mtivity™
making work flow

Customization Guide

Contents

A Note on Catalogue terminology

The Examples in this document may use Catalogue, Catalogue or Campaign.

The name of this component may be personalized for your company - please contact Mtivity Support to make this change.

Introduction

Prerequisites

Before beginning, you should ensure you have an account in Mtivity, a Catalogue Manager license and are familiar with the system's navigation and basic catalogue functionality.

Getting Started

Customizations are created from an Item's detail screen, so you need to have an already created item. You will find four types of items: Downloadable, From Stock, Make to Order, and Book Item.

You can create them by going to Admin/Catalogues/Item section and under the Tools sections there is a selection of items available for the user to create.

Downloadable items are usually guides, ready prepared materials or independent elements like logos and images therefore there are not customizable.

Stock items are on principle items that are already printed and ready to be sent when the order is placed.

Remaining two types: Make to Order and Book Items are the ones that can be customized. They are similar to the idea of templates that each user inputs their information to personalize them.

To set up a customization you need to have a new item created. There are two types of customizations – text and image ones.

You can add customisations using the functions below from the View Page of the Item (this bar is hidden if you are in the Edit Item Page).

Additional Resources

Further Reading

- Catalogue Administration - This is an overall administration guide that covers creation and publishing of items
- Customisations Guide - This focuses solely on adding customisations to templates

These documents are available at http://mtivity.zendesk.com/forums/121332-guides-and-documentation

Support

Mtivity's support desk is available from 09:00 AM to 17:30 PM, Monday - Friday (excluding public holidays).

- **Telephone**: 0333 666 1890
- **Email**: support@mtivity.com
- **Skype**: mtivity.support

Text Customizations

Select the Add Text Customization button to open the New Text Customization screen (Add Text Customisation).
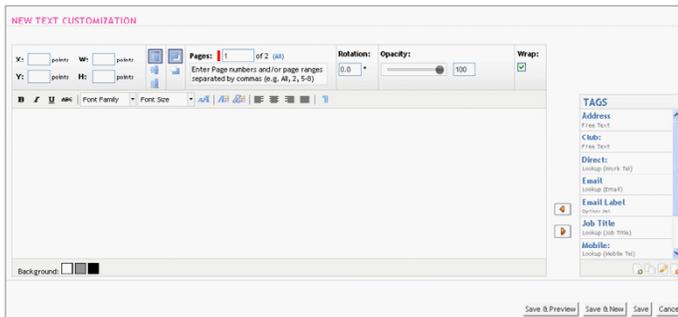
On the left hand side there is an editor window in which you can input and edit a customization.

On the right hand side you can see all available tags. Tag is a single customizable unit – it can be for example a name or address. You can use the same tag more than once in a single customization, or you can use the same tag in different customizations.

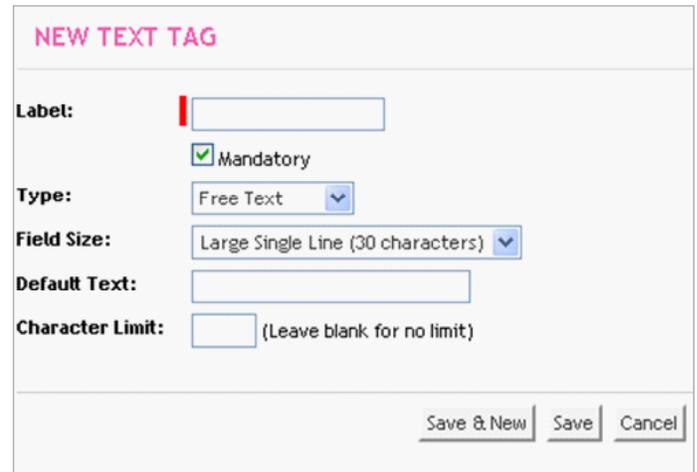Underneath the Tags section you can see four icons

They are New Tag, Copy Tag, Edit Tag and Delete tag respectively.

When you hover over each icon, its name will appear – for example
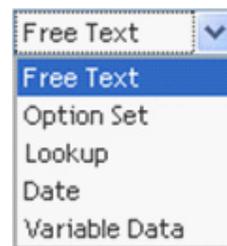

Select New Tag to open the New Text Tag window:

First choose the name for your tag- fill in the Label box which is mandatory, this will appear to your client when they customize the item.

Then select the Type from the drop down box.

Click save to create your Tag

When your tag is created you will next need to define where it will appear on the PDF template and how it is going to display. Double click on the selected tag and it will move across to the editor window, ready to be formatted.

Highlight the tag (and any text you have entered) and choose the formatting options you wish to apply.

Types of Text Custom Tags

Free Text: This option appears as default. It allows the client to enter free text in the input field. You can set the Field Size (the box the client enters text into) to be either:

- Small Single Line (10 Characters)
- Large Single Line (30 Characters)
- Multiple Line (multiple Lines)

Enter in Default text if desired - this will be displayed in the Field Size box.

Set a character limit, or leave blank for no limit.

Option Set: You can import an existing list or create a list by typing the list items into the Options box, and separating each item on a new line (note the newly created option set will only be available for use in this customization.) When completing the customization the client is limited to select one of the available options only. When you have imported a text list you can delete list items by highlighting them and deleting them.

Lookup: the system will bring up the current user's personal information saved in their profile and display this for the customization. This can be marked as editable so that the client can edit the details (if needed), or not editable.

Date: Various date formats can be selected, default text displayed can be set to either Blank, or Date of order being placed. If the latter is selected you may specify how many additional days (weeks or months) to add to the entered date. This can be marked as editable or not.

Variable Data: Enter in a Label for the Customization and set it to Variable Data. If you create an Item with Variable Data customizations, when the client orders the item, Mtivity creates a Template (CSV) using the Labels of the variable data tags. When the client orders the item, this template is available for download – and the client then enters all the details into the CSV as needed. When the order is placed – the artwork, along with the CSV file is sent to the Supplier who can then print the artwork as required with the details from the Variable Date CSV file. Note that the supplier account needs to be set for Variable Data for this option to appear.
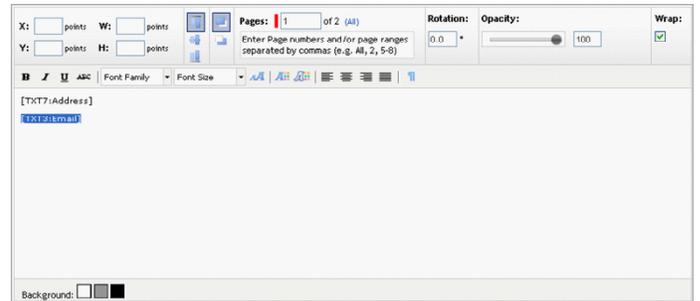
Formatting Tools

- Basic font format options (Bold, Italic, Underline and Strikethrough). These are pseudo style attributes. If you require a true font style you will need to upload a specific font type.

- Font Selection: Select from standard system fonts, or from client specific fonts.

- Font Size: Standard Font size will always be in points.

- Option to enter a specific font size with up to two decimal places (the custom font size can be defined in points, millimeters, centimeters or inches).

- Color Picker tool: Will open a pop-up window.
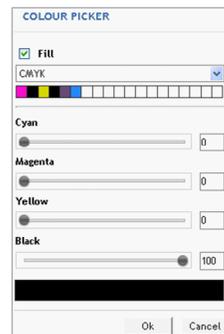
- Here you can select CMYK, RGB, Grayscale or a defined Spot Color (see Changes to Admin Tasks for how to define spot colors).

- You can manually enter in the values, or use the sliders to specify the color.

- The option for Fill is checked by default – this will fill the text with the specified color.

- For Spot Colors only there is an additional option for Tint selection.

- Stroke Tool: Will open a similar pop-up window. Again you may select CMYK, RGB, Grayscale or a defined Spot Color. Stroke Width will default to 0, enter the desired width for the stroke if required in the Stroke Width text box.

- Alignment settings: Align Left, Centrally, Right, or Justified.

- Paragraph style button: This opens up a pop-up tool to define the paragraph settings for the text.

- Settings will be applied to the paragraph where the cursor is located.

- Setting include: First Line Indent (indent of the first line of the selected paragraph) and Paragraph Spacing (the space between the paragraphs).

- The units can be set to points, millimeters, centimeters or inches.

Font Management

All fonts uploaded for a company are available in Admin > Catalogues > Font Management

Mtivity supports the following font types:

- Type 1 (PFB, and PFM file extensions) for both Mac and PC,

- True Type (TTF file extension)

- Open Type (OTF file extension).

Click on an Account name link to add a Font to the selected Account and choose New from the Tools menu. Fonts are associated with each client and will need to be uploaded to the Client Account within Mtivity before it can be used for customizations.

To upload a new font go to Admin > Catalogues > Font Management > Account Name > Tools > New. You will see the new font screen. Enter the name of the new font, select the font format from the Format drop down and select the file(s) required.

Save the new font for this Account.

If a client specific font is uploaded for a client within Mtivity, but it is not installed as a system font on the computer that is used to create the customizations and this font is selected for the customization then it will preview with a standard system font in the editor window. However the

Customization will still be stamped in the correct font on the PDF.

To avoid mistakes the best practice is to install all client specific fonts as system fonts on the computer used for customizations.

Positioning Tools
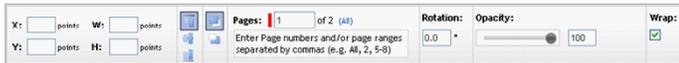
- Co-ordinates info (X and Y starting point). Note that the starting point for the customization is taken from the Top Left hand corner of the boundary box of the customization. If no boundary box (width W, height H) is defined, then by default, the customization will stamped per the top left corner of the page.

- Dimensions: Width and Height appears next to this for the dimensions of the text box.

- Vertical Alignment: Options for aligning text top, middle or bottom. Note that this alignment is within the dimensions of the text box defined above.

- Positioning options: place the text on the foreground or background.

- Page selection options: you may specify what page(s) the customization will appear on. This can be one or more selected pages (e.g.: 1,3,6), a range of pages (e.g.: 1-4) or All pages.

- Rotation settings: The center of rotation is the top left corner of the boundary box (defined by width, height) and rotation is defined in degrees (rotating anti-clockwise).

- Opacity settings: Use the slider to change the opacity of the text.

- Option for word wrap: This will wrap text entered in by a client when it reaches the end of the defined text box width. If not selected text will be cut off when it reaches the end of the defined text box.

Below the editing box there is a Background color selector.

- You may select a different Background color for the text editor if you are working with white text to enable you to see the customization as you are working on it. NOTE the background color of the editor box will not affect the stamping of the customization in any way.

Image Customizations

Select the Add Image Customization button to open the New Image Customization screen (Add Image Customisation).

On the left hand side there is an editor window in which you can format a customization.

On the right hand side you can see all available tags. Tag is a single customizable unit – it can be for example an image for the back of a business card or a logo.

Underneath the Tags section you can see four icons

They are New Tag, Copy Tag, Edit Tag and Delete tag respectively.

Select New Tag to open the New Text Image window:

First choose the name for your tag- fill in the Label box which is mandatory. This is visible to your client.

Select if the customization will be mandatory or not and then choose the Type from the drop down box and click save to create your Tag.

Types of Image Tags

Option Set- Import an existing image list. You can use any existing image lists. From this image list you can delete any options that are not relevant to this customization.
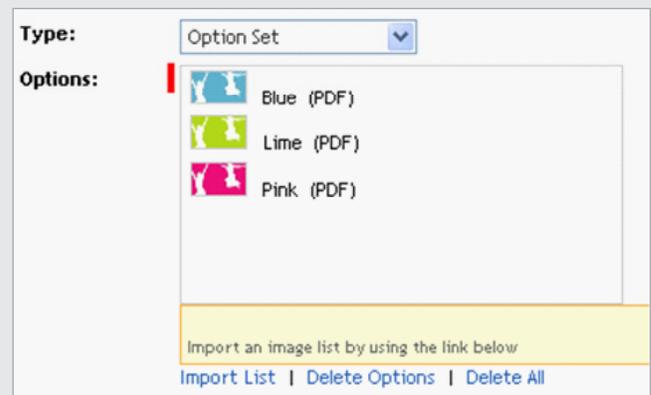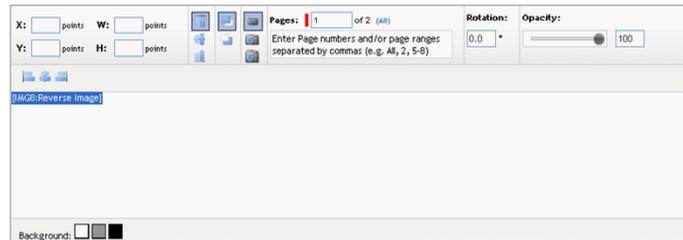

Option Set and Upload – allow the user to select from the available options or to upload their own image. (This option will display a Instructions window where you can give details of the image (like quality and DPI)

Upload – allow the user to upload an image of their choice only (note this will display an instruction section where you can give details of the image (like quality and DPI)

Variable Data - Use the base path to specify where the images are stored on the server. The base path will be indicated in the Job Ticket that results from a catalogue order. From here the Supplier can access the image store by using the base path and can select the image(s) that are needed.

When your image tag is created you will next need to define where it will appear in the PDF template. Double click on the selected tag and it will move across to the editor window.

Highlight the tag and choose the formatting options you wish to apply.

Image Formatting

- Co-ordinates info (X and Y starting point). Note that the starting point for the customization is taken from the Top Left hand corner of the boundary box of the customization. If no boundary box (width W, height H) is defined, then by default, the customization will stamped per the top left corner of the page.

- Width and Height appears next to this for the dimensions of the image box (the bounding box). If width or height is not specified, then it takes the width and height of the page.

- Vertical Alignment: Top, Middle or bottom (so the image will be aligned accordingly within the bounding box)

- Placement: Foreground or Background.

- Scaling: 3 Options:

- None – no scaling of the image will occur.

- Scale Proportionally – fit the image to the bounding box, but maintain the image ratio.

- Scale to Fit – fit the image to the bounding box – the image will occupy the entire area defined as the bounding box with the width and height. Note that the image might be stretched or skewed if an incorrectly proportioned file is used.

- Page selection options – you can specify what page(s) the customization will appear on. This can be one or more selected pages (e.g.: 1,3,6), a range of pages (e.g.: 1-4) or All pages

- Rotation settings: The center of rotation is the top left corner of the boundary box (defined by width,

height) and rotation is defined in degrees (rotating anti-clockwise).

- Opacity settings: 100% the image is solid - use the slider to make the image more opaque.

- Alignment settings: Left, centre or right of the bounding box.