ePS Metrix 22.1

Setup Guide and Worksheets

Metrix®

eProductivity Software
Empowering *Packaging and Print*

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Welcome to Metrix 22.1

ePS Metrix is an industry-leading job planning engine that transforms big data into actionable data in the most proven end-to-end integrated solution with a holistic view into manufacturing. With over 1,200 Metrix users in 25 countries and 17 years of continuous, aggressive development, Metrix is recognized as the de facto industry standard for dynamic, intelligent production planning, and automated imposition.

The Complete Planning and Imposition Solution

The ePS Metrix solution stores your presses, finishing equipment, stock, folds, users' logins and permissions, along with your manufacturing standards. Centralizing this information ensures uniformity, efficiency, and ultimately error-free planning and imposition across your entire organization. The EFI Metrix solution automatically and dynamically determines how many press sheets you need, the optimum layout for each press sheet, and even figures out the most cost-effective printing method, press, and sheet size.

About This Guide

Metrix comes in five major versions: **Standalone, Commercial-Suite-Integrated (Monarch), Fiery-Integrated, Packaging-Suite-Integrated (Radius),** and **Midmarket-Suite-Integrated (Pace)**. This guide covers the first two only. If you have one of the other versions of this product, please see the documentation for your version of the product.

Contact Information

ePS Support

Web Site:	communities.efi.com
US Phone:	1.855.EFI.4HLP (1.855.334.4457)
UK Phone:	+44 (0) 800.783.2737
EU Phone:	+49.2102.745.4500
E-Mail:	metrix.support@efi.com

Metrix Support hours are 8AM CET to 5pm ET Monday – Friday. You may contact support at the above numbers or via our customer portal at communities.efi.com.

> **Note** For problems involving infrastructure (e.g., computers, networks, operating systems, backup software, printers, third-party software, etc.), contact the appropriate vendor. ePS cannot support these types of issues.

EFI Professional Services

US Phone:	651.365.5321
US Fax:	651.365.5334
E-Mail:	ProfessionalServicesOperations@efi.com

ePS Professional Services can help you perform ePS software installations, upgrades, and updates. This group can also help you implement, customize, and optimize your ePS software plus offer a range of training options.

Getting Started

Logging in to Metrix

When you launch Metrix, a Login window opens. If you already have a User Name and Password, select your Name and type your Password, and then click **OK**.

If you are starting Metrix for the first time, or if personal User Roles have not yet been assigned, select one of the following default logins:

Login	Password
Administrator	a
Guest	guest
Senior	senior
Junior	junior

Tip　See Adding User Roles and Users for more information about this topic.

Accessing the Database – Editing Modes

Notes　The Database window has two editing modes: **New/Variation** mode and **Administration** mode, available only to users with appropriate permissions.

　　　　See Adding User Roles and Users for more information on user permissions.

New/Variation mode allows the following operations:

- Adding new records
- Adding variations of existing records

Administration mode is only available when no project is open, and allows the following operations (in addition to those listed above):
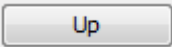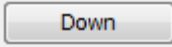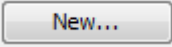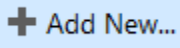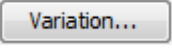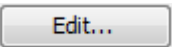
- Importing external data to add new records
- Editing existing records
- Prioritizing the list of existing records
- Deleting records

Database Functions

To access the Database, select **Settings > Database....**

Note　Going into the Database window with a project open will result in a message stating that the Database can only be opened in New/Variation mode, meaning only **New** and **Variation** are available.

Database Functions

Button	What it does
Up	Promotes the currently selected record – used to prioritize the list of records. **Administrator or Senior permissions only.**
Down	Demotes the currently selected record – used to prioritize the list of records. **Administrator or Senior only.**
Set as Default	Make the hi-lighted machine the default selection. **Only available for Guillotine Cutting Machines.**
New... / Add New...	Creates a new record.
Variation... / Variation...	Creates a new record by copying the selected one, then opens the new record for editing.
Edit... / Edit...	Opens the selected record for editing. **Administrator or Senior only.**
Delete / Delete	Deletes the currently selected record. **Administrator or Senior only.**
Import... / Import...	Opens a window allowing import of MXML and CSV data for presses, stocks, XMF job templates, customers, file marks, and mark sets.
Export... / Export...	Opens a window allowing export of MXML and CSV data for a selected press or mark set, and all stocks.

Assigning Priority

Use **Up** and **Down** to prioritize records and control the order in which entries appear in the Metrix User Interface.

For example, the default order for the sample presses in the Metrix database is:

- Speedmaster 102
- Speedmaster 72
- GTO 52
- Rollfed

Left unchanged, the same order appears when a press is selected from the Press window of the New Layout wizard. To change this, use **Up** or **Down** on a selected record.

Tip To minimize editing, promote the records you use most often to the top of each list by clicking **Up** in the Database window.

Note The order of folds is especially important for bound products. Metrix automatically selects the first fold in the list when creating components (signatures). You can select another fold later. However, you can minimize editing by moving your preferred fold to the top of each list (8s, 16s, etc.).

Numerical Data Entry

You can enter numerical data in the default unit of measure, but you can also enter data using other units of measure. When you use the appropriate measurement notation, listed below, Metrix automatically converts the value to the unit of measure of your Metrix installation. The following are units of measurement that Metrix supports:

- mm or cm

- pt

- inches (")

    Note   Metrix can also perform mathematical calculations later in the printing process. For example, you can enter 45+1/16 and Metrix will automatically convert it to 45.0625 when you press ENTER or TAB. For more information about this, see the *ePS Metrix User Guide*.

Adding Equipment and Resources to the Database

Adding presses to the Database

The information required to set up your presses is nearly all information that is supplied by the manufacturer. There are several discretionary fields. They are:

- **No Image** and **No Page** areas

    Note   See Understanding how No Image and No Page Areas Work for more information.

- Hourly Rate

- Average Running Speed

- MakeReady Hours per Color

- Cost per Plate

- Minimum Drying Time for Work-And-Turn Layouts

    Notes   As you gather the information for each stock, you can use the Metrix Setup Worksheets provided in "Appendix A: Setup Worksheets," located in the back of this document.

    To add a press, select Presses on the left side of the Database window, and then click **New**.

    The red properties are required and the black properties are optional.

    Because the New Press window includes the options for Sheetfed or Rollfed presses, the Property names will vary accordingly.

    "Cutoffs/Repeat" becomes available (at the bottom of the screen) when you select "Rollfed" in Press Type.

    When "Ink Units Defined" is set for **True**, the next four fields become available.

Press Properties

Property	Explanation
Name	The name displayed in the Metrix user interface to identify this press.
Device ID	The ID used by Metrix to synchronize this press with an external system such as an MIS. Metrix looks for this ID when reading a JDF or MXML file, and will generate an error if not found. To ensure present or future compatibility with JDF, make sure that this entry matches the Press ID in your MIS system.
Manufacturer	An optional field used in some exported JDF.

Model Name	An optional field used in some exported JDF.
Model Number	An optional field used in some exported JDF.
Serial Number	An optional field used in some exported JDF.
Press Type	Select **Sheetfed** or **Rollfed** as Press Type from the menu.
Digital Press	**True / False** The press is a digital press.
Maximum Sheet Around Cylinder	The maximum sheet size around the cylinder for this press.
Minimum Sheet Around Cylinder	The minimum sheet size around the cylinder for this press.
Maximum Sheet Across Cylinder	The maximum sheet size across the cylinder for this press.
Minimum Sheet Across Cylinder	The minimum sheet size across the cylinder for this press.
No Image Lead Edge	The gripper margin at the bottom of the sheet. Metrix will not allow any page bleed in this area. See Understanding how No Image and No Page Areas Work.
No Image Trailing Edge	The non-imageable area at the tail of the sheet. Metrix will not allow any page bleed in this area.
No Image Sides	The non-imageable area on each side of the sheet. Metrix will not allow any page bleed in this area.
No Page Lead Edge	The amount of space reserved for marks at the gripper edge of the sheet. Metrix will not allow any page trim in this area, but will allow bleeds. See Understanding how No Image and No Page Areas Work.
No Page Trailing Edge	The amount of space reserved for marks at the tail of the sheet. Metrix will not allow any page trim in this area, but will allow bleeds.
No Page Sides	The amount of space reserved for marks on each side of the sheet. Metrix will not allow any page trim in this area, but will allow bleeds.
Press Uses Plates	**True** / **False** The press uses or does not use plates.
Plate Brand	Optional field used in some exported JDF.
Plate Dimension Around Cylinder	The plate size around the cylinder.
Plate Dimension Across Cylinder	The plate size across the cylinder.
Plate Thickness	The plate thickness.
Perfects	**True** / **False** The press is capable of perfecting.

Ink Units Defined	**True** / **False** **True** or **False** for whether or not the ink units are defined. If **True**, Ink Units and Coater Sides fields become available.
Ink Units	An integer value. The total number of ink units on press.
Max Front Ink Units	An integer value. The maximum number of ink units on front of press.
Max Back Ink Units	An integer value. Maximum number of ink units on the back of the press.
Coater Sides	An integer (0, 1, 2) for number of sides that can be coated by a special coating unit (in addition to the ink units).
Maximum Stock Thickness	The maximum stock thickness for this press.
Minimum Stock Thickness	The minimum stock thickness for this press.
Maximum Stock Thickness Perfecting	The maximum stock thickness for a perfecting press.
Minimum Stock Thickness Perfecting	The minimum stock thickness for a perfecting press.
Vertical Sheet Set Back	The vertical distance from the bottom of the plate edge to the bottom of the press sheet edge. This property is only used when exporting to Imposed PDF or JDF, when **Impose To Press Plate** is selected.
Horizontal Sheet Offset Anchor	**Left** / **Center** / **Right** The point on the sheet and the plate from which offsets from are executed. This property is only used when exporting to Imposed PDF or JDF, when **Impose To Press Plate** is selected.
Horizontal Sheet Offset	The amount to offset the sheet on the plate, from the Anchor selected. Positive values move the sheet image to the right; negative values move the sheet image to the left. This property is only used when exporting to Imposed PDF or JDF, when **Impose To Press Plate** is selected.
Horizontal Sheet Offset Mirror Side 2	**True** / **False** The horizontal sheet offset is mirrored on Side 2 of the sheet. The Horizontal Sheet Offset Mirror setting interacts with the Horizontal Device Compensation Mirror setting. If both are set to **True**, they cancel each other out.
Horizontal Device Compensation	The amount to offset the image on the plate, to compensate for centering inaccuracies on devices that are not controlled by hardware panels. Positive values move the plate image to the right; negative values move the plate image to the left.
Horizontal Device Compensation Mirror Side 2	**True** / **False** The horizontal device compensation is mirrored on side 2. The Horizontal Device Compensation Offset Mirror setting interacts with the Horizontal Sheet Offset Mirror setting. If both are set to **True**, they cancel each other out.

Hourly Rate	The hourly rate for this press. Used to calculate the layout and project costs. For digital presses, use the formula [Click Charge × Pages per Minute × 60] to determine this property.
Average Running Speed	The average running speed for this press, in sheets per hour. Used to calculate the layout and project costs and time to produce. For some digital devices, use the formula [Pages per Minute × 60] to determine this property. For rollfed presses this will be expressed as Linear Rate (ft./min or m/min).
Make Ready Hours Per Color	The hours (or fractions of hours) required to complete makeready for each color. Used to calculate the Layout cost and time to produce.
Cost Per Plate	The plate cost for this press.
Minimum Drying Time For Work And Turn	The minimum drying time for work-and-turn (and work-and-tumble) layouts for this press. Used to calculate the Layout cost and time to produce.
Flip Components When Perfecting	Flips print output so that the front side of products prints on the back side of the layout. Cannot be used with Irregular Shape products or Die-cut products planned with Use Die-cutting Tool Geometry set to False.
Double Sided No Gripper Change	**True/ False** Select **True** for a press that prints on both sides in a single pass, while incorporating a sheetwise printing method.
UV Support	**True / False** Select **True** to be able to use UV inks and coatings on the press.
UV Press Requires UV Inks	**True / False** Select **True** to limit the press to only use UV inks.
UV Press Requires UV Coatings	**True / False** Select **True** to limit the press to only use UV coatings.
Cutting Machine	Click the field to select the cutting machine from the list in database.
Cutoffs/Repeat	Enter measurements in the Edit Cutoff Lengths window. This field and the window are only available if "Rollfed" is selected under Press Type. The default is "variable," and Metrix will determine the most efficient layout to accommodate the required quantity. To make the field "variable," click ⋯ and select the **Variable Cutoff Length** box.
Press Guide Allowance	The press guide allowance is a reserved area on the sheet.

Understanding how No Image and No Page areas work

Each press in the Metrix database has properties for **No Image** and **No Page** areas. Metrix takes these areas into account when making an **Auto Layout** calculation.

No Image areas

These are areas of the sheet that cannot take ink. For example, **No Image Bottom** is typically the gripper margin. Metrix will not place any product trim or bleed in this area. You can set the bleed to a negative number, allowing the trim area to fall within the **No Image** area as far as the **No Page** area. This "negative bleed" can sometimes maximize product placement on the sheet. The **No Image** areas are measured from the edge of the sheet inward.

No Page areas

These are areas of the sheet generally reserved for the placement of marks. **No Page** values are also used, even in the absence of marks, so that page trim will never butt up to the edge of the sheet (since stock sheets often vary in size). Metrix will not allow any product trim into this area,but will allow bleeds to fall within it. The **No Page** areas are measured from the edge of the sheet inward.
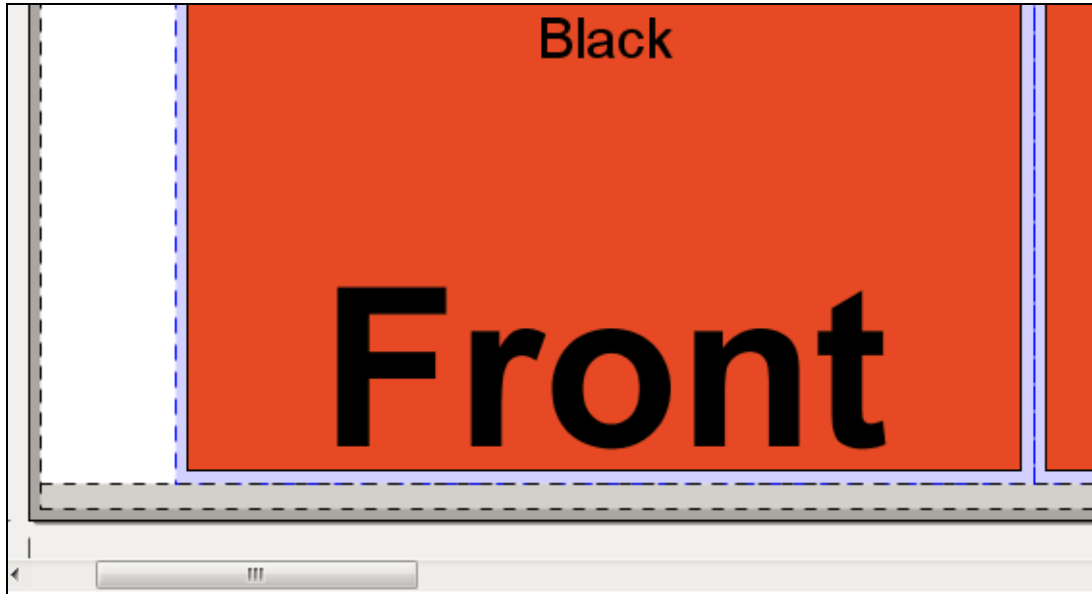
No Image Bottom = .375" No Page Bottom = .125" Product Bleed = .125"

The dark gray is where the **No Image** and **No Page** areas overlap. This product has a positive bleed of .125".

Using UV Inks and Coatings in Projects

Flood varnishes, which are applied by the coater rather than by a plate, must be defined as a **Coating**. Spot varnishes, which are applied by a plate using an ink unit, continue to be defined as a type of **Ink**.

If a product in a project uses coatings and/or UV inks, then they must be defined in **Planned Colors**. If **UV Inks** are used, a message will appear in the Auto Plan window that says, "Products that use UV Inks will require a press that supports UV inks." If **Coatings** are used, a message will appear in the Auto Plan window that says, "Products that use Coatings will require a press that has a Coater." If you select a press that does not have the required UV Ink or Coating support, no algorithms will be available in the Auto Plan dialog and the project cannot be planned.

| Note | The **Algorithm** field displays **(None) with current settings** if the selected presses are not compatible with inks and /or coatings. |

To plan a project with mixed inks

Some projects contain products that use only **UV Ink** as well as products that do not use **UV Inks**. If you want to restrict the products with no **UV Inks** to non-UV presses, then do the following:

1. Specify two presses in **Auto Plan**. One that has **UV** support, and one that does not have **UV** support.

2. Configure the non-UV press to be less expensive to use than the UV press.

3. You can also set the **UV Press Requires UV Inks** and **UV Press Requires UV Coatings** properties to **True** on the UV press.

| Notes | If any product contains both **UV** and **non-UV** inks, it will not be planned and will fail in automation. |
| | If no products can be planned, then you will see a **No workable layouts can be found** error message. |

Adding binding machines to the Database

The manufacturer supplies most of the information required to set up your binding machines, depending on your equipment and your setup. As you gather the information for each binding machine, you can use "Appendix A: Setup Worksheets," provided in the back of this guide.

To add a binding machine
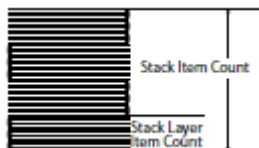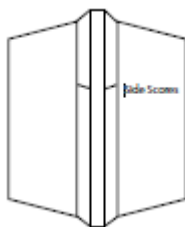
1. From the Database window, select Binding Machines.

2. Click **New.**

   Note The red properties are required and the black properties are optional.

Binding Machine Properties

Property	Explanation
Name	The name displayed in the Metrix user interface to identify this binding machine.
Device ID	The ID used by Metrix to synchronize this binding machine with an external system such as an MIS. Metrix looks for this ID when reading a JDF or MXML file, and will generate an error if not found. To ensure present or future compatibility with JDF, make sure that this entry matches the Binding Machine in your MIS system.
Manufacturer	An optional field used in some exported JDF.
Model Name	An optional field used in some exported JDF.

Model Number	An optional field used in some exported JDF.
Serial Number	An optional field used in some exported JDF.
Assembly Method	**Saddled / Side-By-Side** The type of binding machine. For a stitcher-trimmer, choose Saddled. For a perfect binder, choose Side-by-Side.
Small Signatures	**Outside / Inside (for Saddled) or Back / Front (for Side-by-Side)** The placement of partial signatures in the publication.
Default Stack Item Count	The default number of finished products to stack once binding is complete, to bundle up for delivery.
Default Stack Layer Item Count	The default number of finished products to stack in each layer. Layers are usually rotated by 180° to compensate for variations in thickness from the spine to the face.
Default Number of Stitches (Saddled)	**0 / 1 / 2 / 3 / 4** The default number of stitches for saddle-stitched products.
Default Staple Shape (Saddled)	**Crown / Butted / Eyelet** The default staple shape for saddle-stitched products
Default Side Scores from Spine (Side-By-Side, 0=None)	For perfect bound (side-by-side) products requiring two extra scores on the cover sides, one on the front and one on the back, for a total of 4 scores. The value indicates the distance from the spine scores. Valid range: up to 25.4mm or 1". A value of 0 (zero) indicates no extra side spine scores.
Minimum Jog Trim	The minimum jog trim required for this binding machine.
Default Jog Trim	The default, or preferred, jog trim for this binding machine.
Maximum Jog Trim	The maximum jog trim allowed for this binding machine.
Minimum Text Spine Trim	The minimum text spine trim (grind-off) required for this binding machine.

Default Text Spine Trim	The default, or preferred, text spine trim for this binding machine.
Maximum Text Spine Trim	The maximum text spine trim allowed for this binding machine.
Minimum Non-Jog Trim	The minimum non-jog trim required for this binding machine.
Maximum Non-Jog Trim	The maximum non-jog trim allowed for this binding machine.
Minimum Face Trim	The minimum face trim (front face and/or back face) required for this binding machine.
Maximum Face Trim	The maximum face trim (font face and/or back face) allowed for this binding machine.
Minimum Lap	The minimum lap (or lip) required for this binding machine.
Default Lap	The default, or preferred, lap for this binding machine. Not currently used. Instead, the minimum lap is applied.
Maximum Lap	The maximum lap allowed for this binding machine.
Lap Edge	**Front** / **Back** / **Either** The placement of the lap edge.
Minimum Trim Width	The minimum trim width required for this binding machine.
Maximum Trim Width	The maximum trim width allowed for this binding machine.
Minimum Trim Height	The minimum trim height required for this binding machine.
Maximum Trim Height	The maximum trim height allowed for this binding machine.
Text Folds Inline	**True** / **False** The binding machine is equipped with inline folding.
Cover Feeder	**True** / **False** The binding machine is equipped with a cover feeder. If **True**, the Cover properties below are used to check the binding properties of the product's cover component. If **False**, the cover properties below are ignored.
Cover Minimum Jog Trim	The minimum cover jog trim required for this binding machine.
Cover Default Jog Trim	The default, or preferred, cover jog trim for this binding machine.
Cover Maximum Jog Trim	The maximum cover jog trim allowed for this binding machine.
Cover Jog Match Text Jog Trim	**True** / **False** The jog trim of the cover must match the jog trim of the text.
Cover Maximum Spine Width	The maximum cover spine width allowed for this binding machine.
Cover Minimum Non-Jog Trim	The minimum cover non-jog trim required for this binding machine.

Cover Maximum Non-Jog Trim	The maximum cover non-jog trim allowed for this binding machine.
Cover Minimum Face Trim	The minimum cover face trim (front face and/or back face) required for this binding machine.
Cover Maximum Face Trim	The maximum cover face trim (front face and/or back face) allowed for this binding machine.
Cover Minimum Lap	The minimum cover lap (or lip) required for this binding machine.
Cover Default Lap	The default, or preferred, cover lap for this binding machine.
Cover Maximum Lap	The maximum cover lap allowed for this binding machine.
Cover Lap Edge	**Front** / **Back** / **Either** The placement of the cover lap edge.
Maximum Binding Number Up	**1-Up** / **2-Up** / **3-Up** The maximum binding number up for this binding machine.
Minimum N-Up Offset	The minimum margin required between 2-Up and 3-Up products.
Default N-Up Offset	The default (preferred) margin between 2-Up and 3-Up products.
Maximum N-Up Offset	The maximum margin allowed between 2-Up and 3-Up products.
Collation Marks – Mark Type	**(None)** / **Spine** / **Jog** Placement of the collation marks. When "Spine" or "Jog" is selected, the Collation Marks fields become available.
Collation Marks – Start Offset	The distance from the jog/spine intersection to place the first collation mark.
Collation Marks – Width	The collation mark width.
Collation Marks – Height	The collation mark height.
Collation Marks – Repeat Number	The number of collation marks to step before beginning at the Start Offset again.
Collation Marks – Over Page Content	**True** / **False** Whether or not collation marks print over other text.
Collation Marks – Primary Mark Color	Type of color, color, and percentage of color for collation marks on non-nested components. Primary marks appear on the outermost component(s) of a perfect bound product. Saddle-stitched components all have Primary collation marks.
Collation Marks – Secondary Mark Color	Type of color, ink name, and percentage of color for collation marks on nested components. Secondary marks appear on nested components of a perfect bound product.
Collation Marks – Trailing Text	Default is <TextComponent.Number>, but many other pertinent variables are also available.
Collation Marks – Anchor Trailing Text To	**Block of Marks** / **Individual Marks** Trailing text is positioned relative to the complete set of collation marks, or relative to the individual marks.

Collation Marks – Distance From Anchor	The distance the trailing text will be from the individual collation marks or the block of marks.
Collation Marks – Trailing Text Point Size	The point size of the trailing text.

Trailing Text variables for collation marks

To have Metrix automatically insert information related to collation marks, you can use specified variables in the Edit Binding Machine window. The table below lists the variables that are available to you.

Collation Marks Trailing Text Variables

	Inserts	Related to
<TextComponent.Number>	Text component number (not counting the Cover component)	Component
<Component.Number>	Component number	Component
<Component.Fold.Name>	Name of the component fold	Component
<TextComponent.Count>	Total number of Text components in the product (not including the Cover component)	Component
<Component.Count>	Total number of components in the product (not including the Cover component)	Component
<Component.PageCount>	Page count for this component (front and back)	Component
<Product.ID>	Product ID	Component
<Product.Name>	Product name	Component
<Product.ContentFile>	Product content filename	Component
<Product.RequiredQuantity>	Product required quantity	Component
<Product.TotalQuantity>	Product total quantity	Component
<Product.Width> or <Product.Width.Unit>	Product width and unit of measure	Component
<Product.Width.NoUnit>	Product width without unit of measurement	Component
<Product.Height> or <Product.Height.Unit>	Product height with unit of measure	Component
<Product.Height.NoUnit>	Product height without unit of measure	Component
<Product.BindingMachine.Name>	Name of the binding machine	Component
<Instance.ID>	Name of the binding machine	Component
<Instance.Number>	Instance number (e.g. the "1" in A-1 or A1-1)	Component

<Instance.Count>	Number of instances on the layout	Component
<Instance.RequiredQuantity>	Instance quantity (how many components are produced from the instance)	Component
<Project.ID>	Project ID	Project
<Date>	Current date	Computer
<Time>	Current time	Computer
<Layout.Side> or <Side>	Layout side number (1,2)	Layout
<Layout.Side.Alpha> or <Side.Alpha>	Layout side letter (A, B)	Layout
<Layout.Number> or <Number>	Layout number	Layout
<Layout.PrintingMethod> or <PrintingMethod> or <PM>	Layout printing method	Layout
<Layout.SheetHeight> or <SheetHeight> or <SH>	Layout sheet height	Layout
<Layout.SheetWidth> or <SheetWidth> or <SW>	Layout sheet width	Layout
<Layout.RequiredSheets>	Layout required sheets	Layout
<Layout.Press.Name> or <Press.Name>	Layout press name	Layout
<Layout.Stock> or <Stock>	Layout stock	Layout

Adding die-cutting tools to the Database

Select the Die-Cutting Tools node in the Database window to display the available die-cutting tools. Clicking **Add New** allows you to access the New Die Cutting Tool window, where you can supply the properties for a new die-cutting tool.
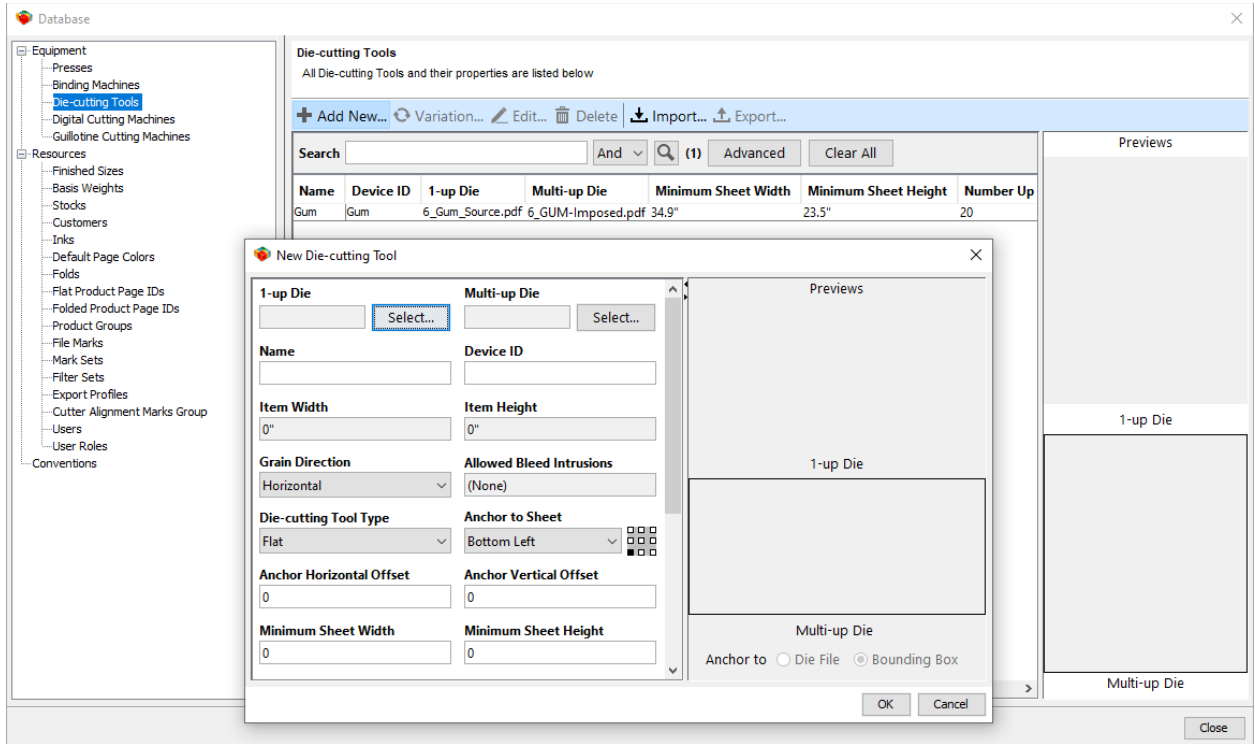
Property	Explanation
1-Up Die	Select a file of a single die-cut item. A preview of this file will appear in the **1-up Die** box.
Multi-Up Die	Select a file with the layout of multiple die-cut items. The individual die shapes must be the same as the 1-up die. A preview of this file will appear in the **Multi-up Die** box.
Name	Name of the die-cutting tool. Defaults to the name of the multi-up die file.
Device ID	The ID number of the die-cutting tool. Defaults to the name of multi-up die file.
Item Width	Width of the 1-up die-cut item.
Item Height	Height of the 1-up die-cut item.
Minimum Sheet Width	Minimum sheet width that can accommodate the multi-up die.
Minimum Sheet Height	Minimum sheet height that can accommodate the multi-up die.
Grain Direction	Grain direction specified for the 1-up die.
Allowed Bleed Intrusion	Choose to allow specific edge bleeds to overlap other bleeds.
Die Cutter Tool Type	**Flat/ Rotary** Select the die-cutter tool type.
Anchor	Position of the die tool relative to the sheet.
X Distance from Anchor	Distance from anchor on the X axis.
Y Distance from Anchor	Distance from anchor on the Y axis.

Number Up	Number of items cut per sheet.
Number Across	Number of items cut across the sheet on the X axis.
Number Along	Number of items cut along the sheet on the Y axis.
Streams	Columns designated to repeatedly print a single product using roll-fed equipment. Specify the number of streams for a multi-up die.
Stream Number Across	Number of items in each stream across the X axis.
Manufacturer	Manufacturer of the die-cutting tool.
Model Name	Model name of the die-cutting tool.
Model Number	Model number of the die-cutting tool.
Serial Number	Serial number of the die-cutting tool.

Adding digital cutting machines to the Database

Select the Digital Cutting Machines node in the Database window to display the available digital cutting machines. Clicking **Add New** allows you to access the New Digital Cutting Machine window, where you can supply the properties for a new digital cutting machine.

> **Note** The red properties are required, and the black properties are optional.

Digital Cutting Machine Properties

Property	Explanation
Name	The name of the digital cutting machine. Must be unique.
Device ID	The ID number of the digital cutting machine. Must be unique.
Description	Description of the digital cutting machine.
Manufacturer	Manufacturer of the digital cutting machine.
Linear Units per hour	Linear distance that can be cut in an hour. Inches or millimeters.
Hourly Rate	Cost per hour to run the digital cutting machine.
Hours per Position	Time needed to travel to a position on the sheet.
Make Ready Hours per Sheet	Setup time for each sheet to be cut.
Minimum Height	Minimum sheet height for this device.
Maximum Height	Maximum sheet height for this device.
Minimum Width	Minimum sheet width for this device.
Maximum Width	Maximum sheet width for this device.
Minimum Material Thickness	Minimum thickness of material for this device.
Maximum Material Thickness	Maximum thickness of material for this device.
Digital Cutting Tools for the selected Digital Cutting Machine	There must be a minimum of one digital cutting tool defined for each device (routers, cutting blades, scorers, etc.).

Adding Cutter Operations to the database:

Digital cutting machines can perform a number of different Cutter Operations depending on the tool that is used. Each digital cutting machine must have at least one tool.

1. Click the **Cutter Operations** button in the New Digital Cutting Machine window.

   Note **Cutter** is a required operation for all digital cutting machines and cannot be deleted.

2. Click the **New** button in the Cutter Operations window.

3. Enter a name for the cutter operation in the Input window.

   a. The cutter operation will now appear in the Cutter Operation window. Also, the cutter operation will be the name of the default **Spot Color Name Pattern.** You can associate more spot color names to the cutter operation by adding the names to the **Spot Color Names Patterns** field.

   Note **Spot Color Name Patterns** must be separated by a comma.

4. Click **OK** to exit the Cutter Operation window.

Adding a Digital Cutting Tool to a cutting machine:

1. Choose a digital cutting machine from the list.

2. Click **Add New** in the **Digital Cutting Tools for the selected Digital Cutting Machine** section.

3. Enter a name and description in the New Digital Cutting Tool window.

4. Choose a cutter operation to associate with the new tool.

Adding guillotine cutting machines to the Database

Select the Guillotine Cutting Machines node in the Database window to display the available guillotine cutting machines. Clicking **Add New** allows you to access the New Guillotine Cutting Machine window, where you can supply the properties for a new guillotine cutting machine.
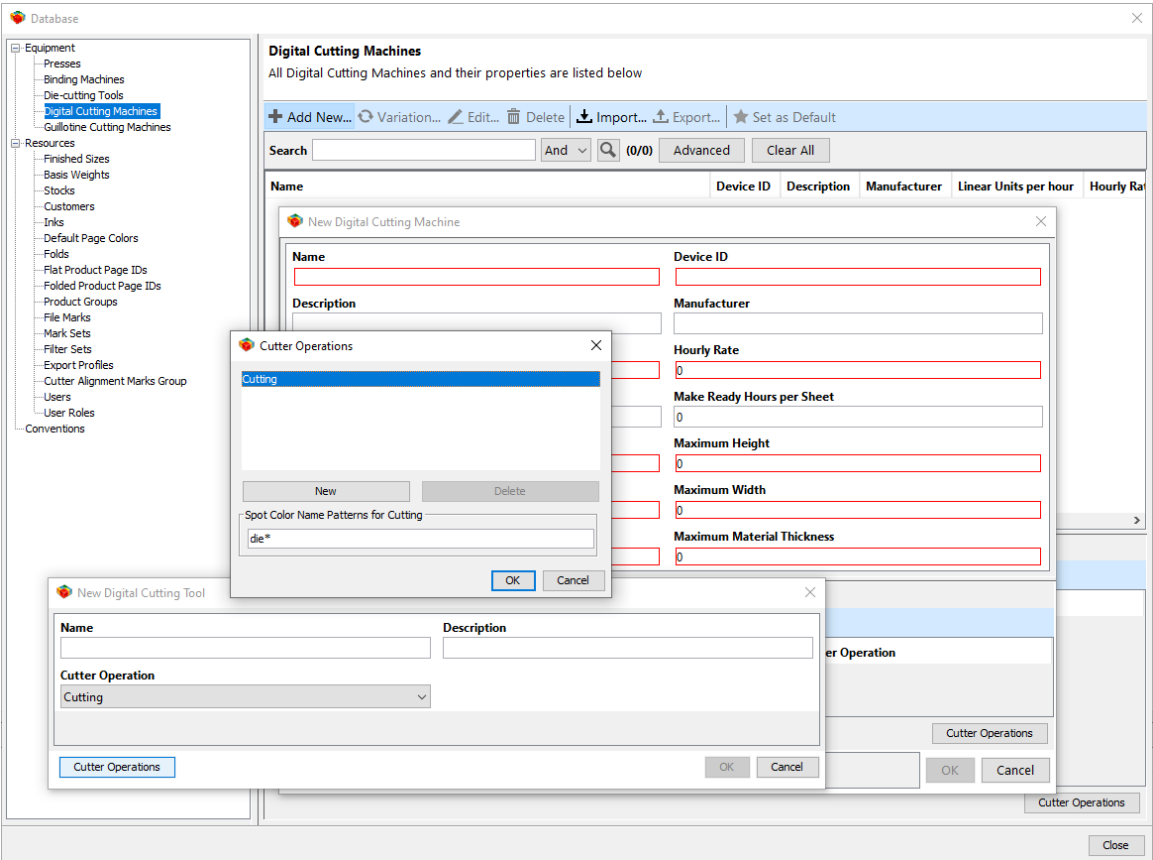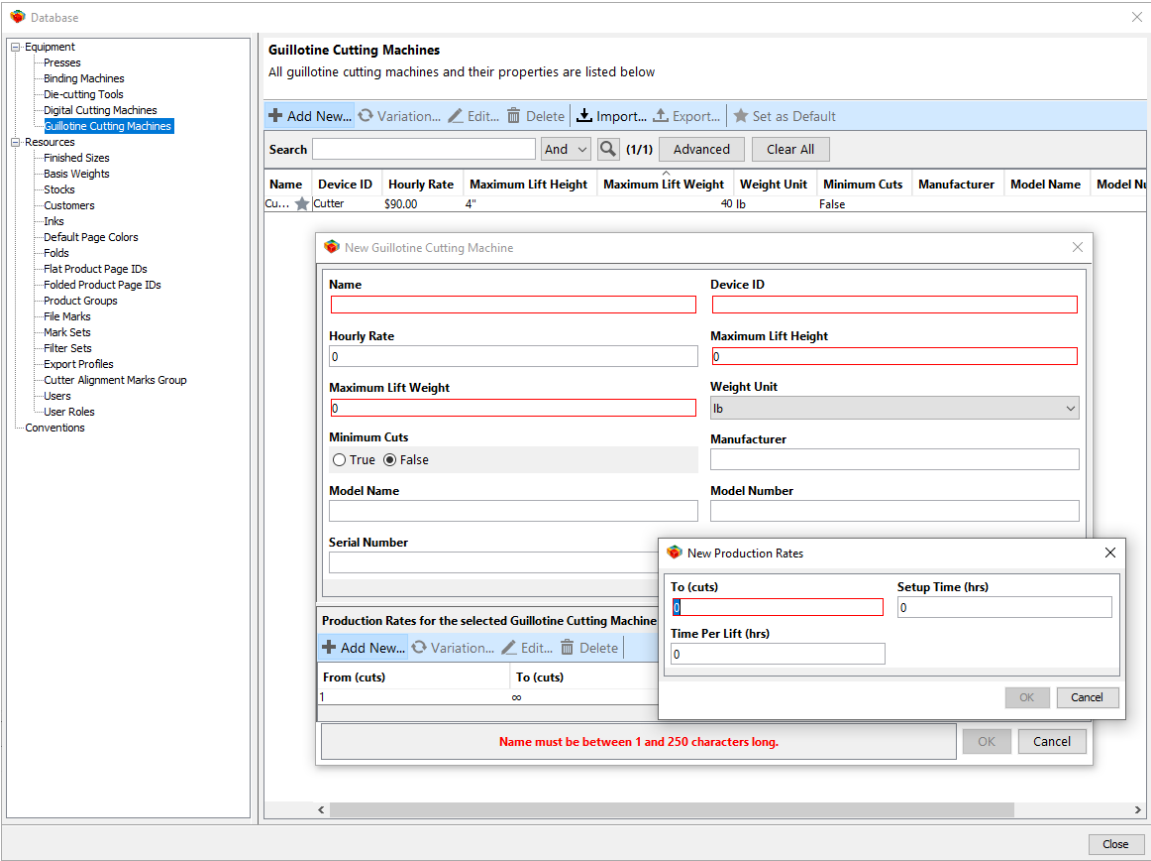

> **Note** The red properties are required, and the black properties are optional.

Guillotine Cutting Machine Properties

Property	Explanation
Name	The name of the cutting machine.
Device ID	The ID number of the cutting machine.
Hourly Rate	The hourly rate for cutting.
Maximum Lift Height	The cutting machine maximum lift height.
Maximum Lift Weight	The maximum lift weight in the unit designated in Weight Unit field.

Weight Unit	**Kb / lb** Select the weight unit from the pull-down menu.
Min Cuts	**True/ False** When minimum cuts is set to **True**, it enables Metrix to calculate the least number of cuts in a project so multiple components can be stacked and cut at the same time.
Manufacturer	Cutting machine manufacturer.
Model Name	The Model name of the cutting machine.
Model Number	The Model number of the cutting machine.
Serial Number	The Serial number of the cutting machine.
Production Rates	Click **Add New** to open the New Production Rates window and enter data for rates. You can **Add, Edit, Delete,** or create a **Variation** of an existing production rate in the **Productions Rates for the selected Guillotine Cutting Machine** section.

Adding finished sizes to the Database

The Finished Sizes node of the Database window can eliminate some data entry for common product sizes. Custom is always available when adding products and finished sizes are displayed in a drop-down list in the New Product wizard.
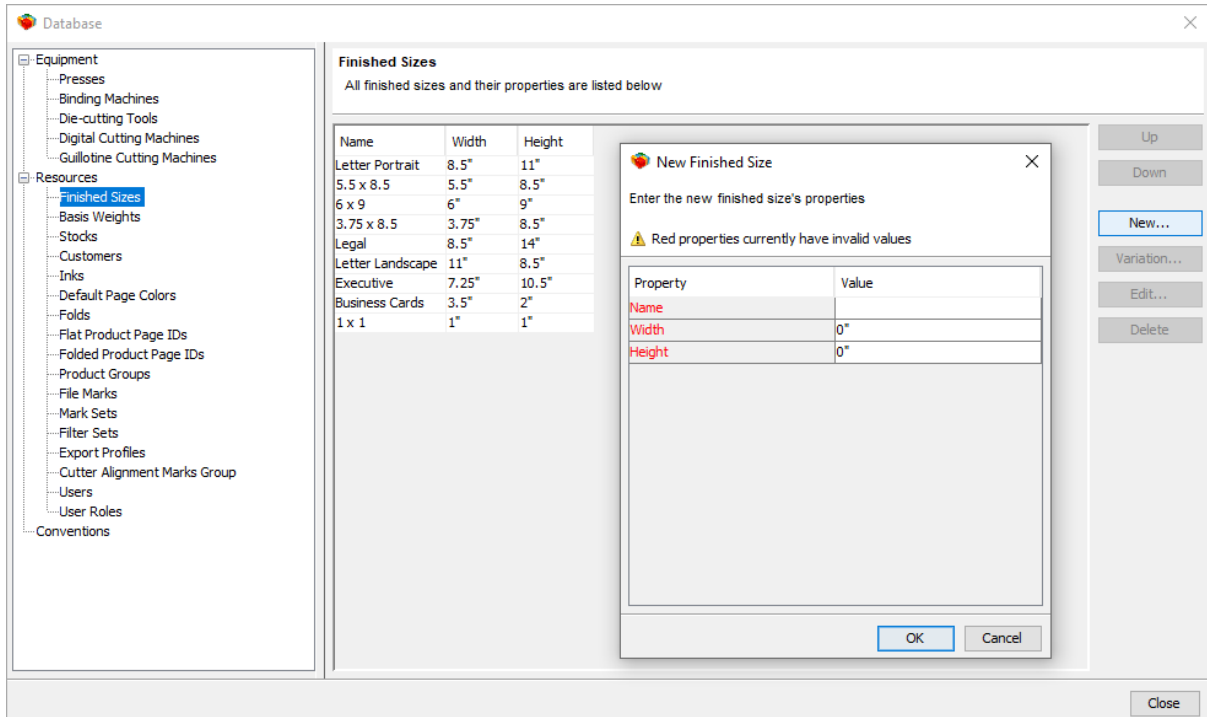
Notes If you plan to import projects or products via JDF, MXML, or CSV, the finished sizes are imported into Metrix automatically.

If you need to add Finished Sizes to the Database window, use the Setup Worksheets provided.

To add a finished size, select the Finished Sizes node under Resources in the Database window, and then click **New**.

> The red properties are required and the black properties are optional.

Finished Size Properties

Property	Explanation
Name	The name of this size.
Width	The finished page width.
Height	The finished page height.

Adding basis weights to the Database

The Basis Weights window of the database has the standard **Up**, **Down**, **New**, **Variation**, **Edit**, and **Delete** options.

To add basis weights to the Database

1. Click the Basis Weights node in the Database window under Resources to display the available basis weights.

2. Click **New** to access the Basis Weight window where you can supply the properties for a new Basis Weight.

Note	These numbers will be used to calculate the pound weight of the Basis Weight and from there, the weight of any size sheet of Text.
Note	The red properties are required and the black properties are optional.
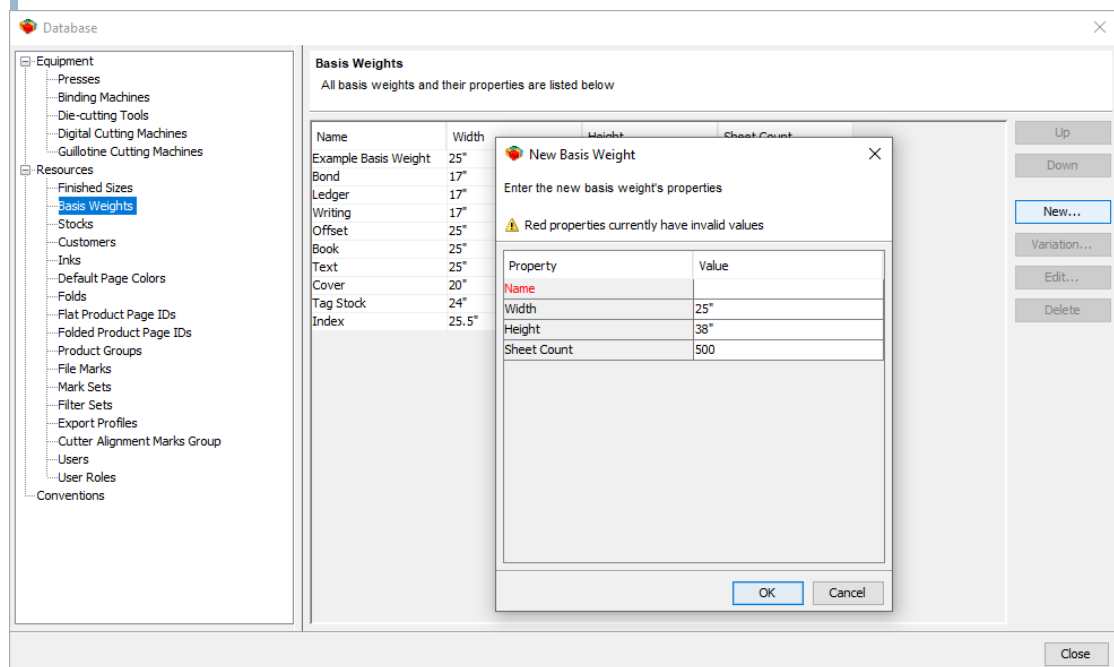
Basis Weights Properties

Property	Explanation
Name	The name of the basis weight.

Width	The width of the Sheet.
Height	The height of the Sheet.
Sheet Count	The sheet count for the basis weight calculation.

Adding stocks and sheets to the Database

Deciding how to enter stocks

If you plan to create Metrix projects with the New Product wizard, the operator will choose stocks from a list in the user interface. If you plan to use JDF or MXML to import projects, Metrix will import the stock and sheet into the database automatically.

When using the New Product wizard, you can sort Stock columns in alphabetical order (up or down) just by clicking the title at the top of the column.

You can also filter the list by entering criteria in the **Filter** field, separated by spaces.

> **Note** Filtering with **Or** selected finds those listings that meet any of the criteria listed. This is a broader, less restrictive search. Filtering with **And** selected finds only those listings that meet all the listed criteria. This is a narrower, more restrictive search.
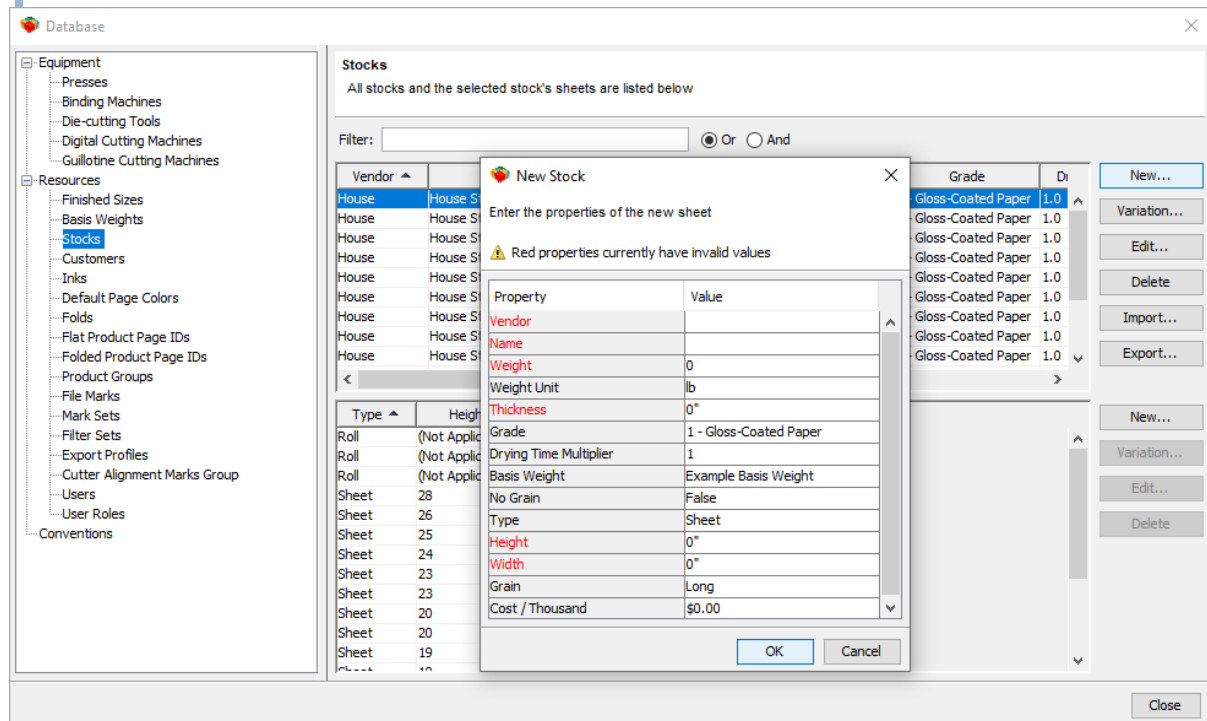
Adding stocks to the Database

As seen above, the Stocks window is divided into two sections. The top section contains the stocks in the Database. The bottom section contains the sheet sizes for the stock selected in the top section.

> **Note** You can add stocks and sheet sizes manually as described below, or you can import a CSV file. See Importing and exporting stocks and sheets.

To add a new Stock

1. Select the Stocks node.

2. Click **New** on the top section of the window.

> **Notes** If you select "Sheet" as the Type, the Height and Width options will be applicable, and the grain will be Short or Long.
>
> If you select "Roll" as the Type, Height will not be applicable, and the grain will be Along or Across.
>
> As you gather the information for each stock, you can use the Metrix Setup Worksheets provided in "Appendix A: Setup Worksheets," located in the back of this document.

Stock Properties

Property	Explanation
Vendor	The vendor name.
Name	The stock name.
Weight	The stock weight.
Weight Unit	**lb** / **gsm** The weight unit.
Thickness	The stock thickness.
Grade	1 – Gloss–Coated Paper 2 – Matte–Coated Paper 3 – Gloss–Coated, Web Paper 4 – Uncoated, White Paper 5 – Uncoated Yellowish Paper The stock grade. An optional field used in some exported JDF.
Drying Time Multiplier	Multiplies the drying time required (for Work-And-Turn or Work-And-Tumble layouts). Interacts with the Minimum Drying Time for Work And Turn property of the selected Press. Used to calculate Layout production time.
Basis Weight	Pick a basis weight from the pull-down menu.
No Grain	**True/ False** Indicates if the stock has a grain.
Type	**Sheet** / **Roll**
Height*	The height of the sheet. (Not applicable for roll stock as the "height" is determined by the press cutoffs.)
Width*	The width of a sheet or roll.
Grain	**Short** / **Long** (**Along** / **Across**) The grain direction of the stock relative to sheet or roll.
Cost / Thousand or Cost / Linear Foot (or Meter)	With **Sheet** selected: The stock cost per 1000 sheets. With **Roll** selected: The cost per Linear Ft. (or cost per Linear Meter)

> ***Note** The **Super Wide Format** module allows you to have a maximum width and height of 25 meters for flat products, and maximum width and height of 30 inches or 762 millimeters for folded and bound products.

Adding sheets to the Database

To add more sheets to the selected Stock

1. Select the Stocks node under Resources in the Database window.

2. Select the stock for which you want to add a new sheet.

3. Click **New** on the bottom section of the window.

   - If you select "Sheet" as the Type, the Height and Width options will apply, and the Grain will be Short or Long.

   - If you select "Roll" as the type, Height will not be applicable as this dimension is determined by the press cutoffs. The Grain will be Along or across.

   > **Note** The red properties are required and the black properties are optional.

Sheet Properties

Property	Explanation
Type	Select **Sheet** or **Roll** from the menu.
Height*	The height of the sheet.
Width*	The width of the sheet.
Grain	**Short** / **Long (Along / Across)** The grain direction of the stock relative to the sheet or roll.
Cost / Thousand or Cost / Linear Foot (or Meter)	With **Sheet** selected: The stock cost per 1000 sheets. With **Roll** selected: The cost per Linear Ft. (or cost per Linear Meter)

> ***Note** The **Super Wide Format** module allows you to have a maximum width and height of 25 meters for flat products, and maximum width and height of 30 inches or 762 millimeters for folded and bound products.

Sorting stock entries

Stocks and sheet sizes are not prioritized. Rather, you can sort the records in the Database window as well as in the user interface.

You can sort stocks and sheet sizes by any of the columns, in either ascending or descending order. You can click the column header to sort in one order. Then you can click again to sort in the opposite order.

You can also filter Stocks using **And** or **Or** functions as previously described.

Importing and exporting stocks and sheets

Metrix can import a comma-separated file (commonly called a CSV file) to populate the database tables with stocks. Metrix can also export, edit, and re-import a CSV file of the existing stocks and sheets.

> **Important** The CSV export/import functionality is designed to streamline the entry of changes to Cost. You must correct any typing or other errors from within the Metrix interface; you *cannot* use the export/import functionality.

Important notes on importing stocks

- We recommend backing up the database before importing data. Importing data cannot be undone (although items can be individually deleted) so the best remedy for an error is to replace the database with a backup copy.

- When constructing the CSV data files to import, keep in mind that leading and trailing spaces are part of the text for text fields. Remove leading or trailing spaces from text fields before exporting the data.

- When constructing the CSV data files to import, keep in mind that the stock parameters for each sheet size must be identical so that Metrix can generate a single (parent) stock with multiple (child) sheet sizes.

- When reimporting an edited CSV, making changes to the vendor, name, and/or weight will result in the generation of a new (parent) stock. Any change to the thickness will result in the cloning of the (parent) stock along with all (child) sheet sizes.

- A carriage return character, a line feed character, or both should follow each record. Any extra commas or spaces between records can cause difficulties when importing the data.

- The program logs the results from any import attempt (successful or unsuccessful) in a file located in the Logs folder of the Metrix installation folder.

CSV field specifications for Stocks

Important Your spreadsheet must have 13 columns – no more and no less. Extra or missing columns will interfere with Metrix's calculations and prevent importation. All fields must have values.

Column	Field	Type	Range
A	**CSV Import Engine**	Text (string)	**Stock 2.0** (must be exactly this string)
B	**Stock Size Unit**	Number (integer enumerator)	**0** = millimeters **2** = inches
C	**Stock Weight Unit**	Number (integer enumerator)	**0** = gsm **2** = lbs
D	**Stock Vendor Name**	Text (string)	**Minimum:** 1 character **Maximum**: 90 characters
E	**Stock Name**	Text (string)	**Minimum:** 1 character **Maximum:** 90 characters
F	**Stock Weight**	Number (integer)	**Minimum:** 1 **Maximum:** 1000
G	**Stock Grade**	Number (integer enumerator)	**1** = Gloss-Coated Paper **2** = Matte-Coated Paper **3** = Gloss-Coated, Web Paper **4** = Uncoated, White Paper **5** = Uncoated, Yellowish Paper
H	**Stock Grade**	Number (integer enumerator)	**1** = Gloss-Coated Paper **2** = Matte-Coated Paper **3** = Gloss-Coated, Web Paper **4** = Uncoated, White Paper **5** = Uncoated, Yellowish Paper
I	**Drying Time Multiplier**	Number (decimal)	**Minimum:** 0 **Maximum:** 999,999
J	**Sheet Height**	Number (decimal)	**Minimum:** 76.2mm (3") **Maximum, Metrix Base:** 3657.6mm (144")
K	**Sheet Width**	Number (decimal)	**Minimum:** 76.2mm (3") **Maximum, Metrix Base:** 3657.6mm (144")
L	**Sheet Grain Direction**	Number (integer enumerator)	**0** = Horizontal grain **1** = Vertical grain
M	**Sheet Cost per Thousand**	Number (decimal) (in OS currency unit)	**Minimum:** 0 **Maximum:** 99,999,999

Importing your stocks CSV file

After you create your file, you must import your CSV file. Below are the steps.

1. Select Stocks node under Resources in the Database window.

2. Click **Import** and navigate to the CSV file.

3. In the Import Stocks window, select the appropriate CSV file, and then click **Import**.

Adding and sorting customers in the Database

Deciding how to enter customers

If you plan to create Metrix projects with the New Product wizard, you must enter the customers into the database before you can select them. If you plan to use JDF, MXML, or CSV to import projects or products, customer data, when present, is imported into the database automatically.

> **Note** While you can sort or filter the list using **And** or **Or** functions, adding hundreds of customers who rarely order from you may make the selection process unwieldy.

When customer information is present, Metrix uses it in the Metrix report and inserts it into the JDF exported to prepress. However, you should weigh this benefit against the overhead cost of possibly maintaining two separate databases of customers – one in your MIS system and one in Metrix.

Adding companies to the Database

The Customers window is divided into two sections:

- The top section contains the companies in the database.

- The bottom section contains the contacts for the company selected in the top section.

You can add companies and contacts manually as described below, or you can import a CSV file.

> **Note** See Importing customers and contacts into the Database.

To add companies to the Database

1. Select the Customers node under Resources in the Database window.

2. Click **New** in the top right section of the window.

3. Enter the required values in the Value column in the New Company window, and then click **OK**.

> **Notes** As you gather the information for each stock, you can use the Metrix Setup Worksheet provided in "Appendix A: Setup Worksheets," located in the back of this document.
>
> The red properties are required but the black properties are optional.

Company Properties

Property	Explanation
Company Name	Required. The company name. This field is used in some exported JDF.
MIS ID	An optional field used in some exported JDF.
Web Address	An optional field used in some exported JDF.
Street	An optional field used in some exported JDF.
Post Box	An optional field used in some exported JDF.

City	An optional field used in some exported JDF.
Region	Region, province, or state. An optional field used in some exported JDF.
Postal Code	An optional field used in some exported JDF.
Country	An optional field used in some exported JDF.
Country Code	An optional field used in some exported JDF.
First Name	Required. Company contact name. This field is used in some exported JDF.
Family Name	Required. Company contact name. This field is used in some exported JDF.
Job Title	An optional field used in some exported JDF.
Phone	Contact phone number.
Fax	Contact fax number.
Email	Contact email address.
Sales Rep	Your sales representative's name.

Adding contacts to the Database

1. Select the Customers node under Resources in the Database window.
2. Click **New** in the bottom right section of the window.
3. Enter the required information in the Values column in the New Company window, and then click **OK**.
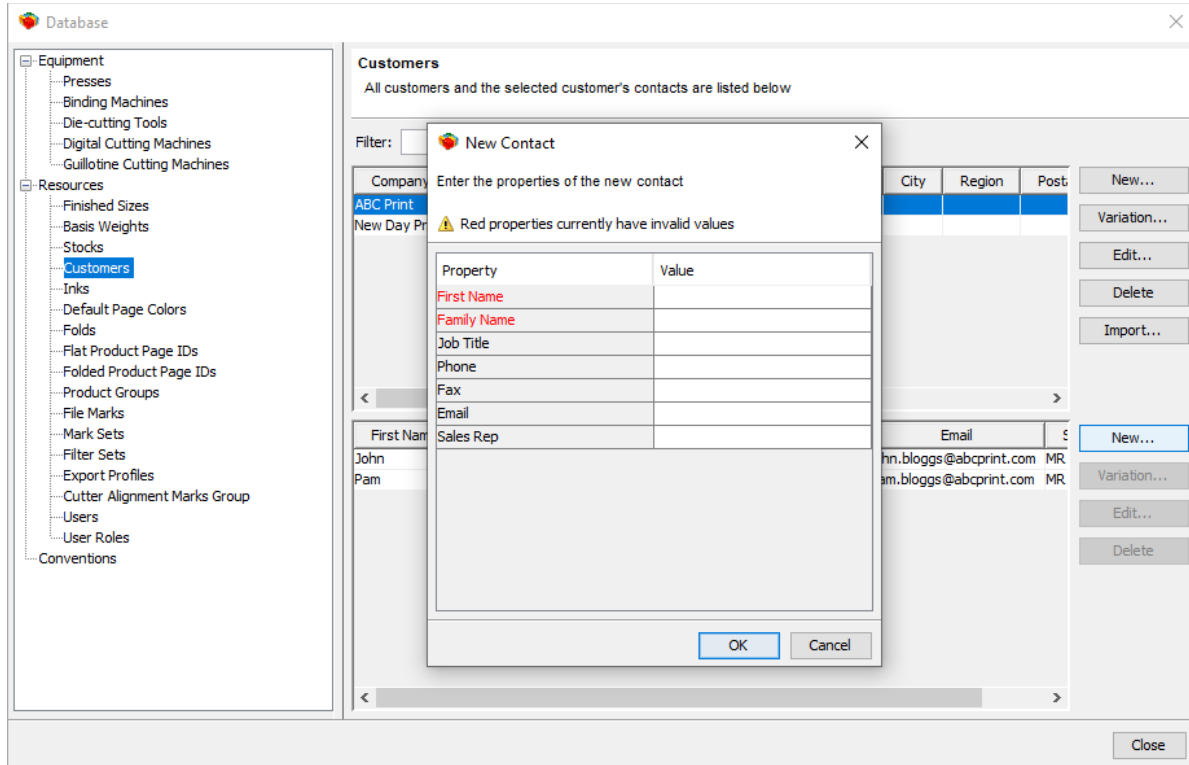
Contact Properties

Property	Explanation
First Name	Required. Company contact name. This field is used in some exported JDF.
Family Name	Required. Company contact name. This field is used in some exported JDF.
Job Title	Optional field used in some exported JDF.
Phone	Contact phone number.
Fax	Contact fax number.
Email	Contact email address.
Sales Rep	Your sales representative's name.

Sorting customer entries

Companies and contacts are not prioritized. Rather, you can sort the records in the Database window as well as in the user interface. The following are options for sorting entries.

- You can sort customers by any of the columns, in either ascending or descending order, by clicking the title at the top of the column. Each click changes the sort order.

- You can also filter the list by entering criteria in the Filter field, separated by spaces.

- Filtering with **Or** selected finds those listings that meet any of the criteria listed. This is a broader, less restrictive search.

- Filtering with **And** selected finds only those listings that meet all of the listed criteria. This is a narrower, more restrictive search.

Importing customers and contacts into the Database

Metrix can import a comma-separated file (commonly called a CSV file) to populate the database tables with customers. For each of these, the information must be formatted in a precise way so that Metrix can recognize each field.

> **Note** If you plan to use JDF, MXML, or CSV to import projects or products, customer data, when present, is imported into the database automatically, so there is no need to import customers manually.

Important notes about importing customers

- We recommend backing up the database before importing data. Importing data cannot be undone (although items can be individually deleted) so the best remedy for an error is to replace the database with a backup copy.
- When constructing the CSV data files to import, keep in mind that leading and trailing spaces are considered part of the text for text fields. Remove leading or trailing spaces from text fields before exporting the data.
- When constructing the CSV data files to import, keep in mind that the Company parameters for each Contact must be identical for Metrix to generate a single customer with multiple contacts.
- When importing data, Metrix does not allow duplicating any existing data records.
- A carriage return character, a line feed, or both should follow each record. Any extra commas or spaces between records can create difficulties when the data is imported.
- Results from any import attempt (successful or unsuccessful) are logged in a file located in the Logs folder of the Metrix installation folder.

CSV field specifications for customers

> **Important** Your spreadsheet must have 17 columns – no more and no less. Extra or missing columns will throw everything off. Empty red fields will prevent importation.

Column	Field	Type	Range
A	Company Name	Text (string)	**Minimum:** 1 character **Maximum**: 250 characters
B	Company MIS ID	Text (string)	**Minimum:** empty **Maximum**: 250 characters
C	Company Web Address	Text (string)	**Minimum:** empty **Maximum**: 250 characters
D	Company Street	Text (string)	**Minimum:** empty **Maximum**: 250 characters
E	Company Post Box	Text (string)	**Minimum:** empty **Maximum**: 250 characters
F	Company City	Text (string)	**Minimum:** empty **Maximum**: 250 characters
G	Company Region	Text (string)	**Minimum:** empty **Maximum**: 250 characters
H	Company Postal Code	Text (string)	**Minimum:** empty **Maximum**: 250 characters
I	Company Country	Text (string)	**Minimum:** empty **Maximum**: 250 characters
J	Company Country Code	Text (string)	**Minimum:** empty

			Maximum: 250 characters
K	Contact First Name	Text (string)	Minimum: 1 character Maximum: 90 characters
L	Contact Family Name	Text (string)	Minimum: 1 character Maximum: 90 characters
M	Contact Job Title	Text (string)	Minimum: empty Maximum: 250 characters
N	Contact Phone	Text (string)	Minimum: empty Maximum: 250 characters
O	Contact Fax	Text (string)	Minimum: empty Maximum: 250 characters
P	Contact Email	Text (string)	Minimum: empty Maximum: 250 characters
Q	Contact Sales Rep	Text (string)	Minimum: empty Maximum: 250 characters

Importing the Customers CSV File

To import the Customers CSV file

1. Select the Customers node under Resources in the Database window.
2. Click **Import** on the top right section of the window.
3. Navigate to and select the CSV file, and then click **Import**.

Adding inks to the Database

Inks are the building blocks for page colors, which Metrix uses for display and for Metrix reports. Inks/page colors do *not* act on PDF page content. Add only commonly used inks. Metrix can add seldom-used inks without interrupting the process.

Use the *Metrix Setup Worksheet* to list your inks. It is in your **Metrix > Doc folder: Setup Worksheets.PDF**.

To add a new ink

1. Select the Inks node under Resources in the Database window.
2. Click **New** on the right side of the Database window.
3. Enter the Name in the Value column of the New Ink window, and then click **OK**.

Note The red properties are required and the black properties are optional.
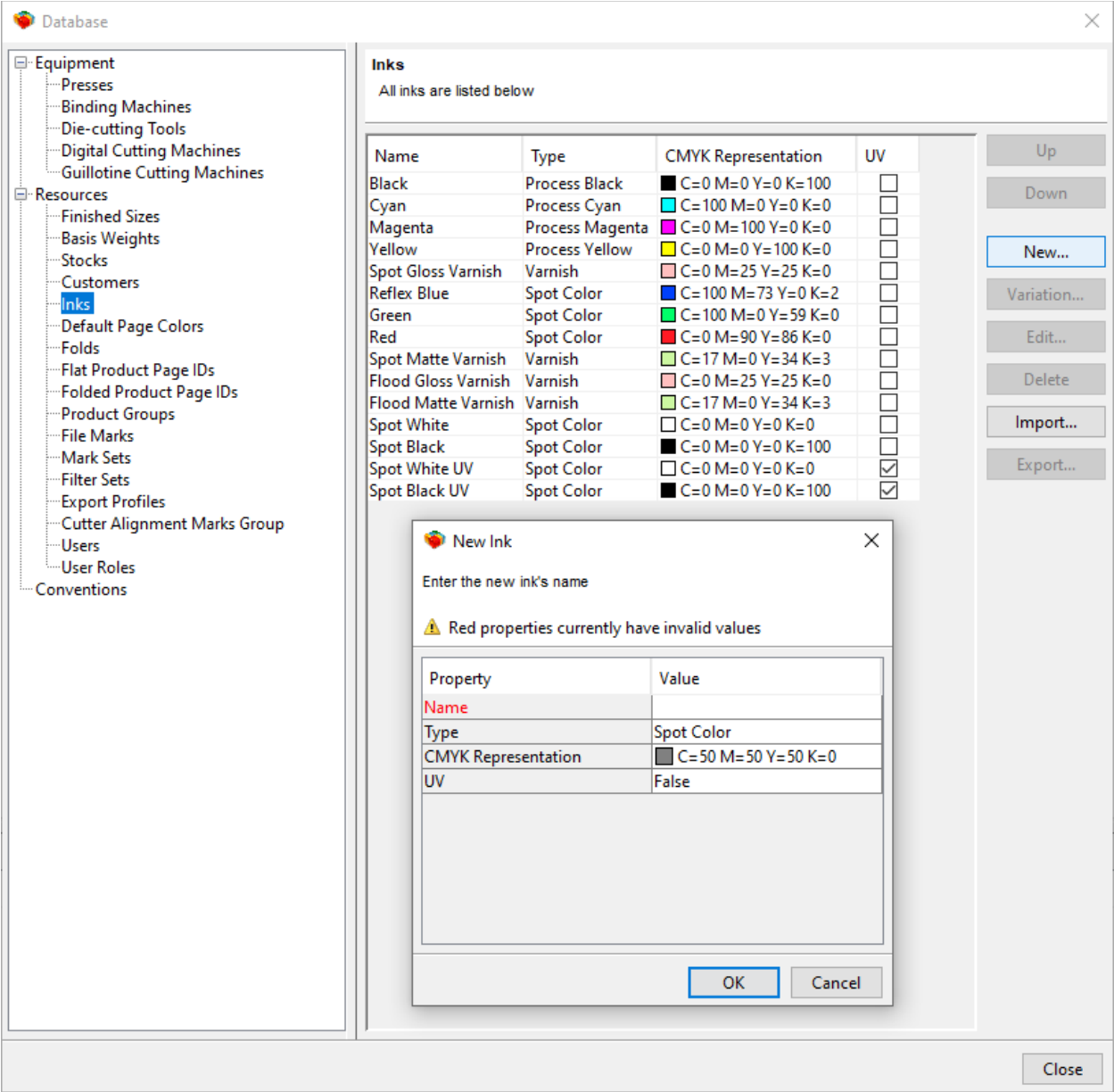
Ink Properties

Property	Explanation
Name	Ink name.
Type	**Spot Color / Varnish / Process Cyan / Process Magenta / Process Yellow / Process Black** The ink type.
CMYK Representation	**%Cyan / %Magenta / %Yellow / %Black** The percentages of Cyan, Magenta, Yellow, and Black for display of this color. The CMYK percentages are for display only and do not represent a CMYK build for spot colors.

UV	**True / False**
	Select **True** to designate the ink as UV.

Importing and exporting inks

Metrix can import a comma-separated file (commonly called a CSV file) to populate the database tables with inks. Metrix can also export, edit, and re-import a CSV file of the existing inks.

Important notes on importing ink

- We recommend backing up the database before importing data. Importing data cannot be undone (although items can be individually deleted) so the best remedy for an error is to replace the database with a backup copy.

- When constructing the CSV data files to import, keep in mind that leading and trailing spaces are part of the text for text fields. Remove leading or trailing spaces from text fields before exporting the data.

- When reimporting an edited CSV, making changes to the name will result in the generation of a new ink.

- A carriage return character, a line feed character, or both should follow each record. Any extra commas or spaces between records can cause difficulties when importing the data.

- The program logs the results from any import attempt (successful or unsuccessful) in a file located in the Logs folder of the Metrix installation folder

CSV field specifications for customers

Important Your spreadsheet must have 8 columns – no more and no less. Extra or missing columns will throw everything off.

Column	Field	Type	Range
A	**CSV Import Engine**	Text (string)	**Ink 2.0** (must be exactly this string)
B	**Type**	Text (string)	Enter the ink type into the column. The available ink types are **Spot Color, Varnish, Process Cyan, Process Magenta, Process Yellow,** and **Process Black.**
C	**Name**	Text (string)	**Minimum:** 1 character **Maximum**: 90 characters
D	**Cyan**	Number (integer)	**Minimum:** 1 **Maximum:** 100
E	**Magenta**	Number (integer)	**Minimum:** 1 **Maximum:** 100
F	**Yellow**	Number (integer)	**Minimum:** 1 **Maximum:** 100
G	**Black**	Number (integer)	**Minimum:** 1 **Maximum:** 100
H	**UV**	Text (string)	**True=**Ink is UV **False=**Ink is not UV

Importing your ink CSV file

After you create your file, you must import your CSV file. Below are the steps.

1. Select Inks node under Resources in the Database window.

2. Click **Import** and navigate to the CSV file.

3. In the Import Inks window, select the appropriate CSV file, and then click **Import**.

> **Note** You can also import a CSV project file containing new inks and Metrix will add them directly into the database.

1. With Metrix not running, open the **Metrix 22.1.Properties** file using a text editor.

2. Add the line **CSV.MakeInks=true** and save the file.

When you import a CSV file that contains inks that do not already exist in the database, the inks will be added as non-UV spot colors and the CMYK representation for all will be C=50%, M=50%, Y=50%, K=0%. The ink definitions can be edited if needed.

Adding default page colors to the Database

The Default Page Colors node of the Database window enables you to create common ink combinations that you can select with the New Product wizard. Keep in mind that these combinations are defaults only – you can customize individual pages, and create new inks and page colors as you go.

The Default Page Colors list is best kept to a minimum, as it is displayed in a drop-down list in the user interface.

To add a new Default Page Colors record
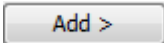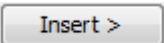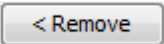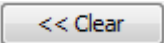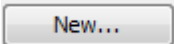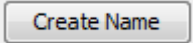
1. In the Database, select the Default Page Colors node under Resources.

2. Click **New** on the right side of the Database window.

> **Notes** The Order column displays the order the inks are listed in the Database. You can filter the Name column using the Filter field, or using **And** or **Or** Boolean searches.
>
> You can access the New Default Page Color window using any Color property when viewing a layout, or with **New**, **Variation**, or **Edit** under the Default Page Colors node in the Database window.
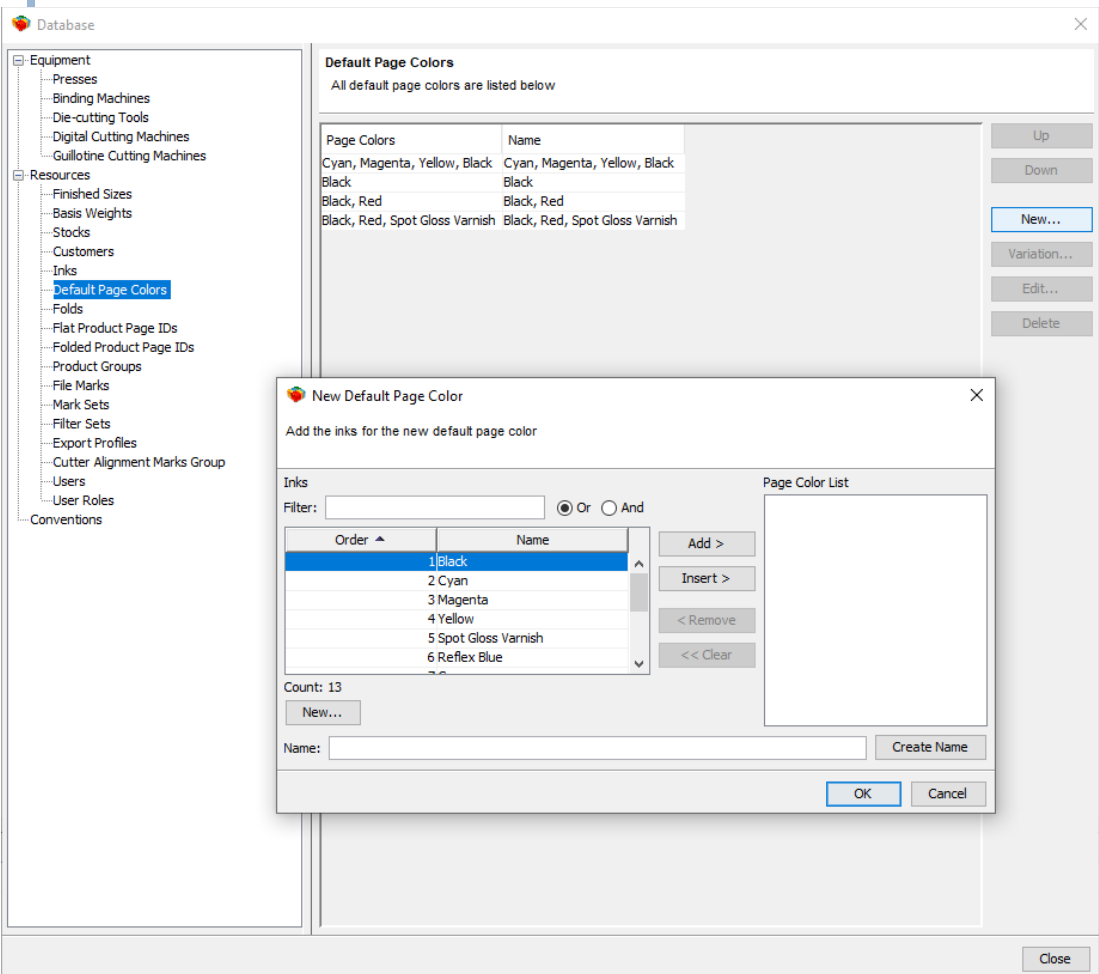
New Default Page Colors Functions

Button	Functionality
Add >	Adds the currently selected ink to the bottom of the Page Colors list.
Insert >	Insert the currently selected ink above the current selection in the Page Colors list. Use the SHIFT key to select consecutive inks in the list, or use the CTRL key to select non-consecutive inks in the list.
< Remove	Remove the currently selected ink from the Page Colors list.
<< Clear	Clear the entire Page Colors list.
New...	Add a new ink to the Database.
Create Name	Use the ink names as the Page Colors name. Alternatively, you can type a name into the Name field. All Default Page Colors must have a Name.

Metrix folds and folding

The Metrix Folding library

Metrix installs with dozens of folding patterns from the JDF folding library. You will find many commonly used folding patterns in the library that can satisfy most requirements. If you need a folding pattern not found in the library, you can create your own.

We recommended that you obtain the assistance of finishing department personnel when creating Metrix folding patterns. Metrix folds are based entirely on the way the paper is folded by the machine. Metrix does not determine the folds by manual page numbering.

Understanding Metrix folding

The Metrix New Fold wizard controls the numbering of all folded product pages, based on the fold-up/fold-down sequences selected. Metrix determines the numbering based solely on the operations performed by the folding machine on the physical sheet of paper to arrive at the final folded stack of pages, independently of the content.

Bound work – jog edge and spine

Because Metrix determines page sequencing and orientation based solely on the physical folding operations, a single folding pattern accommodates all of the following:

Head to Jog (High Folio Lap), Left Spine

Foot to Jog (Low Folio Lap), Left Spine

Head to Jog (High Folio Lap), Right Spine

Foot to Jog (Low Folio Lap), Right Spine
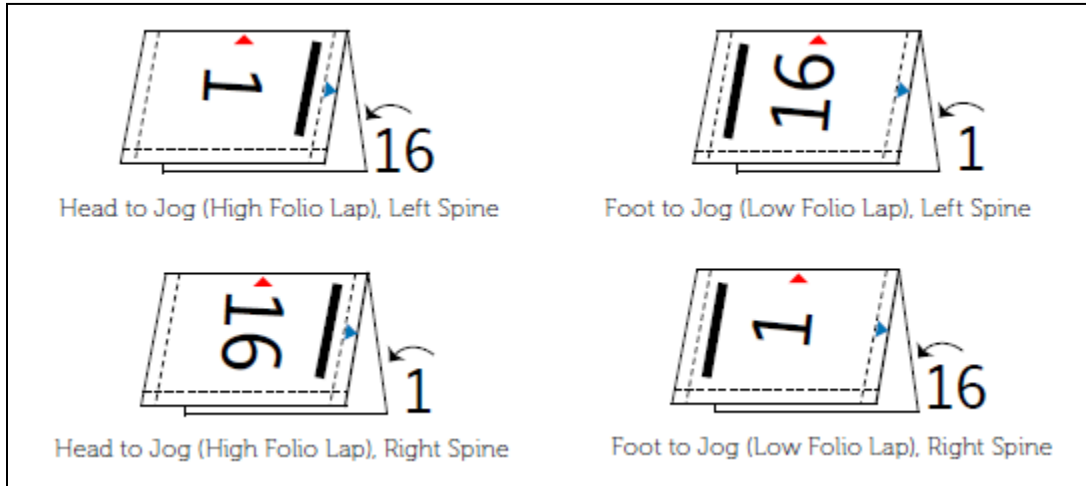
Note The blue triangle, representing the jog edge, remains constant, as does the position of the spine (the red triangle). The only thing that changes from one to the next is the orientation and sequencing of the content – which Metrix handles automatically.

The method Metrix uses to handle folding (which is the same method folding machines use) may be different from what some operators are used to. However, this methodology ensures that each and every product Metrix produces will be folded as specified.

Drilling down to ascertain page sequence

From the perspective of content sequencing and orientation, some folding patterns are ambiguous. As an example, consider a 6-page accordion fold. Prepress operators no doubt encounter many different page sequences for this fold in the files they receive from designers.

However, for folded products as well as for bound products, Metrix considers the folding operations on the paper independently of the content. Therefore, the best way to ascertain the actual content sequence and orientation, as required by the physical folding operations, is to visualize "drilling down" on the folded and rotated sheet.

You can visualize drilling down on a 6-page accordion fold, with the jog edge at the head and the spine at the left, as follows:
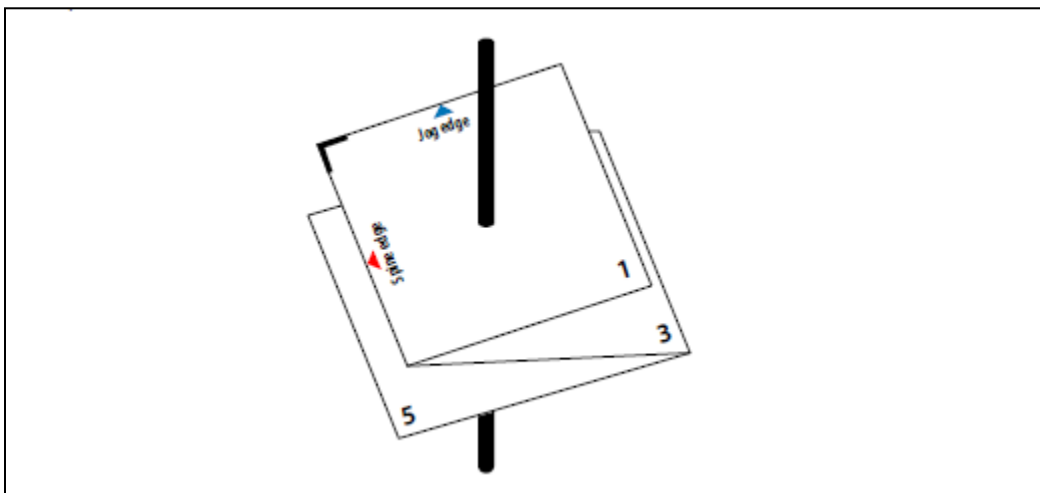
In this example, the drill first touches page 1 and then its back, page 2. The next page touched is page 3 followed by 4. Each successive page touched by the "drill" is the next sequential number. Using this method, you can ensure that the content received matches the actual page sequencing required by the folding pattern.

Adding folds to the Database
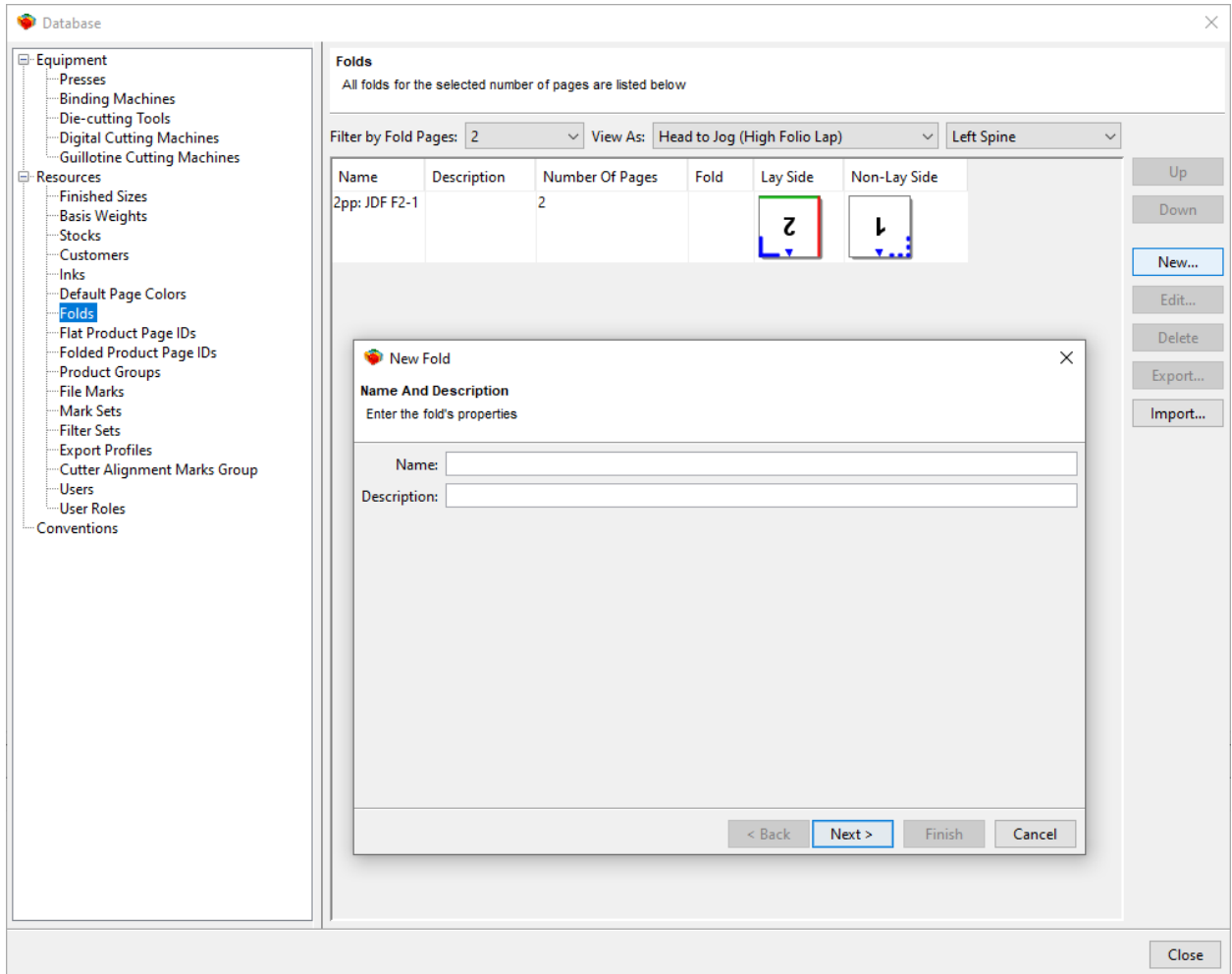
Fold Properties

Field	Explanation
Name	Fold name.
Description	Fold description.

Follow these steps to add a new fold to the database:

> **Note** The red properties are required and the black properties are optional.

1. Select the Folds node under Resources in the Database window, and then click **New**.

2. In the New Fold wizard, enter the fold's name and description, using the mouse or the TAB key to access the fields, and then click **Next**.

3. Enter the number of rows and columns, and then click **Next**.

4. Potential folds are highlighted as you point to them with your mouse. Select the position of the first fold, and then select the direction of the fold from the pop-up menu that appears.

5. Repeat this process for each fold until the sheet has been reduced to a single page stack, and then click **Next**.

6. Swap the jog and/or spine reference edges (if necessary), and then click **Next**.

7. The completed fold appears, with the pages numbered accordingly. The default view is Head to Jog (High Folio Lap) and Left Spine. You can change the view by selecting another Jog or Spine option.
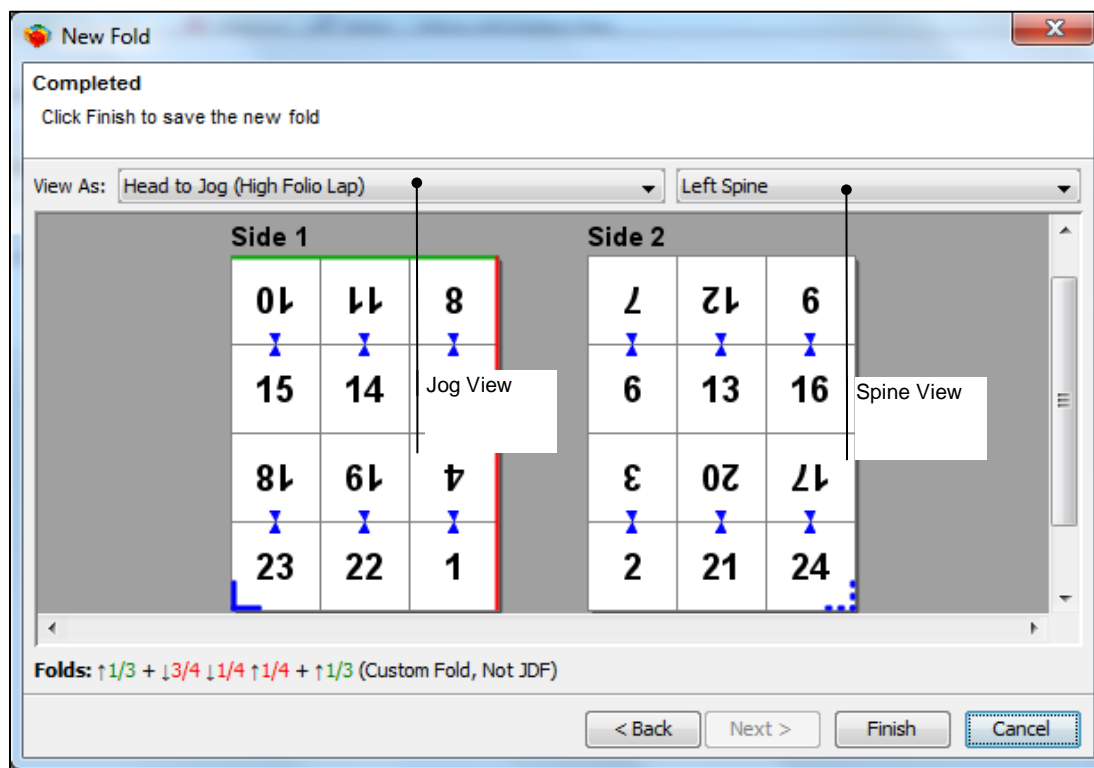
- Completed folds display symbols for the Lay Side (⌐) and the Non-Lay Side (⌐).

- The JDF fold notation is also displayed at the bottom left. Some examples of JDF fold notations:

  - ↑ 1/2 = up fold one half the open sheet along the green edge. ↓ 1/4 = down fold one quarter the open sheet along the red edge.

  - The fractional values are always relative to the open sheet, and are always green or red, depending on which sheet edge the fold is relative to.

8. Click **Finish** to save the fold to the database.

    Note If the fold already exists, even if it has a different name, Metrix will not allow you to save it. Metrix stores only one fold for a specific folding pattern. You can always edit the Fold Name and Description options when necessary.

Prioritizing the folds

Use **Up** and **Down** to reorder the list so the default fold is at the top of each filtered list.

Note The order of folds is especially important for bound products – Metrix automatically selects the first fold in the list when creating signatures (though you can change the fold after product creation is complete).

Importing and Exporting Fold Patterns

Fold patterns can be imported into your database via MXML files. Metrix can also export, edit, and re-import a MXML file of existing fold patterns.

- To import a fold pattern:

  o Click the **Import** button in the **Folds** section of the Database window.

- o   Select the appropriate MXML file and click **Import** in the Import MXML window.
- To export a fold pattern:
    - o   Select the appropriate fold pattern in the **Folds** section of the Database window.
    - o   Click the **Export** button.
    - o   Choose a location to save the MXML file and click **Save**.

Adding flat product page IDs to the Database

Flat product page IDs become flat product folios, which are used for display and for Metrix reports. Flat product page IDs do not act on PDF page content.

To add a Flat Product Page ID

- Select the Flat Product Page IDs node, and then click **New**. The properties are listed in the table below.

Property	Explanation
Side 1	Identification for side 1.
Side 2	Identification for side 2.

Adding folded product page IDs to the Database

Folded product page IDs become folded (and bound) product folios, which are used for display and for Metrix reports. Folded product page IDs do *not* act on PDF page content.

To add a folded product page ID

- Select the Folded Product Page IDs node under Resources in the Database window, and then click **New**.

Folded Product Page ID Properties

Property	Explanation
Prelims List (Comma Separated)	The identification of the first pages of a product, for example, FC (Front Cover), InFC (Inside Front Cover). Each entry must be separated by a comma.
Body Prefix	The prefix to prepend to the body identifier.
Body	**Numbers** / **Upper Case Alpha** / **Lower Case Alpha** / **Upper Case Roman** / **Lower Case Roman** The numeric or alphabetical numbering scheme you wish to use for the body.
Body Direction	**Forwards** / **Backwards** Forwards increments body page identifiers; Backwards decrements body page identifiers.
Starting	The logical number that determines the starting point for body page incrementing or decrementing.
Body Suffix	The suffix to append to the body identifier.
Postlims List (Comma Separated)	The identification of the last pages of a product, for example, InBC (Inside Back Cover), BC (Back Cover). Each entry must be separated by a comma.

Adding product groups to the Database

Metrix uses product groups when finishing operations or content characteristics require products be kept together, or kept apart from other products.

Product group names are arbitrary but descriptive of group characteristics. However, you must have the required number of groups pre-defined in the Metrix database.

To add a product group

1.   Select the Product Groups node under Resources in the Database window, and then click **New**.

2.   Click the color field to reveal the Select Color window.

3.   Use the tabs to choose your preferred color space.
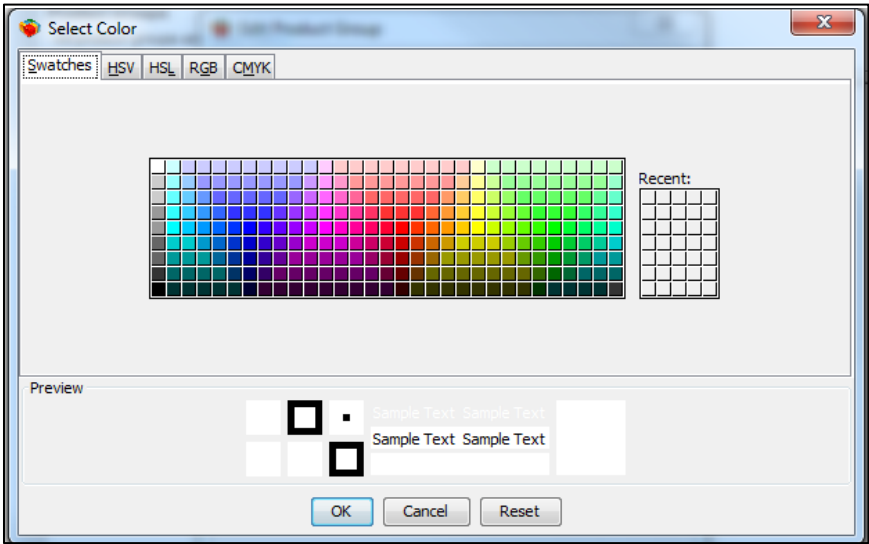
Product Group Properties

Property	Explanation
Name	Group name.
Color	The display color for the group. The product group color enables you to visually identify products on a layout by their product group (rather than individually).

Rampage workflows and templates

Setting up for Rampage workflow and job templates

Follow these steps to prepare your Metrix system to integrate with your Rampage workflow.

1.   Select **Settings > User Preferences...**

2.   Select the General node.

3.   Choose Rampage as your Prepress Workflow, and then click **OK**.

4.   Close and restart Metrix.

Rampage Workflows and Job Templates

For those Metrix users who have set their Prepress Workflow for Rampage (**Settings > User Preferences > General > Prepress Workflow > Rampage**), there are now new options in the Resources section of the Database to set the Rampage Workflows, and the Rampage Job Templates nodes.

With the Rampage Workflows node selected, you can enter or edit specific Workflow names and types, either Page or Sheet Side.

With the Rampage Job Templates node selected, you can enter or edit specific workflow names and descriptions.

Adding Rampage workflows to the Database

Note To have this option available, you must add the Rampage Workflow option by select **Settings > User Preferences > General > Prepress Workflow > Rampage** before attempting these steps.

1. Click the Rampage Workflows node under Resources in the Database window to display the available Rampage workflows.

2. Click **New** to open the New Rampage Workflow window.

3. Supply the Workflow Name, and then, for the Type, select Page or Sheet Side from the field.

Rampage Workflow Properties

Note The red properties are required and the black properties are optional.

Property	Explanation
Workflow Name	Name of the Rampage Workflow.
Type	Select **Page** or **Sheet Side** from the pull-down menu.

Adding Rampage job templates to the Database

1. Click Rampage Job Templates in the Database window to display Rampage job templates.

2. Click **New** to open the New Rampage Job Template window.

3. Enter the Rampage Job Template Name, then select a description of the job template.

Rampage Job Template Properties

Property	Explanation
Rampage Job Template Name	Name of the Job Template.
Description	Description of the Job Template.

Adding file marks to the Database

To add a file mark

1. Select the File Marks node under Resources in the Database window, and then click **Import**.

2. Choose the appropriate file from the Import window, and then click **Import**.

Editing mark sets

You can modify marks sets to help Metrix determine which mark set should be used with a layout.

Editing Mark Set properties is especially helpful for those running Metrix Automation, as it gives the operator precise control over which mark sets will be automatically applied to layouts during the automation process. Mark Set Properties apply whether the mark set is being added manually by an operator or automatically by Metrix Automation.

Note Please refer to the *Metrix User Guide* for detailed instructions on how to create new mark sets.

To edit a mark set

1. Select the Mark Sets node under Resources in the Database window.

2. Select the mark set you wish to edit.

3. Click **Edit** to open the Edit Mark Set window as seen below.

Mark Set Properties

Property	Explanation
Name	The name of the mark set.
Mark Count	The number of marks in the set.
Sheetwise	**True** / **False** Whether or not the mark set is eligible to be applied to sheetwise layouts.
Perfected	**True** / **False** Whether or not the mark set is eligible to be applied to perfected layouts.
Work And Turn	**True** / **False** Whether or not the mark set is eligible to be applied to work and turn layouts.
Work And Tumble	**True** / **False** Whether or not the mark set is eligible to be applied to work and tumble layouts.
One-Sided	**True** / **False** Whether or not the mark set is eligible to be applied to one-sided layouts.
Set Mark Placement to 'Front Only' for Single-Sided Printing Methods	**True** / **False** For single-sided layouts (work and turn, work and tumble, or one-sided), this property will set the mark placement value to 'Front Only' for all marks on the layout. This helps eliminate the need for multiple mark sets for different working styles.
Presses	The list of presses for which this mark set is eligible.
Process Cyan	**True** / **False** / **Either** **True** ensures that this mark set will only be eligible for layouts that contain this ink. **False** ensures that this mark set will not be eligible for layouts that contain this ink. **Either** allows this mark set to be eligible whether or not the layout contains this ink.
Process Yellow	Same description as for Process Cyan.
Process Magenta	Same description as for Process Cyan.
Process Black	Same description as for Process Cyan.

Spot Colors 1-16	Same description as for Process Cyan.

> **Note** You can access and modify Mark Set Properties through 1) the Database Mark Sets node, or 2) when you are saving a mark set, or 3) when you are making a variation of a mark set. You can only delete mark sets from the Database when no project is open.

Adding cutter alignment mark groups to the Database

Select the Cutter Alignment Marks Group node in the Database window to display the available cutter alignment mark groups. Clicking **Add New** allows you to access the New Cutter Alignment Mark Group window, where you can supply the properties for a new cutter alignment mark group.
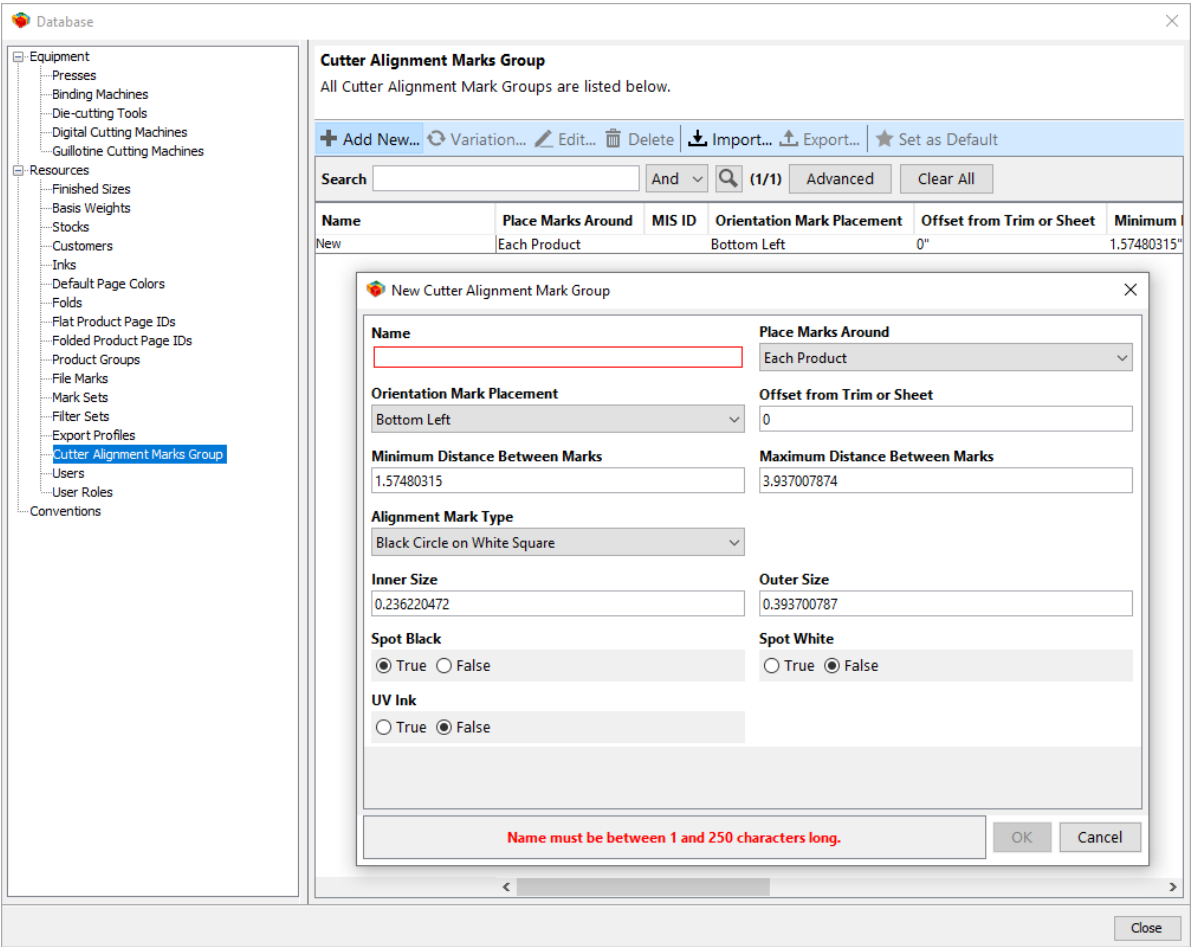
> **Note** The red properties are required, and the black properties are optional.

Property	Explanation
Name	Name of the cutter alignment mark group. Must be unique.
Place Marks Around	**Each Product / All Products / Sheet** Select whether to place marks around each individual product, around the bounding box of all products on the layout, or around the perimeter of the sheet.
Orientation Mark Placement	Sets the position of the orientation mark in either the bottom left or bottom right corner of the sheet.

Offset from Trim	Sets the distance between the trim of the product and the outer edge of the Cutter Alignment Marks.
Minimum Distance Between Marks	Minimum distance marks will be placed apart. If it is not possible to place a mark this distance from another mark, it will be placed as close as possible.
Maximum Distance Between Marks	Maximum distance marks will be placed apart. If it is not possible to place a mark this distance from another mark, the **Insufficient Space** error message will appear.
Alignment Mark Type	Choose one from the five available options: **Black Circle on White Square** **Black Circle on White Circle** **White Circle on Black Circle** **White Circle on Black Square** **Crosshair**
Inner Size	Diameter of the inner mark (black or white circle).
Outer Size	Size of the outer mark (black or white square or circle).
Spot Black	**True / False** **True** means the black part of the mark prints in a pre-defined spot black ink. **False** means 100% process black is used.
Spot White	**True / False** **True** means the white part of the mark prints in a pre-defined spot white ink. **False** means 0% CMYK is used, so there will be no ink and it will be the color of the substrate.
UV Ink	**True / False** **True** means the cutter alignment mark group supports UV ink.

Editing Filter Sets and Export Files

Editing filter sets

1. Click the Filter Sets node under Resources in the Database window to display the available filter sets.

   Note There is no **New** button. New filter sets are generated in the Component Picker when you save a filter set.

2. Click **Edit** to open the Edit Filter Set window.

   Note You can edit the Name and Description fields but the other fields are determined by the Component Picker, and cannot be edited in the Database window.

Filter Set Properties

Property	Explanation
Name	Name of the Filter Set.
Description	Description of the Filter Set.

Filter Count	Number of filters in a set.
Filter Summary	Description of what each filter contains.

Editing export profiles

1. Click the Export Profiles node under Resources in the Database window to display the available export profiles.

   > **Note** There is no **New** button. New Export Profiles are generated in the Export window.

2. Click **Edit** to open the Edit Export Profile window. There you can edit the Name and the Description fields of the export profile.

Export Properties

Property	Explanation
Name	Name of the export profile.
Description	Description of the export profile.

Adding User Roles and Users

You can assign users the default user roles, or, you can create customized user roles.

To add a user

1. Select the Users node under Resources in the Database window, and then click **New**.

2. Select the role, keeping in mind the permissions you want this role to have.

   > **Notes** For more information about which abilities each permission level has, see the *ePS Metrix User Guide*. Or, simply tailor each role according to the permissions you want to grant to that role.
   >
   > Red fields are required.

User Properties

Property	Explanation / Role
User Name	User name.
Password	Any combination of ASCII characters. Case-sensitive.
User Role	**Administrator** / **Guest** / **Senior Planner** / **Junior Planner** / **User-Defined** Choose a user role from the drop-down list.
Email	User email address.

To add a user role

1. Select the User Roles node under Resources in the Database window, and then click **New**.

2. Review the appropriate properties and make any needed changes, and then click **OK**.

   Note   Red fields are required.

New Role ✕

Enter the new Roles properties

⚠ Red properties currently have invalid values

Property	Value
Role Name	
Can Edit a Project	False
Can Create a New Project	False
Can Delete a Project	False
Can Replace an Existing Project	False
Can Import a Project or Product	False
Save, Replace or Delete a Stan...	False
Save, Replace, Import or Delet...	False
Add New Database Items	False
Edit or Delete Database Items	False
Add or Edit Users	False
Add or Edit Roles	False
Export Data	False
Allow Export with Errors	False
Save, Replace, or Delete an Ex...	False
Control Automation	False
Send Project to Metrix Automation	False
Edit Contour Color Name Patterns	False
Can Edit Global Preferences	False

OK   Cancel

User Role Properties

Property	Explanation / Options
Role Name	User Role name.
Can Edit a Project	**True** / **False**
Can Create a New Project	**True** / **False**
Can Delete a Project	**True** / **False**
Can Replace an Existing Project	**True** / **False**
Can Import a Project or Product	**True** / **False**
Save, Replace or Delete a Standard	**True** / **False**
Add New Database Items	**True** / **False**
Edit or Delete Database Items	**True** / **False**
Add or Edit Users	**True** / **False**
Add or Edit User Roles	**True** / **False**
Export Data	**True** / **False**
Allow Export with Errors	**True** / **False**
Save, Replace, or Delete an Export Profile	**True / False**

Control Automation	**True** / **False**
Send Project to Metrix Automation	**True** / **False**
Edit Contour Color Name Patterns	**True / False**
Can Edit Global Preferences	**True / False**

Auto Login

Metrix 2019.2 allows you to set up Auto Login to automatically log in using your system user name without requiring a password. (Previous versions required entry of User Name and Password on each login).

To set up Auto Login

1. Select **Settings > Database > Users**.

2. Click **Auto Login**.

    Note   If your system user name already exists in the database, the next time you start Metrix you will be automatically logged in. If your user name does not exist in the Database, follow these steps to add it:

    – Click **Auto Create user as (role)** and select an assigned user role.
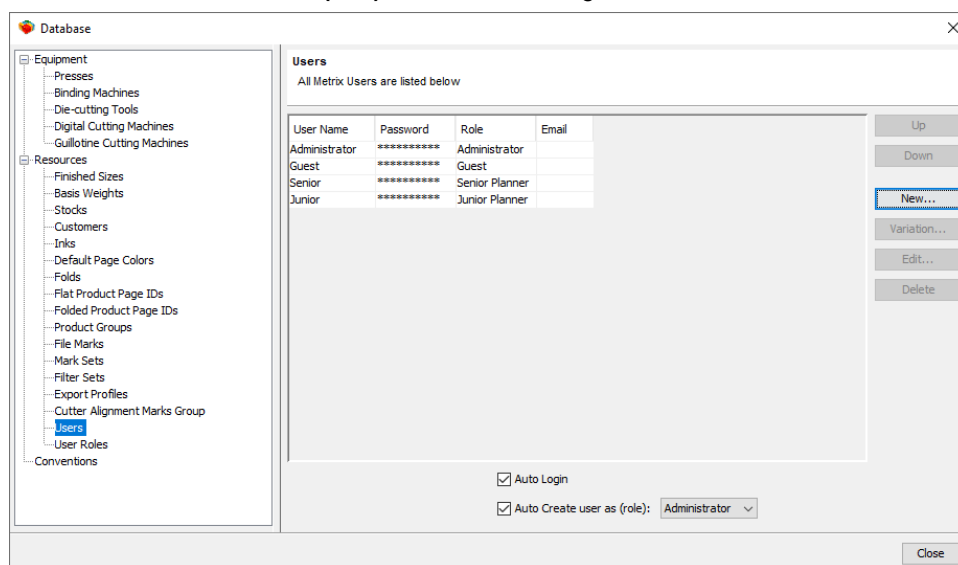
    – Click **Close** and exit Metrix.

    – Restart Metrix. Metrix will open without requiring you to select a user name and password.

    You will now see the system user name in the **Database** with no password assigned.

Editing Database Conventions

Bleed margins and fold clearance

To edit the default bleed margins or fold clearances:

1. Select Conventions in the Database window.

2. Choose either Metric or Inches.

3. Click **Edit**.

4. When you have finished editing the Database Conventions, click **OK**.

Database Conventions Properties

Property	Explanation
Default Bleed	The default amount of bleed. Metrix can change the default bleed on the fly for individual bleed amounts, as required.
Default No Bleed	The negative number that represents the default amount of white space presumed to be around the edges of non-bleeding products. This enables Metrix to place pages into non-imageable areas of the press sheet (e.g., gripper margin) by the amount specified. Enter "0" (zero) to disable this functionality. Metrix does not calculate negative no-bleed amounts into the Default Page To Bleed Gap.
Auto Page To Bleed Gap	**True** / **False** Whether or not Metrix should adjust the page to bleed gap automatically.
Default Page To Bleed Gap	The default amount of space between the trim edge of one page and the bleed edge of an adjacent page. You can change this amount on each layout if needed.
Roll Fold Clearance	The amount by which a panel folded inside another, like a barrel fold, must be shorter than the outer panel. Metrix automatically takes this value into account when calculating page (panel) widths for products folded in this manner.
Flush Fold Excess Maximum	When folding an accordion-fold product it is often possible for each subsequent fold to be a little larger than the previous fold, although this is not a common practice. This property determines how much bigger each fold can possibly be.

Configuring Database Connection Defaults

Metrix uses a default minimum of 10 and maximum of 20 connections to the database server to work with a project. Metrix 2020.2.0.539 or newer allows you to reconfigure the database server to use a minimum number of connections, never exceed a maximum number, and release connections when they are not in use.

To configure the Metrix database connection pool setting

1. Make sure Metrix is not running.

2. Open the **metrix.properties** file in a text editor.

   Note The **metrix.properties** file is located in **C:\ProgramData\EFI\Metrix** for Windows and **/Applications/EFI/Metrix** for Macs.

3. Add the following text to the document.

   Important The table contains the default values.

Setting	Description
DB.ConnectionTimeout=30	Number of seconds to wait for a connection to be created.
DB.ConnectionIdleTimeout=600	Number of seconds a connection is idle before it is released.
DB.MinConnections=2	Minimum number of connections to use (may be 0).
DB.MaxConnections=10	Maximum number of connections to use (must be 5 or greater).

4. Save the file.

Backing up the Database After Completing Setup

After you have finished configuring the Metrix Database for your production environment, make a backup and store it in a safe place.

This backup contains all your setup information but without any projects. You can use it if you ever need to restore your original Metrix configuration.

In addition to backing up your basic Metrix configuration, we recommend frequent backups of your Metrix Data folder.

Accessing Content on a Network Drive/Volume

The content files you assign to a Metrix product may reside on the local drive or on a mounted network volume. Metrix internally translates these network paths between Mac OS and Windows. This means that when content is assigned properly, you can open a Metrix project on either platform and locate the content.

> **Important** Volume should be shared as SMB or 'Windows Share.'

If content resides on the user's local workstation and you want other Metrix installations to access this content, you must share the content location via SMB or Windows Sharing and access the content via that mapped/mounted volume, even on the local workstation. When you save the project into the Metrix database, the network location is stored and can be accessed by Metrix on other workstations.

PreviewCache folder on a shared network drive

To speed up previewing when multiple users are accessing the same content, you can also share the PreviewCache folder on a mounted network drive.

To share the PreviewCache folder

1. Move the PreviewCache folder from the C:\ProgramData\EFI\Metrix (Windows) or /Applications/EFI/Metrix (Mac) folder to the mounted network volume where the shared content is stored.

2. In the User Preferences window, select Content Handling.

3. Set Enable Shared Cache to **True**.

4. Click **Browse…**, navigate to the Shared Cache Folder location, select the folder, and then click **Open**.
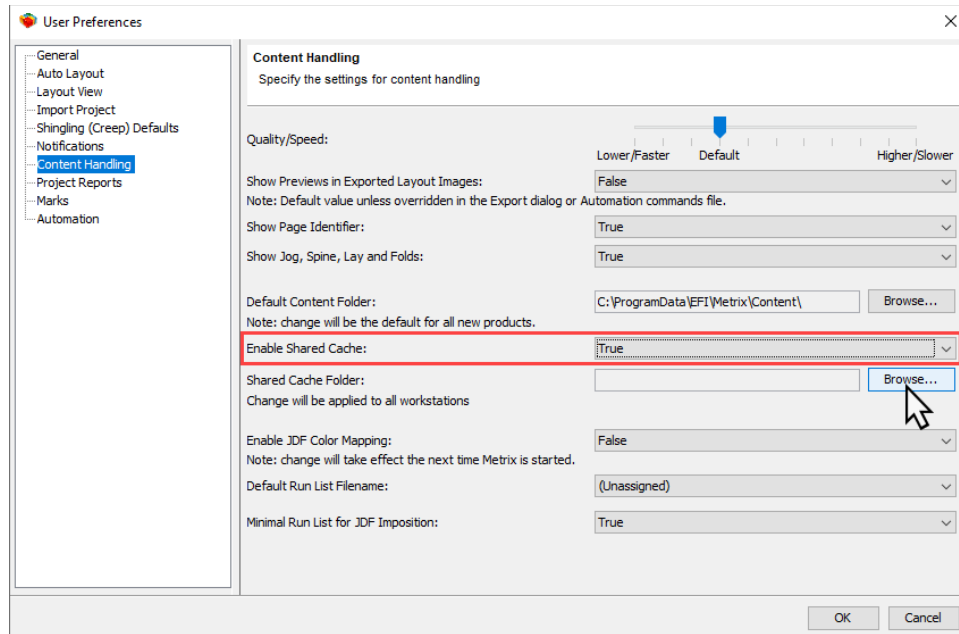
General notes

- AFP drives have not been tested

- NFS drives have not been tested

- FTP and HTTP are currently not supported

- On Mac OS, if Metrix tries to locate content files on a drive that is not mounted, the user will be notified that the volume cannot be found. The user should then mount the drive and press F5. Metrix will try again to access the content files.

Appendix A: Setup Worksheets

Press Setup Worksheet

Red properties are required. **Black** properties are optional.

Property	Data Type	Minimum	Maximum Metrix Base	Your Entry
Name	Alphanumeric	1	250	
Device ID	Alphanumeric	1	250	
Manufacturer	Alphanumeric	None	250	
Model Name	Alphanumeric	None	250	
Serial Number	Alphanumeric	None	250	
Press Type	Selection	Not applicable	Not applicable	Sheetfed Rollfed
Maximum Sheet Around Cylinder (Maximum Cutoff for Rollfed Presses)	Numeric	76.2mm 3"	25m 984.25"	
Minimum Sheet Around Cylinder (Minimum Cutoff for	Numeric	76.2mm 3"	76.2mm 3"	

Rollfed Presses)				
Maximum Sheet Across Cylinder	Numeric	76.2mm 3"	25m 984.25"	
Minimum Sheet Across Cylinder	Numeric	76.2mm 3"	76.2mm 3"	
No Image Lead Edge	Numeric	None	76.2mm 3"	
No Image Trailing Edge	Numeric	None	76.2mm 3"	
No Image Sides	Numeric	None	76.2mm 3"	
No Page Lead Edge	Numeric	None	76.2mm 3"	
No Page Trailing Edge	Numeric	None	76.2mm 3"	
No Page Sides	Numeric	None	76.2mm 3"	
Press Uses Plates	Selection	Not applicable	Not applicable	True False
Plate Brand	Alphanumeric	None	250	
Plate Dimension Around Cylinder	Numeric	76.2mm 0	3759.2mm 34"	
Plate Dimension Across Cylinder	Numeric	0	3759.2mm 34"	
Plate Thickness	Numeric	0.01016mm 0.0004"	6.35mm .25	
Perfects	Selection	Not applicable	Not applicable	True False
Ink Units Defined	Selection	Not applicable	Not applicable	True False
Ink Units	Numeric	1	100	
Max Front Ink Units	Numeric	0	100	
Max Back Ink Units	Numeric	0	100	
Coater Sides	Selection	Not applicable	Not applicable	0 1 2
Maximum Stock Thickness	Numeric	0.01016mm 0.0004"	152.5mm 6"	
Minimum Stock Thickness	Numeric	0.01016mm 0.0004"	152.5mm 6"	
Vertical Sheet Set Back	Numeric	0	152.4mm 6"	
Horizontal Sheet Offset Anchor	Selection	Not applicable	Not applicable	Left Center Right
Horizontal Sheet Offset	Numeric	0	1879.6mm 74" (- or +)	

Horizontal Sheet Offset Mirror Side 2	Selection	Not applicable	Not applicable	True False
Horizontal Device Compensation	Numeric	0	1879.6mm 74" (- or +)	
Horizontal Device Compensation Mirror Side 2	Selection	Not applicable	Not applicable	True False
Hourly Rate	Numeric	1	100,000,000	
Average Running Speed	Numeric	1	100,000,000	
Make Ready Hours Per Color	Numeric	0	999,999	
Cost Per Plate	Numeric	0	999,999	
Minimum Drying Time For Work And Turn	Numeric	0	999,999	
Flip Components When Perfecting	Selection	Not applicable	Not applicable	True False
Cutting Machine	Selection	Not applicable	Not applicable	(None) (Default) *All Cutting Machines in Database*
Cutoffs/Repeat *(for Rollfed Presses)*	Numeric	1	None	
Gutters	Numeric	0	5 (Offset from Center and Width) (- or +)	

Binding Machine Setup Worksheet

Red properties are required. **Black** properties are optional.

Property	Data Type	Minimum	Maximum	Your Entry
Name	Alphanumeric	1	250	
Device ID	Alphanumeric	1	250	
Manufacturer	Alphanumeric	Not applicable	250	
Model Name	Alphanumeric	Not applicable	250	
Model Number	Alphanumeric	Not applicable	250	
Serial Number	Alphanumeric	Not applicable	250	
Assembly Method	Selection	Not applicable	None	Saddled Side-By-Side
Small Signatures	Selection	Not applicable	None	Outside Inside
Default Stack Item Count (Metrix Base only)	Numeric	1	1000	

Default Stack Layer Item Count (Metrix Base only)	Numeric	1	1000					
Default Number of Stitches (Saddled) (Metrix Base only)	Selection	Not applicable	Not applicable	0	1	2	3	4
Default Staple Shape (Saddled) (Metrix Base only)	Selection	Not applicable	Not applicable	Crown Butted Eyelet				
Default Side Scores from Spine (Side-By-Side, 0=None) (Metrix Base only)	Numeric	0	25.4mm 1"					
Minimum Jog Trim	Numeric	0	152.4mm 6"					
Default Jog Trim	Numeric	0	152.4mm 6"					
Maximum Jog Trim	Numeric	0	152.4mm 6"					
Minimum Text Spine	Numeric	0	152.4mm 6"					
Default Jog Trim	Numeric	0	152.4mm 6"					
Maximum Jog Trim	Numeric	0	152.4mm 6"					
Minimum Text Spine Trim	Numeric	0	152.4mm 6"					
Default Text Spine	Numeric	0	152.4mm 6"					
Maximum Text Spine Trim	Numeric	0	152.4mm 6"					
Minimum Non-Jog Trim	Numeric	0	152.4mm 6"					
Maximum Non-Jog Trim	Numeric	0	152.4mm 6"					
Minimum Face Trim	Numeric	0	152.4mm 6"					
Maximum Face Trim	Numeric	0	152.4mm 6"					
Minimum Lap	Numeric	0	101.6mm 4"					
Default Lap	Numeric	0	101.6mm 4"					

Maximum Lap	Numeric	0	101.6mm 4"	
Lap Edge	Selection	None	None	Front Back Either
Minimum Trim Width	Numeric	6.35mm 0.25"	762mm 30"	
Maximum Trim Width	Numeric	6.35mm 0.25"	762mm 30"	
Minimum Trim Height	Numeric	6.35mm 0.25"	762mm 30"	
Maximum Trim Height	Numeric	6.35mm 0.25"	762mm 30"	
Text Folds Inline	Selection	Not applicable	Not applicable	True False
Cover Feeder	Selection	Not applicable	Not applicable	True False
Cover Minimum Jog Trim	Numeric	0	152.4mm 6"	
Cover Default Jog Trim	Numeric	0	152.4mm 6"	
Cover Maximum Jog Trim	Numeric	0	152.4mm 6"	
Cover Jog Match Text Jog Trim	Numeric	Not applicable	Not applicable	True False
Cover Maximum Spine Width	Numeric	0	152.4mm 6"	
Cover Minimum Non-Jog Trim	Numeric	0	152.4mm 6"	
Cover Maximum Non-Jog Trim	Numeric	0	152.4mm 6"	
Cover Minimum Face Trim	Numeric	0	152.4mm 6"	
Cover Maximum Face Trim	Numeric	0	152.4mm 6"	
Cover Minimum Lap	Numeric	0	101.6mm 4"	
Cover Default Lap	Numeric	0	101.6mm 4"	
Cover Maximum Lap	Numeric	0	101.6mm 4"	
Cover Lap Edge	Selection	Not applicable	Not applicable	Front Back Either
Maximum Binding Number Up (N-Up	Selection	Not applicable	Not applicable	1-Up 2-Up 3-Up

Module Only)				
Minimum N-Up Offset (N-Up Module Only)	Numeric	0	25.4mm 1"	
Default N-Up Offset (N-Up Module Only)	Numeric	0	25.4mm 1"	
Maximum N-Up Offset (N-Up Module Only)	Numeric	0	25.4mm 1"	
Collation Marks-Mark Type	Selection	Not applicable	Not applicable	(None) Jog Spine
Collation Marks-Start Offset	Numeric	0.79375mm 0.03125"	152.4mm 6"	
Collation Marks-Width	Numeric	0.79375mm 0.03125"	152.4mm 6"	
Collation Marks-Height	Numeric	0.79375mm 0.03125"	152.4mm 6"	
Collation Marks-Repeat Number	Numeric	2	100	
Collation Marks-Over Page Content	Selection	Not applicable	Not applicable	True False
Collation Marks-Primary Mark Color	Selection	Not applicable	Not applicable	All Separations Spot Color Process Color
All Separations	Numeric	0	100	%Screen=
Spot Color	Selection	Not applicable	Not applicable	Spot Color Name= %Screen=
Process Color	Numeric	0	100	%Cyan= %Magenta= %Yellow= %Black=
Collation Marks-Secondary Mark Color	Selection	Not applicable	Not applicable	All Separations Spot Color Process Color
All Separations	Numeric	0	100	%Screen=
Spot Color	Selection	Not applicable	Not applicable	Spot Color Name= %Screen=
Process Color	Numeric	0	100	%Cyan= %Magenta= %Yellow= %Black=
Collation Marks-Secondary Mark Color	Selection	Not applicable	Not applicable	All Separations Spot Color Process Color
All Separations	Numeric	0	100	%Screen=
Spot Color	Selection	Not applicable	Not applicable	Spot Color Name=

				%Screen=
Process Color	Numeric	0	100	%Cyan= %Magenta= %Yellow= %Black=
Collation Marks- Trailing Text	Alphanumeric	1	100	Static and/or Variable Text up to 100 characters
Collation Marks- Anchor Trailing Text To	Selection	Not applicable	Not applicable	Blocks of Marks Individual Marks
Collation Marks- Distance From Anchor	Numeric	0.79375mm 0.03125"	152.4mm 6"	
Collation Marks- Trailing Text Point Size	Numeric	0.08819444mm 0.00347222	50.8mm 2"	

Digital Cutting Machines Setup Worksheet

Red properties are required. **Black** properties are optional.

Property	Data Type	Your Entry
Name	Alphanumeric	
Device ID	Alphanumeric	
Description	Alphanumeric	
Manufacturer	Alphanumeric	
Linear Units per hour	Numeric	
Hourly Rate	Numeric	
Hours per Position	Numeric	
Make Ready Hours per Sheet	Numeric	
Minimum Height	Numeric	
Maximum Height	Numeric	
Minimum Width	Numeric	
Maximum Width	Numeric	
Minimum Material Thickness	Numeric	
Maximum Material Thickness	Numeric	

Note There must be a minimum of one digital cutting tool defined for each device (routers, cutting blades, scorers, etc.) in the **Digital Cutting Tools for the selected Digital Cutting Machine** section.

Guillotine Cutting Machines Setup Worksheet

Red properties are required. **Black** properties are optional.

Property	Data Type	Your Entry
Name	Alphanumeric	
Device ID	Alphanumeric	

Hourly Rate	Numeric	
Maximum Lift Height	Numeric	
Maximum Lift Weight	Numeric	
Weight Unit	Selection	kg lb
Min Cuts	Selection	True False
Manufacturer	Alphanumeric	
Model Name	Alphanumeric	
Model Number	Alphanumeric	
Serial Number	Alphanumeric	
Production Rates*	Numeric	To (cuts):
	Numeric	Setup Time (hrs)
	Numeric	Time Per Lift (hrs):

*Note The rows below "Production Rates" apply to data entered in the New Production Rates window. This window only becomes available when you click **Add New** in the **Production Rates for the selected Guillotine Cutting Machine** section of the New Guillotine Cutting Machine window.

Die-Cutting Tools Setup Worksheet

Red properties are required. Some Red properties will automatically populate after you select your 1-up Die and Multi-Up Die. **Black** properties are optional.

Property	Data Type	Min.	Max.	Your Entry
1-up Die*	Alphanumeric	1	250	File Name:
Multi-up Die*	Alphanumeric	1	250	File Name:
Name	Alphanumeric	1	250	
Device ID	Alphanumeric	1	250	
Item Width	Extracted from 1-up Die	–	–	
Item Height	Extracted from 1-up Die	–	–	
Maximum Sheet Width	Numeric	3"	25 m 984"	
Maximum Sheet Height	Numeric	3"	25 m 984"	
Grain Direction	Selection	Not Applicable	Not Applicable	Horizontal Vertical Either Either-All Same
Allowed Bleed Intrusion	Undefined	Not Applicable	Not Applicable	Graphical representation configured in Metrix GUI
Die-cutting Tool Type	Selection	Not Applicable	Not Applicable	Flat Rotary
Anchor	Selection	Not Applicable	Not Applicable	Graphical representation configured in Metrix GUI or drop-down list
X Distance from	Numeric	–	–	

Anchor				
Y Distance from Anchor	Numeric	–	–	
Number Up	Numeric	1	10,000	
Number Across	Numeric	1	10,000	
Number Along	Numeric	1	10,000	
Streams	Numeric	None	10,000	
Stream Number Across	Numeric	None	10,000	
Manufacturer	Alphanumeric	None	250	
Model Name	Alphanumeric	None	250	
Model Number	Alphanumeric	None	250	
Serial Number	Alphanumeric	None	250	

Note *Click ⬚ in the Value column next to the field name to select a file.

Finished (Trim) Sizes Setup Worksheet

Red properties are required. **Black** properties are optional.

Property	Data Type	Minimum	Maximum Metrix Base	Your Entry
Name	Alphanumeric	1	250	
Width	Alphanumeric	2.54mm 0.1"	25 m 984"	
Height	Numeric	2.54mm 0.1"	25 m 984"	
Name	Alphanumeric	1	250	
Width	Numeric	2.54mm 0.1"	25 m 984"	
Height	Numeric	2.54mm 0.1"	25 m 984"	
Name	Alphanumeric	1	250	
Width	Numeric	2.54mm 0.1"	25 m 984"	
Height	Numeric	2.54mm 0.1"	25 m 984"	
Name	Alphanumeric	1	250	
Width	Numeric	2.54mm 0.1"	25 m 984"	
Height	Numeric	2.54mm 0.1"	25 m 984"	
Name	Alphanumeric	1	250	
Width	Alphanumeric	2.54mm 0.1	25 m 984"	
Height	Numeric	2.54mm 0.1"	25 m 984"	
Name	Alphanumeric	1	250	

Width	2.54mm .1"	3657.6mm 144"	25 m 984"	
Height	Numeric	3657.6mm 144"	25 m 984"	
Name	Alphanumeric	1	250	
Width	Numeric	2.54mm 0.1"	25 m 984"	
Height	Numeric	2.54mm 0.1"	25 m 984"	

Basis Weight Setup Worksheet

Red properties are required, **Black** properties are optional.

Property	Data Type	Your Entry
Name	Alphanumeric	
Width	Numeric	
Height	Numeric	
Sheet Count	Numeric	
Name	Alphanumeric	
Width	Numeric	
Height	Numeric	
Sheet Count	Numeric	
Name	Alphanumeric	
Width	Numeric	
Height	Numeric	
Sheet Count	Numeric	
Name	Alphanumeric	
Width	Numeric	
Height	Numeric	
Sheet Count	Numeric	
Name	Alphanumeric	
Width	Numeric	
Height	Numeric	
Sheet Count	Numeric	

Stocks Setup Worksheet

Red properties are required, **Black** properties are optional.

Property	Data Type	Minimum	Maximum Metrix Base	Your Entry
Vendor	Alphanumeric	1	90	
Name	Alphanumeric	1	90	
Weight	Numeric	1	1000	

Weight Unit	Selection	Not applicable	Not applicable	lb gsm
Thickness	Numeric	.01016mm .0004"	12.7mm .5"	
Grade	Selection	Not applicable	Not applicable	**1** – Gloss–Coated Paper **2** – Matte–Coated Paper **3** – Gloss–Coated, Web Paper **4** – Uncoated, White Paper **5** – Uncoated, Yellowish Paper
Drying Time Multiplier	Numeric	0	999,999	
Basis Weight	Selection	Not applicable	Not applicable	Select from list of defined Basis Weights
Type	Selection	Not applicable	Not applicable	Sheet Roll
Height (Not Applicable for Roll)	Numeric	76.2mm 3"	25 m 984"	
Width	Numeric	76.2mm 3"	25 m 984"	
Grain	Selection	Not applicable	Not applicable	Horizontal Grain Vertical Grain
Cost/Thousand (Cost/Linear Foot or Meter for Roll)	Numeric	0	99,999,999	

Sheet Sizes Setup Worksheet

Red properties are required. **Black** properties are optional.

| **Note** Output/copy this section for each Stock.

Stock Name

Property	Data Type	Minimum	Maximum Metrix Base	Your Entry
Type	Selection	Not applicable	Not applicable	Sheet Roll
Height	Numeric	76.2mm 144"	25 m 984"	
Width	Numeric	76.2mm 3"	25 m 984"	
Grain	Selection	Not applicable	Not applicable	Long Short
Cost/Thousand	Numeric	0	99,999,99	
Type	Selection	Not applicable	Not applicable	Sheet Roll
Height	Numeric	76.2mm 3"	25 m 984"	
Width	Numeric	76.2mm 3"	25 m 984"	
Grain	Selection	Not applicable	Not applicable	Long Short
Cost/Thousand	Numeric	0	99,999,999	

Type	Selection	Not applicable	Not applicable	Sheet	Roll
Height	Numeric	76.2mm 3"	25 m 984"		
Width	Numeric	76.2mm 3"	25 m 984"		
Grain	Selection	Not applicable	Not applicable	Long	Short
Cost/Thousand	Numeric	0	99,999,999		
Type	Selection	Not applicable	Not applicable	Sheet	Roll
Height	Numeric	76.2mm 3"	25 m 984"		
Width	Numeric	76.2mm 3"	25 m 984"		
Grain	Selection	Not applicable	Not applicable	Long	Short
Cost/Thousand	Numeric	0	99,999,999		
Type	Selection	Not applicable	Not applicable	Sheet	Roll
Height	Numeric	76.2mm 3"	25 m 984"		
Width	Numeric	76.2mm 3"	25 m 984"		
Grain	Selection	Not applicable	Not applicable	Long	Short
Cost/Thousand	Numeric	0	99,999,999		
Type	Selection	Not applicable	Not applicable	Sheet	Roll
Height	Numeric	76.2mm 3"	25 m 984"		
Width	Numeric	76.2mm 3"	3657.6mm 144"		
Grain	Selection	Not applicable	Not applicable	Long	Short
Cost/Thousand	Numeric	0	99,999,999		
Type	Selection	Not applicable	Not applicable	Sheet	Roll
Height	Numeric	76.2mm 3"	25 m 984"		
Width	Numeric	76.2mm 3"	25 m 984"		
Grain	Selection	Not applicable	Not applicable	Long	Short
Cost/Thousand	Numeric	0	99,999,999		
Type	Selection	Not applicable	Not applicable	Sheet	Roll
Height	Numeric	76.2mm 3"	25 m 984"		
Width	Numeric	76.2mm 3"	25 m 984"		
Grain	Selection	Not applicable	Not applicable	Long	Short
Cost/Thousand	Numeric	0	99,999,999		
Type	Selection	Not applicable	Not applicable	Sheet	Roll
Height	Numeric	76.2mm 3"	25 m 984"		

Width	Numeric	762.2mm 3"	25 m 984"		
Grain	Selection	Not applicable	Not applicable	Long	Short
Cost/Thousand	Numeric	0	99,999,999		
Type	Selection	Not applicable	Not applicable	Sheet	Roll
Height	Numeric	76.2mm 3"	25 m 984"		
Width	Numeric	76.2mm 3"	25 m 984"		
Grain	Selection	Not applicable	Not applicable	Long	Short
Cost/Thousand	Numeric	0	99,999,999		
Type	Selection	Not applicable	Not applicable	Sheet	Roll
Height	Numeric	76.2mm 3"	25 m 984"		
Width	Numeric	76.2mm 3"	25 m 984"		
Grain	Selection	Not applicable	Not applicable	Long	Short
Cost/Thousand	Numeric	0	99,999,999		

Customer Setup Worksheet

Red properties are required, **Black** properties are optional.

Property	Data Type	Min.	Max.	Your Entry
Company Name	Alphanumeric	1	250	
MIS ID	Alphanumeric	none	250	
Web Address	Alphanumeric	none	250	
Street	Alphanumeric	none	250	
Post Box	Alphanumeric	none	250	
City	Alphanumeric	none	250	
Region	Alphanumeric	none	250	
Postal Code	Alphanumeric	none	250	
Country Code	Alphanumeric	none	250	
First Name	Alpha	1	90	
Family Name	Alpha	1	90	
Job Title	Alphanumeric	none	250	
Phone	Alphanumeric	none	250	
Fax	Alphanumeric	none	250	
Email	Alphanumeric	none	250	
Sales Rep	Alphanumeric	none	250	

Contacts Setup Worksheet

Red properties are required, **Black** properties are optional.

Property	Data Type	Min.	Max.	Your Entry
First Name	Alpha	1	90	
Family Name	Alpha	1	90	
Job Title	Alphanumeric	none	250	
Phone	Alphanumeric	none	250	
Fax	Alphanumeric	none	250	
Email	Alphanumeric	none	250	
Sales Rep	Alphanumeric	none	250	
First Name	Alphanumeric	1	90	
Family Name	Alphanumeric	1	250	
Job Title	Alphanumeric	none	250	
Phone	Alphanumeric	none	250	
Fax	Alphanumeric	none	250	
Email	Alphanumeric	none	250	
Sales Rep	Alphanumeric	none	250	
First Name	Alphanumeric	1	90	
Family Name	Alphanumeric	1	90	
Job Title	Alphanumeric	none	250	
Phone	Alphanumeric	none	250	
Fax	Alphanumeric	none	250	
Email	Alphanumeric	none	250	
Sales Rep	Alphanumeric	none	250	

Inks Setup Worksheet

Red properties are required, **Black** are optional.

Property	Data Type	Min.	Max.	Your Entry					
Name	Alphanumeric	1	250						
Type	Selection	-	-	Spot Color	Varnish	Cyan	Magenta	Yellow	Black
CMYK Representation	Numeric	-	-	Cyan= Magenta= Yellow= Black=					
Name	Alphanumeric	1	250						
Type	Selection	-	-	Spot Color	Varnish	Cyan	Magenta	Yellow	Black
CMYK Representation	Numeric	-	-	Cyan= Magenta= Yellow= Black=					
Name	Alphanumeric	1	250						
Type	Selection	-	-	Spot Color	Varnish	Cyan	Magenta	Yellow	Black
CMYK	Numeric	-	-	Cyan=					

Representation				Magenta= Yellow= Black=
Name	Alphanumeric	1	250	
Type	Selection	-	-	Spot Color Varnish Cyan Magenta Yellow Black
CMYK Representation	Numeric	-	-	Cyan= Magenta= Yellow= Black=
Name	Alphanumeric	1	250	
Type	Selection	-	-	Spot Color Varnish Cyan Magenta Yellow Black
CMYK Representation	Numeric	-	-	Cyan= Magenta= Yellow= Black=
Name	Alphanumeric	1	250	
Type	Selection	-	-	Spot Color Varnish Cyan Magenta Yellow Black
CMYK Representation	Numeric	-	-	Cyan= Magenta= Yellow= Black=

Rampage Workflows Setup Worksheet

Red properties are required. **Black** properties are optional.

Property	Data Type	Your Entry	
Rampage Workflow	Alphanumeric		
Type	Selection	Page	Sheet Side
Rampage Workflow	Alphanumeric		
Type	Selection	Page	Sheet Side
Rampage Workflow	Alphanumeric		
Type	Selection	Page	Sheet Side
Rampage Workflow	Alphanumeric		
Type	Selection	Page	Sheet Side
Rampage Workflow	Alphanumeric		
Type	Selection	Page	Sheet Side
Rampage Workflow	Alphanumeric		
Type	Selection	Page	Sheet Side
Rampage Workflow	Alphanumeric		
Type	Selection	Page	Sheet Side
Rampage Workflow	Alphanumeric		
Type	Selection	Page	Sheet Side
Rampage Workflow	Alphanumeric		
Type	Selection	Page	Sheet Side

Rampage Workflow	Alphanumeric		
Type	Selection	Page	Sheet Side
Rampage Workflow	Alphanumeric		
Type	Selection	Page	Sheet Side

Rampage Job Template Setup Worksheet

Red properties are required. **Black** properties are optional.

Property	Data Type	Your Entry
Rampage Job Template Name	Alphanumeric	
Description	Alphanumeric	
Rampage Job Template Name	Alphanumeric	
Description	Alphanumeric	
Rampage Job Template Name	Alphanumeric	
Description	Alphanumeric	
Rampage Job Template Name	Alphanumeric	
Description	Alphanumeric	
Rampage Job Template Name	Alphanumeric	
Description	Alphanumeric	
Rampage Job Template Name	Alphanumeric	
Description	Alphanumeric	
Rampage Job Template Name	Alphanumeric	
Description	Alphanumeric	
Rampage Job Template Name	Alphanumeric	
Description	Alphanumeric	
Rampage Job Template Name	Alphanumeric	
Description	Alphanumeric	
Rampage Job Template Name	Alphanumeric	
Description	Alphanumeric	
Rampage Job Template Name	Alphanumeric	
Description	Alphanumeric	

Automation Setup Worksheet

Red entries are required. **Black** entries are optional.

	Data Type	Description	Your Entry

Database Users Setup

Automation requires a valid email address for the Administrator and Senior Planner users

User Name	Alphanumeric	Your chosen Metrix user name.	
Password	Alphanumeric	The email address of the Administrator user for this site. Emails will be sent to this address. One is sent as a test when Metrix Server starts. Multiple addresses can be entered, separated with a comma. e.g. planners@ourplace.com e.g. planners@ourplace.com, bigboss@here.com	
Role	Alphanumeric	Your role type	
Email	Alphanumeric	Your email address.	

User Preferences Automation Setup
Automation requires a valid SMTP account

SMTP Host	Alphanumeric	This will be site specific e.g. smtp.comcast.com	
SMTP Port	Numeric	Your SMTP Port number	
SMTP Account	Alphanumeric	Your account login	
Password	Alphanumeric	Your SMTP account password	
Email From Address	Alphanumeric	The email address that you wish to display in emails that Metrix sends out	