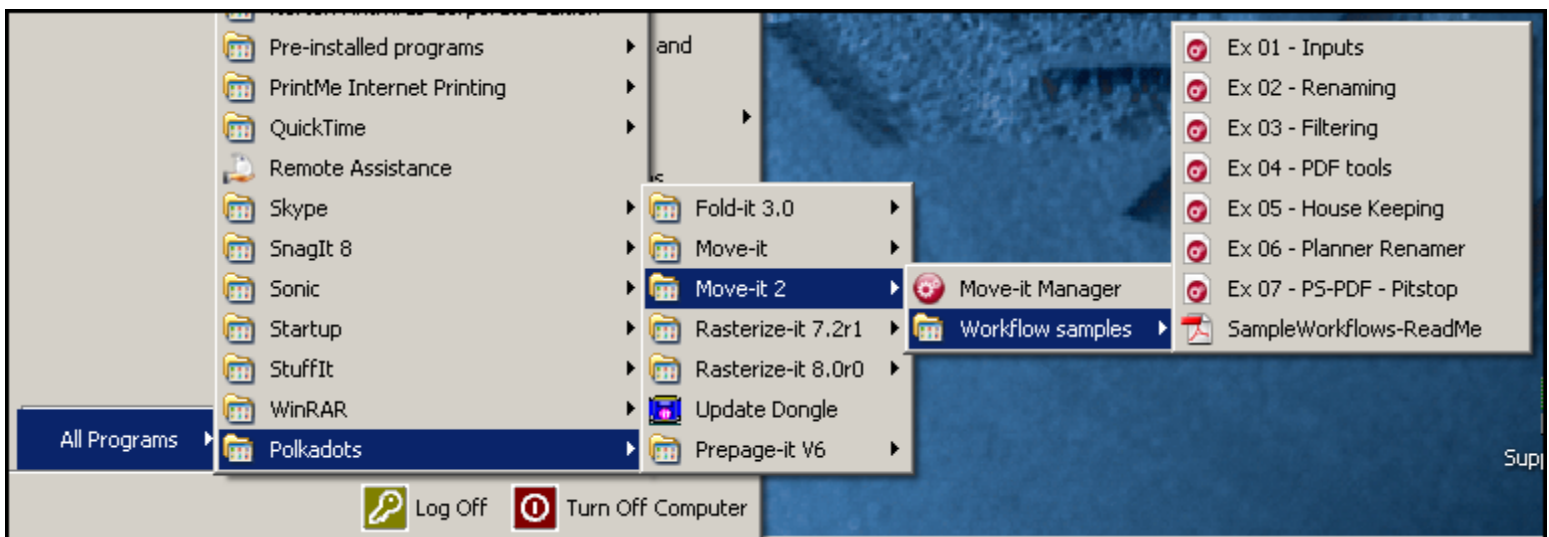


Figure 96 Sample Workflows menu

# Chapter 3 -

## Load Balancing

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### 3.1 What is Load Balancing?

Load Balancing is a function which evenly distributes (i.e. balances) the flow of jobs between two or more PrePage-it server machines. Typically it balances the load of incoming jobs between two identical sets of PrePage-it queues, each located on a different server machine. The result is an optimized, automated workflow where job files are always dispatched to an idle PrePage-it queue that is ready to process new jobs, effectively balancing the workload and maximizing the throughput of a PrePage-it multi-server configuration.

Note that Load Balancing is an optional, payable module which requires dongle activation in order to be functional.

#### How Load Balancing works

Load Balancing automates the distribution of jobs by associating a Load Balancing Input Folder with a PrePage-it queue group. In a load balancing workflow, all your job files are sent to Load Balancing input folders rather than directly to PrePage-it hotfolders. The Load Balancing module then scans the associated PrePage-it queue group. The PrePage-it queue group is made up of two or more queues which are identical or similar. Usually, each queue within a group performs the same task but is located on a different server. After scanning the queue group, the Load Balancing module will send the job file to a queue that is free. If none are free i.e. there are no queues within the PrePage-it queue group that are idle with no jobs RIPping, then it waits until a queue becomes free. Only then will the Load Balancing module send the next job. Once a file is received by a PrePage-it queue, it is processed in the usual way, as if the file had been sent there directly.

When a PrePage-it queue group is created and associated with an Input Folder, it is referred to as a Load Balancing group. The procedure for creating a Load Balancing group is described on page 103, in section [3.3 Creating a Load Balancing group](#).

### Warning

If anti-virus software is activated, it may interfere with or even block the Load Balancing function entirely. When this is the case, simply disabling the anti-virus software's "real-time scanning" will cause Load Balancing to resume its normal operations.

### How errors are handled

If for any reason, a job file can't be properly dispatched by the Load Balancing module, the file will probably end up in the Load Balancing Error Folder. An example of when this may occur is if you configure the Load Balancing function to only accept .pdf files and then send a .ps job file. It must be noted, however, that if you do not configure an error folder, then error files will have no place to go and will therefore be deleted. Also note that the Load Balancing Error Folder (accessed via **Tools > Configure Load Balancing > Error Folder**) must be configured separately from the Move-it Error Folder (accessed via **Server > Settings > Default Error Handling**) and should be two *different* folders.

### Multi-server vs. single-server

Load balancing is designed to be used in PrePage-it multiple-server workflows, where it load balances jobs so as to make the most efficient use of a workflow.

Although it is also possible to use this feature in a single-server PrePage-it configuration (since you can create a PrePage-it queue group consisting of queues that are defined on the same server), it may not result in any significant increase of the system's throughput.

### Load balancing vs. Actions

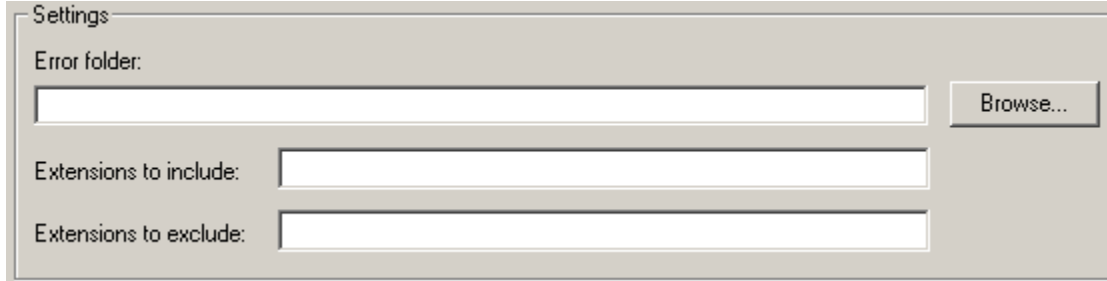
The load balancing module is a separate function within Move-it and works independently from Move-it actions. Some of the notable differences are:

- Load balancing input folders and error folders must be unique to the load balancing feature – you cannot use the same input folder or error folder for both a load balancing group and a Move-it action.
- The load balancing service is always on, that is, it is always working "in the background". It cannot be turned off from within the Move-it interface. Should you need to stop or restart the PrePage-IT Load Balancing Service, you must use the Windows' Services tool, which can be accessed by clicking **Start > Programs > Administrative Tools > Services**. Please refer to your Windows documentation for more information.

The only link between Move-it Actions and Load Balancing is that you can automatically direct files within a workflow to be output to an existing Load Balancing Folder. This can be set up with the [Copy To LB Folder](#) action (see p.50).

## 3.2 General Settings

The **Settings** frame shown below contains some parameters that apply to all load balancing groups and only need to be set once. These parameters are the Error folder and the Extensions to include / exclude, explained next.



The screenshot shows a 'Settings' frame with a light gray background. It contains three input fields. The first field is labeled 'Error folder:' and has a 'Browse...' button to its right. The second field is labeled 'Extensions to include:' and the third is labeled 'Extensions to exclude:'. All fields are empty.

Figure 97 –Load Balancing – General Settings

The **Settings** frame is located in the bottom half of the **Load Balancing** dialog box, as shown in [Figure 99](#) on p. 104.

### Error folder

When jobs that are sent to a load balancing input folder generate errors, they are transferred to the Load Balancing Error folder. See [How errors are handled](#) on page 101 for details. Note that the Load Balancing Error Folder is not the same folder as the Move -it Error Folder.

To specify an Error folder for *all* load balancing groups, click the corresponding **Browse** button and select a folder.

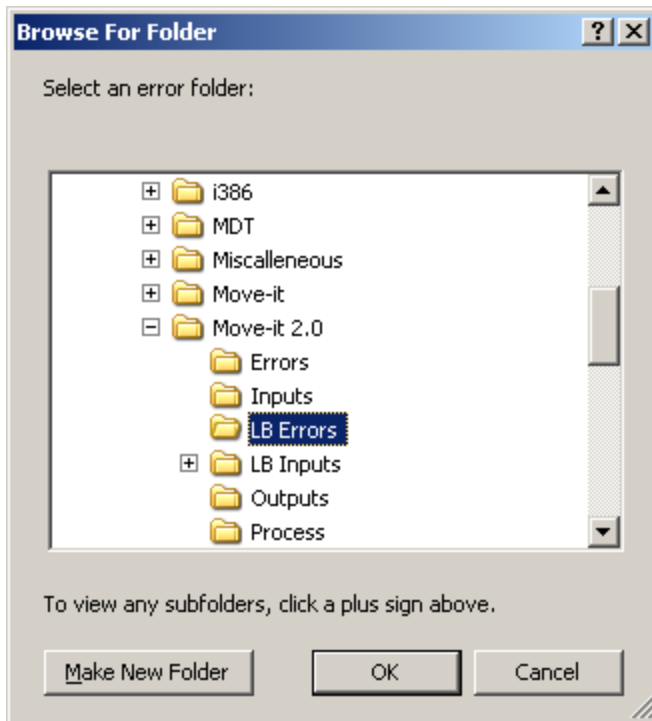


Figure 98 – Select Load Balancing Error folder

### Extensions to include / exclude

Specify any file types that should be accepted by the load balancing feature by typing them in the **Extensions to include** text box. File types are specified by their filename extensions and separated by a semi-colon, for e.g., ps;pdf;eps;.

As an alternative, you can specify file types that should never be accepted by the load balancing feature, by typing them in the **Extensions to exclude** text box.

Once you have configured the **Extensions to include** or **Extensions to exclude** parameter, job files that do not conform to your specifications are treated as errors.

#### Important

The filename extensions you specify in the **Extensions to include** and in the **Extensions to exclude** text boxes are case-sensitive. For example, ps;pdf;tif; would yield different results from PS;PDF;TIF;. Note that case-sensitivity applies to the load balancing's Extensions to include/exclude only, not to Route Filter arrows.

## 3.3 Creating a Load Balancing group

The procedure for configuring load balancing is described below. Repeat this procedure for each load balancing group you want to create.

1. Open the **Load Balancing** dialog box by clicking **Tools > Configure Load Balancing**.

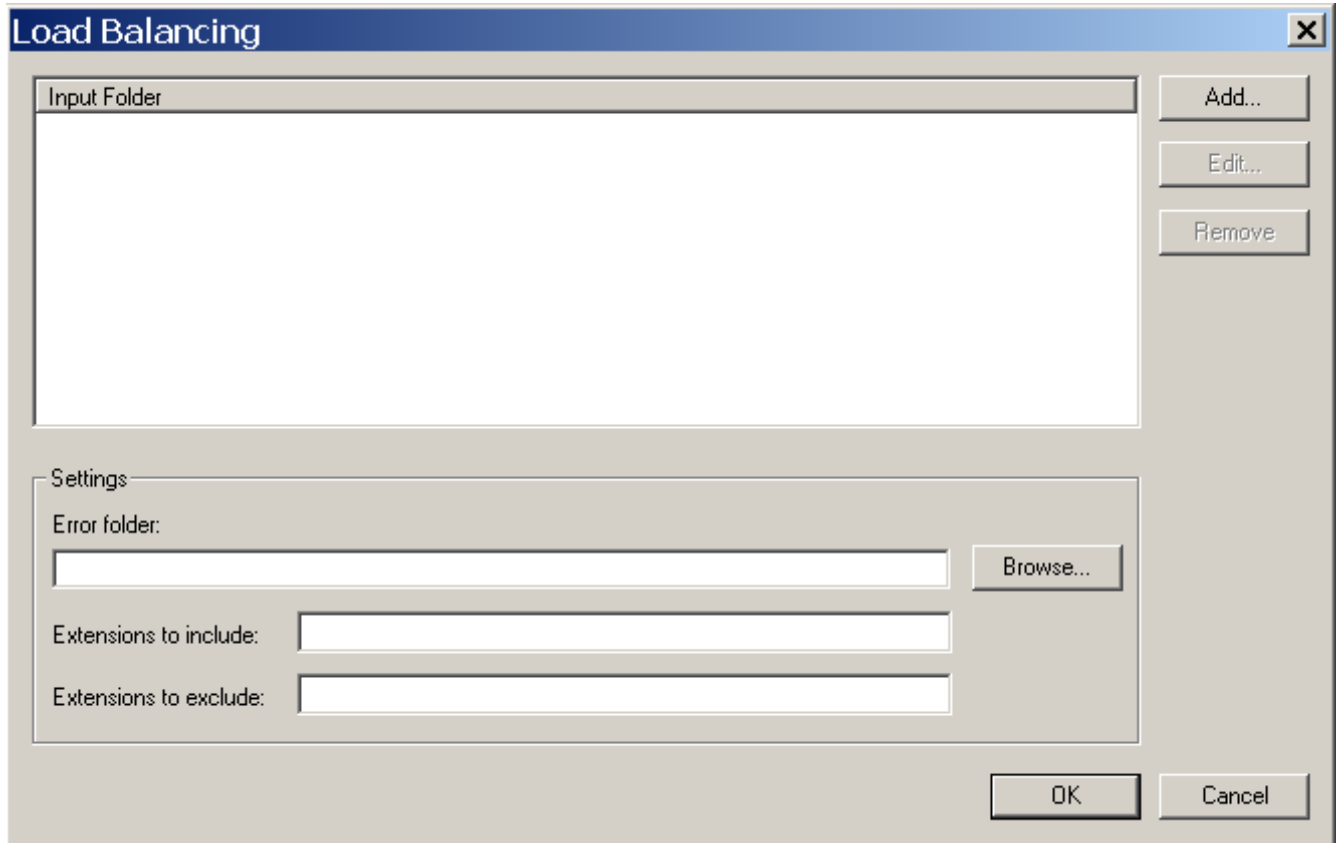


Figure 99 – Load Balancing dialog box-blank

2. Click the **Add** button each time you want to configure a new Load Balancing group. The following dialog box is displayed.

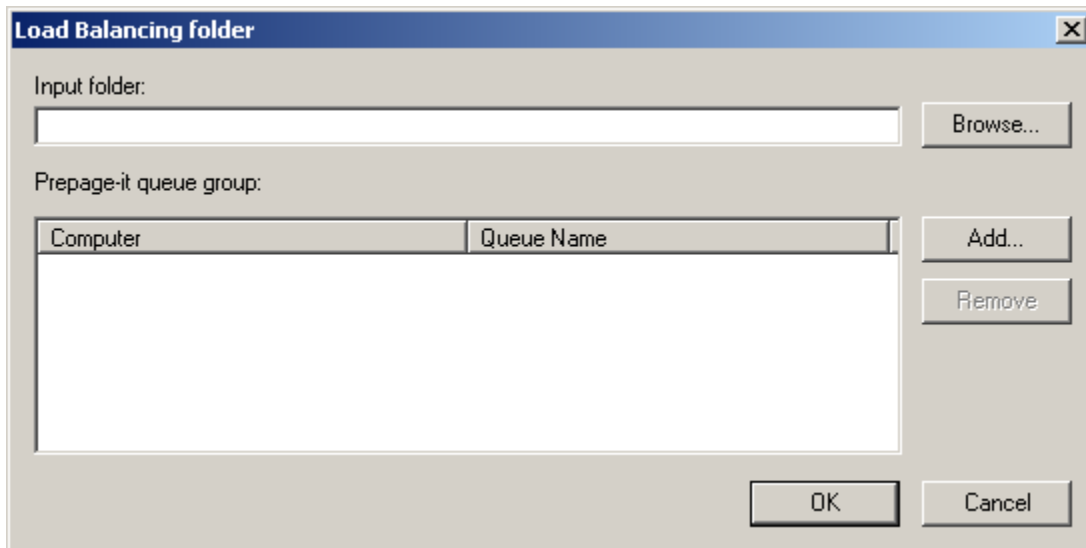


Figure 100 – Load Balancing group dialog box-blank

*Configuring a Load Balancing group consists mainly of specifying an input folder and a PrePage-it queue group (i.e. two or more PrePage-it queues).*



- Click the **Browse (for Input Folder)** button ([Figure 100](#)), then specify an input folder.

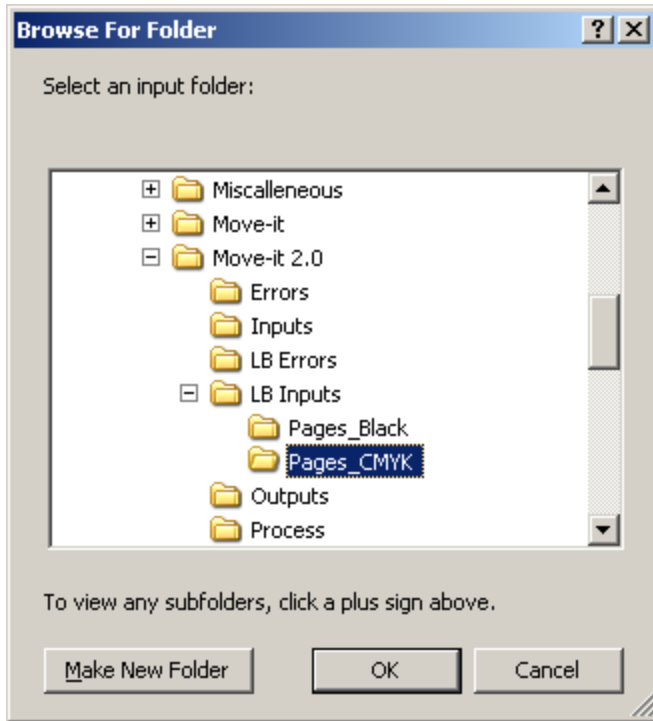


Figure 101 – Browse For Input Folder

- Click **OK**. The path of the selected input folder will now be displayed in the **Input folder** text box.

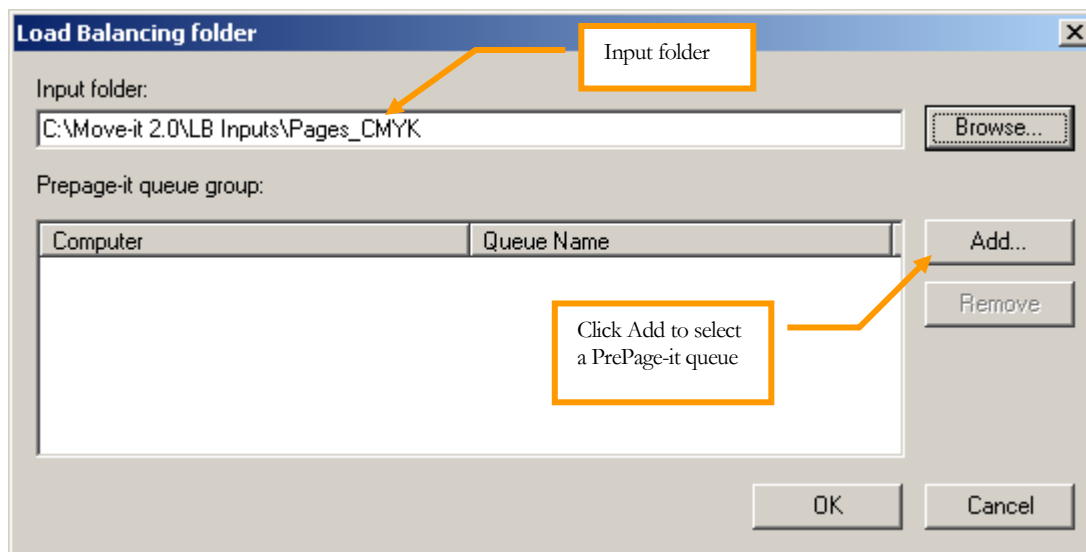


Figure 102 – Load Balancing group dialog box w input folder

- Next, click the **Add** button (see Figure 102) to add a PrePage-it hot folder. In the **Browse for PrePage-it Queue** dialog box, either type the name of the computer you wish to browse or leave it blank to browse all computers in your workgroup. Then click the **Browse** button to display the requested computers.

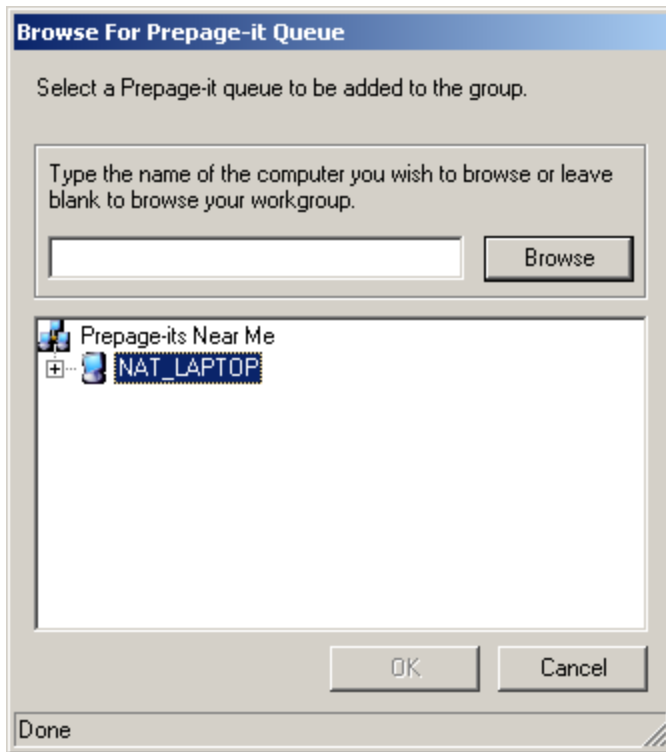


Figure 103 – Display PrePage-it computers

6. Click the “+” sign for each computer you want to browse. The PrePage-it queues for that computer will be displayed. Select a queue to add to your PrePage-it queue group and click **OK**.

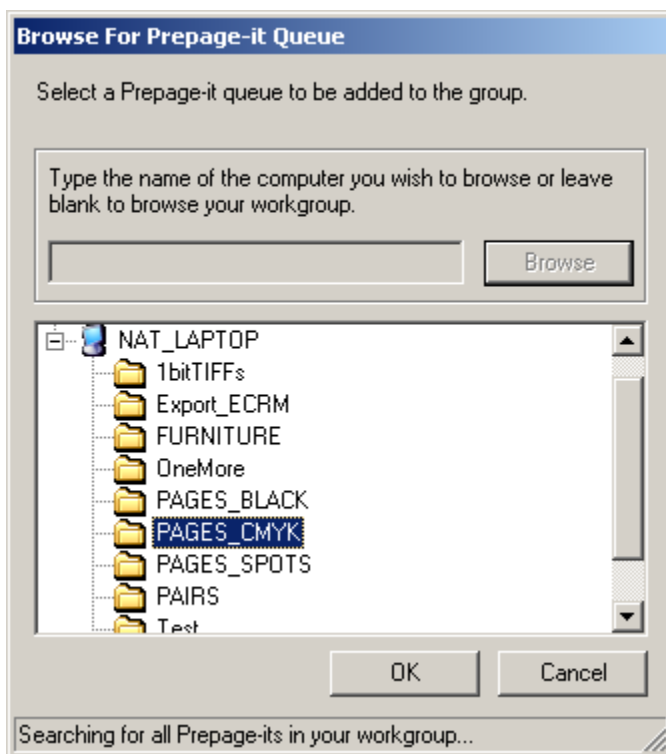


Figure 104 – Browse for PrePage-it Queue

### Note

If your setup contains several PrePage-it servers, it may take a while before all the servers and their corresponding queues appear in the **Browse for PrePage-it Queue** dialog box.

- Repeat steps 5 and 6 for each queue you want to add to the PrePage-it queue group. If you wish to remove a queue from the group, select it and click the **Remove** button. When you're finished selecting the queues, you'll see all the selected queues listed in the **Load Balancing group** dialog box, along with the associated input folder.

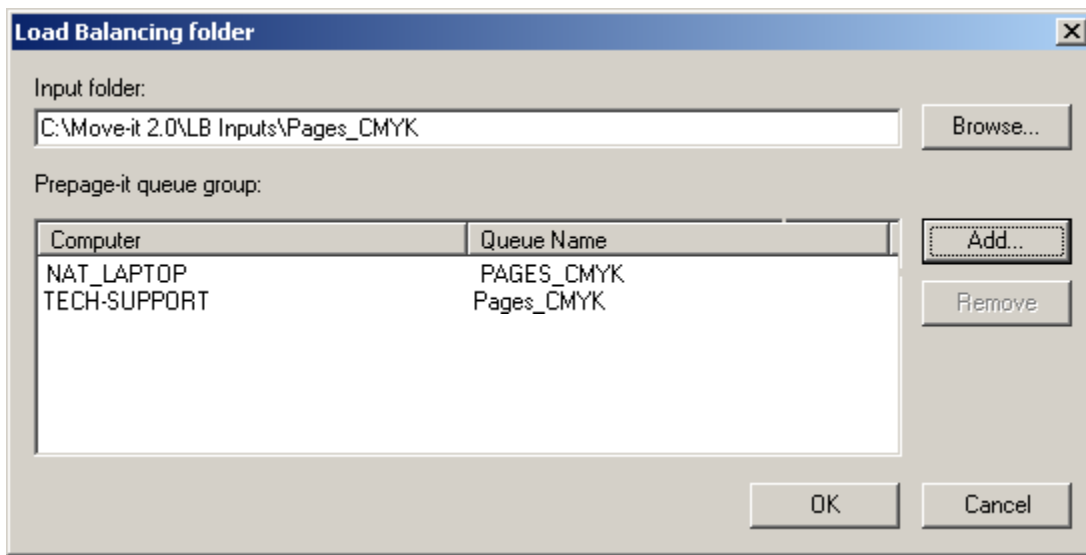


Figure 105 – Load Balancing group dialog box - completed

- Click **OK** to finalize the new load balancing group.

### Note

Only the path of the input folder is shown in the main **Load Balancing** dialog box (see [Figure 106](#) on page 108). However you can view details about the load balancing group by selecting the input folder path and clicking the **Edit** button.

- Finally, click **OK** to close the **Load Balancing** dialog box.

## 3.4 Editing Load Balancing groups

Every setting within the **Load Balancing** dialog box can be edited. The **Load Balancing** dialog box can be accessed from the **Tools** menu by clicking **Tools > Configure Load Balancing**.

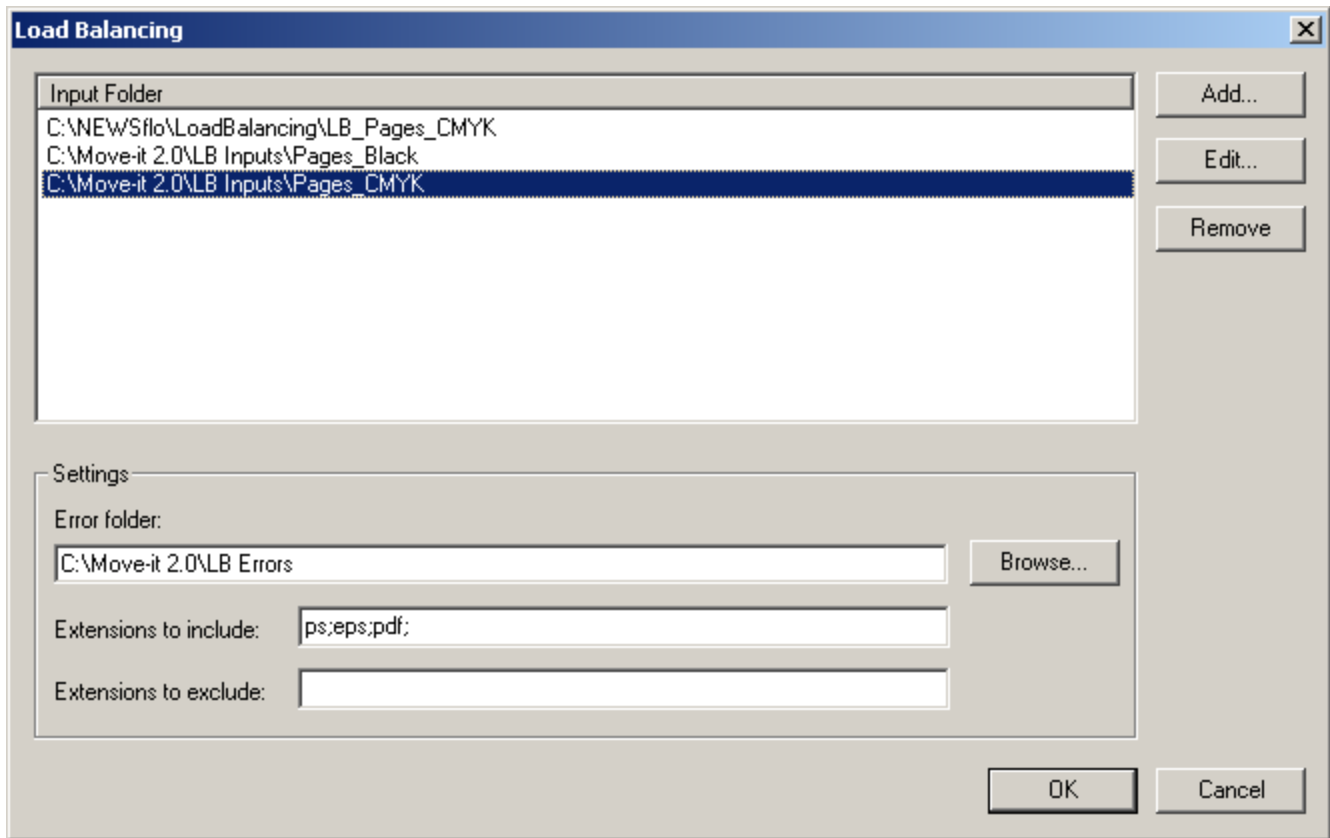


Figure 106 – Editing Load Balancing dialog box

The various ways you can edit load balancing settings are listed below:

- Edit any load balancing group by selecting it from the list (you must actually select the path of the input folder) and clicking the **Edit** button.
- Delete any load balancing group by selecting it from the list (you must actually select the path of the input folder) and clicking the **Remove** button.
- Change the error folder by clicking the **Browse** button and choosing a different folder.
- Add or remove any filename extensions directly in the **Extensions to include** or the **Extensions to exclude** text boxes.

### 3.5 Sending files to the Load Balancing folder

Described below are some common ways in which job files are fed to a load balancing input folder.

#### Dropping job files directly

After the load balancing is configured, your workflow is reduced to one input folder for each PrePage-it queue group. When you want PrePage-it to process a job, simply “drop” the job file

into the appropriate load balancing input folder. The load balancing module will decide which PrePage-it queue to send it to for processing.

### Printing job files

If your workflow includes an up-to-date version of PrePage-it 6.x or higher, you will be able to print to a load balancing input folder from any application. This is possible after you create a Polkadots Printer (corresponding to a load balancing input) in the **Printer Manager**.

The **Printer Manager** now displays load balancing input folders, as shown in the following figure.

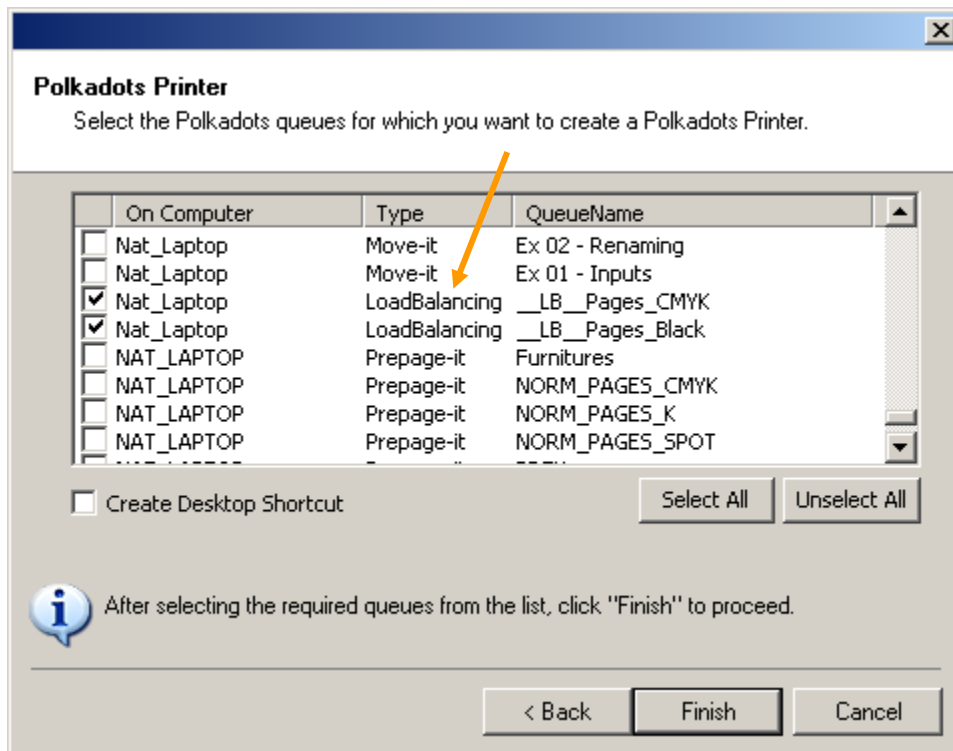


Figure 107 – Printer Manager (LB queues)

Therefore you can create one Polkadots Printer for each load balancing input folder. Once created and shared, these printers will appear in any Mac or PC application.

Detailed information about how to create these printers can be found in the section [Input via Polkadots Printers](#) on p.38 and in the *PrePage-it 6.x User Guide*.

### Sending job files from a Move-it workflow

You can also configure a Move-it workflow to send its output to a load balancing folder rather than a regular output folder. This type of setup results in a completely automated processing cycle: a workflow monitors an Input Folder for an incoming file, processes it according to the Actions that you specify, then sends it to a load balancing folder, which in turn sends the job file to an available PrePage-it queue. Any Move-it workflow can be set up so that its output goes to a

load balancing folder by adding the **Copy To LB Folder** action (see [Copy To LB Folder](#) on p.50 for more information).

## 3.6 Scaling a Load Balancing Group

It is possible to set a scaling factor to an entire load balancing group rather than setting it individually to each queue in the group. Scaling here refers to the horizontal and vertical scaling that can normally be set for any individual RIP queue.

The scaling factor for an entire load balancing group can be set either in the PrePage-it Client or in the PrePage-it Web application.

In the PrePage-it Client application, you can select the input folder of a load balancing group in the **Queues** window and then set the scaling factor just like you would for any individual queue. If you do not see the load balancing input folders in the **Queues** window, you must add them by following the same procedure as for individual queues.

Scaling can also be set for a load balancing group via the **Queues** window of the PrePage-it Web application. Load balancing input folders are not shown in this window. To do the setup, just set the scaling on one queue from the queue group and all other associated queues will be automatically set to the same scaling value.

Detailed information about the PrePage-it Client and PrePage-it Web applications can be found in their respective user guides.

# Appendix

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## Windows XP Pro limitation

Move-it is bound by a Windows XP Pro limitation of 10 concurrent connections. This means that Move-it can establish a maximum of 10 simultaneous connections when inputting and/or outputting to any *remote* Windows XP Pro machine. Simultaneous connections includes all inputs and outputs from all Move-it workflows to a particular Windows XP Pro machine. In this regard, it is important to understand the difference between Move-it's Real-time mode and Periodic mode. These two modes or monitoring methods are also referred to as **Scan folder when needed** (Periodic) and **Wait for folder changes in real time** (Real-time).

Move-it Real-time input folders establish connections which remain open as long as a workflow remains launched. Periodic input folders establish connections at the specified periodic interval (e.g. every 5 minutes) for only a few seconds at a time i.e. while Move-it scans the folder. Therefore, if your Move-it configuration requires you to have multiple connections (inputs/outputs) to a particular Windows XP Pro machine, it is recommended to set up your Inputs with Periodic scanning of folders in order to leave as many free connections as possible.

Note that this limitation only applies to remote Windows XP Pro machines. This limitation does not apply when Move-it is inputting/outputting to local folders on a Win XP Pro machine. Also, this limitation does not exist with Windows 2003 Servers.

### Reminder

If your Move-it configuration requires you to have multiple connections (inputs/outputs) to a particular Windows XP Pro machine, it is recommended to set up your Inputs with Periodic scanning of folders in order to leave as many free connections as possible.



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