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 Productivity Suite | User Guide

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## Introduction

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 ePS 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 four 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

<b>Web Site:</b>	<a href="https://communities.efi.com">communities.efi.com</a>
<b>US Phone:</b>	1.855.EFI.4HLP (1.855.334.4457)
<b>UK Phone:</b>	+44 (0) 800.783.2737
<b>EU Phone:</b>	+49.2102.745.4500
<b>E-Mail:</b>	<a href="mailto:metrix.support@efi.com">metrix.support@efi.com</a>

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](https://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.

### ePS Professional Services

<b>US Phone:</b>	651.365.5321
<b>US Fax:</b>	651.365.5334
<b>E-Mail:</b>	<a href="mailto:ProfessionalServicesOperations@efi.com">ProfessionalServicesOperations@efi.com</a>

**Note** 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.

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## **Metrix Options and Login**

## Metrix 22.1

### Metrix optional modules

- Auto Plan
- Capacity Plus
- N-Up Binding
- Automation Pro
- Automation Lite
- Irregular Shapes

### Metrix key features

- Maximum sheet dimension- (W x H): 984.25" (25,000 mm)
- Maximum products handled by Auto Layout: 16
- Maximum products per project: 100

Feature	Included or Optional
Plans/imposes flat, folded, and bound jobs	Included
Automatically determines the most cost-effective Production Method, Press, and Sheet-Size (Auto-Production)	Included
Automatically matches new layouts to saved profiles (Standards)	Included
User Permissions, Logins, and Passwords	Included
Handles chop cuts automatically (Auto Bleed)	Included
Print reports	Included
Imports JDF	Included
Imports Metrix XML and CSV data	Included
Exports Imposed PDF	Included
Exports Metrix XML	Included
Exports JDF Imposition / JDF Stripping	Included
Exports JDF/CIP3 Cutting data	Included
Exports JDF/CIP3 Folding data	Included
Exports JDF Binding data	Included
Site Licenses available	Included
Super Wide Format	Included
Barcodes module	Included

Display Graphics module	Included
Content Previews module	Included
Auto Plan module	Optional
Capacity Plus module	Optional
N-Up Binding module	Optional
Automation Pro module	Optional
Automation Lite module	Optional
Irregular Shapes module	Optional

## Optional Modules

### Auto Plan Module

- Automatically and dynamically determines how many layouts are required for the products in the project
- Plans and simultaneously imposes across multiple press sheets and even multiple presses
- Uses real costing data from the Metrix database
- Applies standards where appropriate
- Uses proprietary and sophisticated algorithms to consider dozens, hundreds, or even thousands of options to find the most cost-effective project solution

### Capacity Plus Module

- Allows for projects of greater complexity – more products for Auto Layout and Auto Production calculations, and more products per project
- Up to 2000 products allowed per project, regardless of the number of press sheets
- Up to 200 products allowed for Auto Production and Auto Layout calculations

### N-Up Binding Module

- The N-Up Binding module automates the setup of products that print, fold, and bind 2- or 3-up on a press sheet.
- Allows for the n-up folding of some signatures in a bound product, even allowing you to fold together 2 or 3 signatures from different bound products.
- Customers who need this functionality normally own finishing equipment that can accommodate 2- or 3-up binding, such as a book saw or specialized knife-trimmer.
- This module provides instant visual feedback on how the project will fit on a press sheet with the new manufacturing configuration.
- The Metrix N-Up Binding module is easy to work with – even editing the options is easy.
- Metrix takes care of all the details like shingling/creep compensation automatically.

## Automation Pro or Automation Lite Module

- Automation Pro (or Lite) is an advanced, hot-folder driven module for Metrix which accepts MXML files and fully automates their processing in Metrix.
- MXML files arrive in the Automation hot folder, a Metrix project is created, settings are applied, tasks are performed and output (JDF, PDF, etc.) can be automatically exported.
- Commands can come from one of two places. You can load them from an MXML commands file or you can embed them in incoming MXML project files.
- You only need to select "Automation Mode" from the File menu, and Metrix automatically switches to the Automation user interface.
- Many projects can now travel through Metrix with zero operator involvement.

## Differences between Automation Pro and Automation Lite

The Automation Lite module is similar to the Automation Pro module, but with two differences.

1. Automation Lite does not allow you to embed scripting commands in incoming MXML files
2. There is no requirement to maintain an MSA.

## Irregular Shapes Module

- Metrix supports irregular shape products, nesting them to maximize sheet usage. Multiple Contour Lines can be defined for cut, crease, perforation, etc.
- Die-cutting tools and multi-up die standards use the geometry of customer-supplied multi-up dies.
- Plans projects that contain a mix of irregular shape and other types of products.

**Notes** Metrix plans die-cut products to a separate layout from other types of products.

If the Irregular Shape products contains a rotated PDF, then an error message will appear because Irregular Shape products may not correctly render rotated PDFs.

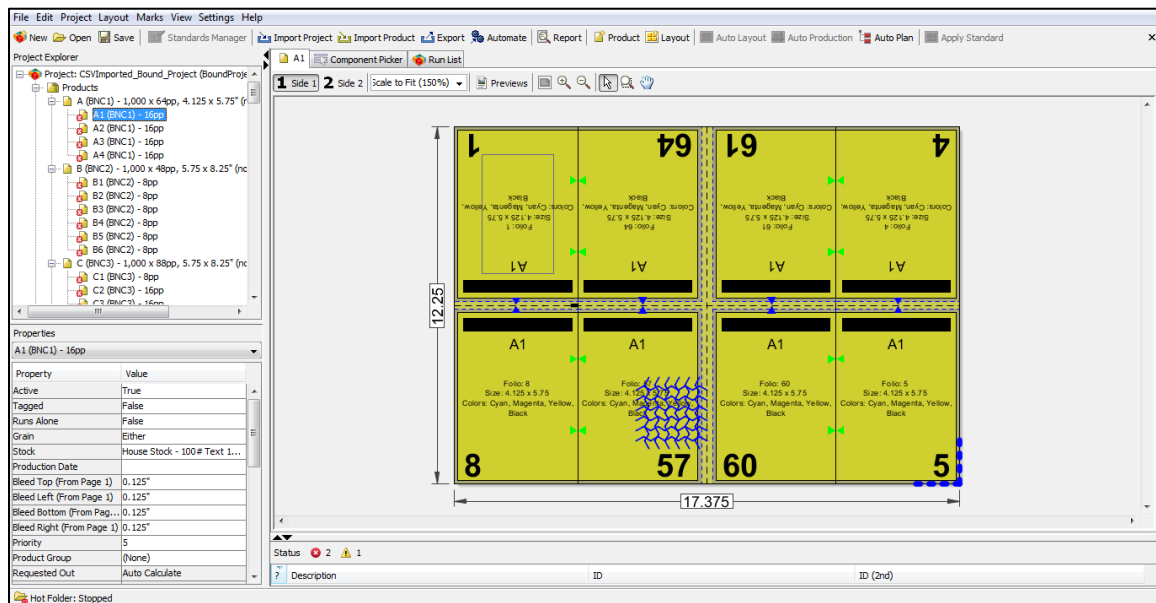
## Platforms

Features and functionality of Metrix on Windows and Mac are identical. However, the appearance of user interface elements may vary. Keystroke differences, where they exist, are noted.

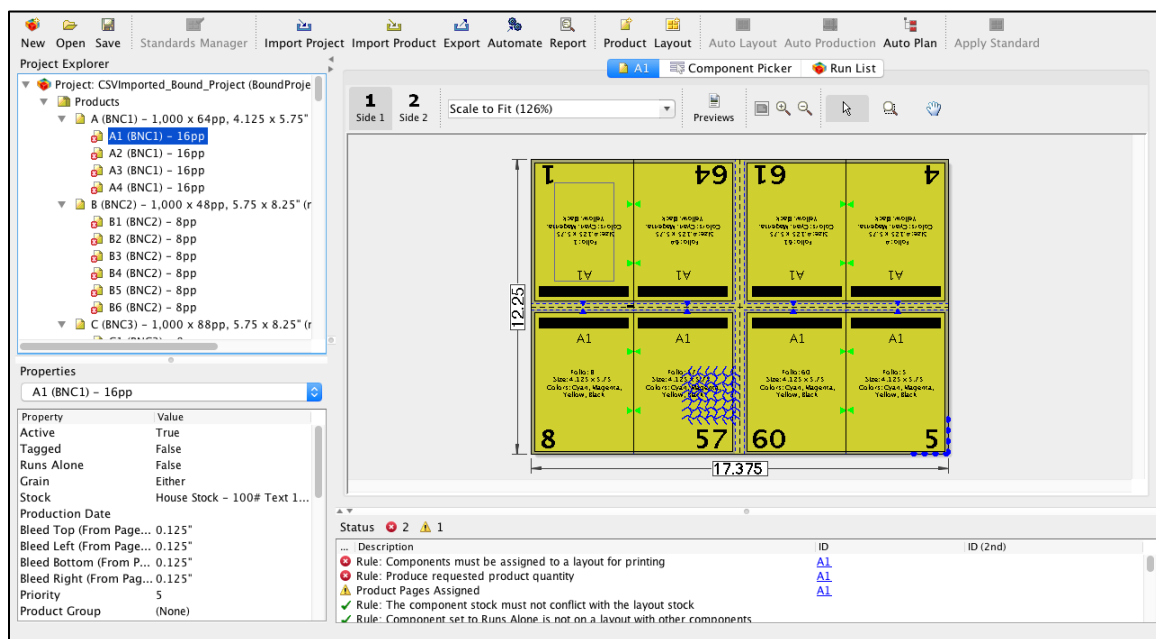
**Note** This document uses screenshots from Mac and Windows user interfaces.

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## Windows Interface



## Mac Interface



## Installing and Configuring Metrix Software

For detailed information on installing and configuring Metrix, see *ePS Metrix 22.1 Installation Guide*. For information on Metrix eFlow Licensing, see *ePS Metrix 22.1 Installation Guide*.

## Logging in to Metrix

When you start Metrix, you will see a Login window.

1. If you already have a user name and password, select your name and type your password.

- If you are starting Metrix for the first time, or if you do not have a personal user role, assigned by an Administrator, select one of the following default logins:

Login	Password
Administrator	a
Guest	guest
Senior	senior
Junior	junior

- Note** See the *Metrix Setup Guide* for information on how to set up users and user roles.
- Click **OK** to launch Metrix.

## Auto Login

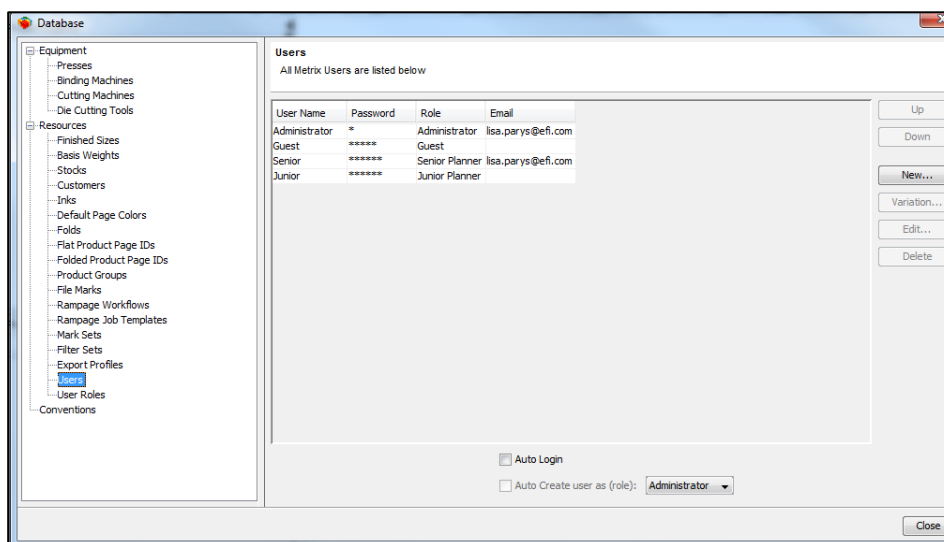
Metrix 22.1 allows you to set up Auto Login to automatically log in using your system user name without requiring a password. (Previous versions required entry of **User Name** and **Password** on each login.)

### To set up Auto Login

- Select **Settings > Database > Users**.
- Click **Auto Login**.

**Note** If your system user name already exists in the Database window, the next time you start Metrix you will be automatically logged in. If your user name does not exist in the Database window, 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.

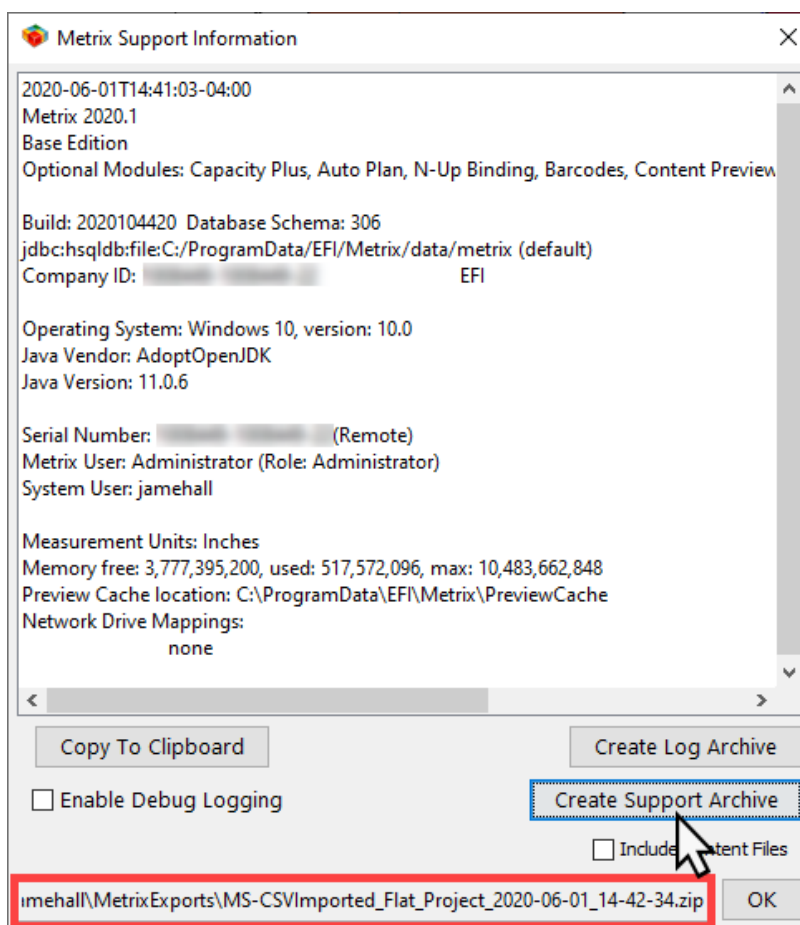
## Support Archive

Metrix allows users to export a “support archive” zip file that contains the open project, marks, mark sets, content files, the database resources and equipment, **metrix.properties** file, **Metrix 2022.1.Properties** file, and the log

files from the last 48 hours. This helps Metrix Support diagnose problems without requiring users to send their entire database.

## To export a Support Archive

1. Open the appropriate project.
2. Select **Support Information** from the **Help** menu.
3. If you want to include content files, select **Include Content Files**.
4. Click **Create Support Archive** and then click **OK**.



**Note** The support archive is saved in the user's MetrixExports folder: /Users/(username)/MetrixExports (Mac) or C:\Users\username\MetrixExports (Windows).

## To submit a Support Archive to ePS Support

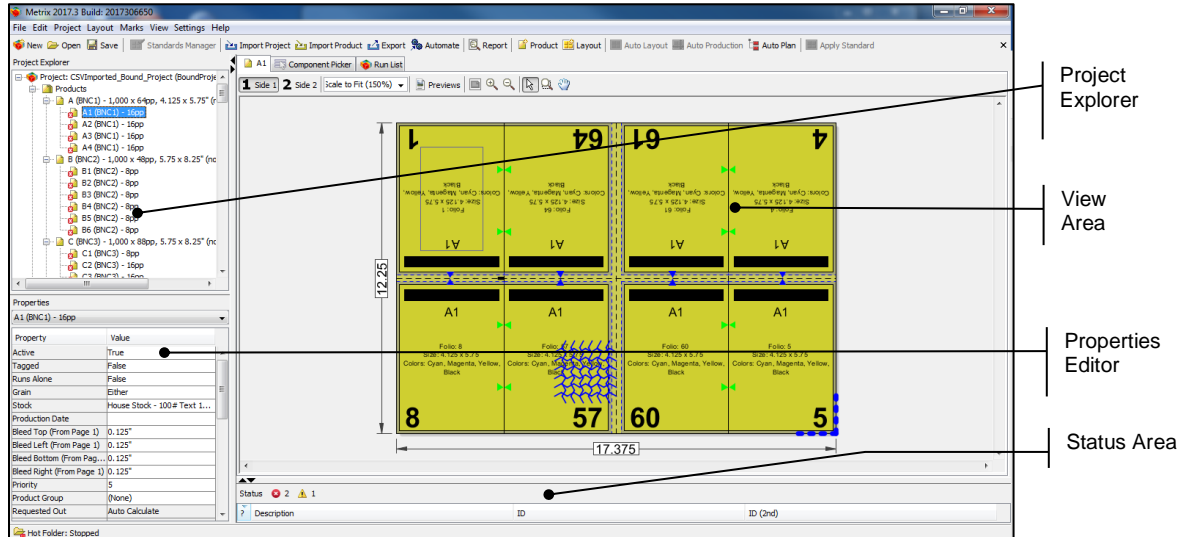
1. Name the archive with the case number and your company name using the format **CaseNumber\_CustomerName.zip**.
2. Contact [Metrix Support](#) and they will give you a location where you can upload your zip file.
3. When the upload is complete, send an email to [metrix.support@efi.com](mailto:metrix.support@efi.com) to let them know you've uploaded your **Support Archive** zip file.

# The Metrix User Interface

## The Metrix User Interface Overview

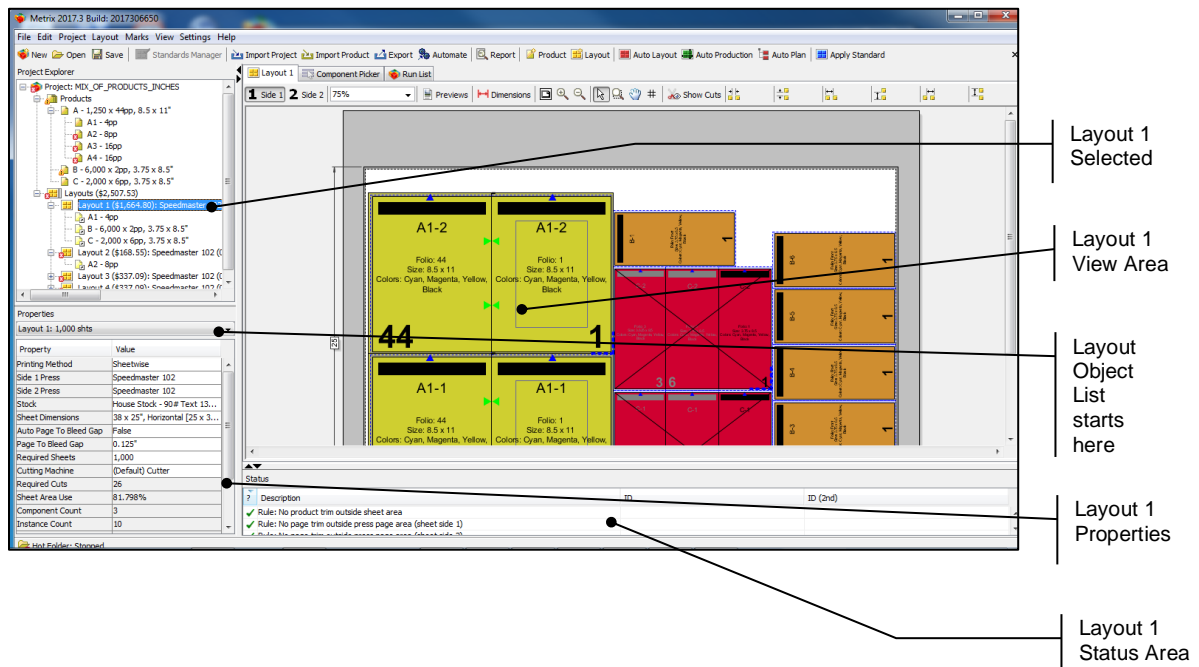
### The Four Metrix User Interface (UI) areas

Use the following illustrations for quick reference.

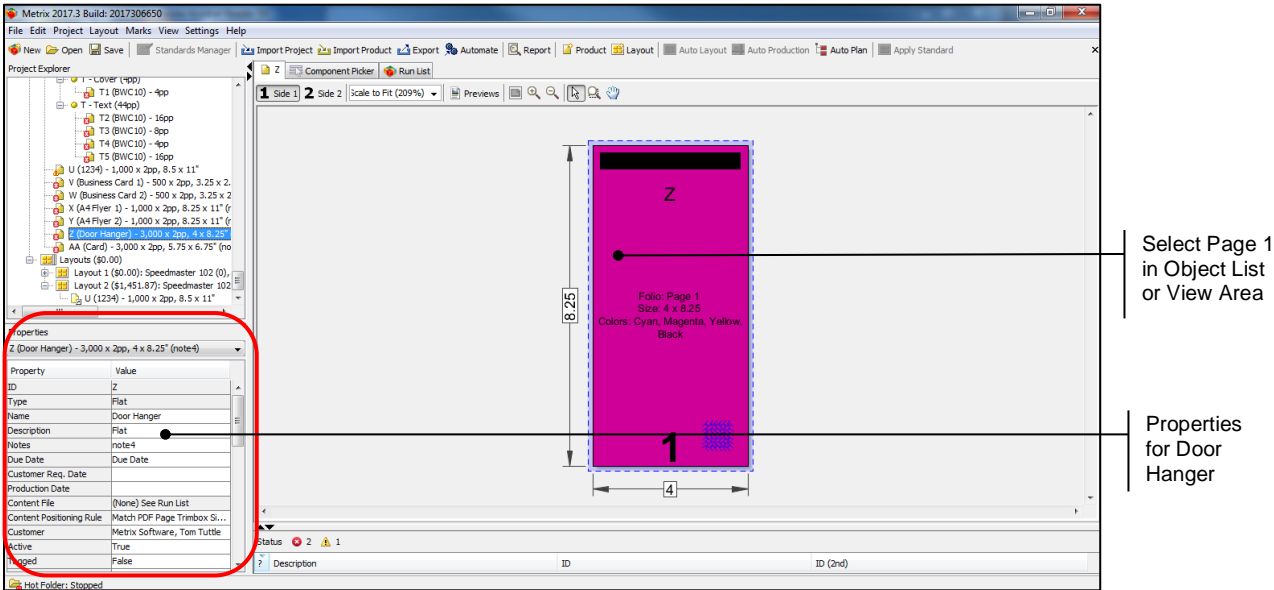


**Note** When you select a layout, there is a property called Press Inspection Zone. You can use the Press Inspection Zone field for specific digital presses; however, they are disabled for presses that do not support this feature.

### Interaction and display of the four UI areas

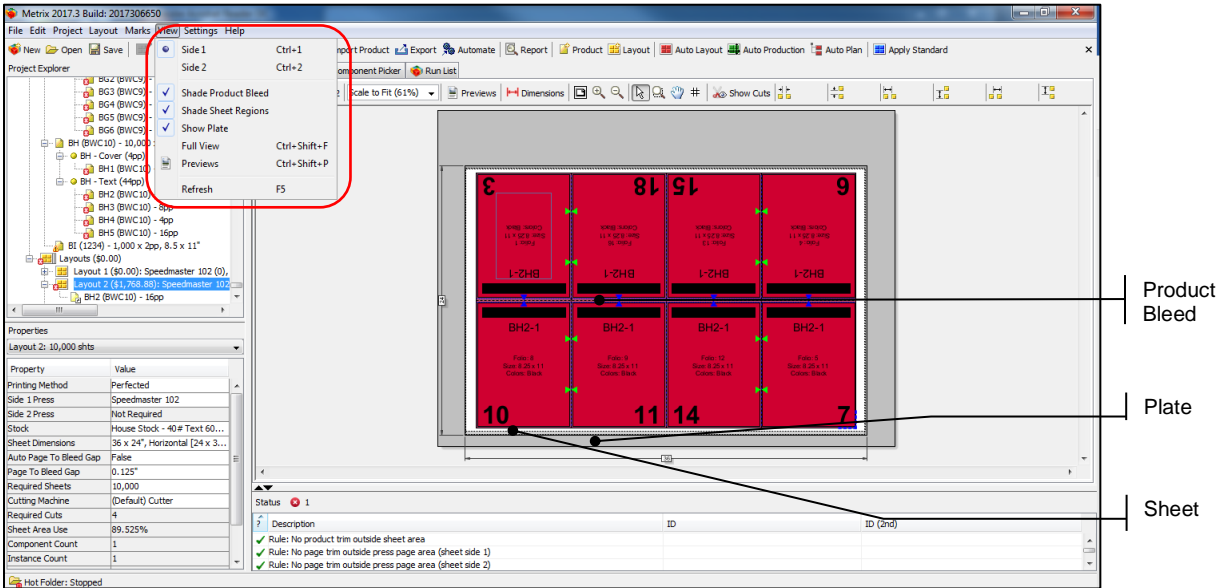


## The View Area and the Object List

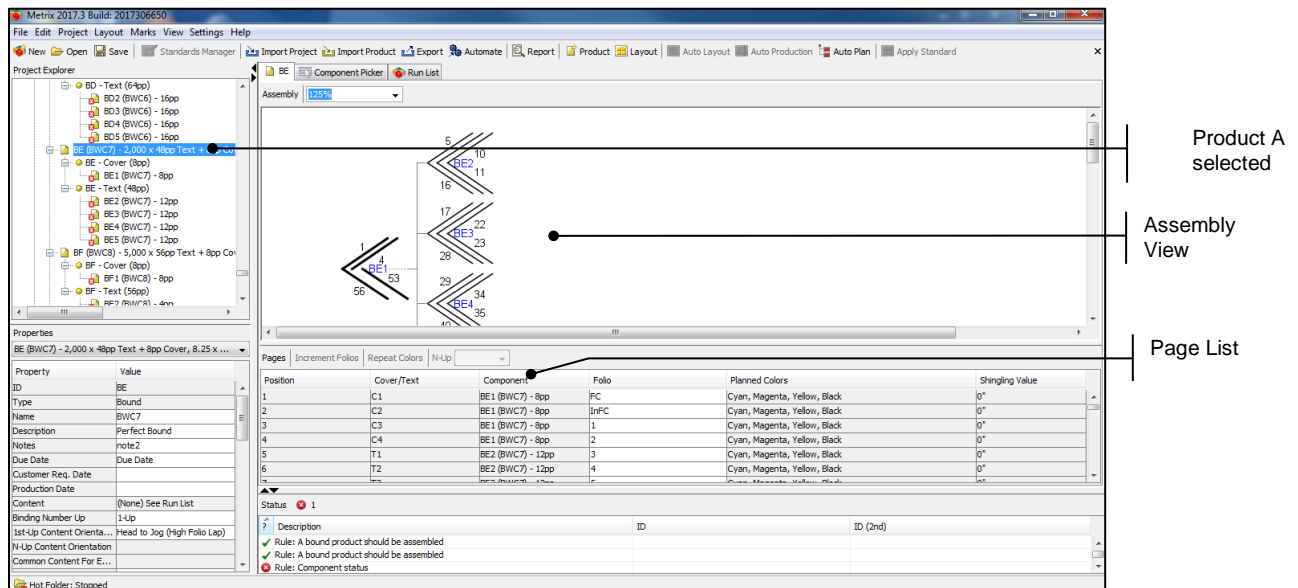


## The View menu

You can alter the view according to your preferences by selecting **View** on the Metrix menu. The following options are then available.



## The Assembly View – Bound Products only



## The Status Area – Explanation of symbols

As shown above, the Status Area is open at the bottom of most windows. You will see the following symbols there. This is what they indicate.

- ✓ = The rule has been satisfied.
- ⚠ = The rule has been violated and caution is advised. This warning will appear, for example, when Allow Nesting is activated.
- ✖ = The rule has been violated and corrective action may be required.

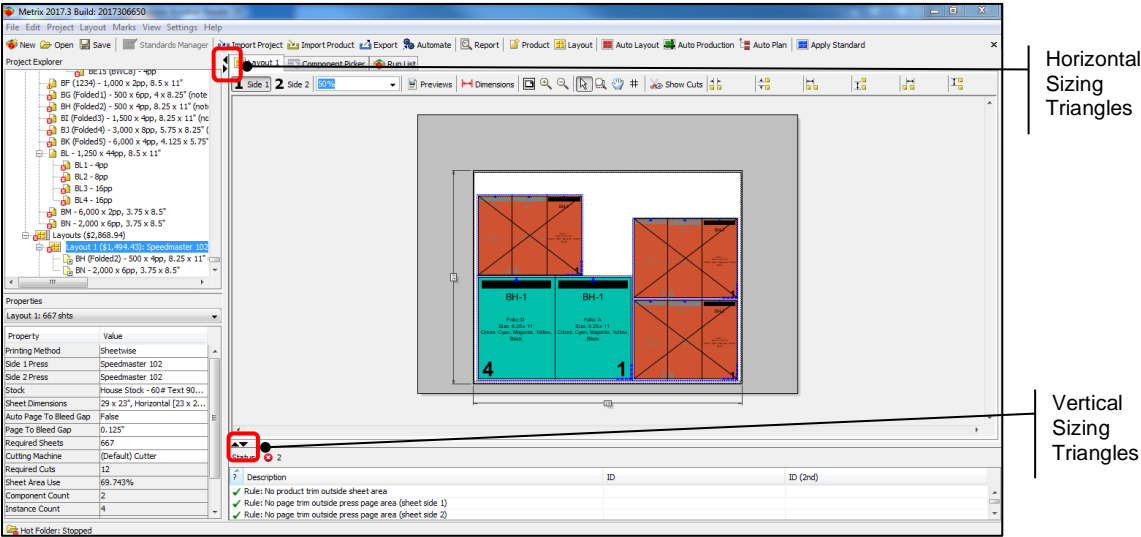
**Important** Metrix will prohibit exporting when rules are violated, unless the option to “Allow Export with Errors” is set to **True** in the User Roles in the Database. For more information, see [Exporting with Errors](#).

## Enlarging the View Area to full-window size

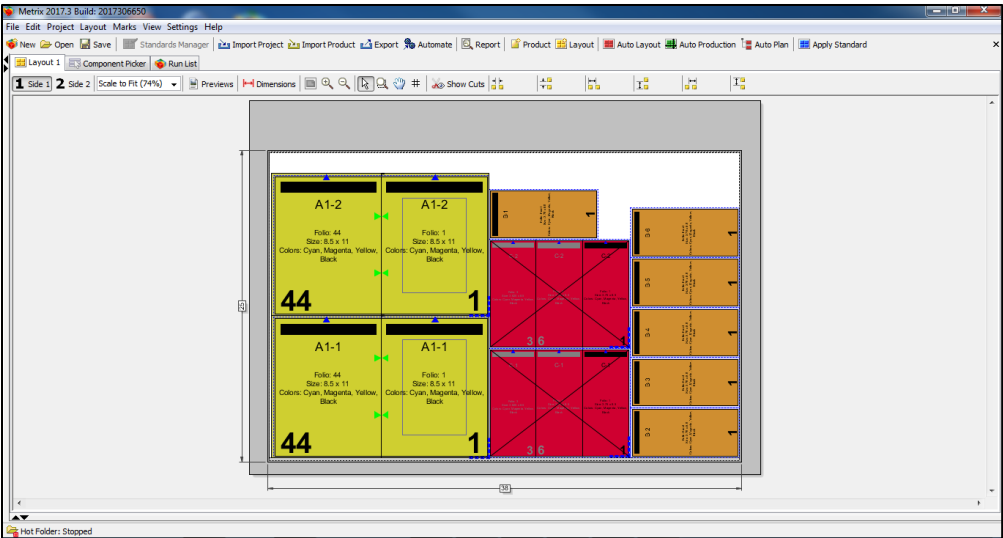
You can expand the View Area of the Metrix window to full-window size—horizontally, vertically, or both. The “full-window” is relative to the Metrix window, and not the full screen of the computer.

You can click the small triangles at the upper and lower left-hand corners of the View Area to enlarge or shrink the size of the View Area.

The following is an illustration of the View Area at normal size, with the triangles identified.


















The following is an example of the same View Area, but with the Area expanded both horizontally and vertically. To achieve this, click **View > Full View**. To cancel **Full View**, unselect the checkbox from the same menu.



**Note** You can use the triangles to re-size the View Area horizontally or vertically, or you can toggle between the normal size and the expanded size (both horizontally and vertically) with **CTRL-SHIFT-F** on Windows, or **CMD-SHIFT-F** on Mac.















## The Metrix Toolbar





Button	Functionality	Menu Path
	Creates a new project and opens it for editing.	<b>File &gt; New Project</b>
	Opens the database of existing projects. Also used to delete existing projects.	<b>File &gt; Open Project</b>
	Saves the current project.	<b>File &gt; Save Project &gt;and File &gt;Save Project As...</b>

 Standards Manager	Opens the Standards Manager window, where you can open, duplicate, edit, save, or delete standards.	<b>File &gt; Standards Manager</b>
 Import Project	Opens a navigation window for selection of a JDF, MXML, or CSV project.	<b>File &gt; Import JDF/MXML Project...</b>
 Import Product	Opens a navigation window for selection of a JDF, MXML, or CSV file containing one or more products.	<b>File &gt; Import JDF/MXML/CSV Product</b>
 Export	Opens the Export window. Export data types depend on the Metrix edition purchased.	<b>File &gt; Export...</b>
 Automate	Opens the Send Product to Metrix Automation window. Gives the operator access to all Automation Workflows currently available on the network.	<b>File &gt; Automate...</b>
 Report	Opens a Report window for viewing and printing of the Metrix report. The report shows many details of the current project.	<b>File &gt; Preview Project Report...</b>
 Product	Accesses the New Product Wizard to create a new product in the current project.	<b>Project &gt; Add New Product...</b>
 Layout	Accesses the New Layout Wizard to create a new layout in the current project.	<b>Project &gt; Add New Layout...</b>
 Auto Layout	For the selected layout, calculates the optimum positioning and number of instances needed to produce the required quantity of each product.	<b>Layout &gt; Automatic Layout</b>
 Auto Production	For the selected layout, calculates the Printing Method, Press, and Sheet Size, as well as the optimum positioning and number of instances needed to produce the required quantity of each product.	<b>Layout &gt; Automatic Production Method...</b>
 Auto Plan	Calculates and creates the number of layouts required for all products and product components, the assignment of components to the layouts, and for each layout calculates the optimum positioning and number of instances needed to produce the required quantity of each product.	<b>Project &gt; Automatic Production Plan...</b>
 Apply Standard	Applies the standard previously saved for this type of layout, when Metrix finds a match to certain properties.	<b>Layout &gt; Apply Standard</b>

**Note** Auto Plan is an optional module for Metrix.

## The Layout Toolbar

Button/Tab	Functionality	Menu path, if any
 Layout 1	Indicates which layout is selected and is being displayed in the Layout View window	none
 Component Picker	Opens the Component Picker window for sorting, selecting, editing, and saving components.	none
<b>1</b> Side 1	When highlighted, indicates that side 1 of the layout is displayed in the layout window.	<b>View &gt; Side 1</b>
<b>2</b> Side 2	When highlighted, indicates that side 2 of the layout is displayed in the layout window.	<b>View &gt; Side 2</b>
 Scale to Fit (63%) ▼	The Scale menu allows you to select a percentage size at which to display the layout, or to type in a custom size. Selecting <b>Scale to Fit</b> scales the layout to fit the Layout View window.	none
 Previews	Displays the assigned PDF content for the products. Toggles between <b>Previews</b> and regular layout view.	<b>View &gt; Previews</b>
 Dimensions	Opens the Dimensions window.	<b>Marks &gt; Dimensions</b>
	Scales the layout to fit in the Layout View window. Will be unavailable if the layout is already scaled to fit.	<b>Layout Toolbar &gt; Scale Menu &gt; Scale to Fit</b>
	Zooms in on the layout, making the layout image larger, showing less of the image, but in greater detail.	none
	Zooms out from the layout, making the layout image smaller, showing more of the image, but in lesser detail.	none
	Returns the cursor to the regular arrow shape for use as a selection tool.	none
	Changes the cursor to a Marquee Tool magnifying glass. Click and drag to select an area of the layout to expand to the full size of the layout window.	none
	Turns the cursor into a grab hand cursor for dragging the layout in the Layout View window.	none
 Show Cuts	Clicking this icon toggles the cut lines in a layout on and off.	none
	The horizontal gutter amount, from trim edge to trim edge. If the components overlap horizontally, the distance will appear as a negative number.	none
	The vertical gutter amount, from trim edge to trim edge. If the components overlap vertically, the distance will appear as a negative number.	none

	The distance from left trim edge to left trim edge. When you select two components, the distance between the left trim edges of the two components will appear to the right of the icon.	none
	The distance from bottom trim edge to bottom trim edge. When you select two components, the distance between the bottom trim edges of the two components will appear to the right of the icon.	none
	The distance from right trim edge to right trim edge. When you select two components, the distance between the right trim edges of the two components will appear to the right of the icon.	none
	The distance from top trim edge to top trim edge. When you select two components, the distance between the top trim edges of the two components will appear to the right of the icon.	none

## Locating Layouts and Components

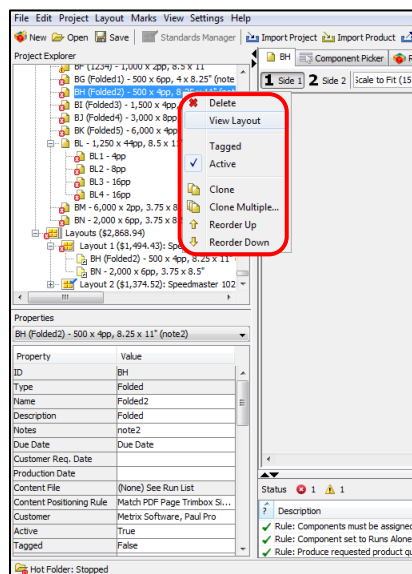
Finding the layout that a component has been assigned to can sometimes be difficult for those who perform a lot of manual layout manipulation. This is especially true when there are multiple products and layouts.

**Note** For more refined location, filtering, and editing of components in a project, please see [Component Picker](#).

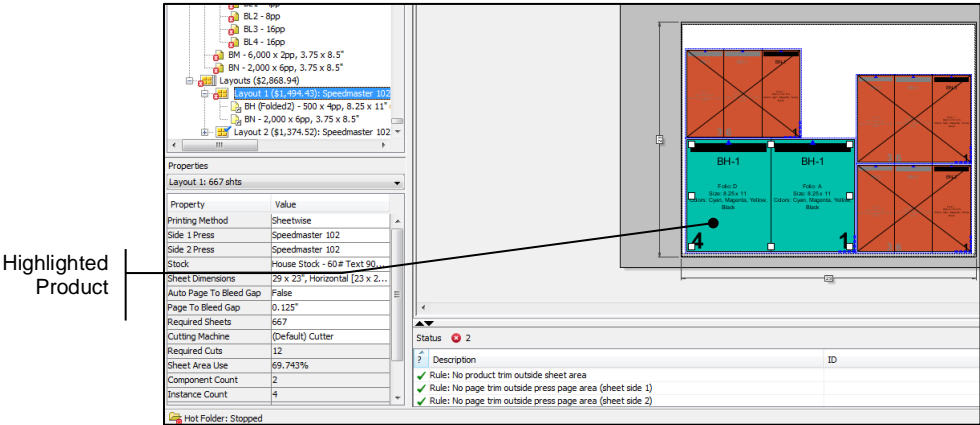
### Locating the layout for a component

To find the component's assigned layout:

1. Right-click the component (**CTRL-click** on Mac) and select **View Layout**.



The layout is now highlighted, and the component is selected on the layout in the View Area.

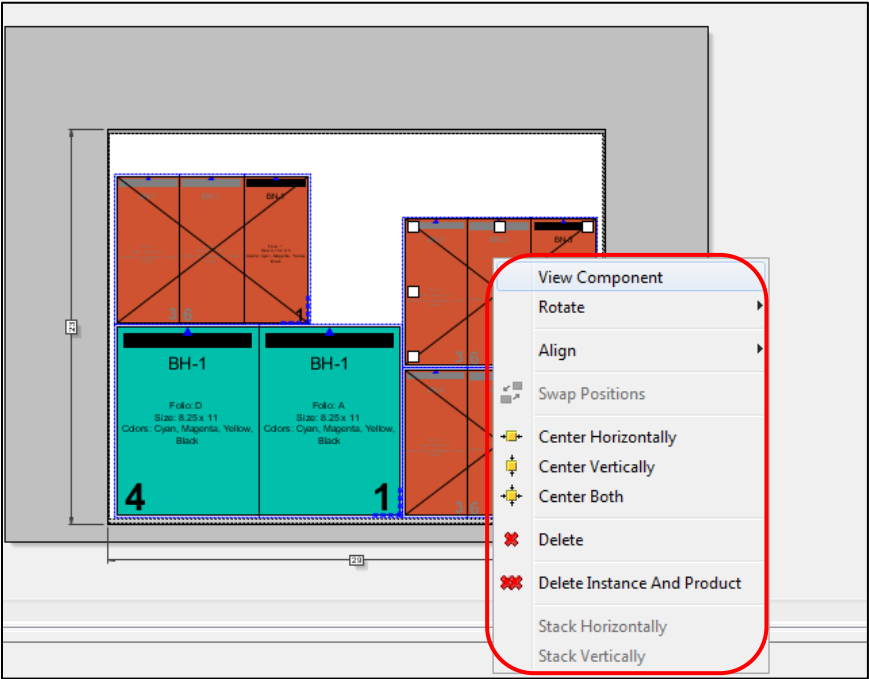


## Viewing a component from a layout

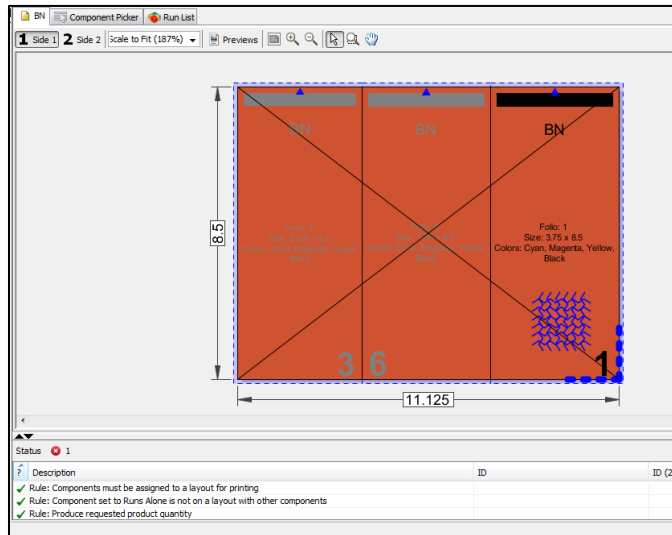
Sometimes the details of a component on a layout can be so small it makes it almost impossible to know which component is selected.

For an effortless way to view a component from a layout:

1. Select the component on the layout, then right-click the component (**CTRL-click** on Mac).
2. Select **View Component** from the contextual menu.



The layout with that component will open, and the component is highlighted and displayed in the View Area.



## Using the Marquee Zoom Tool

On the toolbar, you will find three magnifying glass tools used for viewing the Layout window. The magnifying glasses with a plus or minus on them are for zooming in or out on the layout respectively.

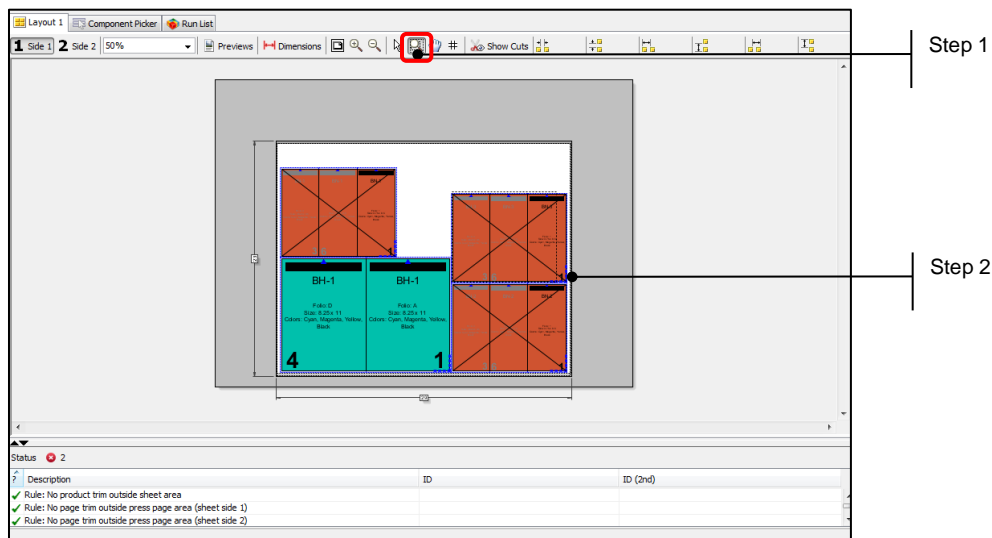
The third tool is a blank magnifying glass with a dotted marquee symbol around it. This is the Marquee Zoom Tool. Clicking this tool and then dragging it around an area in the Layout window allows you to increase the selected area to the size of the Layout window.

Here are some steps that you can try to get familiar with the tool.

1. Click the Marquee Tool icon in the toolbar. Your cursor will turn into the Marquee Tool icon. You can also turn your cursor into the Marquee Zoom Tool temporarily by holding down **CTRL+ALT+SPACEBAR** on Windows, or **CTRL+OPTION+SPACEBAR** on Macintosh.

**Note** Depending on your operating system, the keystrokes may work in some sequences, but not others. Try different sequences until you find one that works in your system.

2. Click and drag around the area you wish to view at a larger size.



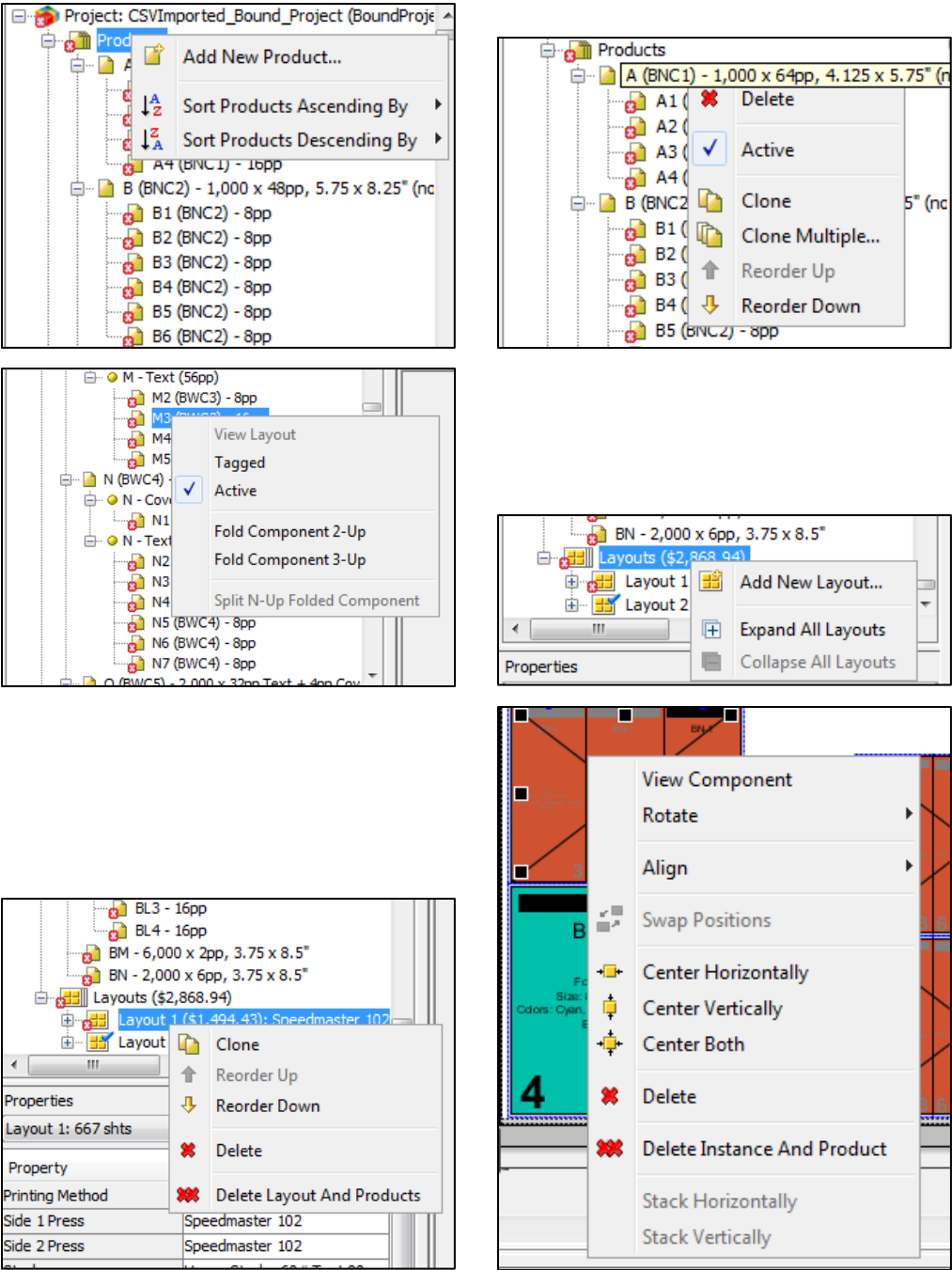
3. Release the mouse button. The selected area displays in the Layout window at a larger size. The size depends on the shape of the selected area.

The selected area displays with either the top and bottom or the left and right sides matching the Layout window, whichever does not cut off any of the image. The rest of the layout displays around the selected image at the appropriate proportional size.

You can switch back to your regular arrow-shaped cursor by clicking the Select icon—the cursor-shaped icon to the left of the Marquee Tool in the toolbar.

## Contextual Menu Shortcuts

Right-click (or **CTRL-click** on the Mac) the item to open a contextual menu. Examples of some contextual menus follow.



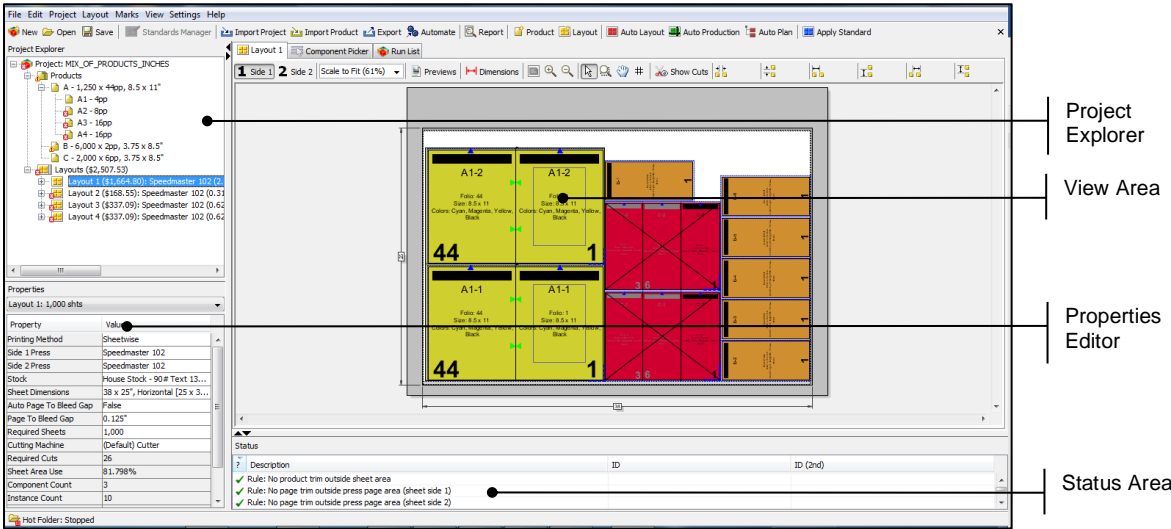
## Metrix Properties

# Metrix Properties Overview

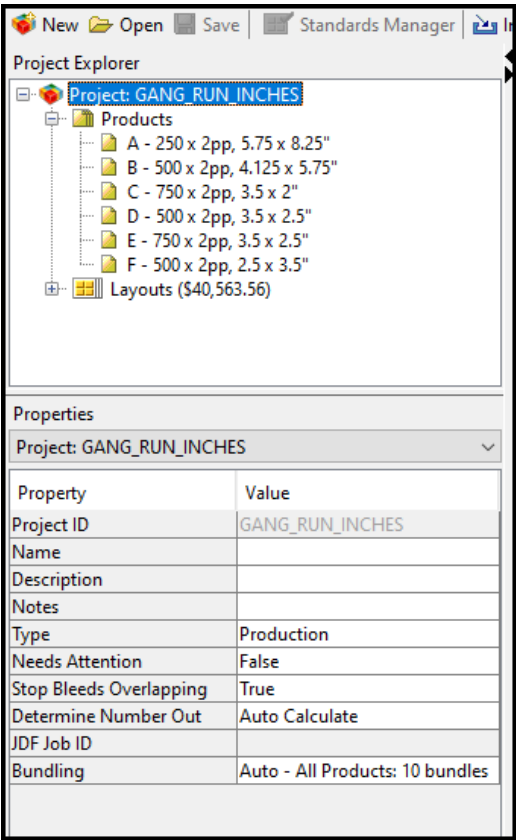
This chapter lists and describes all project, product, component, page, and layout properties.

All Metrix project nodes have editable (white) and non-editable (gray) properties.

Clicking any of the nodes in the Project Explorer displays its properties in the Properties Editor. Clicking any of the product instances within the View Area displays its properties in the Properties Editor.



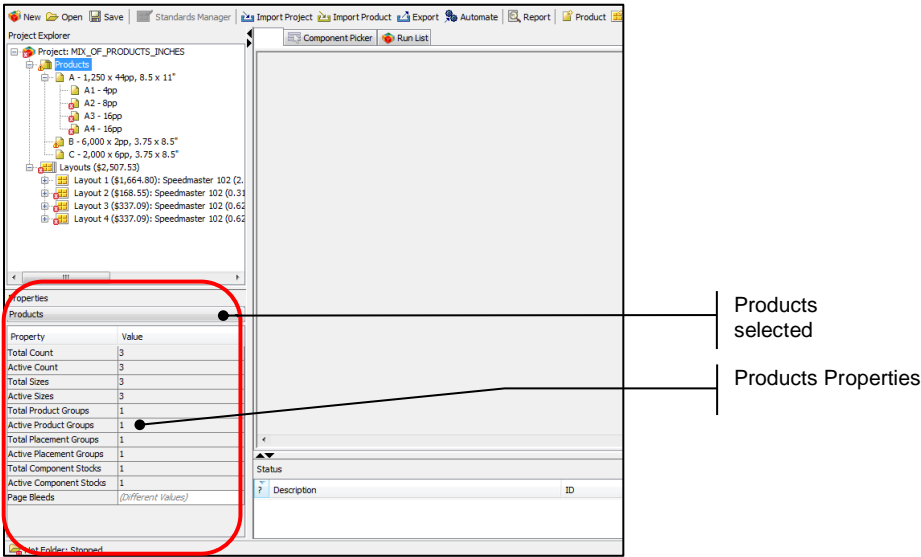
## Project properties



**Project Properties**

Property	Explanation
Project ID	The ID for the project. You can enter it when creating the project or Metrix reads it when importing the project.
Name	Project Name.
Description	Project description.
Notes	Project notes.
Type	<b>Production / Estimate / Template</b> The project's stage of production, or suitability for use as a template. A tag only. You can set the default in User Preferences window.
Needs Attention	<b>True / False</b> The project requires operator intervention. <b>True</b> indicates that a flag is set when projects are processed by Metrix Automation Server.
Rampage Job Template	<b>(None) / Template Name</b> Either no Rampage Template is applied, or the name of the Template to be applied is listed.
Stop Bleeds Overlapping	<b>True / False</b> Automatically clips bleeds on butting product instances when they overlap.
Determine Number Out	<b>Auto-Calculate / User-Define</b> You can set the default for this property in User Preferences window. Auto-Calculate enables Metrix to find the number out of each product based on the required quantity. <b>User-Define</b> enables you to determine the number out for each product.
JDF Job ID	The first JDF ID of the first job imported into Metrix. JDF Job IDs of subsequent imports will not be read.
Bundling	<b>(None) / Bundling Type</b> The type of Bundling applied to the project.

Product properties



Product Properties

Property	Explanation
Total Count	The total number of products in this project.
Active Count	The total number of active products in this project.
Total Sizes	The total number of different product sizes in this project.
Active Sizes	The total number of different sizes of active products in this project.
Total Product Groups	The total number of product groups in this project.
Active Product Groups	The total number of product groups for active products in this project.
Total Placement Groups	The total number of placement groups in this project. A project may contain up to 10 Placement Groups.
Active Placement Groups	The total number of placement groups in this project. A project may contain up to 10 Placement Groups.
Total Component Stocks	The total number of stocks for all the products/components in this project.
Active Component Stocks	The total number of stocks for all the active products/components in this project.
Page Bleeds	The page bleed amounts for all edges of all pages in this project. <i>Empty when the project contains any variation in page bleed amounts. All folded products with bleed will have variations in page bleed amounts</i>

## Bound product properties

The screenshot shows the Metrix software interface. On the left, the Project Explorer lists various products. The Properties panel is highlighted with a red circle, showing fields for ID, Type, Name, Description, Notes, Due Date, Customer Req. Date, Production Date, Content, Binding Number Up, 1st-Up Content Orientation, N-Up Content Orientation, and Content Folder. The Assembly view on the right shows a diagram of a bound product with components B1, B2, and B3. A table below the diagram lists the components and their properties.

Position	Cover/Text	Component
1	C1	B1 (BNC2) - 8pp
2	C2	B1 (BNC2) - 8pp
3	C3	B1 (BNC2) - 8pp
4	C4	B1 (BNC2) - 8pp
5	T1	B2 (BNC2) - 8pp
6	T2	B2 (BNC2) - 8pp

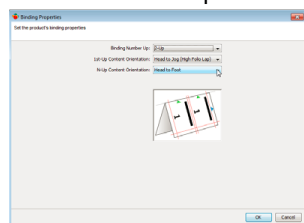
Type of product selected

Product properties

## Bound Product Properties

Property	Explanation
ID	The ID Metrix assigns to the product. You can only change this property by moving products up and down in the list (right-click > <b>Reorder Up</b> or <b>Reorder Down</b> ).
Type	<b>Bound / Flat / Folded / Diecut</b> The product type.
Name	The product name.
Description	The product description.
Notes	Product notes.
Due Date	The product due date. It can be any string of text.
Customer Req. Date	Delivery date required by the customer. Date formatted field with pull-down calendar.
Production Date	Date formatted field with pull-down calendar. The user determines the purpose.
Content	<b>(Populated)</b> The product has PDF file(s) assigned. <b>(None)</b> The product does not have any PDF file(s) assigned.
Binding Number Up	<b>1-Up / 2-Up / 3-Up</b> The number of products to bind together and then trim apart. N-Up Binding is an optional module available only in Metrix Base.
1st-Up Content Orientation	<b>Head to Jog (High Folio Lap) / Foot to Jog (Low Folio Lap)</b> The orientation and order of the 1st-Up content relative to the jog edge. Default is <b>Head to Jog</b> .
N-Up Content Orientation (N-Up Module only)	<b>Head to Foot</b> The positioning of the 2nd-Up (and 3rd-Up when applicable) is head to foot with the 1st-Up. <b>Foot to Foot</b>

The positioning of the 2nd-Up (and 3rd-Up when applicable) is foot to foot with the 1st-Up.



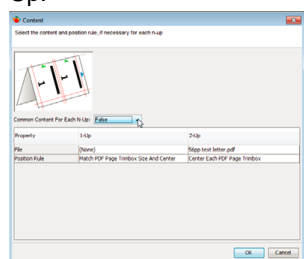
Common Content for Each N-Up  
(N-Up Module only)

**True**

The PDF content for all N-Ups is common.

**False**

The PDF content for each N-Up is unique. When **False** is selected, the Content Select... window displays a Content property for each N-Up.



Spine Side

**Left / Right**

The orientation and order of the content relative to the spine.

You can set the default in the General node of **User Preferences**.

Cutting Complexity

Choose the operating speed of the machine from the drop-down list. The speed is based on the complexity of the product, so more complex products will require decreased machine speed. **Cutting Complexity** is used to determine the cost of a layout.

Customer

The customer for this product (Company Name and Contact Name).

Active

**True / False**

The status of all product components is active. Only active product components are included in the layout calculation.

*This property says (Different Values) when the product contains both Active and Inactive components.*

Required Quantity

The quantity of product to be printed. Editing the product quantity may require another Auto Layout or may require that the number of sheets produced is changed accordingly using **Layout > Set Required Sheets**.

Runs Alone

**True / False**

The item runs alone (**True**) or not (**False**).

Display Color

RGB display color for this product.

Finished Width

The final trimmed product width.


Finished Height

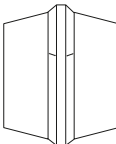
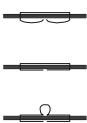


The final trimmed product height.

Grain

**Either / Either-All Same / Vertical / Horizontal**

Grain direction of the finished, bound product. Editing the grain direction directly affects the layout so is often followed by an Auto Layout.

Stock	The stock specified for this product. <i>This property says (Different Values) when Cover and/or Text Component stocks vary.</i>
Bleed Top (From Page 1)	The amount of bleed on the top edge of the product. <i>All bound products with bleed have some empty bleed properties, as bleed amounts vary.</i>
Bleed Left (From Page 1)	The amount of bleed on the left edge of the product.
Bleed Bottom (From Page 1)	The amount of bleed on the bottom edge of the product.
Bleed Right (From Page 1)	The amount of bleed on the right edge of the product.
Allow Nesting	<b>True / False</b> Determines if a product may impinge on the area of another, irregularly shaped object.
Folio Pattern	1, 2, 3... n / Page 1, Page 2... / A, B, C... / FC, InFC, 1, 2, 3... InBC, BC, etc. The folio numbering scheme to display on the layout. "FC" indicates front cover; "InFC" indicates inside front cover, etc.
Page Numbers	1, 2, 3... n / C1, C2, T1, T2... The sequential page numbering scheme to display on the layout. <b>C</b> indicates cover page; <b>T</b> indicates text page. The numbering scheme selected also prints on the reports.
Colors	The inks common to all pages of the product. Use the Page list to edit page colors. <i>This property says (Different Values) when Colors vary.</i>
Binding Machine	The binding machine selected for this product.
Jog Trim	The jog trim margin required for all components of this product.
Text Spine Trim	The spine trim margin (grind off) required for the text components of this product.
Non-Jog Trim	The non-jog trim margin required for all components of this product. <i>This property says (Different Values) when Non-Jog Trims vary.</i>
Front Face Trim	The front face trim margin required for all components of this product. <i>This property says (Different Values) when Front Face Trims vary.</i>
Back Face Trim	The back face trim margin required for all components of this product. <i>This property says (Different Values) when Back Face Trims vary.</i>
N-Up Offset N-Up Module only	The margin between each N-Up.
Calculate Cover Spine	<b>Auto / Manual</b> Auto enables Metrix to calculate the width of the spine for perfect bound products based on the paper thickness.
Cover Spine Width	The cover spine width. <i>You can only edit this property when <b>Manual</b> is selected. This only applies to perfect-bound products with a cover.</i>
Number of Pages	The total number of pages (including the cover) for this product.
Collation Marks	Click  to access the following: <b>Method: Binding Machine Defaults / Custom</b> – The default settings for the selecting binding machine, or user defined settings. <b>Mark Type: (None) / Spine / Jog</b> – Placement of the collation marks.

	<p><b>Start Offset</b> – The distance from the jog/spine intersection to place the first collation mark.</p> <p><b>Width</b> – The collation mark width.</p> <p><b>Height</b> – The collation mark height.</p> <p><b>Repeat Number</b> – The number of collation marks to step before beginning at the Start Offset again.</p> <p><b>Over Page Content - True / False-</b> Whether or not collation marks print over other text.</p> <p><b>Primary Mark Color</b> – 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.</p> <p><b>Secondary Mark Color</b> – Type of color, color, and percentage of color for collation marks on nested components. Secondary marks appear on nested components of a perfect bound product.</p> <p><b>Trailing Text</b> – Default is &lt;TextComponent.Number&gt;, but many other pertinent variables are also available.</p> <p><b>Anchor Trailing Text To - Block of Marks / Individual Marks</b>–You can position Trailing text relative to the whole set of collation marks, or relative to the individual marks.</p> <p><b>Distance From Anchor</b> – The distance the trailing text will be from the individual collation marks or the block of marks.</p> <p><b>Trailing Text Point Size</b> – The point size of the trailing text.</p>
Shingling (Creep)	<p><b>Auto</b></p> <p>Auto enables Metrix to calculate the shingling required based on the stock thickness of each 4-page set, the number of sets, and their position relative to the spine edge.</p> <p>Inner % (0–300)</p> <p>The percentage of the total shingling amount applied to the innermost 4-page set. When a value of less than 100% is entered, the remainder, expressed as a negative shingling amount (moving away from the spine), is applied to the outermost 4-page set.</p> <p>Choose <b>Settings &gt; User Preferences &gt; Shingling (Creep) Defaults</b> to select your Automatic Shingling defaults.</p> <p><b>Manual</b></p> <p>Manual enables you to specify Inner and Outer values and then Metrix calculates the resulting shingling for each 4-page set.</p> <p><b>Inner Value</b></p> <p>The absolute shingling amount to apply to the innermost component. Enter a positive value to move pages towards the spine.</p> <p><b>Outer Value</b></p> <p>The absolute shingling amount to apply to the outermost component. Enter a negative value to move pages away from the spine.</p>
Binding Parameters	<p><b>Binding Machine Defaults</b></p> <p>Use the binding machine setup defaults as specified in the Metrix database.</p> <p><b>Custom</b></p> <div></div> <p><b>Stack Item Count</b></p> <p>The number of finished products to stack once binding is complete, to bundle up for delivery.</p>

**Stack Layer Item Count**

The 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.

**Number of Stitches (Saddled) – 0 / 1 / 2 / 3 / 4**

The number of stitches for this saddle-stitched product.

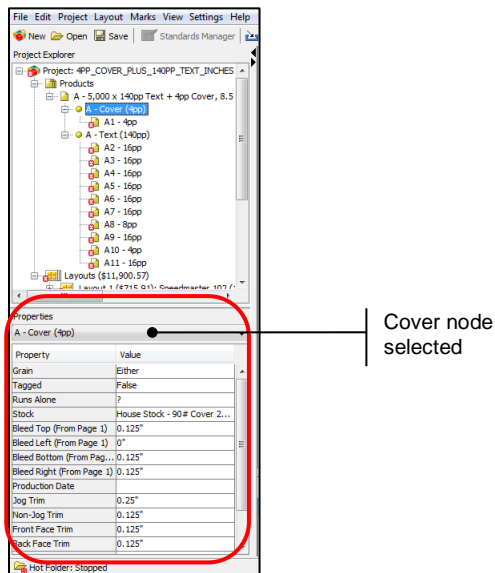
**Staple Shape (Saddled) – Crown / Butted / Eyelet** The staple shape for this saddle-stitched product.

**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.

MIS ID	A MetrixXML product identifier for the originating MIS.
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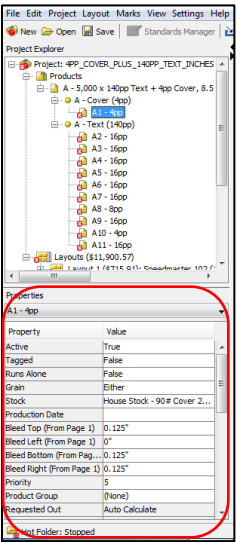
**\*Note** If you are not sure that your PDF contains a trimbox or if it matches the product size, you can use any of the PDF tools available, including Acrobat, to check it.

**Cover node properties****Cover Node Properties**

Property	Explanation
Grain	<b>Either / Vertical / Horizontal</b> Grain direction of the finished, folded cover.
Tagged	<b>True / False</b> The product is tagged ( <b>True</b> ), or not ( <b>False</b> ). You can use tagged items as a group in various functions.
Runs Alone	<b>True / False</b> The item runs alone ( <b>True</b> ) or not ( <b>False</b> ).
Stock	The stock for all cover components.


Bleed Top (From Page 1)	The amount of bleed on the top edge of cover pages. <i>All bound products with bleed have some empty bleed properties, as bleed amounts vary.</i>
Bleed Left (From Page 1)	The amount of bleed on the left edge of cover pages.
Bleed Bottom (From Page 1)	The amount of bleed on the bottom edge of cover pages.
Bleed Right (From Page 1)	The amount of bleed on the right edge of cover pages.
Production Date	Date formatted field with pull-down calendar. You determine the purpose.
Jog Trim	The jog trim margin required for all components of this cover.
Non-Jog Trim	The non-jog trim margin required for all components of this cover.
Front Face Trim	The front face trim margin required for all components of this cover.
Back Face Trim	The back face trim margin required for all components of this cover.
Calculate Cover Spine	<b>Auto / Manual</b> Auto enables Metrix to calculate the width of the spine for perfect bound products based on the paper thickness.
Cover Spine Width	The cover spine width. <i>This property is editable only when <b>Manual</b> is selected.</i>
Number of Pages	The total number of pages for the cover.

Cover component properties



Cover Component Properties

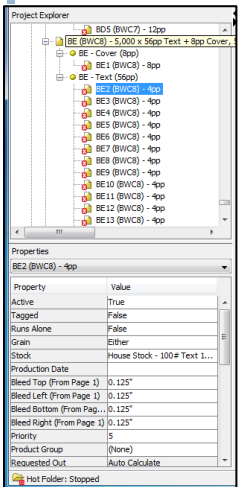
Property	Explanation
Active	<b>True / False</b> The status of this component is active.

	<i>Only active components are included in the layout calculation.</i>
Tagged	<b>True / False</b> The product is tagged ( <b>True</b> ), or not ( <b>False</b> ). You can use tagged items as a group in various functions.
Grain	<b>Either / Vertical / Horizontal</b> Grain direction of the finished, folded cover component.
Stock	The stock for this cover components.
Production Date	Date formatted field with pull-down calendar. Purpose is determined by you.
Bleed Top (From Page 1)	The amount of bleed on the top edge of cover pages. <i>All bound products with bleed have some empty bleed properties, as bleed amounts vary.</i>
Bleed Left (From Page 1)	The amount of bleed on the left edge of cover pages.
Bleed Bottom (From Page 1)	The amount of bleed on the bottom edge of cover pages.
Bleed Right (From Page 1)	The amount of bleed on the right edge of cover pages.
Finishing Group	Group products together on a layout based on their finishing requirements.
Priority	<b>1–10</b> Highest priority = 1. Establishes a placement hierarchy. Metrix places components with higher assigned priorities first, often nearer to the gripper edge, ensuring the highest print quality.
Product Group	<b>None / Product Group [User-Defined Name]</b> The product group to which this component belongs. Product groups can then be assigned to one of up to ten placement groups, selected upon initiating an auto layout.
Requested Out	<b>Auto Calculate / User Define</b> Only editable when the project's Determine Number Out property has been set to <b>User Define</b> .
Number Out	The number out for this component, as calculated by Metrix or as user-defined.
Total Quantity	The total number of components, including extras, to be produced by this layout.
Combine Pages	<b>True / False</b> The content file for this cover component contains a single page or spread for each side. Leave this property set to <b>False</b> when the cover content file contains individual pages corresponding to the finished product size. Change this property to <b>True</b> when the cover content file contains a single page or spread for each side.
Number of Pages	The total number of pages for the cover component.
Fold Name	The folding pattern selected for this cover component. You can change the folding pattern by clicking  and selecting another from the Metrix database.
Fold Description	The description saved in the Metrix database for this folding pattern.
Fold	The JDF notation for this folding pattern. <i>Arrows indicate fold direction, colors and fractions indicate sheet edge and fold distance on the open sheet.</i> <i>Examples:</i>

	$\uparrow 1/2$ = up fold half the open sheet along the green edge. $\downarrow 1/4$ = down fold one quarter the open sheet along the red edge.
Jog Trim	The jog trim margin specified for this cover component. <i>To edit this property, select the Cover node.</i>
Text Spine Trim	The spine trim margin (grind off) specified for the text components of this product.
Non-Jog Trim	The non-jog trim margin specified for this cover component.
Front Face Trim	The front face trim margin specified for this cover component.
Back Face Trim	The back face trim margin specified for this cover component.
Lap	The difference between the Front Face Trim and Back Face Trim properties, as calculated by Metrix.
N-Up Offset	The margin between 2-Up and 3-Up products.
Max Non-Jog Trim	The maximum, or largest, Non-Jog Trim specified for the cover component.
Max Front Face Trim	The maximum, or largest, Front Face Trim specified for the cover component.
Max Back Face Trim	The maximum, or largest, Back Face Trim specified for the cover component.
Flat Width	The total component width, including pages and trim margins.
Flat Height	The total component height, including pages and trim margins.
MIS ID	A MetrixXML component identifier for the originating MIS.

### Text node properties

**Note** The following properties appear when you select an individual text item and not its parent.

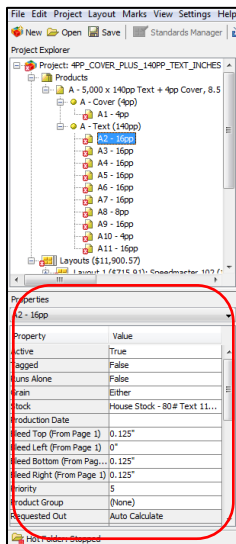


#### Text Node Properties

Property	Explanation
Grain	<b>Either / Vertical / Horizontal</b> Grain direction of the finished, folded text.
Tagged	<b>True / False</b>


Runs Alone	<b>True / False</b> Runs alone ( <b>True</b> ) or not ( <b>False</b> )
Stock	The stock for all text components. <i>This property says (Different Values) when text component stocks vary.</i>
Production Date	Date formatted field with pull-down calendar. You can also type in the date manually. Purpose is determined by you.
Bleed Top (From Page 1)	The amount of bleed on the top edge of text pages.
Bleed Left (From Page 1)	The amount of bleed on the left edge of text pages.
Bleed Bottom (From Page 1)	The amount of bleed on the bottom edge of text pages.
Bleed Right (From Page 1)	The amount of bleed on the right edge of text pages.
Jog Trim	The jog trim margin common to all text components.
Text Spine Trim	The spine trim margin (grind-off) common to all text components.
Non-Jog Trim	The non-jog trim margin common to all text components.
Front Face Trim	The front face trim margin common to all text components.
Back Face Trim	The back face trim margin common to all text components.
Number of Pages	The total number of text pages

## Text component properties



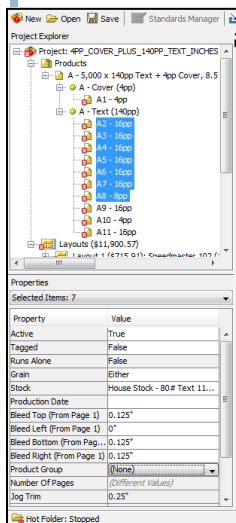
### Text Component Properties

Property	Explanation
Active	<b>True / False</b> The status of this component is active.

	<i>Only active components are included in the layout calculation.</i>
Tagged	<b>True / False</b> The product is tagged ( <b>True</b> ), or not ( <b>False</b> ). You can use tagged items as a group in various functions.
Runs Alone	<b>True / False</b> The item runs alone ( <b>True</b> ) or not ( <b>False</b> ).
Grain	<b>Either / Vertical / Horizontal</b> Grain direction of the finished, folded cover component.
Stock	The stock for this text component.
Production Date	Date formatted field with pull-down calendar. You determine the purpose.
Bleed Top (From Page 1)	The amount of bleed on the top edge of cover pages.
Bleed Left (From Page 1)	The amount of bleed on the left edge of text pages in this component.
Bleed Bottom (From Page 1)	The amount of bleed on the bottom edge of text pages in this component.
Bleed Right (From Page 1)	The amount of bleed on the right edge of text pages in this component.
Priority	<b>1–10</b> Highest priority = 1. Establishes a placement hierarchy. Metrix places components with higher assigned priorities first, often nearer to the gripper edge, ensuring the highest print quality.
Product Group	<b>None / Product Group</b> [User-Defined Name] The Product Group to which this component belongs. You can then assign Product Groups to one of up to ten Placement Groups, selected upon initiating an Auto Layout.
Requested Out	<b>Auto Calculate / User Define</b> Only editable when you set the project's Determine Number Out property to <b>User Define</b> .
Number Out	The number out for this component, as calculated by Metrix or as user defined.
Total Quantity	The total number of components, including extras, that this layout will produce.
Number of Pages	The total number of pages for this text component.
Fold Name	The folding pattern selected for this text component. You can change the folding pattern by clicking  and selecting another from the Metrix database.
Fold Description	The description saved in the Metrix database for this folding pattern.
Fold	The JDF notation for this folding pattern. <i>Arrows indicate fold direction; colors and fractions indicate sheet edge and fold distance on the open sheet.</i> <i>Examples:</i> ↑ <span style="color: green;">1/2</span> = up fold half the open sheet along the green edge. ↓ <span style="color: red;">1/4</span> = down fold one quarter the open sheet along the red edge.
Jog Trim	The jog trim margin specified for this text component. To edit this property, select the <b>Text</b> node.
Text Spine Trim	The spine trim margin (grind off) specified for this text component.

	To edit this property, select the <b>Text</b> node.
Non-Jog Trim	The non-jog trim margin specified for this text component.
Front Face Trim	The front face trim margin specified for this text component.
Back Face Trim	The back face trim margin specified for this text component.
Lap	The difference between the Front Face Trim and Back Face Trim properties, as calculated by Metrix.
N-Up Offset	The margin between 2-Up and 3-Up products.
Max Non-Jog Trim	The maximum, or largest, Non-Jog Trim specified for this text component.
Max Front Face Trim	The maximum, or largest, Front Face Trim specified for this text component.
Max Back Face Trim	The maximum, or largest, Back Face Trim specified for this text component.
Flat Width	The total component width, including pages and trim margins.
Flat Height	The total component height, including pages and trim margins.
MIS ID	A MetrixXML component identifier for the originating MIS.

**Note** If you have multiple text components selected (using **SHIFT-click** or **CTRL/CMD-click**), the properties list below will only display those properties shared by all of the text components. If the field says, “(Different Values),” you can edit the value, and it will become the same for all of the selected text components.

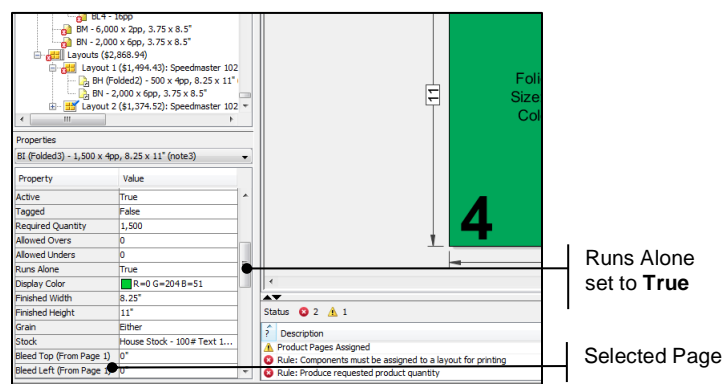


## Runs Alone component property

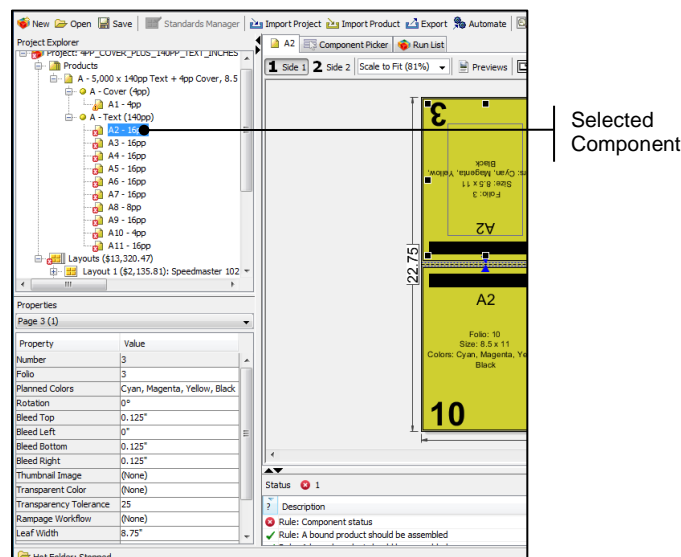
The Runs Alone property allows you to specify that a component appear on its own layout rather than being ganged with any other components.

### To activate the feature

1. Select a component and scroll down the Properties Editor.
2. Set the Runs Alone property to **True**.



Bound page properties

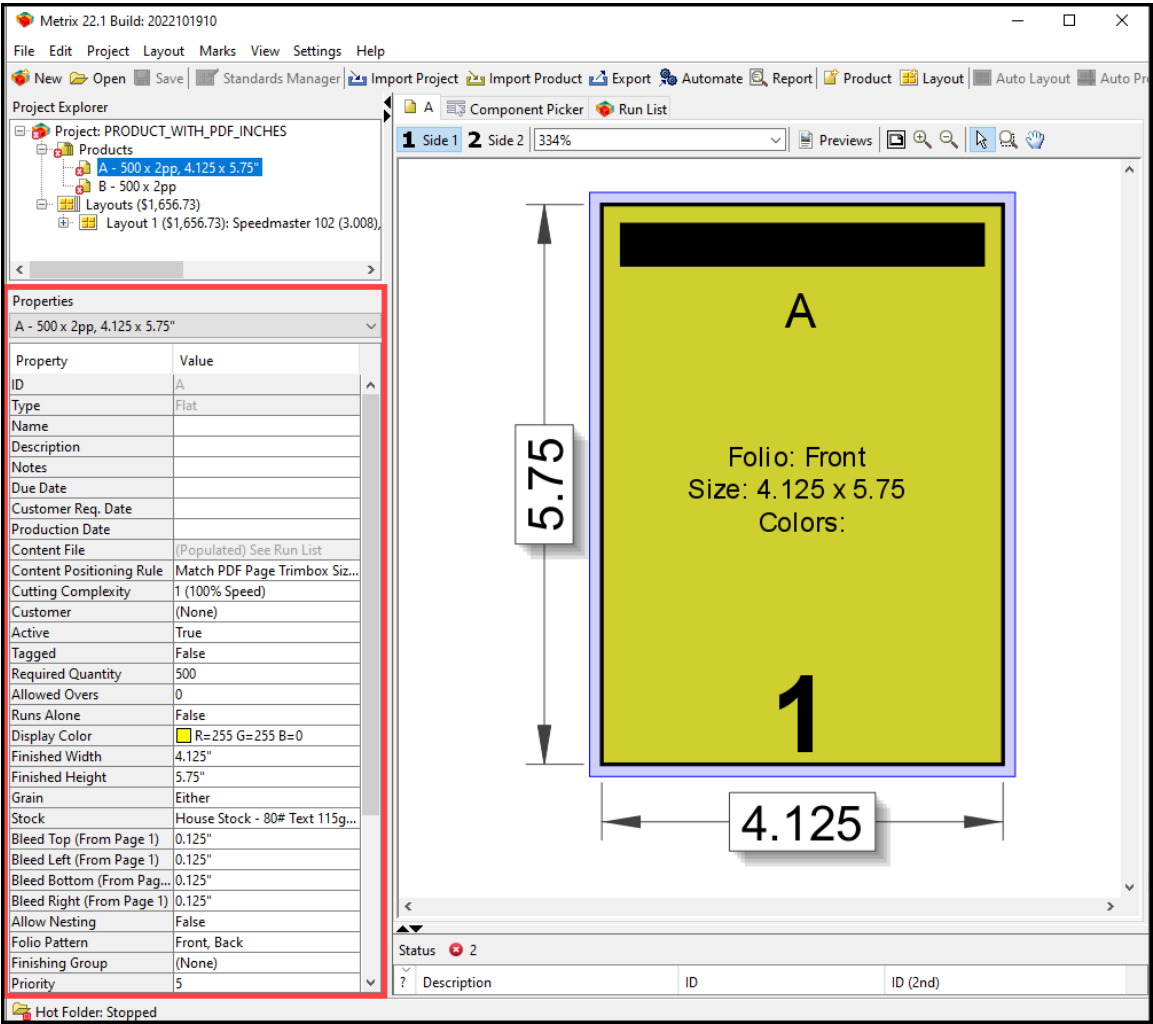


Bound Page Properties

Property	Explanation
Number	The sequential number of the selected page.
Folio	The folio assigned to the selected page for display and reporting purposes.
Planned Colors	The ink colors of a selected page.
Rotation	<b>0° / 90° / 180° / 270°</b> The rotation of the selected page.
Bleed Top	The bleed amount on the top edge of the selected page.
Bleed Left	The bleed amount on the left edge of the selected page.
Bleed Bottom	The bleed amount on the bottom edge of the selected page.
Bleed Right	The bleed amount on the right edge of the selected page.
Thumbnail Image	The low-resolution JPG, PNG, or GIF preview image (RGB only) assigned to the selected page. <i>This property is ordinarily used only when nesting irregularly shaped objects on a Metrix layout.</i>
Transparent Color	The background color of the thumbnail image (most often white) to turn transparent.

	<i>This property is ordinarily used only when nesting irregularly shaped objects on a Metrix layout.</i>
Transparency Tolerance	<p>The range of red, green, and blue (RGB) values, either side of the selected Transparent Color's values, to be rendered transparent for the thumbnail image background may not be pure white. With a tolerance of + / - 20, all pixels within the following range are rendered transparent: R=215-255, G=25-255, B=215-255.</p> <p><i>This property is ordinarily used only when nesting irregularly shaped objects on a Metrix layout.</i></p>
Rampage Workflow	Whether or not a Rampage workflow is applied to this page, and if so, the name of the workflow.
Leaf Width	The width of the selected page plus trim margins.
Leaf Height	The height of the selected page plus trim margins.
Custom Shingling	<p><b>True / False</b></p> <p>Override product-level shingling and apply custom shingling to this page.</p>
Shingling Value	<p>When Custom Shingling is <b>True</b>, the custom shingling value to apply to the selected page.</p> <p><i>Editable only when Custom Shingling is set to <b>True</b>.</i></p>


Flat/folded product properties



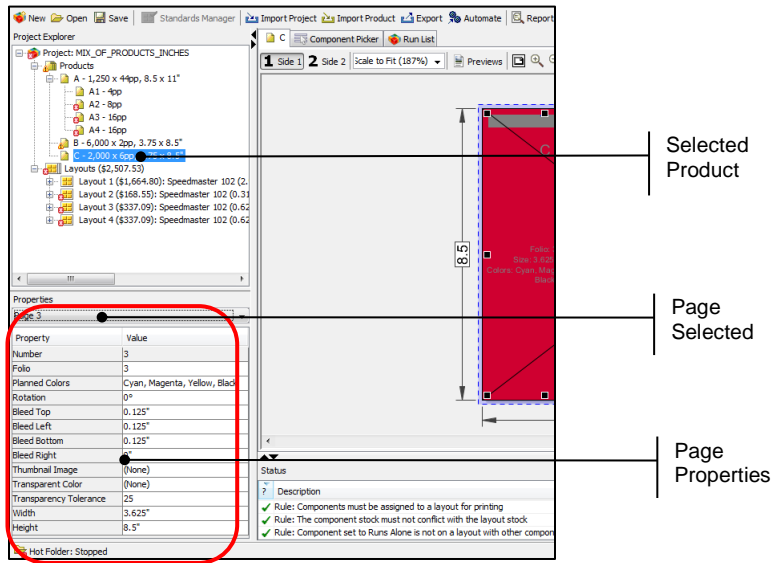
Flat/Folded Product Properties

Property	Explanation
ID	The ID Metrix assigns to the product. You can only change this property by reordering the list of products.
Type	<b>Bound / Flat / Folded / Diecut</b> The product type.
Name	The product name.
Description	The product description.
Notes	Product notes.
Due Date	The product due date. It can be any string of text.
Customer Req. Date	Delivery date required by the customer. Date formatted field with pull-down calendar.

Production Date	Date formatted field with pull-down calendar. You determine the purpose.
Content File	The PDF file assigned to the product.
Content Positioning Rule	<p><b>Match PDF Page Trimbox Size and Center</b> The content file contains a trimbox for each page that matches precisely the Metrix page size.</p> <p><b>Center Each PDF Page Trimbox</b> The content file contains a trimbox for each page that does <i>not</i> necessarily match precisely the Metrix page size. Metrix centers the PDF page trimbox on the Metrix page, and crops any PDF content falling outside the Metrix page size plus bleed.</p> <p><b>Center Each PDF Page</b> The content file does <i>not</i> necessarily contain a trimbox for each page. Metrix centers the PDF page on the Metrix page, and crops any PDF content falling outside the Metrix page size plus bleed.</p>
Cutting Complexity	Choose the operating speed of the machine from the drop-down list. The speed is based on the complexity of the product, so more complex products will require decreased machine speed. <b>Cutting Complexity</b> is used to determine the cost of a layout.
Customer	The customer for the product (Company Name and Contact Name).
Active	<p><b>True / False</b> The product is active. <i>Only active products are included in the layout calculation.</i></p>
Tagged	<p><b>True / False</b> The product is tagged (<b>True</b>), or not (<b>False</b>). You can use tagged items as a group in various functions.</p>
Required Quantity	The quantity of product to be printed.
Allowed Overs	The number of acceptable overs for the product. Rectangular and irregular shape products must be planned using the <b>Display Graphics</b> algorithm. For die-cut products, set the <b>Use Die-cutting Tool Geometry</b> field in the <b>Layout</b> properties to <b>True</b> .
Runs Alone	<p><b>True / False</b> The product runs on its own layout (<b>True</b>), or not (<b>False</b>).</p>
Display Color	The RGB display color for this product.
Finished Width	The final trimmed product width, in reader orientation.
Finished Height	The final trimmed product height, in reader orientation.
Grain	<p><b>Either / Either-All Same / Vertical / Horizontal</b> The grain direction of the finished product.</p>
Stock	The stock specified for this product.
Bleed Top (From p. 1)	The amount of bleed on the top edge of the product. <i>All folded products with bleed have some empty bleed properties, as bleed amounts vary.</i>
Bleed Left (From p. 1)	The amount of bleed on the left edge of the product.
Bleed Bottom (From p. 1)	The amount of bleed on the bottom edge of the product.
Bleed Right (From p. 1)	The amount of bleed on the right edge of the product.

Allow Nesting	<b>True / False</b> Determines if a product may impinge on the area of another, irregularly shaped object.
Folio Pattern	1, 2, 3... n / Page 1, Page 2... / A, B, C... / FC, InFC, 1, 2, 3... InBC, BC, etc. The folio numbering scheme to display on the layout. "FC" indicates front cover; "InFC" indicates inside front cover, etc.
Finishing Group	Group products together on a layout based on their finishing requirements.
Priority	<b>1–10</b> Highest priority = 1. Establishes a placement hierarchy. Metrix places products with higher assigned priorities first, often nearer to the gripper edge, ensuring the highest print quality.
Product Group	<b>None / Product Group [User Defined Name]</b> The <b>Product Group</b> to which this product belongs. You can then assign product groups to one of up to ten placement groups, selected upon initiating an auto layout.
Requested Out	<b>Auto Calculate / User Define</b> Only editable when you set the Determine Number Out property in the Project node to <b>User Define</b> .
Number Out	The number out on the layout for this product, as calculated by Metrix or as user defined.
Total Quantity	The total number of products, including extras, to be produced by this product's layout.
Combine Pages (Folded only)	<b>True / False</b> Set to <b>True</b> when the content file contains a single page or spread for each side.
Number of Pages (Folded only)	The total number of pages for the product.
Fold Name (Folded only)	The folding pattern selected for this product. You can change the folding pattern by clicking  and selecting another from the Metrix database.
Fold Description (Folded only)	The description saved in the Metrix database for this folding pattern.
Fold (Folded only)	The JDF notation for this folding pattern. <i>Arrows indicate fold direction, colors and fractions indicate sheet edge and fold distance on the Open sheet. Examples: ↑1/2 = up fold half the open sheet along the green edge. ↓1/4 = down fold one quarter the open sheet along the red edge.</i>
Offcut Top	The amount of extra white space to reserve at the top edge of the product. Will not affect crop mark placement.
Offcut Left	The amount of white space to reserve at the left edge of the product. Will not affect crop mark placement.
Offcut Bottom	The amount of white space to reserve at the bottom edge of the product. Will not affect crop mark placement.
Offcut Right	The amount of white space to reserve at the right edge of the product. Will not affect crop mark placement.
Flat Width	The product page width plus any offcuts specified.
Flat Height	The product page height plus any offcuts specified.
MIS ID	A Metrix XML product identifier from the originating MIS.

## Flat/folded page properties

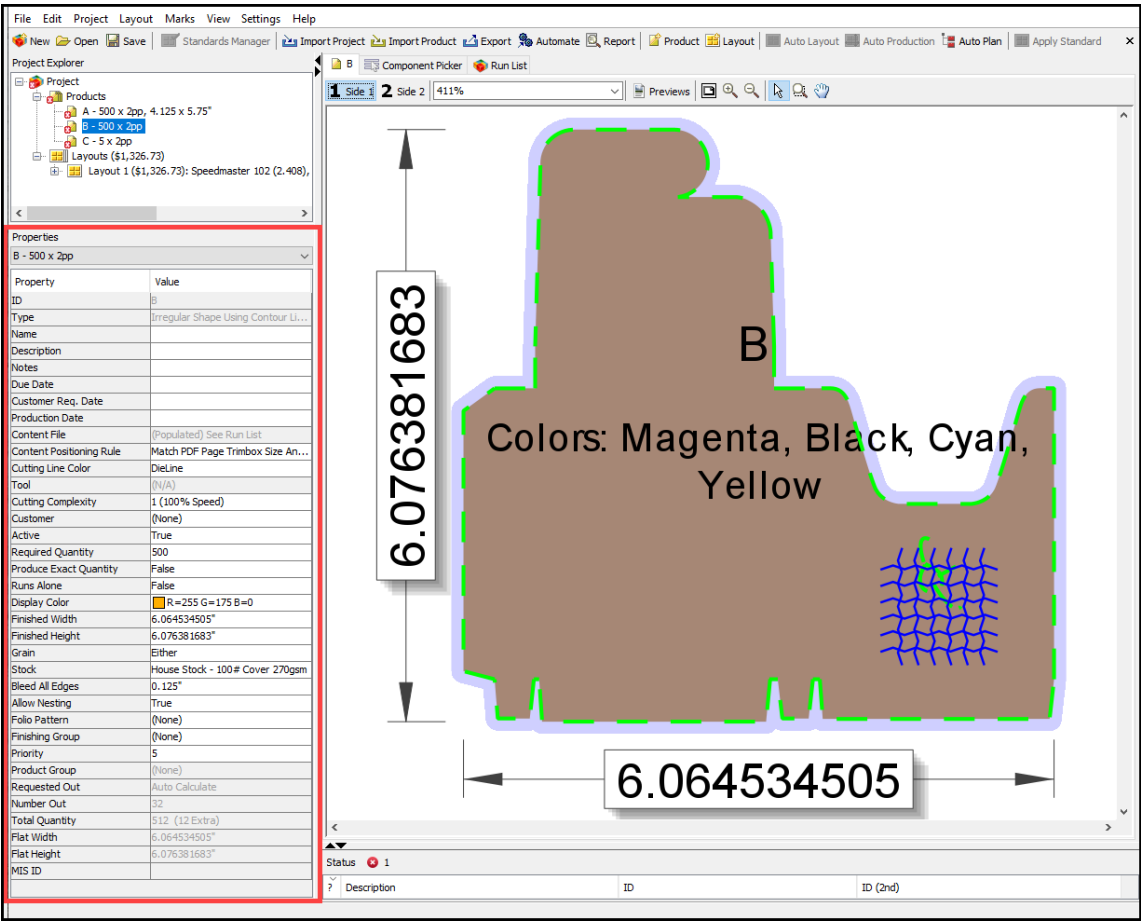


## Flat/Folded Page Properties

Property	Explanation
Number	The sequential number of the selected page.
Folio	The folio number (or alpha-numeric designation) of the selected page.
Planned Colors	The inks for the selected page.
Rotation (Flat)	<b>0° / 90° / 180° / 270°</b> The rotation of the selected page. <i>This property is editable on side 2 only. Use this property to specify variations in page orientation from front to back.</i>
Rotation (Folded)	<b>0° / 90° / 180° / 270°</b> The rotation of the selected page. <i>When folded pages are rotated, bleeds are affected. Edit the bleed properties as necessary.</i>
Bleed Top	The bleed amount on the top edge of the selected page.
Bleed Left	The bleed amount on the left edge of the selected page.
Bleed Bottom	The bleed amount on the bottom edge of the selected page.
Bleed Right	The bleed amount on the right edge of the selected page.
Thumbnail Image	The low-resolution JPG, PNG, or GIF preview image (RGB only) assigned to the selected page. <i>This property is ordinarily used when products are nested.</i>
Transparent Color	The background color of the thumbnail image (most often white) to turn transparent. <i>This property is ordinarily used when products are nested.</i>
Transparency Tolerance	The range of red, green, and blue (RGB) values, either side of the selected transparent color's values, to be rendered transparent for the Display Image. Pure white pixel values are: R=255, G=255, B=255, but the

	Thumbnail Image background may not be pure white. With a tolerance of +/- 20, all pixels within the following range are rendered transparent: R=215–255, G=215–255, B=215–255. <i>This property is ordinarily used when products are nested.</i>
Rampage Workflow	Whether or not a Rampage workflow is applied to this page, and if so, the name of the workflow.
Width (Folded only)	The width of the selected page. <i>Use this property to specify a custom width for a folded panel.</i>
Height (Folded only)	The height of the selected page. <i>Use this property to specify a custom height for a folded panel.</i>

Die-Cut and Irregular Shape product properties



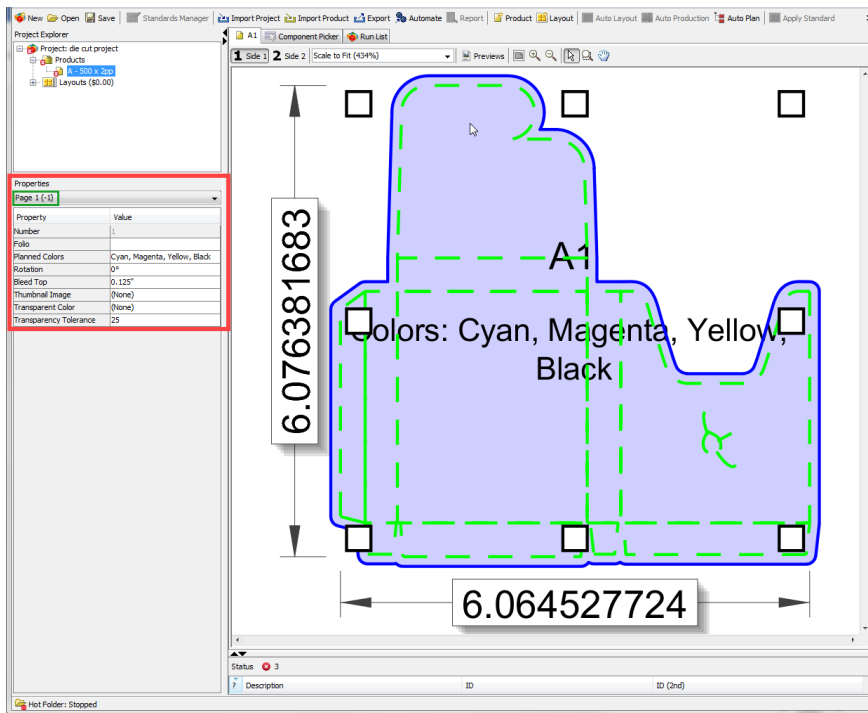
Die-Cut and Irregular Shape Product Properties

Property	Explanation
ID	The ID Metrix assigns to the product. You can only change this property by reordering the list of products.
Type	<b>Bound / Flat / Folded / Die-cut using Die-Cutting Tool / Irregular Shape Using Contour Line in Content File</b>

	The product type.
Name	The product name.
Description	The product description.
Notes	Product notes.
Due Date	The product due date. It can be any string of text.
Customer Required Date	Delivery date required by the customer. Date formatted field with pull-down calendar.
Production Date	Date formatted field with pull-down calendar. You determine the purpose.
Content File	The PDF file assigned to the product.
Content Positioning Rule	<p><b>Match PDF Page Trimbox Size and Center</b> The content file contains a trimbox for each page that matches precisely the Metrix page size.</p> <p><b>Center Each PDF Page Trimbox</b> The content file contains a trimbox for each page that does <i>not</i> necessarily match precisely the Metrix page size. Metrix centers the PDF page trimbox on the Metrix page, and crops any PDF content falling outside the Metrix page size plus bleed.</p> <p><b>Center Each PDF Page</b> The content file does <i>not</i> necessarily contain a trimbox for each page. Metrix centers the PDF page on the Metrix page, and crops any PDF content falling outside the Metrix page size plus bleed.</p>
Cutting Line Color	The currently selected contour line used for the Cutting operation.
Tool	Selected die-cutting tool.
Resolve Bleed Conflicts	<p><b>True / False</b> Applies <b>Allowed Bleed Intrusion</b> settings configured for the die-cutting tool.</p>
Cutting Complexity	Choose the operating speed of the machine from the drop-down list. The speed is based on the complexity of the product, so more complex products will require decreased machine speed. <b>Cutting Complexity</b> is used to determine the cost of a layout.
Customer	The customer for the product (Company Name and Contact Name).
Active	<p><b>True / False</b> The product is active. <i>Only active products are included in the layout calculation.</i></p>
Required Quantity	The quantity of product to be printed.
Allowed Overs	<p>The number of acceptable overs for the product. Rectangular and irregular shape products must be planned using the <b>Display Graphics</b> algorithm. For die-cut products, set the <b>Use Die-cutting Tool Geometry</b> field in the <b>Layout</b> properties to <b>True</b>.</p>
Produce Exact Quantity	<p><b>True / False</b> When set to <b>True</b>, there will be no overs because only the exact required quantity is produced. Die-cut products only.</p>
Runs Alone	<p><b>True / False</b> The product runs on its own layout (<b>True</b>), or not (<b>False</b>).</p>
Display Color	The RGB display color for this product.

Finished Width	The final trimmed product width, in reader orientation.
Finished Height	The final trimmed product height, in reader orientation.
Grain	<b>Either / Either-All Same / Vertical / Horizontal</b> The grain direction of the finished product. When set to <b>Either</b> or <b>Either-All Same</b> , product may be at any angle relative to the sheet.
Stock	The stock specified for this product.
Bleed All Edges	The amount of bleed on each edge of the product.
Allow Nesting	<b>True / False</b> Determines if a product may impinge on the area of another, irregularly shaped object.
Folio Pattern	1, 2, 3... n / Page 1, Page 2... / A, B, C... / FC, InFC, 1, 2, 3... InBC, BC, etc. The folio numbering scheme to display on the layout. "FC" indicates front cover; "InFC" indicates inside front cover, etc.
Finishing Group	Group products together on a layout based on their finishing requirements.
Priority	<b>1–10</b> Highest priority = 1. Establishes a placement hierarchy. Metrix places products with higher assigned priorities first, often nearer to the gripper edge, ensuring the highest print quality.
Product Group	<b>None / Product Group[User-Defined Name]</b> The <b>Product Group</b> to which this product belongs. You can then assign product groups to one of up to ten placement groups, selected upon initiating an auto layout.
Requested Out	<b>Auto Calculate / User Define</b> Only editable when you set the <b>Determine Number Out</b> property in the Project node to <b>User-Define</b> .
Number Out	The number out on the layout for this product, as calculated by Metrix or as user defined.
Total Quantity	The total number of products, including extras, to be produced by this product's layout.
Flat Width	The product page width plus any offcuts specified.
Flat Height	The product page height plus any offcuts specified.
MIS ID	A Metrix XML product identifier from the originating MIS.

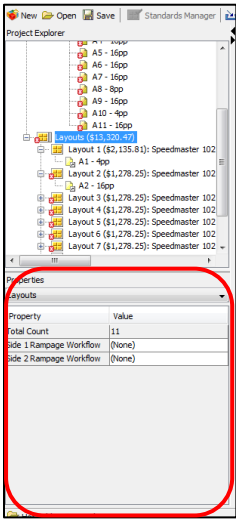
## Die-Cut and Irregular Shape page properties



### Die-Cut and Irregular Shape Page Properties

Property	Explanation
Number	The sequential number of the selected page.
Folio	The folio number (or alpha-numeric designation) of the selected page.
Planned Colors	The inks for the selected page.
Rotation	<b>0° / 90° / 180° / 270°</b> The rotation of the selected page.
Bleed Top	The bleed amount on the top edge of the selected page.
Thumbnail Image	The low-resolution JPG, PNG, or GIF preview image (RGB only) assigned to the selected page. <i>This property is ordinarily used when products are nested.</i>
Transparent Color	The background color of the thumbnail image (most often white) to turn transparent. <i>This property is ordinarily used when products are nested.</i>
Transparency Tolerance	The range of red, green, and blue (RGB) values, either side of the selected transparent color's values, to be rendered transparent for the Display Image. Pure white pixel values are: R=255, G=255, B=255, but the Thumbnail Image background may not be pure white. With a tolerance of +/- 20, all pixels within the following range are rendered transparent: R=215–255, G=215–255, B=215–255. <i>This property is ordinarily used when products are nested.</i>

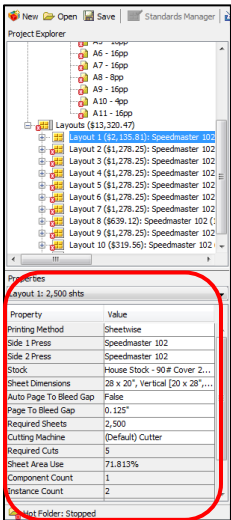
### Layouts properties (all layouts)




Layouts Properties

Property	Explanation
Total Count	The total number of layouts in this project
Side 1 Rampage Workflow	Whether or not a Rampage workflow is applied to side 1, and if so, the name of the workflow.
Side 2 Rampage Workflow	Whether or not a Rampage workflow is applied to side 2, and if so, the name of the workflow.

### Layout properties (individual layout)

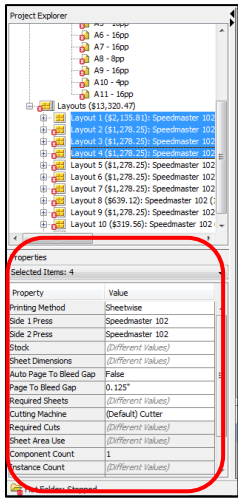


**Layout Properties**

Property	Explanation
Printing Method	<b>One-Sided / Sheetwise / Work and Turn / Work and Tumble / Perfected</b> The printing method for this layout. <i><b>Perfected</b> is only available when the selected press is capable of perfecting as defined in the Metrix database.</i>
Side 1 Press	The press specified for side 1 of this layout.
Side 2 Press	The press specified for side 2 of this layout. <i>When you select either <b>One-Sided</b>, <b>Work and Turn</b>, or <b>Work and Tumble</b> as the printing method, this property is non-editable.</i>
Stock	The stock specified for this layout. <i>To change the layout stock, click  and choose a different stock in the Stock Selector window.</i>
Sheet Dimensions	The sheet size of the selected stock.
Use Die-cutting Tool Geometry	<b>True/ False</b> Select <b>True</b> to use the die-cutting tool geometry, or select <b>False</b> to use the nesting algorithm when creating an auto layout using a die-cut product.
Auto Page to Bleed Gap	<b>True / False</b> When set to <b>True</b> , automatically sets the <b>Page to Bleed Gap</b> for all products to the amount required for the largest bleed on any side of any product on the layout.
Page to Bleed Gap	The distance between the trim edge of one product instance to the bleed edge of an adjacent product instance.
Required Sheets	The number of sheets required to produce the required quantity of the product(s) on the layout, as calculated by Metrix using Auto Layout or using <b>Layout &gt; Set Required Sheets</b> , or as input manually.
Cutter	The name of the cutting machine selected for the layout.
Required Cuts	The number of cuts required for this layout.
Sheet Area Use	The percentage of the sheet consumed by the product instances on the layout.
Component Count	The total number of products (and/or bound components) assigned to the selected layout.
Instance Count	The total number of product instances on the selected layout.
Mark Count	The total number of marks on the selected layout.
Side 1 Rampage Workflow	Whether or not a Rampage workflow is applied to side 1, and if so, the name of the workflow.
Side 2 Rampage Workflow	Whether or not a Rampage workflow is applied to side 2, and if so, the name of the workflow.
MIS ID	A MetrixXML layout identifier from the originating MIS.
Press Inspection Zone	An area reserved for printing control marks on certain digital presses. If this area is gray, then the selected press does not support inspection marks.
Auto Cutoff Length	<b>True/ False</b>


	Select <b>True</b> to have Metrix automatically determine your cutoff length or select <b>False</b> to enter your own cutoff length within the parameters of the chosen sheet size. <i><b>Auto Cutoff Length</b> is only available if you set your production properties and parameters for <b>Auto Plan</b> to have a rolled press with variable cutoff length.</i>
Cutoff Length	Enter the cutoff length for your layout. <i><b>Cutoff Length</b> is only available if you select <b>False</b> for your <b>Auto Cutoff Length</b>.</i>
Is Display Graphics	<b>True/ False</b> Show whether or not the layout was planned using the Display Graphics algorithm.

**Note** If you have multiple, individual layouts selected (using **SHIFT-click** or **CTRL/CMD-click**), the properties list will be the same as for an individual layout, but properties that are different in different layouts will have the message “(Different Values)” in the property field. If the field is gray, the value is not editable. If the field is white, the value is editable, and will become the same for all the selected layouts.

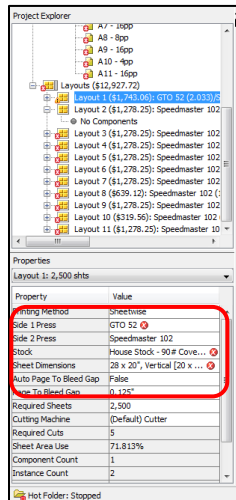


## Changing presses from the Properties Editor

You can change the Press first, and Metrix will warn you if the press, stock, and sheet size do not match.

If you change the Press, and Metrix displays warnings, you can change the stock and sheet size directly from the Properties Editor. Change the stock by clicking  in the Stock option in the Properties Editor. Select a different sheet size from the menu that appears when you click the current sheet size.

Below are examples where we have changed the press size and warnings appear.



## Changing automatic gutters between component instances

Gutters are determined by both the Page To Bleed Gap property and the product Bleeds property.

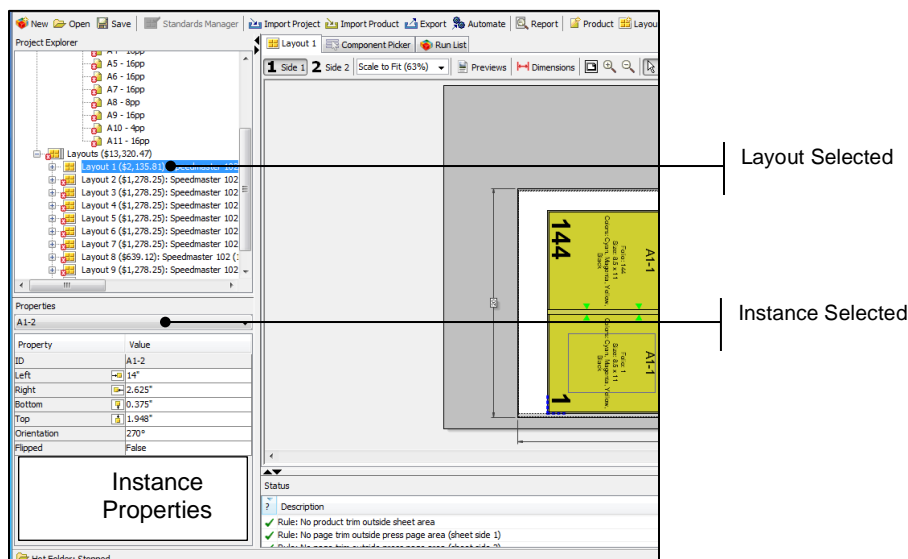
**Note** For more information on bleeds, see [Understanding positive and negative bleed](#).

1. Select a layout in the Project Explorer.
2. Edit the Page to Bleed Gap property in the Properties Editor.
3. Click **Auto Layout**.

**Notes** The default Page To Bleed Gap is set in the Conventions node of the Database window.

Use auto bleeds to eliminate bleeds between adjacent product instances, while maintaining the exterior bleeds. For more information, see [Step and Repeat Using Drag and Drop](#).

## Product instance properties



## Product Instance Properties

Property	Explanation
ID	A1-2
Left	14"
Right	2.625"
Bottom	0.375"
Top	1.948"
Orientation	270°
Flipped	False

---

ID	The instance ID assigned by Metrix.
Left	The distance from the left trim edge of the instance to the left edge of the sheet.
Right	The distance from the right trim edge of the instance to the right edge of the sheet.
Bottom	The distance from the bottom trim edge of the instance to the bottom edge of the sheet.
Top	The distance from the top trim edge of the instance to the top edge of the sheet.
Orientation	<p>The orientation of the selected instance.</p> <p><b>Flat/Folded/Bound Products:</b> 0° / 90° / 180° / 270°</p> <p><b>Irregular Shape Products:</b> Enter the degree of rotation for the product instance. The number must be from 0° - 359°.</p>
Flipped	<p><b>True / False</b></p> <p>Swap the front and back sides of this instance.</p>

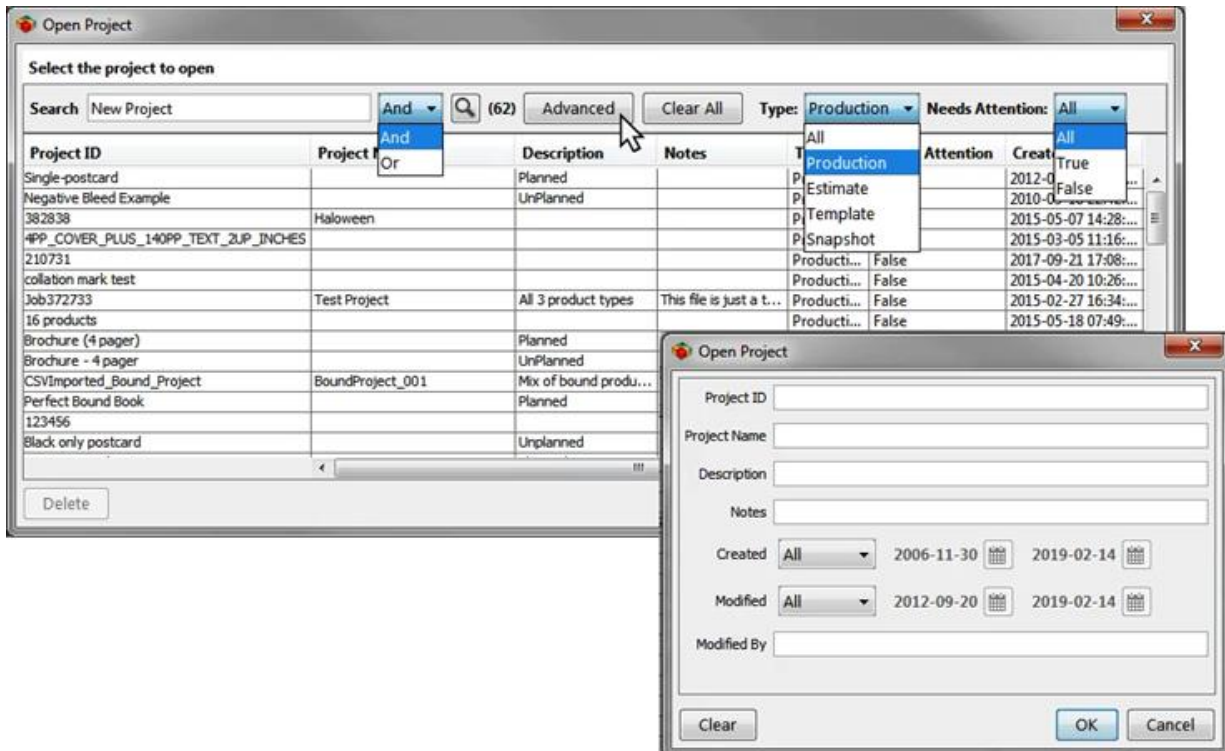
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## **Working with Projects**

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## Creating, Opening, Searching, and Sorting Projects

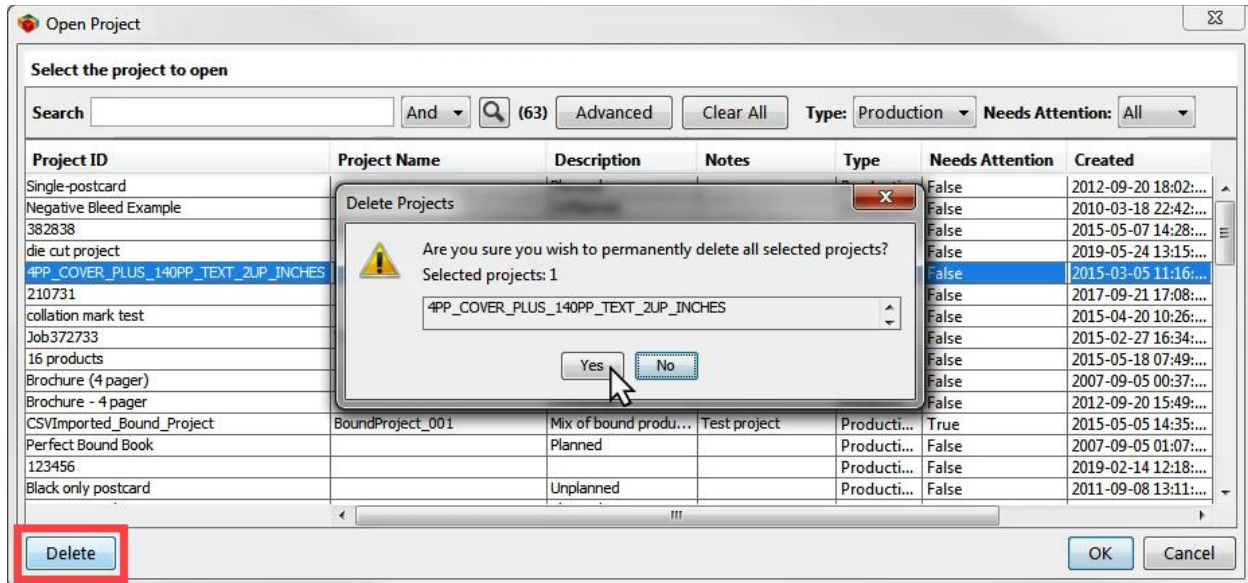
- Create a new project by clicking the **New** button or selecting **File > New Project**.
- Open a project by clicking the **Open** button or selecting **File > Open Project**. In the Open Project window, you can sort any of the **Project** properties (Project ID, Name, Description, Notes, Type, etc.) in ascending or descending order by clicking the title at the top of the column. You can also sort the list by typing criteria in the **Filter** field, separated by spaces.
- Filtering with **Or** selected, finds the projects that meet any of the criteria listed. This is a broader, less restrictive search.
- Filtering with **And** selected, finds only the projects that meet all the listed criteria. This is a narrower, more restrictive search.
- Removing all data from the **Filter** field or clicking the **Clear All** button makes all the listings appear again.
- Open an advanced search window by clicking the **Advanced** button. Here you can search for projects by name, idea, description, as well as created and modified dates. Select **Clear** to reset the advanced search.
- Filter projects by type using the **Type** drop down list, or by urgency using the **Needs Attention** drop down list.



## Deleting Projects

1. To delete one or more projects, click **Open** and then select the projects you wish to delete.
2. Click **Delete**, and then click **Yes** in the Delete Projects window.

**Note** You may **SHIFT-click** to select a range of multiple projects, or **CTRL-click** (Windows) or **CMD-click** (Mac) to select multiple, non-contiguous projects.



## Working with Products

### Creating a new product

Create a new product by clicking the Product button or selecting **Project > Add New Product**. In the New Product Wizard, fill in or select the appropriate information to define the product. When you reach the Default Page Properties window, you have the option to click **Finish**, which creates just the product, or to continue and define the layout as well.

### Making a one-sided product

In the Run List, set the non-printing side to have Planned Colors “(None)” and Filename “(Blank).” Choose One-sided as the Layout Printing Method.

**Note** You can change the printing method after creating the layout.

### Deleting a product

1. Select a product in the Project Explorer.
2. Right-click the selected product.
3. Select **Delete** from the contextual menu.

### Controlling product orientation on the sheet

Orientation is controlled by the Metrix Auto Layout engine, which considers the grain for the product and the grain of the selected sheet. You can set the grain for the product in the New Product Wizard, or you can edit the product's properties in the Project Explorer. The sheet's grain direction is defined in the Database window.

**Note** You can rotate product instances on a layout. For more information see [Rotating product instances](#).

### Product Bundling

Bundles are a means of keeping printed products with common criteria together to streamline post-printing processes such as finishing or distribution. The user defines the bundles with a unique name, which products are in each bundle, and the desired quantity of each product in each bundle.

Possible use cases for this feature are:

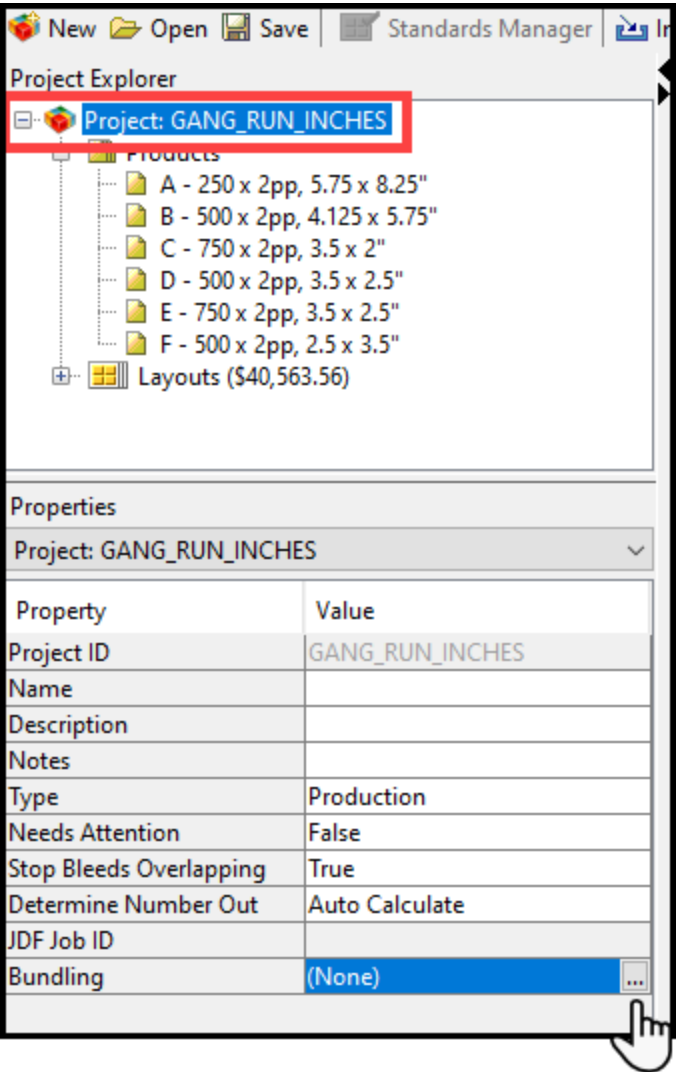
- A “kit” of products needs to be sent to multiple destinations, so for ease of picking and packing, each kit should be bundled together on the same layout(s). This allows distribution to begin before the entire run is finished printing.
- All products that need to be delivered on a specified date should be bundled together. For example, 10 of each of 500 products must be delivered today with the remaining quantities to be delivered at other times. This also allows distribution to begin before the entire run is finished printing.
- You want to keep all components for each product together on layouts rather than having them scattered throughout multiple layouts.

**Note** For more information on product bundling, see *ePS Metrix Tech Note-Bundling*.

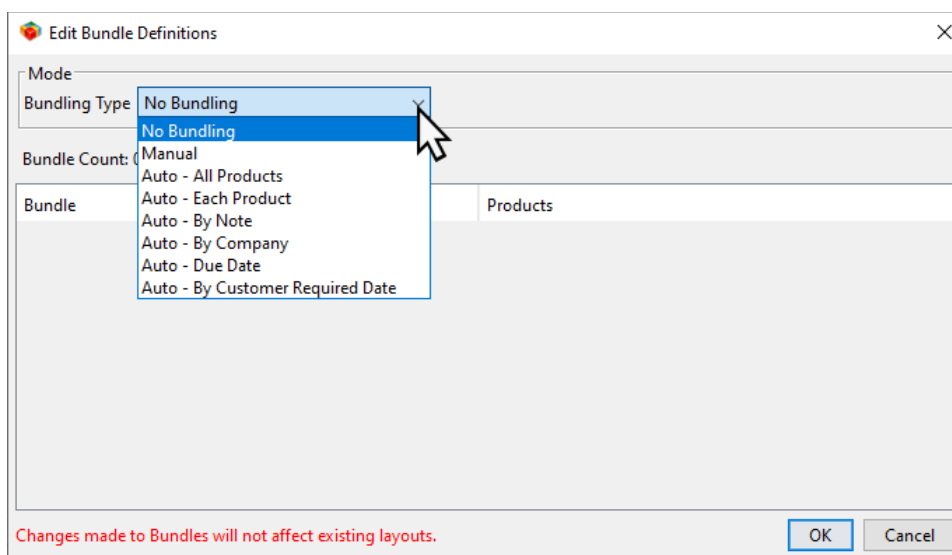
**To configure a bundle**

Product bundles are configured for a project, and cannot be set up for individual products. Product bundling only works with the **Display Graphics** module.

1. Select the project in the **Project Explorer**.
2. Click the **Bundling** field in the **Project Properties**.
3. Click the [...] button to open the Edit Bundle Definitions window.



4. Choose the bundle type from the **Bundling Type** drop-down list:



- a. **No Bundling** is the default mode that applies no bundles to the project.
- b. **Manual** allows you to edit the settings configured for other modes or customize an all-new bundle.
 

**Note** If the first mode you select is **Manual**, there will be no pre-defined bundles. **Manual** bundling provides the most flexibility for creating bundles with varying quantities. In addition to changing the number of bundles and the bundle names, you can specify the number of each product in each bundle. For more information on the **Manual** mode, see [To configure a Manual bundle](#).
- c. **Auto-All Products** creates bundles with all the products of the project in each bundle.
 

**Note** The **Required Quantity** for each product is evenly divided among the specified number of bundles. The default **Number of Bundles** is 10. The maximum number of bundles is 1000. You can change this number by opening the Metrix 2022.1.properties file in a text editor when Metrix is not running and editing the value for "Bundle.MaxNum=XXXX".
- d. **Auto-Each Product** creates a separate bundle for each product.
 

**Notes** Metrix divides the **Required Quantity** by the specified **Product Instance per Bundle**. For example, if there are 3 products with a **Required Quantity** of 30 each, then there will be 3 bundles with 10 instances for each product.

The maximum number of bundles is 1000. You can change this number by opening the Metrix 2022.1.properties file in a text editor when Metrix is not running and editing the value for "Bundle.MaxNum=XXXX".
- e. **Auto-By Note** creates a separate bundle for each unique **Note** in the **Product Properties**.
 

**Notes** The **Note** property is not case sensitive.

If the **Note** property is empty for a product, then it will not appear in the list of bundles.
- f. **Auto-By Company** creates a separate bundle for each **Company** that appears in the **Product Properties**.
 

**Note** If the **Company** property is empty for a product, then it will not appear in the list of bundles.
- g. **Auto-Due Date** creates a separate bundle for each **Due Date** that appears in the **Product Properties**.
 

**Notes** The **Due Date** property is not case sensitive.

If the **Due Date** property is empty for a product, then it will not appear in the list of bundles.

- h. **Auto-By Customer Required Date** creates a separate bundle for each **Customer Required Date** that appears in **Product Properties**.

**Note** If the **Customer Required Date** property is empty for a product, then it will not appear in the list of bundles.

5. Complete the remaining fields:

- a. **Bundles always start on new sheet** is available for all **Bundling Types**. When this check box is selected, Metrix will not place bundles on a sheet that contains another bundle. Instead, each bundle starts on a new sheet.
- b. **Separator Marks** is only available if **Bundles always start on new sheet** is not selected. When this checkbox is selected, Metrix will place a **Separator Mark** between bundles that appear on the same sheet.

**Notes** You can change the thickness of the **Separator Marks** in the **Bundle Separator Mark Size** field in the **Marks** tab of the **User Preferences**.

You can edit an individual **Separator Mark** by selecting it on the layout and changing the thickness, color, and position in the **Properties**.

- c. **Spacing** is only available if **Separator Marks** is selected. This field allows you to specify how much space to leave between product bleeds and the **Separator Mark**.
- d. **Bundle Count** is available for all **Bundle Types**. The field is not editable; it is automatically populated with the total number of bundles in the project.
- e. **Number of Bundles** is only available for **Auto-All Products** bundling type. This field allows you to specify the number of bundles in the project.
- f. **Product Instances per Bundle** is only available for **Auto-Each Products** bundling type. This field allows you to specify the number of product instances in each bundle.
- g. **Respect Quantity** is available for the **Auto-All Products** and **Auto-Each Products** bundling types. When this checkbox is selected, bundles will contain only the **Required Quantity** for products. This may result in some bundles having more or fewer instances of products, but the total quantity will equal the product **Required Quantity**. If **Respect Quantity** is not selected, the quantities for all products will be equally distributed among all bundles.

**Note** When the total number of products configured for Bundling does not match the **Required Quantity**, the **Quantities in Bundles do not match product Required Quantities** message appears. If you click **OK**, then a Fix Product Quantities window opens:

**Edit Bundle Definitions**

Mode

Bundling Type: Auto - All Products ☐ Bundles always start on new Sheet

☒ Separator Marks, Spacing: 1

Bundle Count: 11 Number of Bundles: 11 ☐ Respect Quantity

Bundle	Products
Bundle.1	46 x A, 46 x B, 69 x C, 46 x D, 69 x E, 23 x F
Bundle.2	46 x A, 46 x B, 69 x C, 46 x D, 69 x E, 23 x F
Bundle.3	46 x A, 46 x B, 69 x C, 46 x D, 69 x E, 23 x F
Bundle.4	46 x A, 46 x B, 69 x C, 46 x D, 69 x E, 23 x F
Bundle.5	46 x A, 46 x B, 69 x C, 46 x D, 69 x E, 23 x F
Bundle.6	46 x A, 46 x B, 69 x C, 46 x D, 69 x E, 23 x F
Bundle.7	46 x A, 46 x B, 69 x C, 46 x D, 69 x E, 23 x F
Bundle.8	46 x A, 46 x B, 69 x C, 46 x D, 69 x E, 23 x F
Bundle.9	46 x A, 46 x B, 69 x C, 46 x D, 69 x E, 23 x F
Bundle.10	46 x A, 46 x B, 69 x C, 46 x D, 69 x E, 23 x F

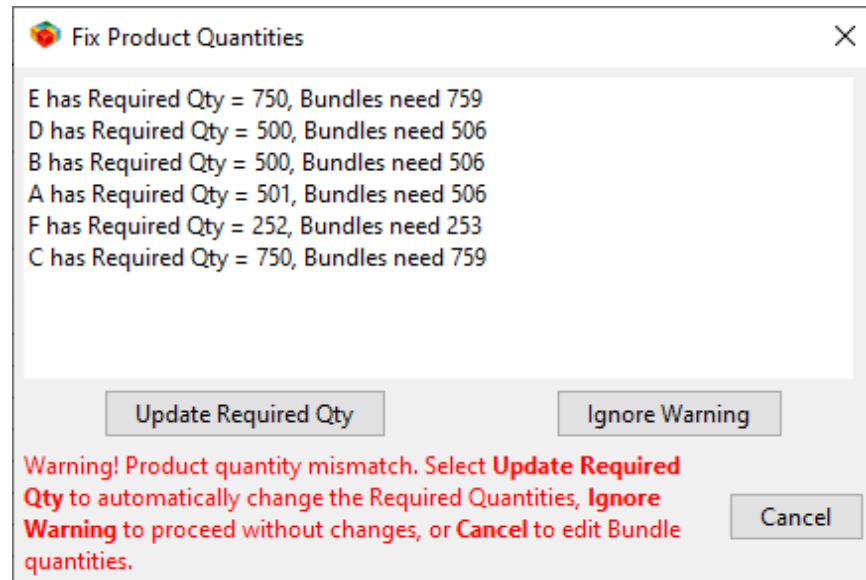
Quantities in Bundles do not match product Required Quantities. Changes made to Bundles will not affect existing layouts.

**OK** **Cancel**

Select **Update Required Qty** to automatically change the Required Quantities for the listed product(s) so they match the number specified for bundling.

Select **Ignore Warning** so no charges will be made to the **Required Quantity** or bundles. There may be overs or unders.

Select **Cancel** to return to the Edit Bundle Definitions window so you can edit the product quantities in the bundles.

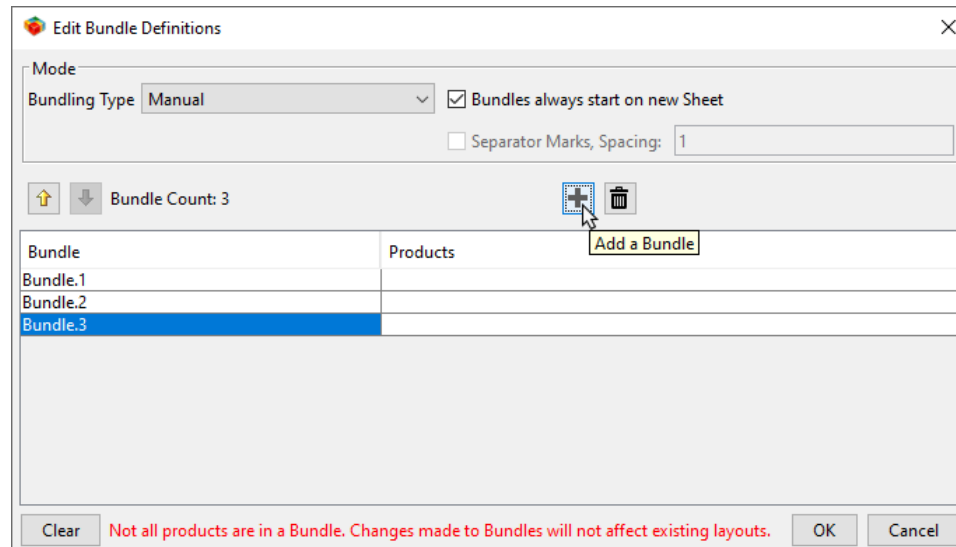


- Click **OK**.

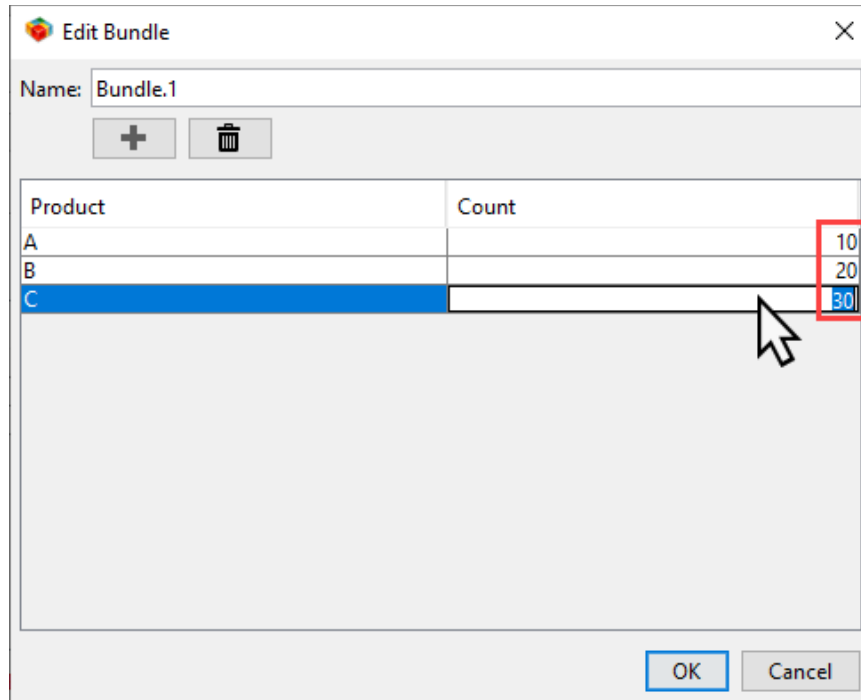
### To configure a Manual bundle

- Choose **Manual** from the **Bundling Type** drop-down list.
- Click the **+** button to add a new bundle.

**Note** You can add as many bundles as you want.

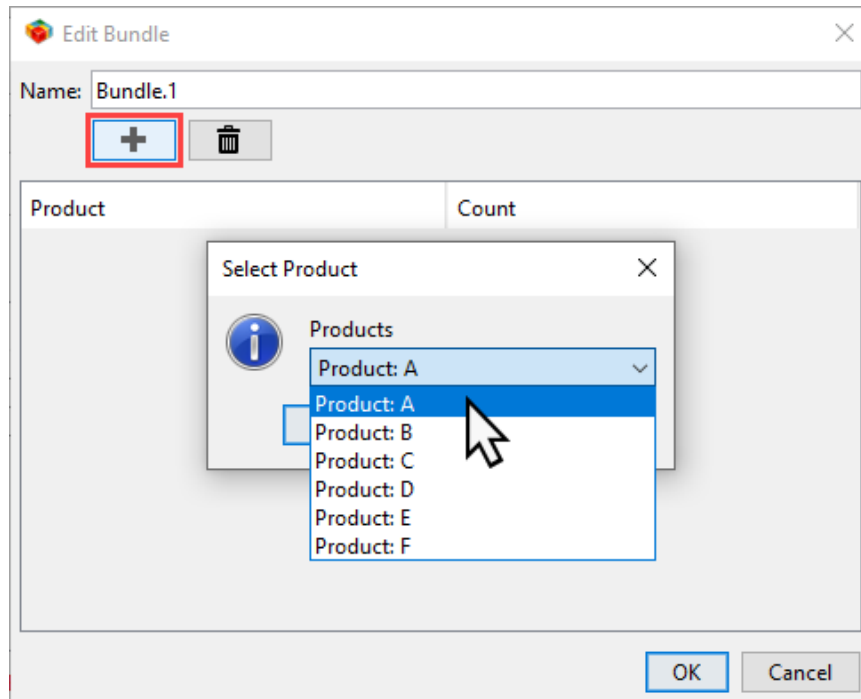


- Click in the **Product** column for the bundle you want to edit. You can change the name and add products to the bundle in the Edit Bundle window.

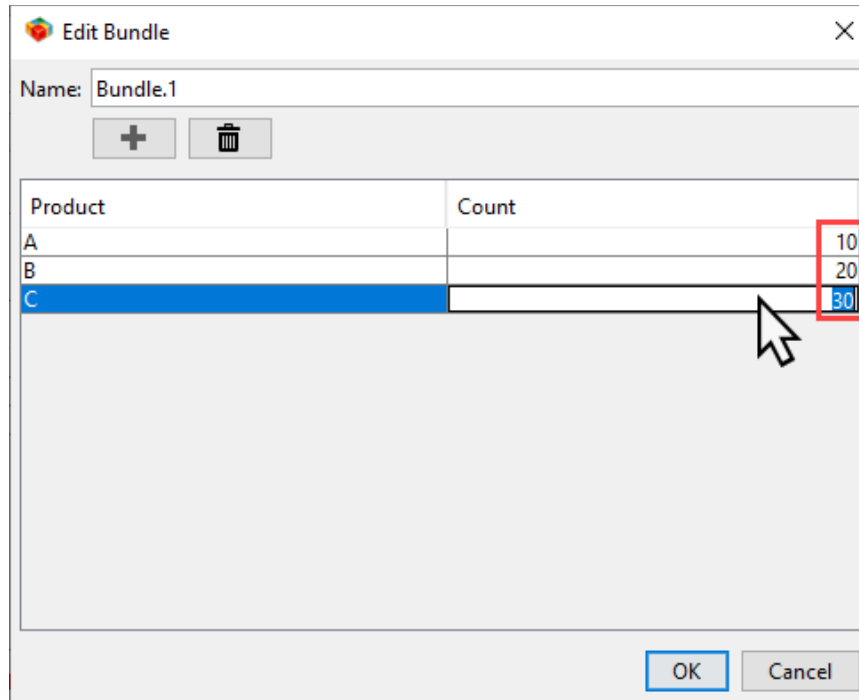


4. Enter a custom name in the **Name** field to change the name of the bundle.
5. Click the **+** button to open the Select Product window, where you can choose the products to add to the selected bundle.

**Note** You can add as many products to a bundle as you want.



6. Click in the **Count** column for the Product you want to edit and enter the number of instances to include in the bundle for that product.



- Click **OK** to save the configuration when all the bundles are complete.

**Note** If you want to delete **ALL** configured bundles in **Manual** mode, click the **Clear** button.

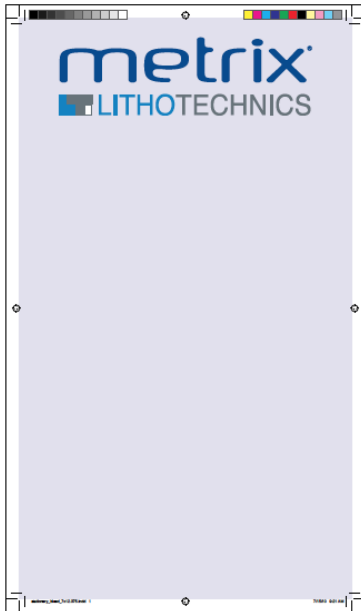
## Bleeds

### Understanding positive and negative bleed

Metrix approaches product bleed from the perspective of the layout – how much product fits on the layout when bleeds are considered? But Metrix goes one step further with the concept of negative bleed – how much extra product can be squeezed onto the layout when products contain white space in the margins and therefore non-image areas of the press sheet can be utilized?

### Products with bleeds

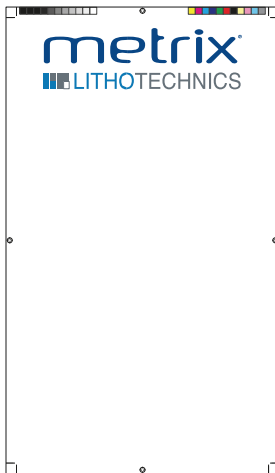
“Positive” bleed is the conventional way we think about bleed. For example, Metrix ensures that pages with bleed are kept away from the No Image area on the press sheet.



**Note** The gutter between bleeding and non-bleeding product instances is controlled by the Page To Bleed Gap property. For more information, see [Changing Automatic Gutters](#).

## Products with no bleed

Products with no bleed may be defined as having zero bleed, or they may be defined as having “negative” bleed. Negative bleed allows Metrix to use No Image areas of the sheet for product placement, which sometimes means that more product can be placed onto the sheet, improving the productivity of the press run.



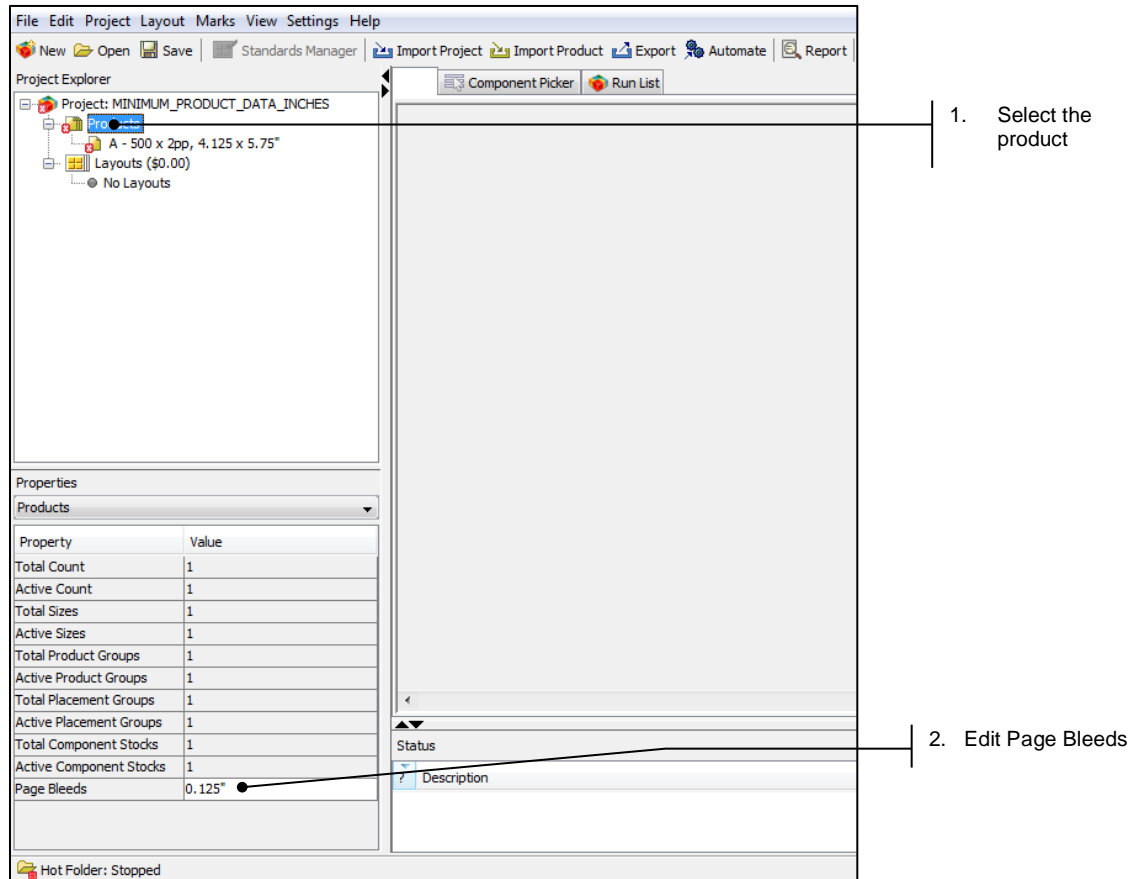
Metrix allows products with negative bleed to be placed into the No Image areas, up to the amount of negative bleed, or up to the No Page area, whichever comes first.

## Changing bleeds

### Changing all bleeds for all products

1. Select **Products** in the Project Explorer.
2. Edit **Page Bleeds** in the Properties Editor.

**Note** Edits made to the Page Bleeds property of the Products node apply to all sides of all products.

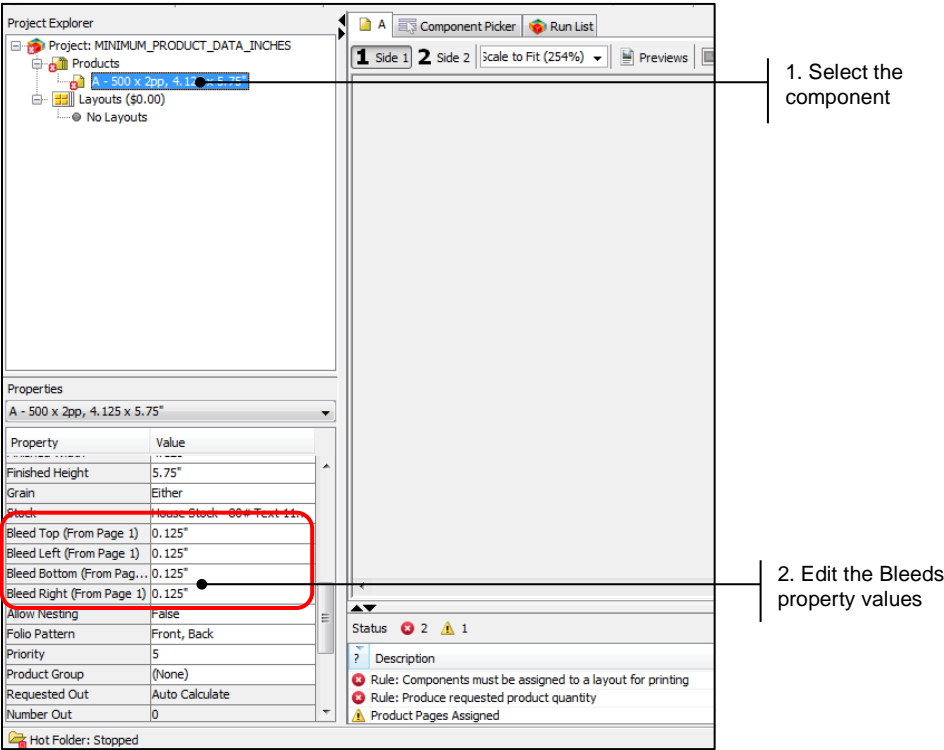


## Changing product bleeds on both sides


### To change the bleeds values on both sides of a single product

1. Select the individual **product** (underneath the parent product) in the Project Explorer.
2. Edit the **Bleeds** values (highlighted in the following illustration).

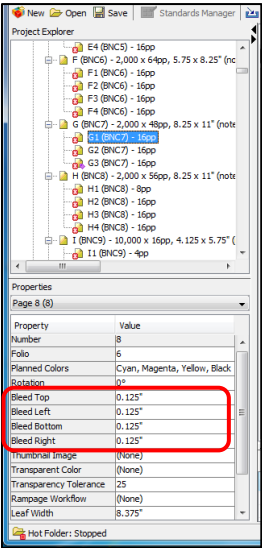
**Note** Edits made to the bleed properties of the Product node apply to both sides of the product.



### Changing product bleeds on one side only

1. Select the Component in the Project Explorer.
2. Click the **View Area** tab (  ).
3. Select the tab for the appropriate **Side**.
4. Select the desired **Page** in the View Area.
5. Edit the **Bleed Properties (Top, Left, Bottom, and Right)**.

**Note** Edits made to the Page node apply to the selected page only.



## Resolving overlapping bleeds

When the project property Stop Bleeds Overlapping is set to **True** (the default), whether you are looking at the product or the layout, the overlapping bleeds are automatically resolved.

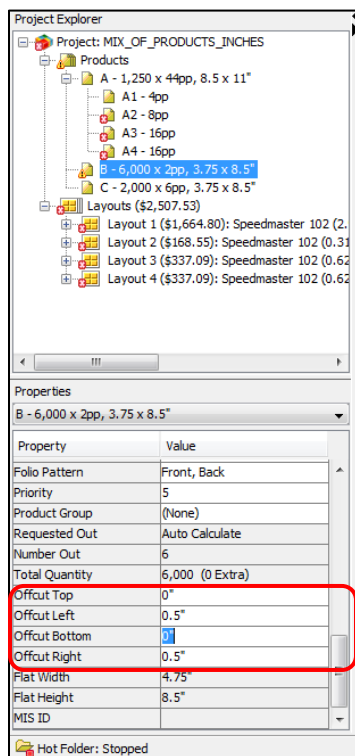
## Using Offcuts

Sometimes finishing operations such as embossing or die-cutting require extra white space on the sheet. You can use offcuts in such situations.

1. Select a product in the Project Explorer.
2. Enter selected offcuts in the Values field of the Properties Editor.
  - Offcut Top
  - Offcut Left
  - Offcut Bottom
  - Offcut Right

**Note** Offcut location may depend on the product's orientation on the layout. For more information, see [Controlling Product Orientation](#).

In the following illustration, we have changed the Offcut Left and Offcut Right Values to .5".



## Using Groups

### Assigning product groups

To assign the product group and priority (1–10; 1 is highest priority), use the following steps.

**Notes** Before you can assign product groups they must be defined in the Metrix database. See the *Metrix Setup Guide* for complete details.

You can assign up to 10 product groups per layout. Higher priority products are placed first, often nearer the grip edge, ensuring the highest print quality.

Product groups are not supported with the **Display Graphics** algorithm.

1. Select a product from the Project Explorer.
2. Select a value or option from the product group and priority in the Properties Editor.

**Note** You can set product display colors individually or by group. Choose **Project > Set All Product Display Colors**, and then select either **Individually** or **By Product Group**.

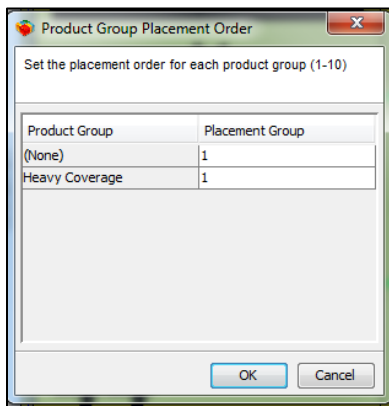
## Assigning placement groups

If you need a gap between groups, set the Placement Group Gap property in the User Preferences window. For more information, see [Auto Layout Preferences](#).

You can edit the placement group after you:

- Select a product.
- Click the Product Group property in the Properties Editor.
- Select a product group (if it is not already assigned).
- Click **Auto Layout**.

Enter a number (1–10) to indicate the placement order for each product group.



## Finishing Groups

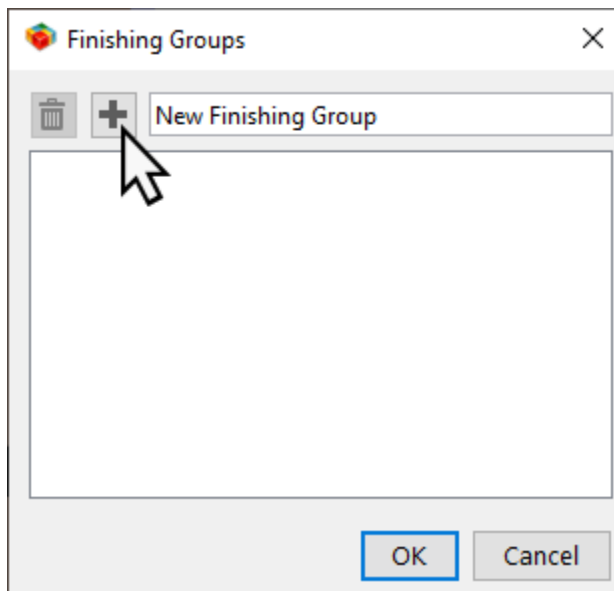
Finishing groups allow you to group together products that share the same finishing requirements onto the same layout. These products may require the same foil, coating, or have other unique requirements that are different from the rest of the products in the project.

To add a finishing group to a product:

1. Select a product from the Project Explorer.
2. Click the **Finishing Group** field in the Product Properties.
3. Select **(Edit Finishing Groups)** to open the Finishing Groups window.

Allow Nesting	True
Folio Pattern	(None)
Finishing Group	New Finishing Group
Priority	(None)
Product Group	Another Finishing Group
Requested Out	Custom Stock
Number Out	Gold Foil
Total Quantity	New Finishing Group
Flat Width	Unique coating
Flat Height	(Edit Finishing Groups)
MIS ID	6.0/6381683

4. Enter the custom name of the **Finishing Group**.



The 'Finishing Groups' dialog box shows a list of finishing groups. The 'New Finishing Group' button is highlighted with a mouse cursor. The list contains the following items:

- New Finishing Group

Buttons: OK, Cancel

5. Click  or press enter.


**Notes** **Finishing Group** names are not case sensitive.

The **Name** field in the Finishing Group window automatically filters the list as you type.

You can add as many finishing groups as you want to the list.

To delete a finishing group:

1. Select a product from the Project Explorer.
2. Click the **Finishing Group** field in the Product Properties.
3. Select **(Edit Finishing Groups)** to open the Finishing Groups window.

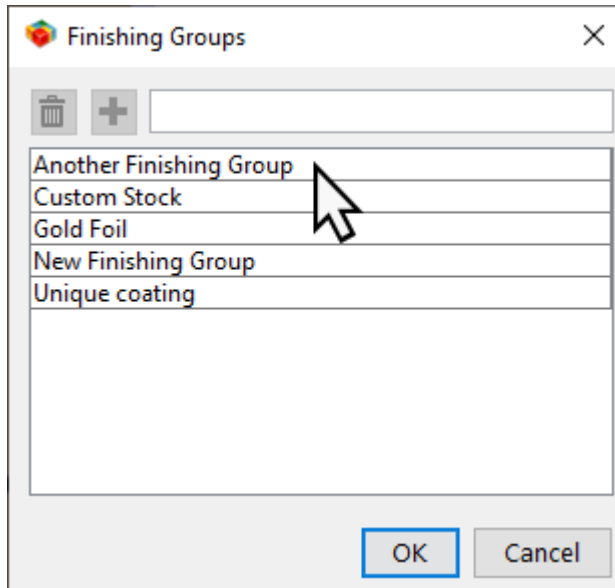
4. Choose the appropriate finishing group from the list and click  .

**Notes** When a finishing group is deleted, all the products in the current project assigned to that finishing group are changed to **(None)**.

Deleting a finishing group removes it from the master list that applies to all projects, but if you open a project that uses a deleted finishing group, then the finishing group will be re-added to the list.


To assign a finishing group to a product:

1. Select a product from the Project Explorer.
2. Select a finishing group from the **Finishing Group** drop-down list in the Properties Editor, or select **(Edit Finishing Groups)** and choose the finishing group from the list in the Finishing Groups window.



**Note** The **Finishing Group** drop-down list in the Properties Editor shows only the finishing groups used in the current project. The Finishing Groups window shows all finishing groups.

## Changing Product Stock

1. In the Project Explorer, select the **product**.
2. From the Properties Editor, select **Stock** > .
3. Select your new stock from the Stock Selector window.

**Note** If the product stock and assigned Layout stock do not match a warning will display.

## Selecting and changing multiple items

Metrix gives you the ability to select multiple components—products, layouts, or both—so you can change many properties of those items at one time.

When you have only one product or layout selected in the Project Explorer, you see that item in the View Area. The Properties Editor displays the properties of the selected item. Those fields that are not gray in the Properties Editor are available to be changed manually.

You can use **SHIFT-click** (Windows or Mac) to select a range of items, or you can use **CTRL-click** on Windows (**CMD-click** on Mac) to select non-contiguous items.

If you select more than one item, the View Area cannot display both items at the same time, so it will display a message telling you how many items have been selected. Since the properties of the selected items can be different, the Properties Editor then displays the properties of the items differently, giving you the opportunity to change some of the properties to be the same for all the items.

There are basically four kinds of property displays in the Properties Editor:

- Properties that have the same values, and are editable will display in regular black text in a field with a white background
- Properties that are not editable and have a gray background
- Properties that are different will have the words *(Different Values)* in the field. *(Different Values)* where change is not allowed will have gray italic text with a gray background
- *(Different Values)* where change is allowed will be in gray italic text with a white background. When you click in the field, the gray italic text will change to regular black text. You can then edit the property so it will be the same for all of the selected items.

**Note** Properties that are not relevant to one or more of the selected items will disappear from the Property Editor.

If you select enough items, for example layouts and products, you may only be left with the few properties the items have in common.

**Note** This can be helpful if you want to be sure all products and layouts are on the same stock.

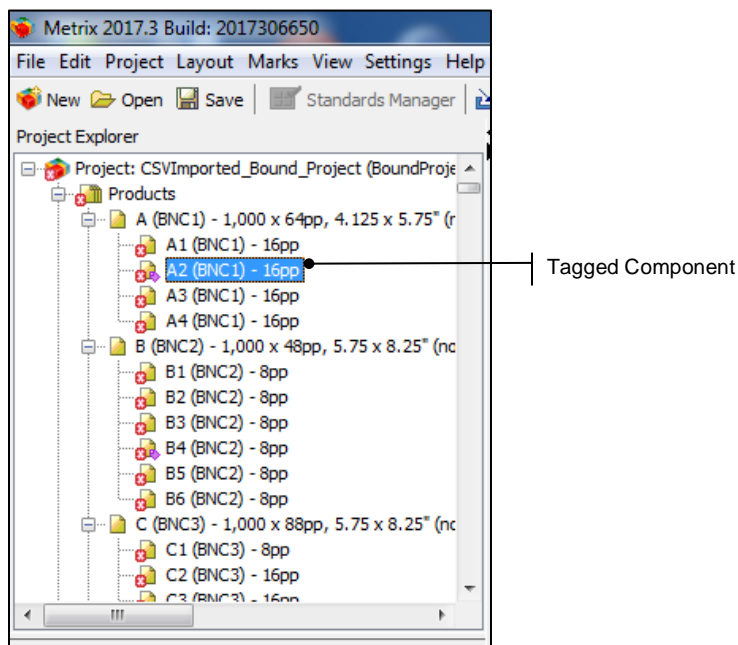
## Tagging Components

Metrix allows you to tag components. You can tag any component or leave it untagged. You may think of your own uses for this function, such as tagging those products that have been approved, or tagging products having a particular ink coverage, or products on a particular stock. This simple function can give you greater control over selecting, sorting, and filtering items.

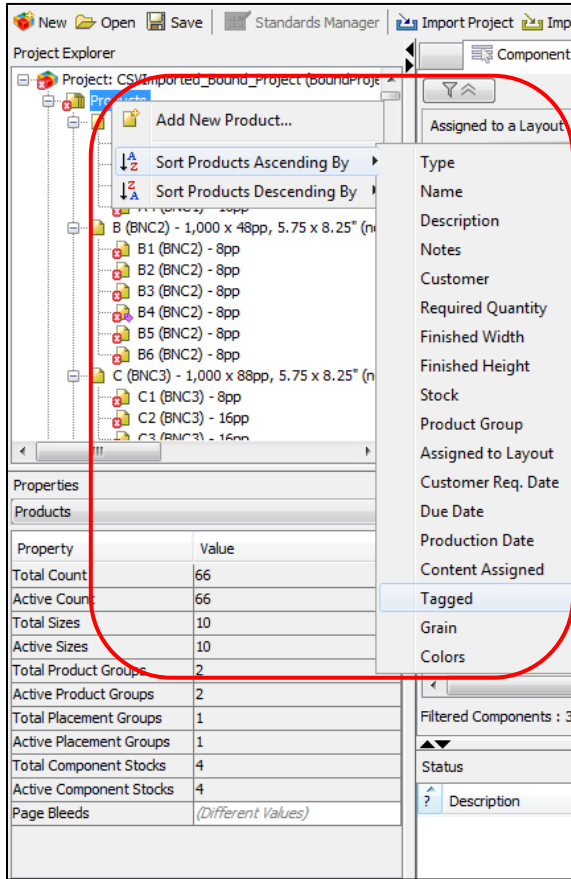
When you tag a component, it is marked with a small tag icon on the lower, right-hand corner of the component as seen below.



To tag a component, simply right-click it inside the Project Explorer, and select **Tagged** from the contextual menu.



One of the ways you can use tagging is in sorting or filtering.



You can also choose to run Auto Plan only on the tagged components in your project. Once you start tagging components, you will probably find many uses for this feature.

## Flipping Items and Instances

### Flipping items on a sheet

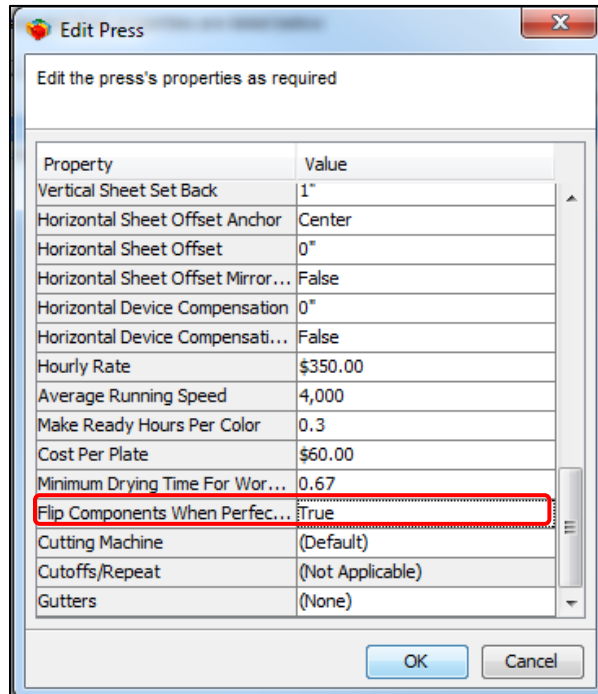
In some cases, you may want to print the front of your product on the back side of the sheet and vice versa. The following sections in this chapter will explain how to do this.

### Flipping components when perfecting

Metrix 22.1 allows you to flip print output so that the front side of the products is printed on the back side of the layout, arriving face up in the delivery area of the press, when using the Perfected printing method.

#### *To turn on the Flip Components When Perfecting option*

1. In the Database window, select Presses, and then select the appropriate press.
2. Click **Edit**, and then find the **Flip Components When Perfecting** property in the Edit Press window.
3. Set the option to **True**, and then click **OK**.



**Notes** Metrix will then “flip” all projects planned for that press using the perfected printing method so that the fronts of the components appear on the back of the press sheet, and vice versa.

This setting applies only to components, not to marks.

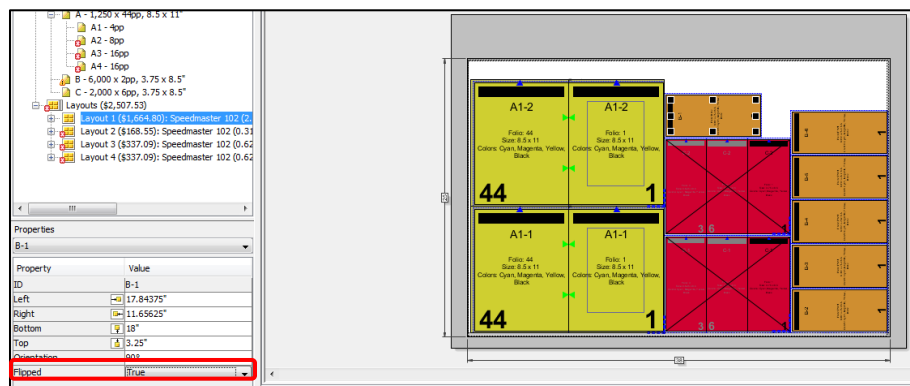
For more information about how to set up **Presses** in the Database window, see the *Setup Guide*.

## Flipping component instances individually

You can flip individual components regardless of the selected printing method.

**Note** Flipping is when the front side of products is printed on the back side of the layout so the printed sheet arrives face up in the delivery area of the press.

1. Select the layout and the View tab.
2. Click the component instance.
3. In the Properties Editor, select **Flipped >True**.



**Note** For more information on Product properties, see [Product properties](#).

## Rotating Pages

### Rotating a single flat product side

**Note** When Bleed properties are unequal, page rotation may require changes to the bleeds.

1. Click the product in the Project Explorer area.
2. Click **Side 2** underneath the **Component Picker** tab.
3. Select the page from the View Area below by clicking on it.
4. Change the Rotation value in the Properties Editor on left side of the screen.

### Rotating a single folded page

**Note** The Rotation property acts on the selected page side only – the reverse side of the page is not rotated.

1. Select the product in the Project Explorer area.
2. Select the page from the View Area.
3. Change the Rotation value in the Properties Editor on left side of the screen.

### Rotating product instances

To rotate a product instance, use the following steps.

1. Select the product instance by clicking on it, and then right-click (**CTRL-click** on Mac).
2. Select **Rotate > 90° CCW, 180°, or 90° CW**.

## Assigning a Product to a Layout

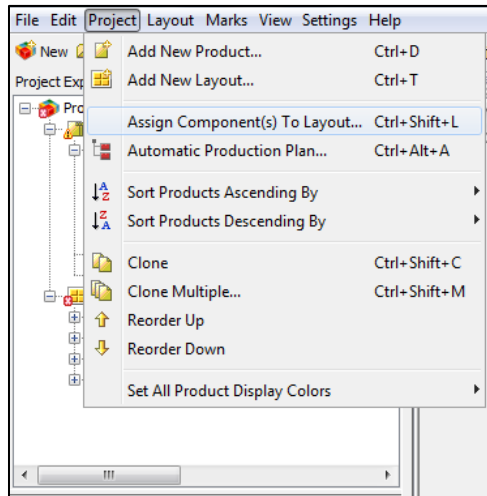
Your layout must have one or more products assigned to it before you can generate an Auto layout or use the Auto Production function. Use one of the following methods.

### Methods 1-3

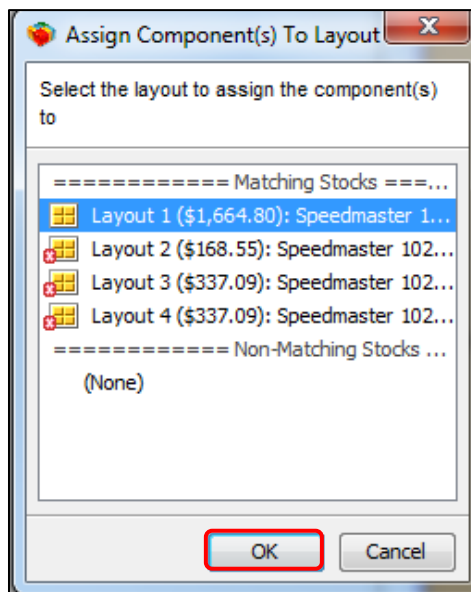
- Drag the product onto the layout in the Project Explorer.
  - Note** To assign multiple products to a layout, press and hold the Shift or Command key (Mac) or Ctr key (Win) and click on the products in the Project Explorer. While holding down the modifier key, drag the components to a layout.
- Use the New Product Wizard to assign the product to a layout during product creation.
- Run Auto Plan to assign all the products to layouts automatically.

### Method 4

1. Select a product in the Project Explorer.
  2. Choose **Assign Component(s) to Layout...** from the Project menu.
-



3. Select the layout to which you wish to add the product.
4. Click **OK**.



## Manually adding a Product to a Layout

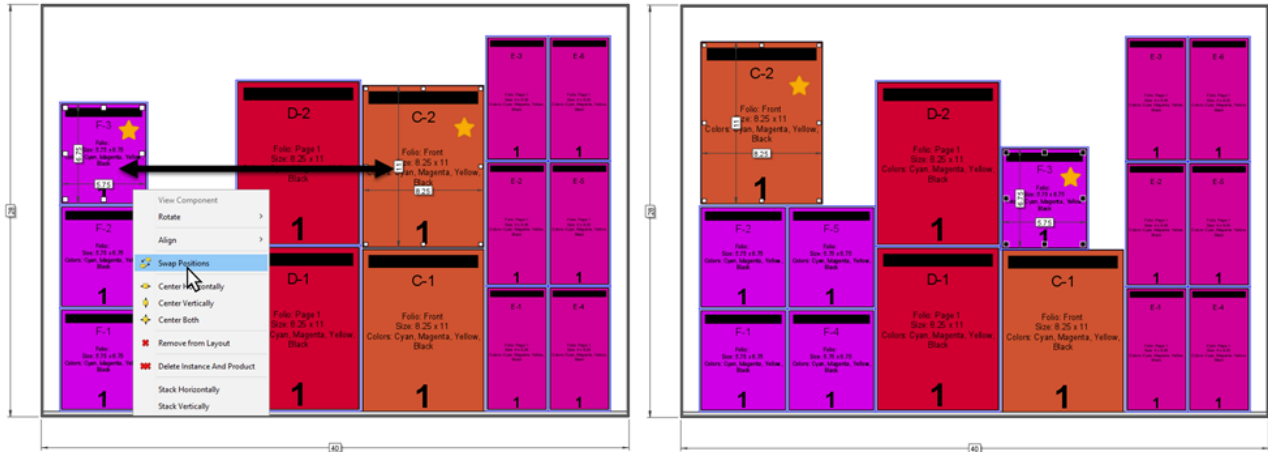
1. Select the layout from the Project Explorer.
2. Right-click and choose **Add Component Instance** from the contextual menu.

**Note** **Add Component Instance** places a single instance on the lower-left sheet corner. You must already have at least one component assigned to a layout for this option to become available in the contextual menu.

## Swapping Component Instances on a Layout

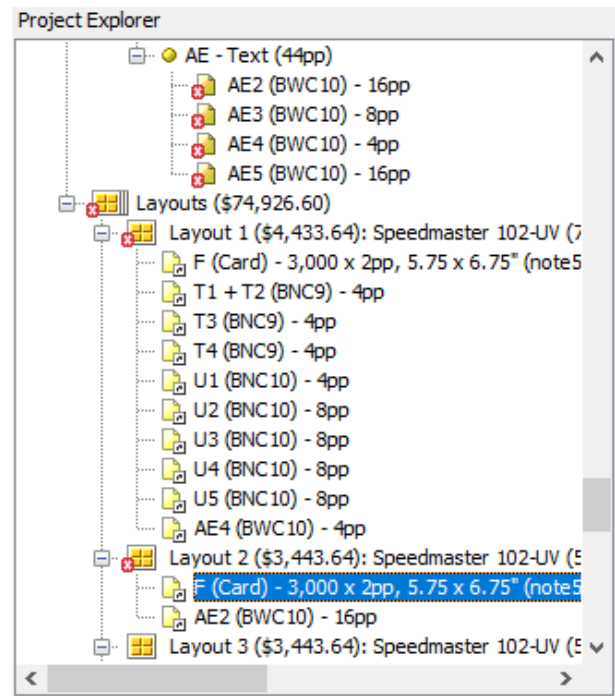
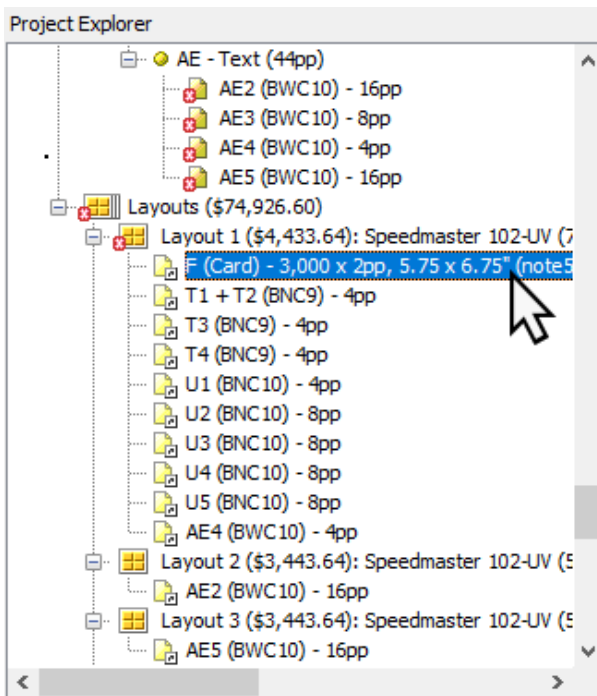
1. Select the two component instances you want to swap on the layout in the Layout View.
2. Right-click and choose **Swap Positions** from the contextual menu.

**Note** **Swap Positions** does not delete the existing dimensions of the products on the layout.



## Copying Component Instances from One Layout to Another

1. Open the User Preferences window and select the **Auto Layout** tab.
2. Set the **Allow a Component to be on multiple Layouts** to **True**.
3. Hold the **Alt** key on Windows or the **Option** key on Mac.
4. Click and drag a component from one layout to another in the **Project Explorer**. This adds a copy of the component to the new layout.



**Note** You can move a component from layout to another by clicking and dragging the component without holding the **Alt** or **Option** key.

## Show/Hide Layout Tooltips

### To show or hide Layout Tooltips:

1. Right-click on a component instance in the Layout View area.

2. Select or de-select **Show Layout Tooltips** on the contextual menu.

## Using the Metrix Auto Layout Engine

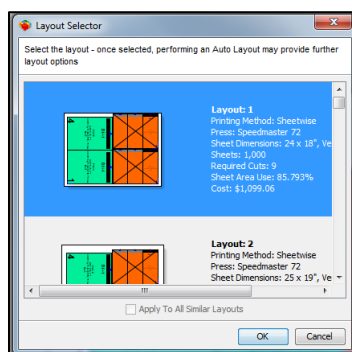
The Auto Layout feature calculates the best way to lay a project out on a sheet. It works based on the constraints and specifications that you provide, calculating the best possible layout for a given scenario.

Auto Layout does not consider the best, most cost-effective layout overall. It only works within the constraints that you specify. For example, it does not consider other possibilities with different parameters (sheet size, quantities, printing methods, presses, etc.) from what you specify.

**Note** The **Auto Layout** feature cannot improve on **Auto Plan** results when the **Media Optimization** or **Display Graphics** algorithms are used, because these algorithms already find the most optimal layout.

### To run Auto Layout

3. Select a layout that has one or more products assigned to it.
4. Select **Auto Layout**. Auto Layout will present one or several options in the Layout Selector window.
5. Choose the preferred layout and click **OK**.



**Note** Metrix without the Capacity Plus module restricts the Auto Layout and Auto Production engines to 16 different products per sheet. Metrix with Capacity Plus allows up to 200 different products per sheet. For more information, see [Using the Metrix Auto Layout Engine](#) and [Using Metrix Auto Production](#).

## Using Metrix Auto Production

You can use the Metrix Auto Production engine to find the most cost-effective press, printing method, sheet size, and product geometry for the currently selected layout.

It allows you to consider multiple layouts in one action. For example, if you wanted to try an auto layout on a layout of various sized stocks, you could run an auto layout on each stock type individually. Or, you could simply run the Auto Production feature, and then specify which options (press, sheet size, etc.) you want auto production to consider in its calculations. Auto production would then choose the best options and present you with the results.

**Note** The **Auto Production** engine cannot improve on **Auto Plan** results when the **Media Optimization** algorithm is used, because this algorithm already finds the most optimal layouts.

**Auto Production** does work with layouts that were planned using the **Display Graphics** algorithm; the selected press must be digital.

If all products have the **Filename** set to "Blank" for one side, you can only use the **One-Sided Printing Method**; if you want to use a two-sided Printing Method for Auto Production, set the **Filename** to "Unassigned" instead.

### To run Auto Production

1. Select a layout that has one or more products assigned to it.

2. Select **Auto Production** from the tool bar above the Layout View.
3. Step through the wizard, selecting Printing Method, Presses, and Sheet Dimensions options for Metrix to consider and process.
4. Click **Finish** in the Sheet Dimensions window.
5. Choose your preferred option in the Layout Selector window, and then click **OK**.

**Note** Metrix without the Capacity Plus module restrict the Auto Layout and Auto Production engines to 16 different products per sheet. Metrix with Capacity Plus allows up to 200 different products per sheet. For more information, see [Using the Metrix Auto Layout Engine](#) and [Using Metrix Auto Production](#).

## Step and Repeat Using Drag and Drop

You must add one or more product instances before you can use step and repeat.

**Note** For more information about product instances, see [Manually Adding a Product to a Layout](#).

### Step and repeat options

Action	Windows	Mac
Step and repeat selected product	ALT-Drag	OPTION-Drag
Step and repeat selected product with Auto Bleeds (trim to trim)	CTRL-ALT-Drag	CMD-OPTION-Drag

### Step and repeat using the wizard

You can use the Step And Repeat Wizard to step and repeat selected product instance(s), considering bleeds and page to bleed gap, or with auto bleeds (trim to trim).

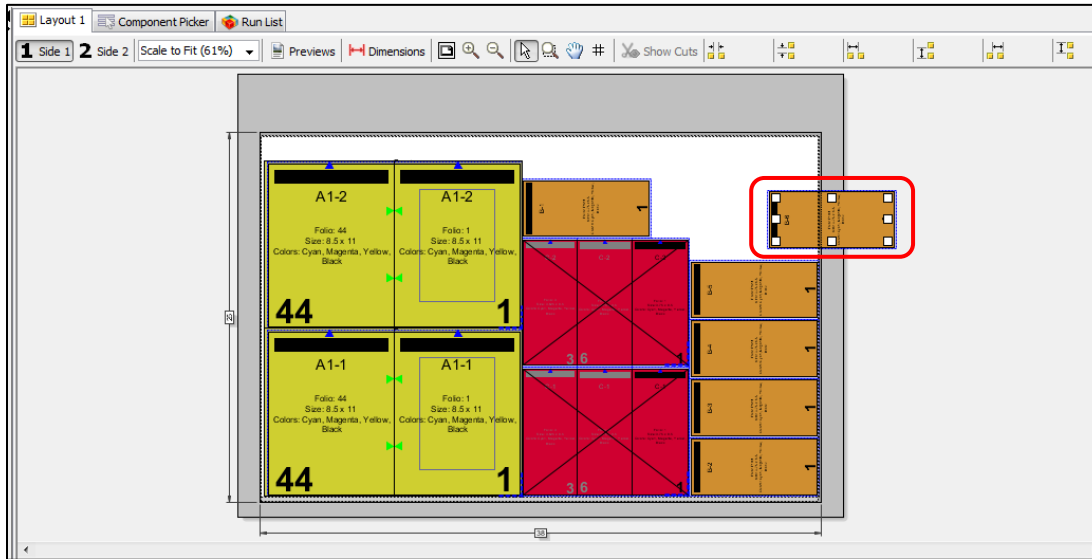
1. Select 1 or more instances.
2. Select **Layout> Step And Repeat** from the menu.
3. Step through the wizard.

The screenshot shows the 'Step And Repeat' dialog box with the title bar 'Step And Repeat' and a close button. The main area is titled 'Reposition Selected Instances' and contains the instruction 'If necessary, enter the new bottom left position for the selected instances'. Below this, there are five input fields: 'Selected Instances' with the value '1', 'Total Width' with '8.5"', 'Total Height' with '3.75"', 'X (from left)' with '17.84375', and 'Y (from bottom)' with '18"'. At the bottom of the dialog are four buttons: '< Back', 'Next >', 'Finish', and 'Cancel'.

## Working with Product Instances

### Selecting multiple product instances

**SHIFT-click** for Windows or **Command-click** for Mac and select multiple items on a layout or drag-select. Start the drag off any product instance.



### Drag and drop product instances

Action	Windows	Mac
Drag and snap to another product instance, considering Bleeds, Page to Bleed Gap, and Offcuts	Drag and drop	Drag and drop
Drag and snap to the lower left-hand sheet corner, considering Bleeds, Offcuts, and No Image areas.	Drag and drop	Drag and drop
Drag and snap to another product instance trim to trim	CTRL-Drag and drop	CMD-Drag and drop

**Note** To adjust drag and snap sensitivity, go to **Settings > User Preferences > Layout View** and use the Drag and Snap Sensitivity slide bar to set greater or lesser sensitivity.

### Nudging product instances

To nudge one or more instances left, right, up, or down:

- On Windows: use CTRL ←↑→↓
- On Mac: use CMD ←↑→↓

**Note** Nudge increments are 1 mm or 1/16".

### Moving product instances

This type of move is relative to the current position.

1. Select the instances you want to move.
2. Select **Layout > Move...** from the menu.

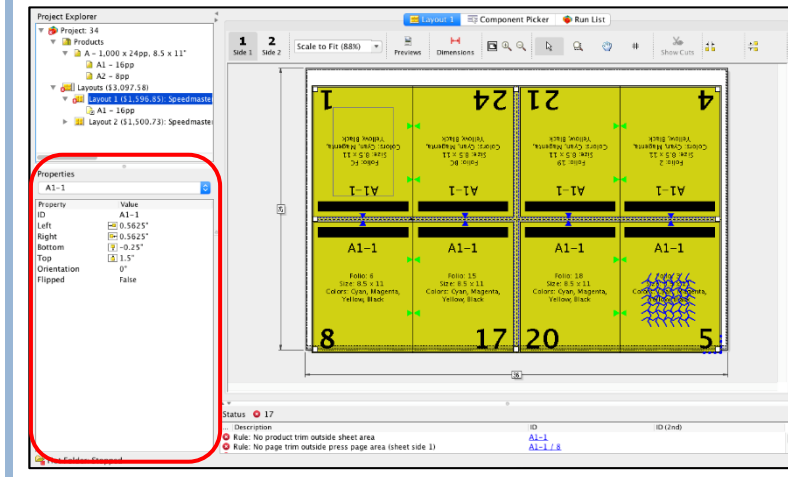
3. Enter Horizontal and Vertical values in the Move window.

**Note** Positive values move Right and Up, negative values move Left and Down.

## Changing product instance x-y coordinates

1. Select the instances.
2. Edit Left, Right, Bottom, and/or Top properties in the Properties Editor.

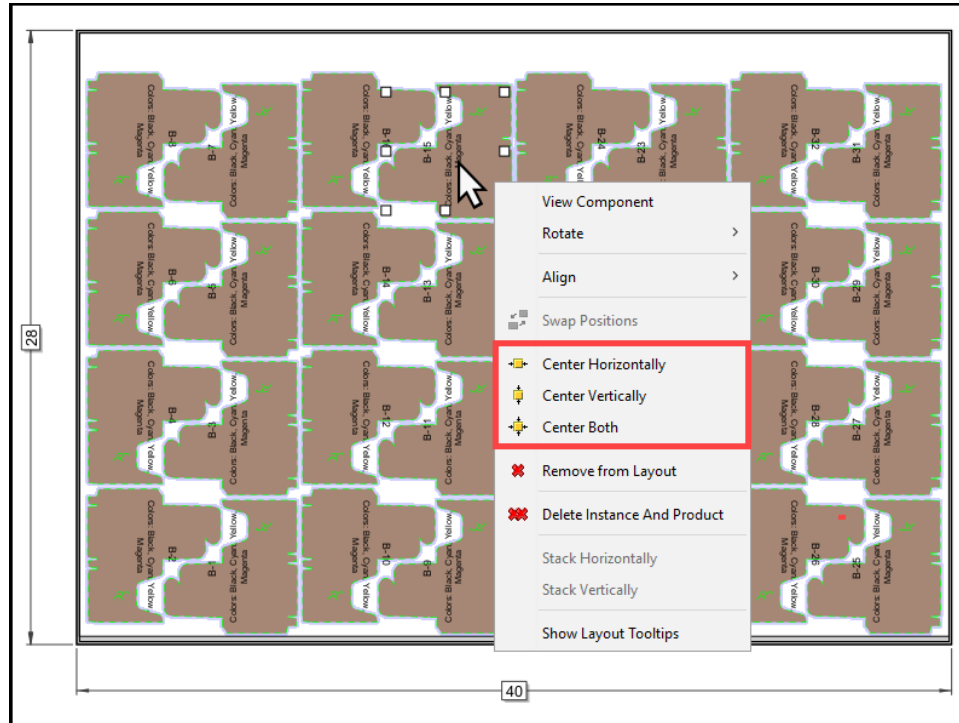
**Note** You can use fractions and mathematical expressions, which Metrix will resolve.



## Aligning product instances

To align the Product Instances:

1. Select the instance(s) to move.
2. Select the instance to align with, and then right-click.
3. Choose **Align**, and then select a direction.



## Centering product instances on the sheet

1. Select the instance(s), and then right-click.
2. Choose **Center Horizontally**, **Center Vertically**, or **Center Both**.

## Measuring distances between instances

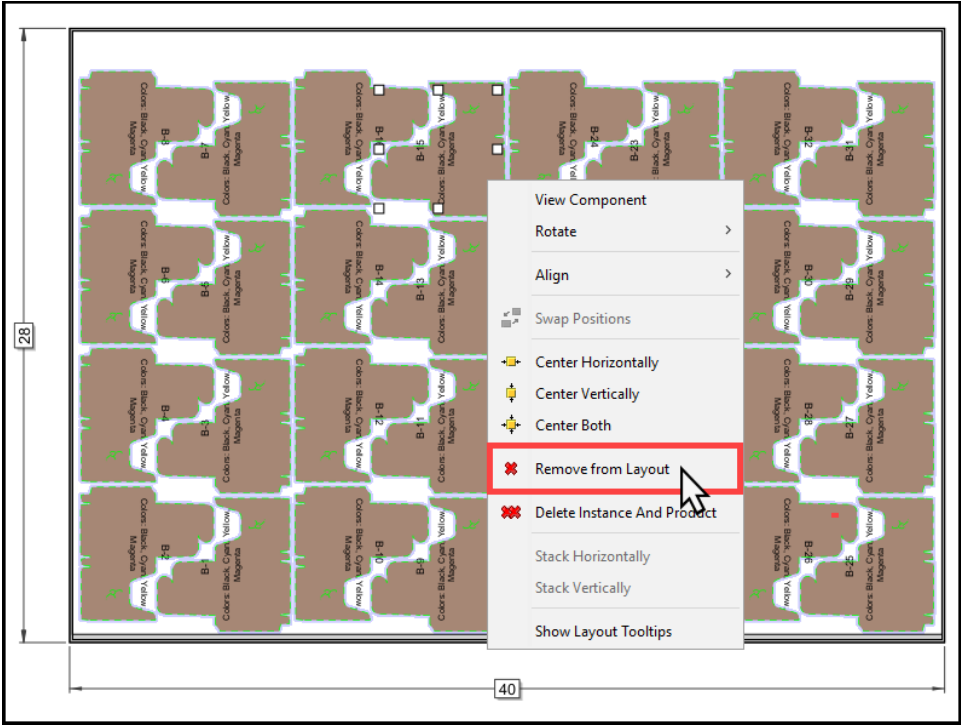
**Note** The measuring tools only display the values. If you want to insert a distance notation, use dimensions. For more information, see [Adding Dimensions to the Layout](#).

1. Select two instances in the View Area.
2. Review the measurements in the top right corner.

Icon	Displays this measurement	Icon	Displays this measurement
	The horizontal gutter amount		The distance from bottom trim edge to bottom trim edge
	The vertical gutter amount, from trim edge to trim edge.		The distance from right trim edge to right trim edge.
	The distance from left trim edge to left trim edge		The distance from top trim edge to top trim edge.

## Removing instances from layouts

1. Select an individual or multiple instance in the Project Explorer or View Area.
2. Right-click and choose **Remove from Layout** to remove the instance from the layout without deleting it from the project.



## Layout Tooltips

Layout tooltips allow you to view the component instance number, product size, and planned color.

To enable and use **Layout Tooltips**:

1. Right-click on any component instance on the layout.
- Note** **Layout Tooltips** will be applied globally to all layouts in your system.
2. Choose **Show Layout Tooltip**.
3. Hover on the component instance to see the layout tooltip.



## Manually Setting the Run Length

The Required Sheets property is the layout run length calculated by Metrix during an auto layout, auto production, or auto plan. When products are placed manually, you need to recalculate the run length.

1. Select a layout from the Project Explorer.
2. Select **Layout > Recalculate Required Sheets** from the menu.

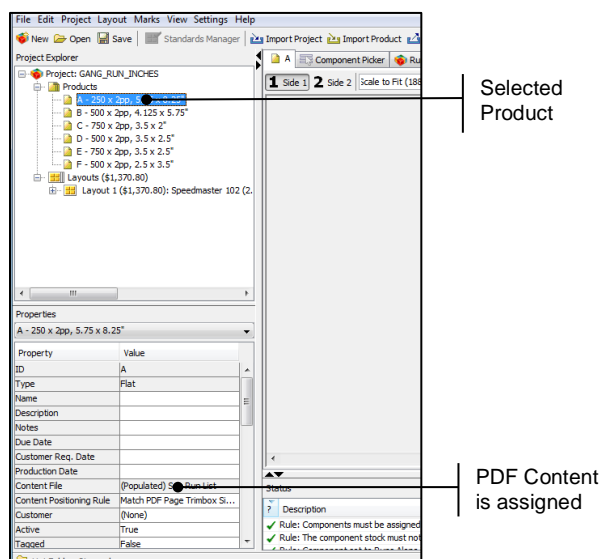
**Note** You can also edit the Required Sheets property manually.

## Content Previews


Content Previews allows Metrix to instantly show a live preview of the assigned PDF content files. Metrix uses industry-standard Adobe preview technology to generate the content previews, and stores these page previews locally for instant retrieval. Content Previews works on Mac or Windows, and you can toggle Previews on and off with easy keyboard commands.

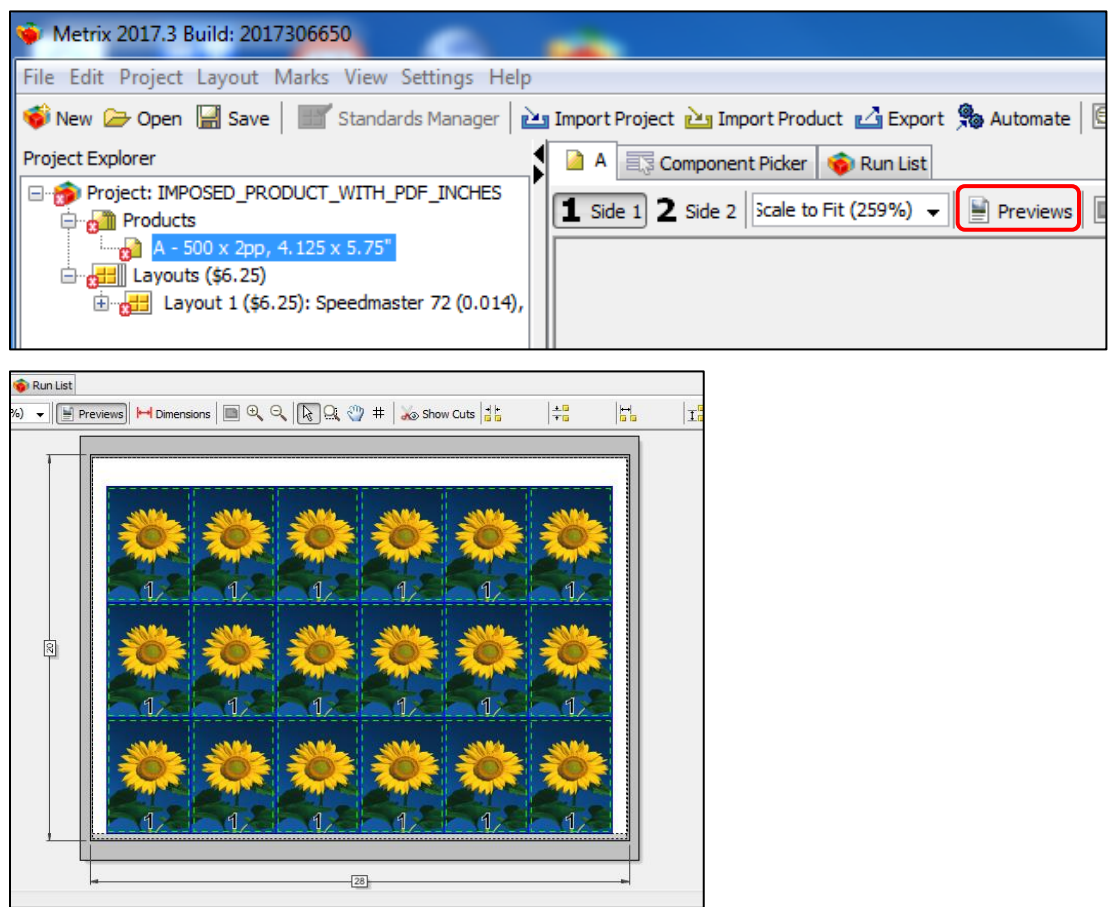
**Note** You must have PDF content applied to a product to use the Content Previews.

In the Project Explorer, with a product selected, you can see in the Content File property that PDF content has already been assigned to this product.



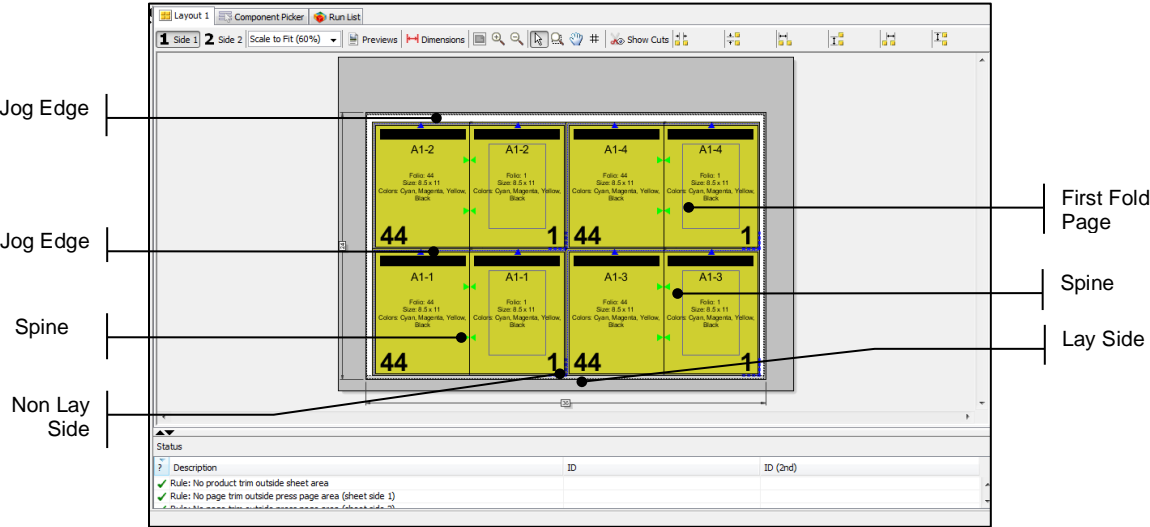
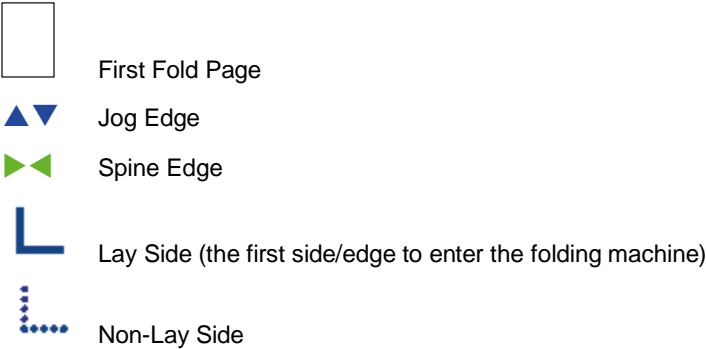
## Displaying assigned content

When you select a product, component, or layout and then click  above the Layout window, the product will display the assigned PDF content.



## **Bound Work**

# Bound Component Symbols



## Handling Spreads (Cover Only)

### Turning a cover page into a spread

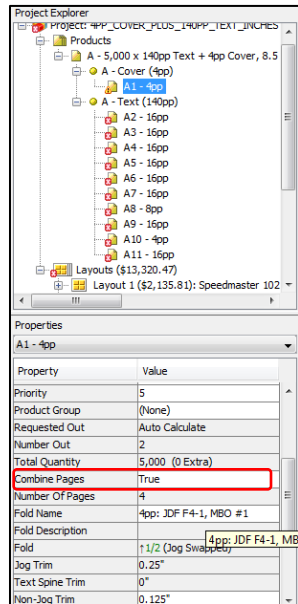
1. Select a cover component.
2. In the Properties Editor, select **Combine Pages > True**.

**Notes** When the “Combine Pages” property is set to **False** (the default), the cover pages will be treated as separate pages.

If the “Combine Pages” property is set to **True**, the cover pages will be treated as spreads.

How “Combine Pages” is set determines how Metrix imposes PDF graphics.

For example, in the example following, since “Combine Pages” is set to **True**, Metrix expects the graphic to consist of two pages, one for each spread. If “Combine Pages” were set to **False**, Metrix would expect the graphic to have four pages, one for each separate page of the cover.



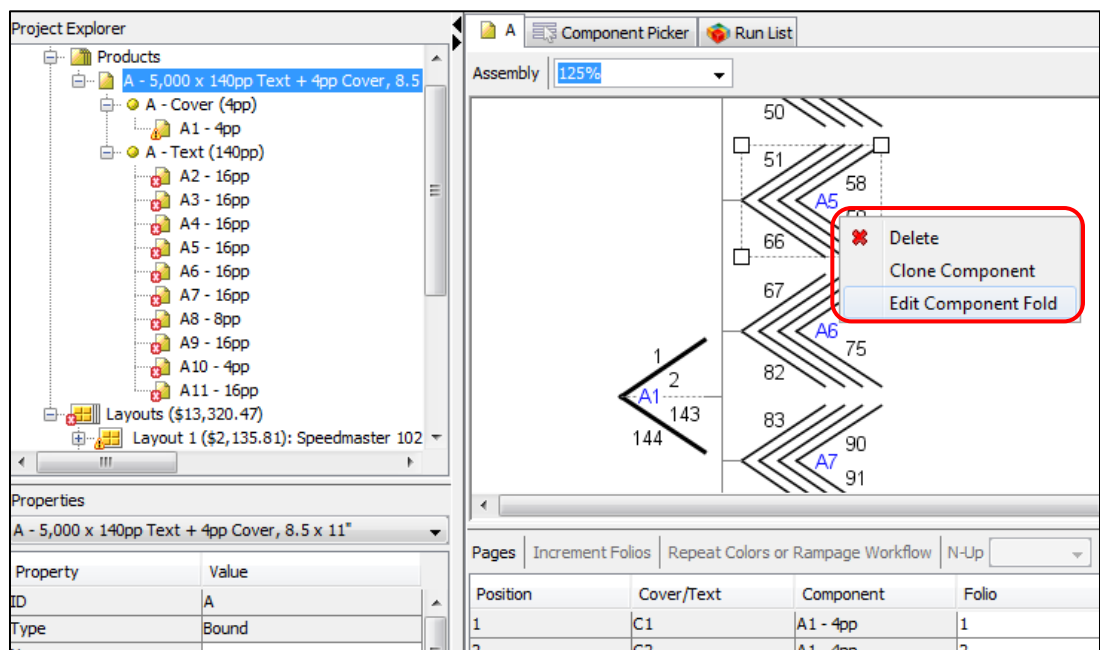
## Handling Folding

### Fold choice in the New Product Wizard

The Metrix New Product Wizard chooses the fold that's been promoted to the top of the list in the database, for the number of pages selected as the Largest Text Component.

#### To change the fold or page count

1. In the Project Explorer, select the product.
2. In the Assembly View, select the component.
3. Right-click, and then choose **Edit Component Fold**.

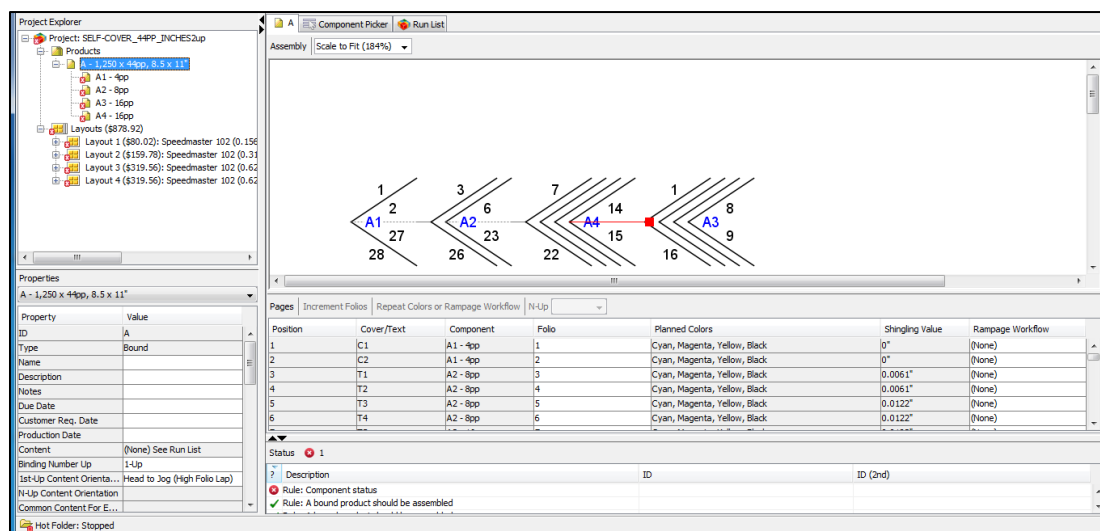


4. In the Fold Selector window, select the Page Count in the **Filter by Fold Pages** option.
5. Select the fold pattern.

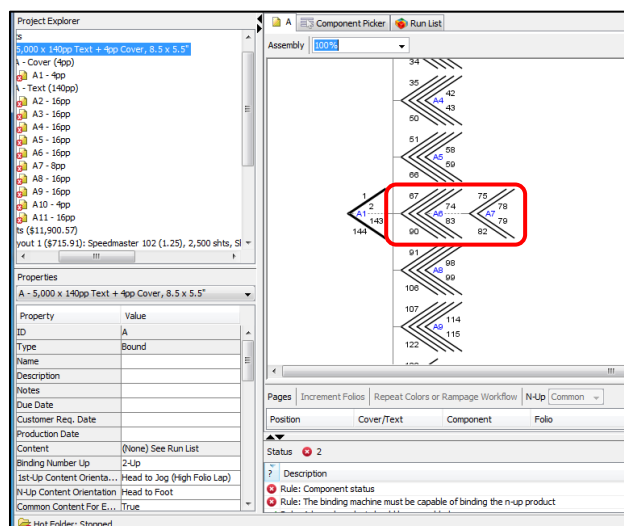
## Working with Components

### Reordering components

1. Select the product in the Project Explorer.
2. Drag and drop component.



3. Drag and drop to Pre-collate.



### Deleting a component

1. Select a product in the Project Explorer, and then select the component from the View Area.
2. Right-click on the component, and then choose **Delete**.

### Removing a component from a layout


You can remove a component from a layout without deleting it from the project.

1. Select a component on a layout in the Project Explorer or the View Area.
2. Right-click on the component and select **Remove from Layout**.

**Note** **Remove from Layout** in the Project Explorer removes all component instances from the layout. **Remove from Layout** in the Layout View removes only the selected component instance(s) from the layout.

## Changing the component stock


**Note** Component stock must match the layout stock it is assigned to. For more information, see [Changing the Layout Stock](#).

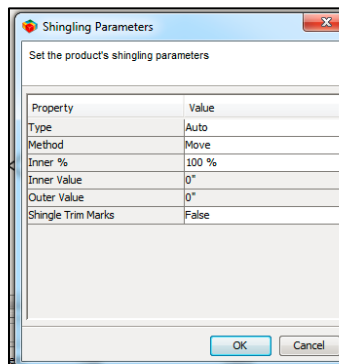
1. Select a component in the Project Explorer.
2. Select **Stock** > .
3. Choose **New Stock** in the Stock Selector window.

## Shingling

### Using Automatic Shingling

When the Automatic Shingling option is disabled by default, you can still enable shingling for individual products. Alternatively, you can enable automatic shingling by default. For more information, see [Shingling Preferences](#).

1. Select a product in the Project Explorer.
2. Select **Shingling** > .
3. Choose Shingling Parameters from the window of the same name.



### Shingling Properties

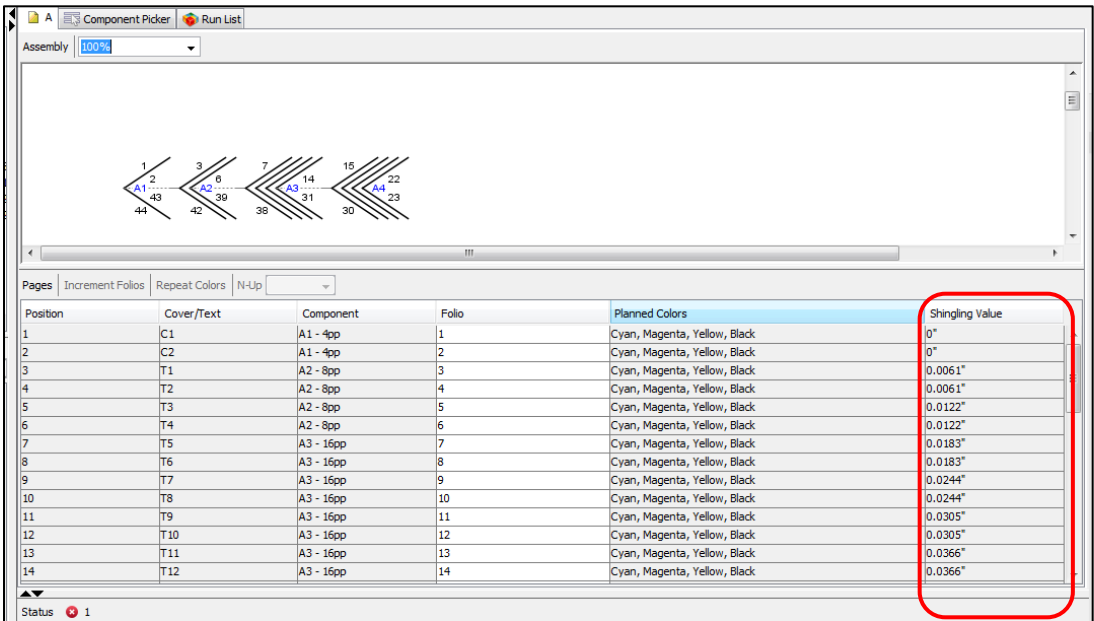
Property	Explanation
Type	<b>(None) / Auto / Manual</b> The type of shingling to use.
Method	<b>Move / Scale</b> Whether the page image will be moved or scaled.
Inner %	<b>0 – 300</b> The percentage of the total calculated shingling amount to be applied to the center (inner) 4-page set of product pages. <i>Only editable when auto selected.</i>
Inner Value	The amount of shingling to apply to the innermost 4-page set.
Outer Value	The amount of shingling to apply to the outermost 4-page set. <i>Only editable when Manual is selected.</i>
Shingle Trim Marks	<b>True / False</b> Add or not add shingle trim marks to page on export.

### Shingling calculations – Inner %

A few examples will illustrate how the Inner % value of Metrix shingling works.

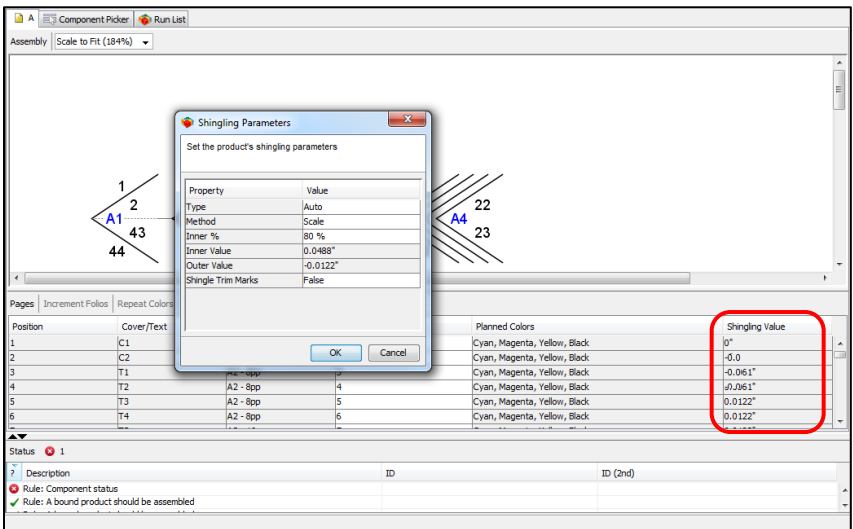
#### Example 1: 100% inner

We have inserted 100% of the total shingling amount calculated for this product (.061") on the innermost pages, feathering out to 0" for the outermost pages.



#### Example 2: 80% inner

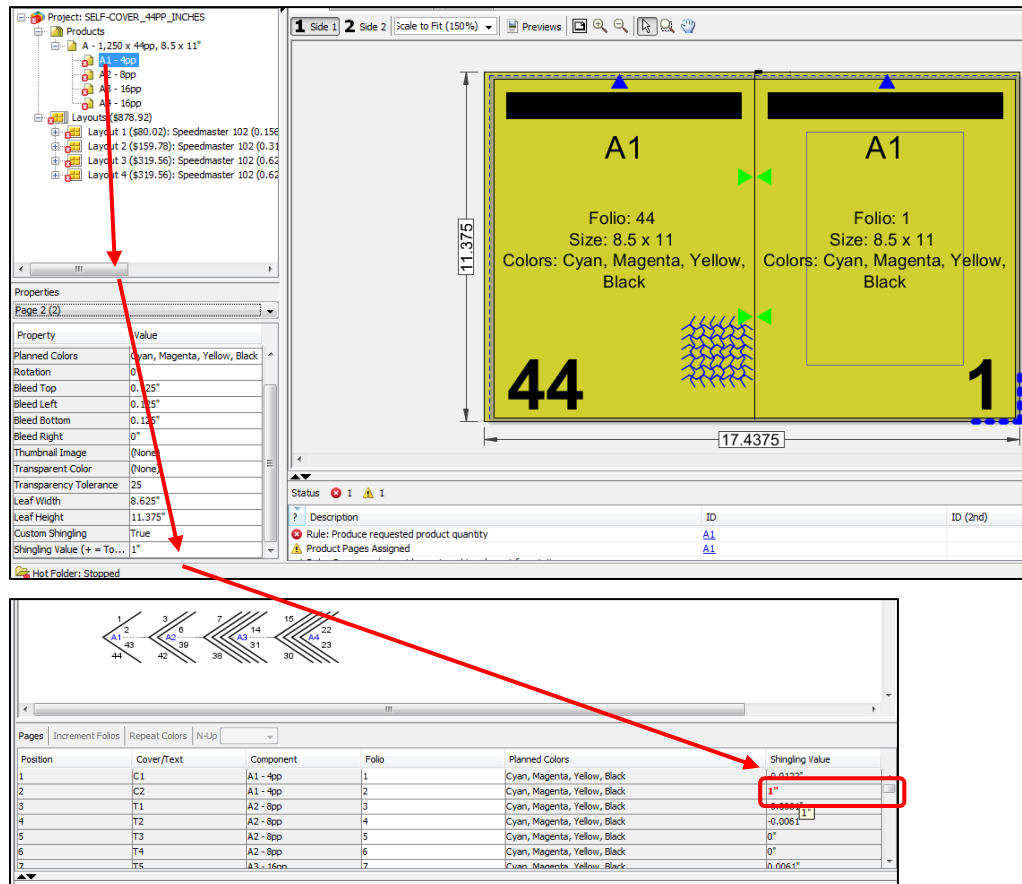
We have inserted +80% of the total shingling amount calculated for this product (.0488") on the innermost pages, feathering out to -20% (-.0122) for the outermost pages.



### Custom Shingling

1. Select a component in the Project Explorer.
2. Select a page from the Properties Editor.

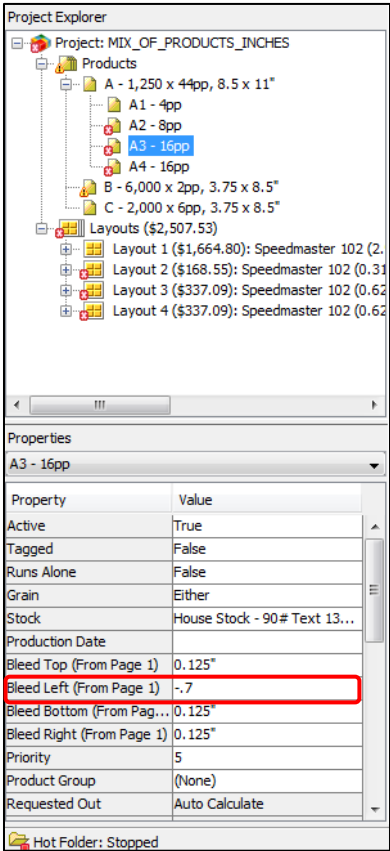
3. Select **Custom Shingling** > **True** in the Properties Editor.
4. Enter a value.




## Pulling Back Images in the Spine

This is sometimes necessary to accommodate gluing. Entering a negative value in the Bleed Left property of the Text node will apply a negative bleed in the spine of all text components.

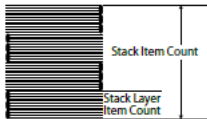
1. Select the Text node.
2. Enter a negative value in the **Bleed Left** property value.

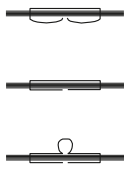
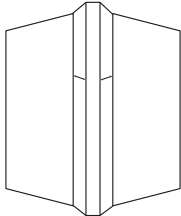


## Changing the Binding Parameters

- 1. Select a product in the Project Explorer.
- 2. Select **Building Parameters** > .
- 3. Choose parameter in the Binding Parameters window.

### Binding Parameters Properties

Property	Explanation
Method	<b>Binding Machine Defaults / Custom</b> The binding machine setup to use.
Stack Item Count	The number of finished products to stack once binding is complete, to bundle up for delivery. <div></div>
Stack Layer Item Count	The 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.
Number of Stitches (Saddled)	<b>0 / 1 / 2 / 3 / 4</b> The number of stitches for this saddle-stitched product.
Staple Shape (Saddled)	<b>Crown / Butted / Eyelet</b> The staple shape for this saddle-stitched product.

Side Scores from Spine (Side-By-Side, 0=None)	 <p>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.</p> 
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## Changing the Cover Spine Width


1. Select a product in the Project Explorer.
2. Select **Calculate Cover Spine > Manual** in the Properties Editor.
3. Enter a value for the **Cover Spine Width** of the Properties Editor.

## Creating a Book with No Cover

Metrix always creates a cover component. However, you can still create a book with no cover by deactivating the cover component. If a layout has already been created for this component, delete the layout. Use the following steps.

1. Select a cover component in the Project Explorer.
2. Right-click, then select **Active**.

## Changing the Layout Stock

1. Select a layout.
2. Select **Stock** > .
3. Choose **New Stock**, and then click **OK**.

**Note** Layout and Component stock must match. For more information, see [Changing the Component Stock](#).

## Auto Expand Trims to Fill Sheet

Metrix 22.1 includes the **Auto Expand Trims** feature, which allows Metrix to automatically expand the **Non-Jog Trim**, **Face Trim**, and **Back Face Trim** to fill the sheet, while maintaining the lip as a default. Previously in Metrix, you had to manually adjust the trims on a layout and then save it as a standard. Now you can set a **User Preference** and trims will be expanded automatically.

When the **Auto Expand** feature is enabled, Metrix does the following:

- Subtracts the **Flat Width** and **Flat Height** from the sheet size assigned to the selected component.
- Applies the extra space (Sheet Height – Flat Height = y) to the **Non-Jog** trims.
- Change the **Non-Jog Trim** to [current value]+y/2.
- If there are two **Front Face Trim** margins and two **Back Face Trim** margins on this component, the extra space on the component sides (Sheet Width – Flat Width = x) is applied to the **Face Trims**. To

maintain the current lap, the **Front Face Trim and Back Face Trim** margins are set to [current value]+x/4

- Respects the **Binding Machine** settings, so trims will not expand more than the maximum allowed by the binding machine nor contract more than the minimum.

## Auto Expand Limitations

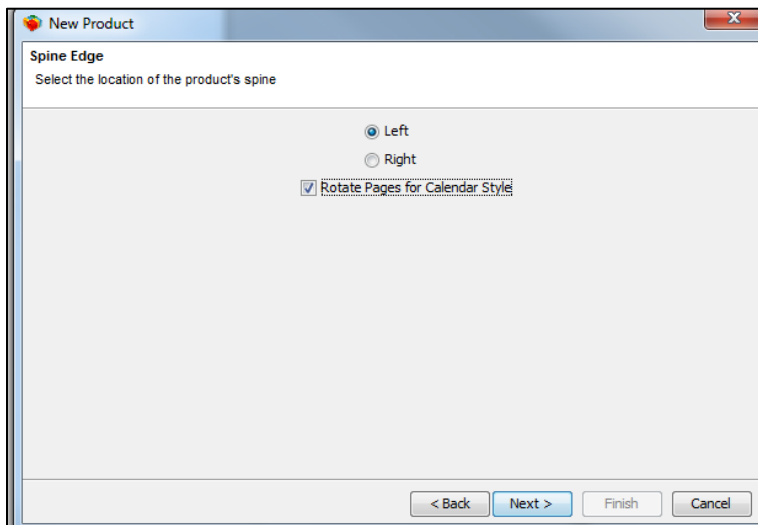
- Can be applied only to one or two identical components that are oriented head-to-foot or head-to-head on a sheet. There can be no mixed types of components, and no more than two per sheet.
- Applies to only bound products with 4-, 8-, or 16-page folds.
- Finished size must be the same for all components.
- **Auto Expand Trims** is not applied in all workflow use cases where there are multiple scenarios for solutions.

### To use Auto Expand Trims:

1. Select **User Preferences > Auto Layout**.
2. From the **Auto expand/contract face and non-jog trim to fit sheet** menu, select **True**.

## Creating Calendar Style Products

### Calendar style – Spine edge

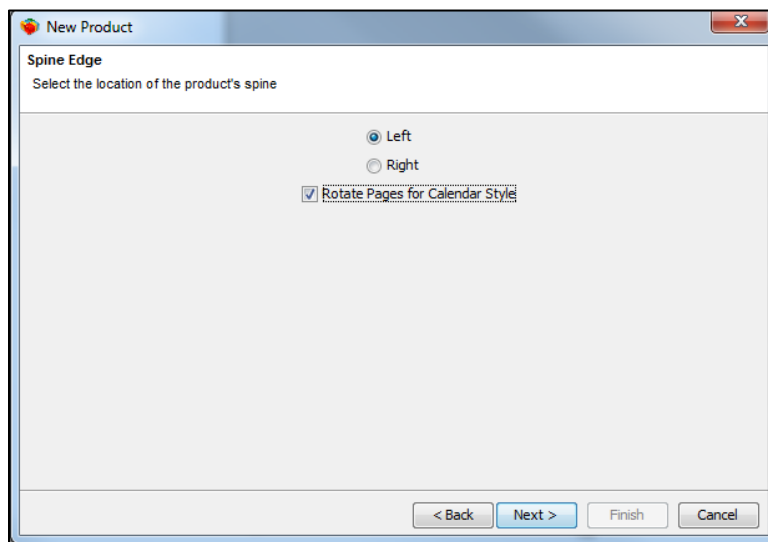
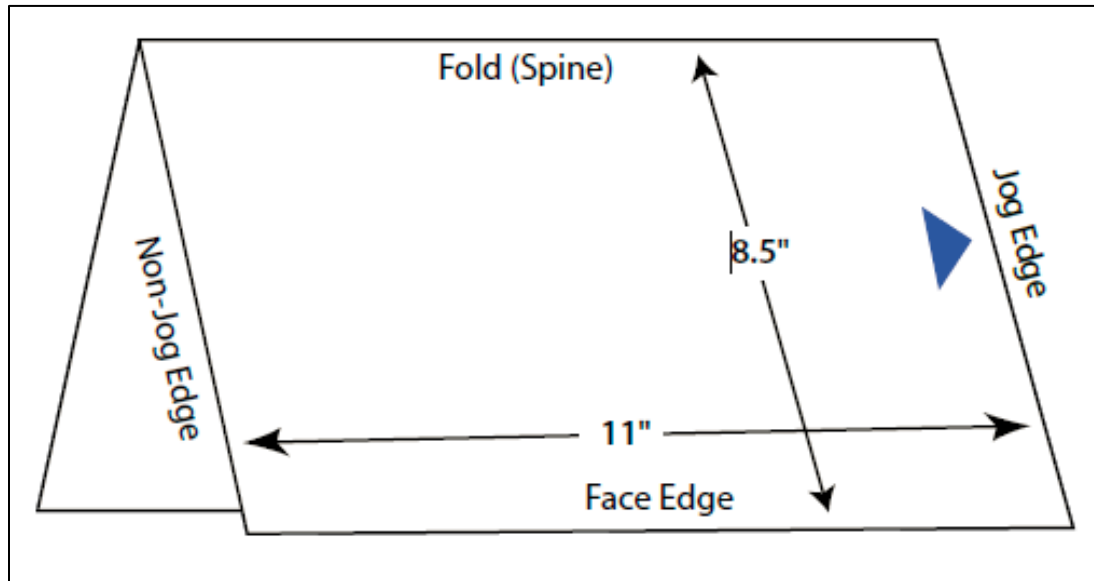


**Note** Checking the Rotate Pages for Calendar Style checkbox rotates the pages so the spine is on top, and orients them head-to-foot.

### Calendar style – Page size

The text on this window can help you in determining how to enter the finished size for a calendar style product.

The width is the distance from the spine to the face edge, the height is the distance from the jog to non-jog edge.



## Flat/Folded Work

## Handling Folded Product Spreads

When the **Combine Pages** property is set to **False** (the default), the product pages will be treated as separate pages.

If the **Combine Pages** property is set to **True**, the product pages will be grouped together as one object, also known as a spread.

How **Combine Pages** is set determines how Metrix imposes PDF graphics.

For example, in the example below, since **Combine Pages** is set to **True**, Metrix expects the graphic to consist of two pages, one for each spread. If **Combine Pages** were set to **False**, Metrix would expect the graphic to have six pages, one for each separate page of the product.

Properties	
C - 2,000 x 6pp, 3.75 x 8.5"	
Property	Value
Number Out	4
Total Quantity	2,000 (0 Extra)
Combine Pages	True
Number Of Pages	6
Fold Name	6pp: JDF F6-5, MBO #4
Fold Description	
Fold	↑ 2/3 ↓ 1/3 (Jog Swapped)
Offcut Top	0"
Offcut Left	0"
Offcut Bottom	0"
Offcut Right	0"
Flat Width	11.125"
Flat Height	8.5"
MTS ID	

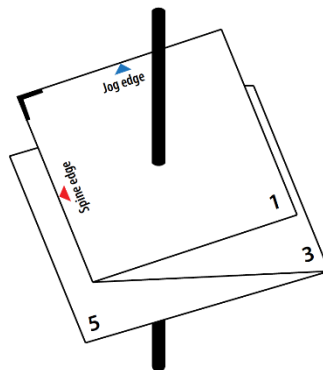
**Note** You should always enter the folded product size as the finished size (folded and trimmed size), regardless of the Combine Pages property setting.

## Understanding Metrix Folding

The numbering of all folded product pages is controlled by the Metrix Folding Wizard, 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.


### Drilling down to ascertain page sequence

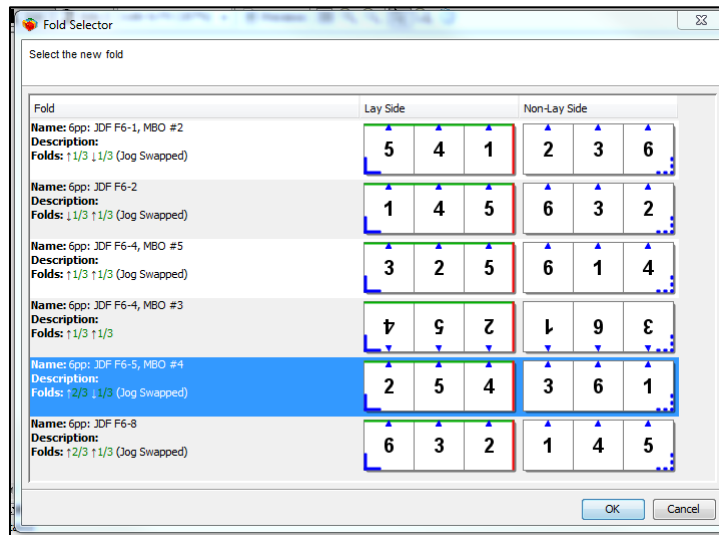
Metrix considers the folding operations on the paper independently of the content. Therefore, the best way to ascertain the actual content sequence and orientation – as required by the physical folding operations – is to visualize “drilling down” on the folded and rotated sheet. Drilling down on a 6-page accordion fold, with the jog edge at the head and the spine at the left, can be visualized as follows:



In this example, the drill first touches page 1 and then it's 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.



## Changing the folding pattern

1. Select a Product in the Project Explorer in the top left of the screen.
2. From the Properties Editor, select **Fold Name** > .
3. Select a new fold from the Fold Selector window.



## Reading the fold diagrams

### Corner symbol

The L-shaped, solid blue angle () is the reference edge lay mark on the lower, left-hand corner of the lay side of the sheet. The dotted angle () is the same reference edge lay mark as viewed from the non-lay side.

### Blue triangles

The small blue triangles on the fold diagram represent the jog edge after folding. This is the same as in the layout view in Metrix.

### Green and red lines

Green line - the side of the sheet indicating the fold direction for green fractions.

Red line - the side of the sheet indicating the fold direction for red fractions.

You could think of it this way: green always folds onto green, and red always folds onto red.

Folds on the green line are always left to right.

Folds on the red line are always bottom to top.

### Up and down arrows

The up and down arrows (↑↓) indicate the direction of the fold relative to the lay side of the sheet.

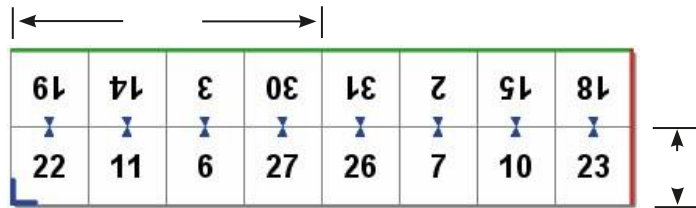
“Fold up” (↑) means toward the lay side (toward you) and on top of other pages.

“Fold down” (↓) means toward the non-lay side (away from you) and under other pages.

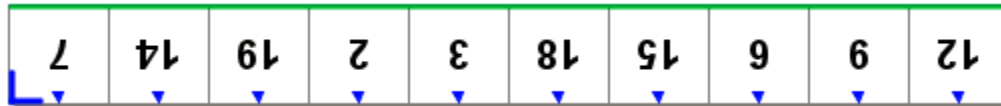
### Fractions

The fraction is always part of the whole, unfolded sheet. It is not the part of the remaining “visual” pages after other folds have been made.

For example, on a fold diagram with a green line of 8 pages, and a red line of 2 pages,  $1/2$  means 4 pages on the green line, but  $1/2$  means 1 page on the red line.



For a 20-page fold, with 10 pages wide (green line), and 1 page long (red line), the lay side might look like this:



Given this configuration,  $1/10 = 1$  page,  $1/5 = 2$  pages,  $2/5 = 4$  pages,  $1/2 = 5$  pages.

So, if you fold  $\uparrow 1/2$ , you will fold the 5 left pages over the 5 right pages, because  $1/2$  of 10 is 5. If you were doing this with real paper, you would then see 5 pages from the non-lay side of the sheet, like this:



If you then fold down  $\downarrow 1/5$ , you do not fold one page down (page 4), but two pages (pages 4 and 1), because  $1/5$  here means  $1/5$  of 10, which is 2 pages, and not  $1/5$  of the 5 pages you see (which would be 1 page). The result is:



Thus, the fractions are based on the overall, unfolded sheet, and not on what remains after folds have been made.

## Database Conventions and Folded Page Size

The Metrix Database contains two conventions that can affect the page size of folded products, depending on the folding pattern selected:

- Roll Fold Clearance
- Flush Fold Excess Maximum

**Note** You can only edit the conventions if you have a User role with permission to Edit or Delete Database items. See the *ePS Metrix Setup Guide and Worksheets* for more information on creating Users and User Roles.

## Changing a Folded Panel (Page) Size

1. Select a product in the Project Explorer.
2. Select a page in the Properties Editor.
3. Edit the **Width** in the Properties Editor.

# Component Picker

## What is the Component Picker?

If a project has only a few products, and a few layouts, it is simple to find the individual components to modify them.

However, if a project has hundreds of products, and dozens of layouts, finding and changing components could then become a daunting task.

The Component Picker makes the job of finding and changing multiple components as easy as sorting and filtering items in a list.

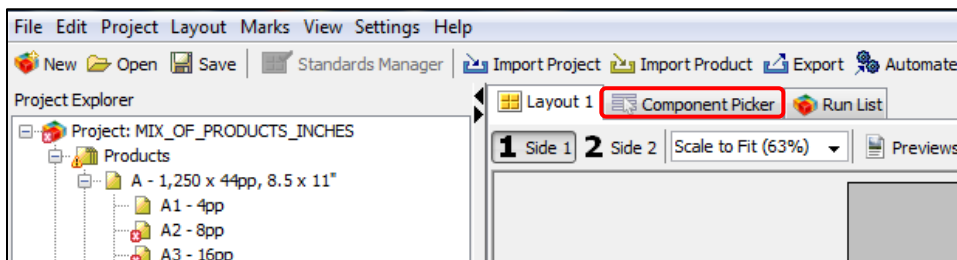
The basic elements of the Component Picker include:

- A table in the view area where each row represents a component in the current Metrix Project, and each column represents a component property
- A window to select different component properties to display in the table. This gives you the ability to filter by only those properties pertaining to the current project
- Simple-to-use but comprehensive filtering functions that you can tailor to your specific needs
- Boolean AND, OR, and NOT searches at the click of a mouse, or with a menu selection
- The ability to sort a column ascending or descending by clicking the header, much like other tables in Metrix where you can rearrange the column order
- The ability to modify or tag multiple filtered items in the Project Explorer.
- You can save multiple filtering parameters as a set and then re-load them for use with the same or other projects

## Using the Component Picker

### Opening the Component Picker table

You access the Component Picker by clicking **Component Picker** above the View Area.



The Component Picker table will then open in the View Area.

**Notes** The default filter selection is “Assigned to a Layout is Either.” That way all components in the current project will be displayed in the table, whether those components are assigned to a Layout or not.

You can change the **Either** selection to **True** or **False**. A selection of **True** will display only those components that are assigned to a Layout. A selection of **False** will display only those components that are not assigned to a Layout.

This default filter cannot be removed, because all components must fall into one of these three categories. That is why **X** (delete) on the right side is gray.

Component...	Type	Name	Description	Notes	Due Date	Customer ...	Production...	Customer	Active	Req. Quan...	Finished W...	Finished H...	Flat Width
A1	Bound	BNC1	Saddle-Sttc...	note1	Due Date				True	1000	4.125"	5.75"	17.
A2	Bound	BNC1	Saddle-Sttc...	note1	Due Date				True	1000	4.125"	5.75"	17.
A3	Bound	BNC1	Saddle-Sttc...	note1	Due Date				True	1000	4.125"	5.75"	17.
A4	Bound	BNC1	Saddle-Sttc...	note1	Due Date				True	1000	4.125"	5.75"	17.
B1	Bound	BNC2	Saddle-Sttc...	note2	Due Date				True	1000	5.75"	8.25"	17
B2	Bound	BNC2	Saddle-Sttc...	note2	Due Date				True	1000	5.75"	8.25"	17
B3	Bound	BNC2	Saddle-Sttc...	note2	Due Date				True	1000	5.75"	8.25"	17
B4	Bound	BNC2	Saddle-Sttc...	note2	Due Date				True	1000	5.75"	8.25"	17
B5	Bound	BNC2	Saddle-Sttc...	note2	Due Date				True	1000	5.75"	8.25"	17
B6	Bound	BNC2	Saddle-Sttc...	note2	Due Date				True	1000	5.75"	8.25"	17
C1	Bound	BNC3	Saddle-Sttc...	note3	Due Date				True	1000	5.75"	8.25"	17
C2	Bound	BNC3	Saddle-Sttc...	note3	Due Date				True	1000	5.75"	8.25"	23.1
C3	Bound	BNC3	Saddle-Sttc...	note3	Due Date				True	1000	5.75"	8.25"	23.1
C4	Bound	BNC3	Saddle-Sttc...	note3	Due Date				True	1000	5.75"	8.25"	23.1
C5	Bound	BNC3	Saddle-Sttc...	note3	Due Date				True	1000	5.75"	8.25"	23.1
C6	Bound	BNC3	Saddle-Sttc...	note3	Due Date				True	1000	5.75"	8.25"	23.1
D1	Bound	BNC4	Saddle-Sttc...	note4	Due Date				True	1000	8.25"	11"	22
D2	Bound	BNC4	Saddle-Sttc...	note4	Due Date				True	1000	8.25"	11"	22
D3	Bound	BNC4	Saddle-Sttc...	note4	Due Date				True	1000	8.25"	11"	22
D4	Bound	BNC4	Saddle-Sttc...	note4	Due Date				True	1000	8.25"	11"	22
E1	Bound	BNC5	Saddle-Sttc...	note5	Due Date				True	2000	5.75"	8.25"	11.9
E2	Bound	BNC5	Saddle-Sttc...	note5	Due Date				True	2000	5.75"	8.25"	17
E3	Bound	BNC5	Saddle-Sttc...	note5	Due Date				True	2000	5.75"	8.25"	23.1
E4	Bound	BNC5	Saddle-Sttc...	note5	Due Date				True	2000	5.75"	8.25"	23.1

Filtered Components : 319/323

Status 2

Component Picker  
Table

Click Gear  
Icon

Click the small, gear-shaped icon just below the View Area on the right side. This will open the "Column Selection" window, where you can determine which columns will appear in the Component Picker table.

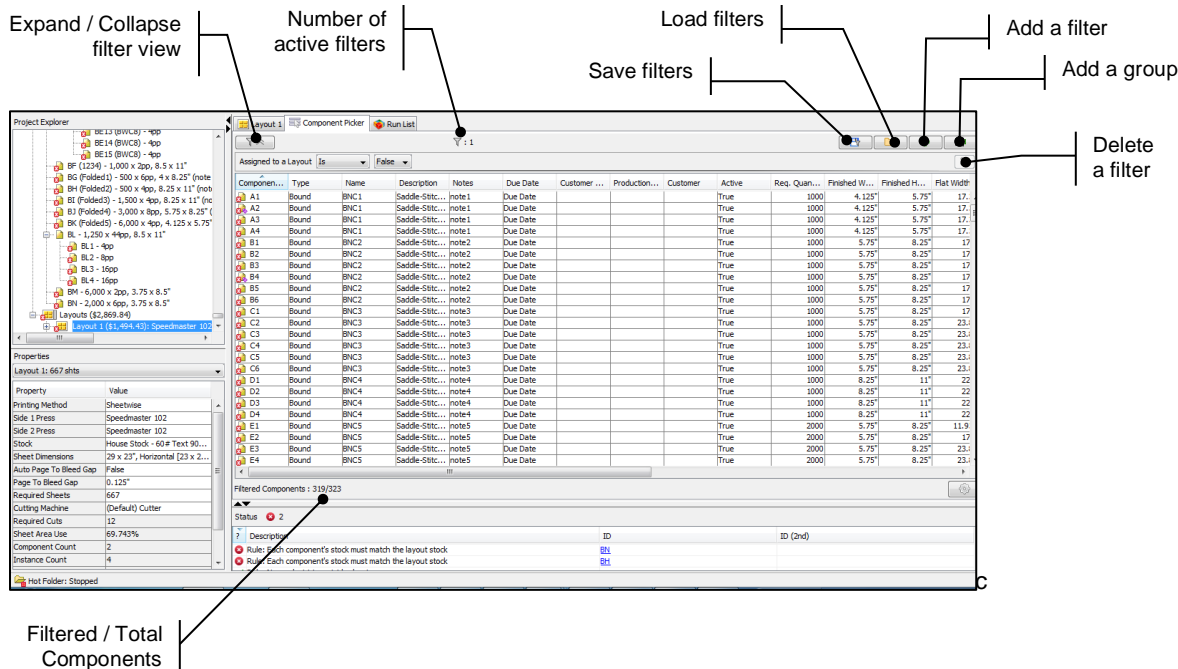
## Setting up the Component Picker property columns

After you click the gear icon, the Column Selection window opens. Check the box of each component property you wish to appear as a column in the Component Picker table. Pick the properties that will be most useful to you in the filtering process. When you have made your selections, click **OK** to close the window and return to the Component Picker table.

## The Component Picker control icons

The filtering process in the Component Picker is governed by the icons located above the table. Those icons include:

- Expand/Collapse Filter View ( ) - Clicking this icon either hides or shows the filters.
- Number of Active Filters ( ) - Shows the number of filters, even if the filters are hidden.
- Save Filters ( ) - Saves the current filters as a set.
- Load Filters ( ) - Opens a window of the currently saved filter sets so you can load one.
- Add A Filter ( ) - Opens a new filter.
- Add A Group ( ) - Opens a filter group. Groups are used for more complex filtering.
- Delete A Filter ( ) - Clicking the red X deletes that filter from the list of filters.



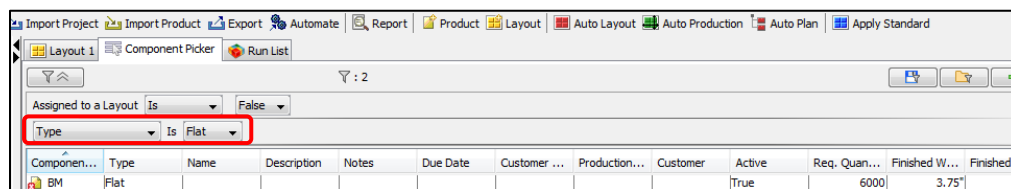
## Using the Component Picker filters

Below is an illustration of the Component Picker where we have added one filter by clicking . Then we selected “Type” on the first component menu, and “Flat” on the second. Consequently, only the components with the Type marked as Flat are selected. Those components with “Bound” or “Folded” as the Type property have been excluded from the list.

The first menu is always the list of component columns that are selected in the Component Picker- Column Selection window.

The second, or subsequent menus, will be options for the first component property.

On some filters, a text field will open where you can type in numbers, such as a width, a height, or an integer for establishing a number or range of numbers.



## Editing components and Component properties

### Editing the Component properties

Once you have filtered the components, you can change the properties of those components in basically four ways:

- **Single Components** – You can select just one component by clicking it in the Component Picker, and then change its properties in the Properties Editor.
- **Multiple, non-contiguous components** – You can select non-contiguous components in the Component Picker, and then change the properties of just those components in the Properties Editor.

- Contiguous series of components – You can select a contiguous series of components in the Component Picker, and then change the properties of just those components in the Properties Editor.
- All filtered components – You can select all the filtered components in the Component Picker, and then change the properties of all the components in the Properties Editor.

Not all the properties of the selected components will be available for editing, but if the background field is white, or white with gray text, then you can change the property.

If the background field is gray, then you cannot change the property.

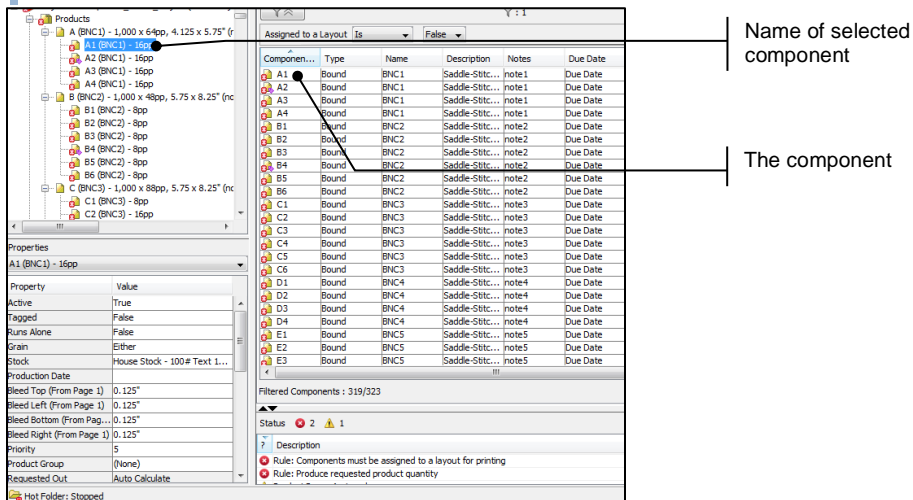
**Important** Be careful when changing fields marked as “(Different Values)” because entering a new value will change all selected components to that value. You may want to check the selected components first to see if you want all the components to have the same value for that property.

If the fields are visible in the Component Picker table, you will see the property changes reflected immediately in the table.

## Editing the properties of a single component

To edit a single component, click that component in the Component Picker table, and then change the properties in the Properties Editor.

**Note** The Properties Editor lists the name of the single component being changed.



## Editing the properties of non-contiguous components

To edit non-contiguous components, **CTRL-click (CMD-click on Mac)** the components in the Component Picker table, and then change the properties in the Properties Editor.

**Note** The Properties Editor lists the number of selected components being changed.

## Editing a contiguous series of components

To edit a series of components:

1. Click the first component in the Project Explorer, and then **SHIFT-click** through to the last component in the series.
2. Then change the properties in the Properties Editor.

**Note** The Properties Editor lists the number of selected components being changed.

## Editing all the filtered components

You can select all the components in the Component Picker table in two ways:

- If you can see both the first and last components in the list, you can click the first component, and then **SHIFT-click** the last.
- If the list of components is so long that you cannot see the last component, click the first component in the table, and then use **CTRL-A (CMD-A on Mac)** to select all components.

Then change the properties in the Properties Editor.

**Note** The Properties Editor lists the number of selected components being changed.

## The Component Picker property options

Here is a table of the property options (the first menu on a filter) for the Component Picker, and the additional options for that property. The additional options may be pull-down menus, text fields, or both.

Property (First Menu)	Options (Second, Third, or Fourth Menu)
Component ID	<b>Any / Matches / Contains / Begins With / Ends With</b> Selections other than <b>Any</b> open a text box to enter all or a portion of the Component ID for filtering.
Type	<b>(is)Any / Flat / Folded / Bound / Diecut</b> A table displays either all types of products, or only the type designated in the second menu selection.
Name	<b>Any / Matches / Contains / Begins With / Ends With</b> Selections other than <b>Any</b> open a text box to enter all or a portion of the name for filtering.
Description	<b>Any / Matches / Contains / Begins With / Ends With</b> Selections other than <b>Any</b> open a text box to enter all or a portion of the description for filtering.
Notes	<b>Any / Matches / Contains / Begins With / Ends With</b> Selections other than <b>Any</b> open a text box to enter all or a portion of the notes for filtering.
Due Date	<b>Any / Matches / Contains / Begins With / Ends With</b> Selections other than <b>Any</b> open a text box to enter all or a portion of the due date for filtering.
Customer Req. Date	<b>Any / Within Last / Within Next / Exactly / Before / After / Today / Tomorrow / Yesterday / This Week / This Month / This Year</b> <b>Any</b> selects components with any date, including components with nothing in the date field. <b>Within Last</b> opens a field to enter an integer, and a drop-down menu with days, weeks, months, and years. <b>Within Next</b> opens a field to enter an integer, and a drop-down menu with days, weeks, months, and years. <b>Exactly</b> opens a third menu with the current date selected. Clicking the drop-down triangle opens a calendar where you can scroll to and select an exact date. <b>Before</b> opens a field to enter an integer, and a drop-down menu with days, weeks, months, and years. <b>Today</b> opens a third menu with the current date selected. <b>Tomorrow</b> opens a third menu with tomorrow's date selected. <b>Yesterday</b> opens a third menu with the yesterday's date selected. <b>This Week (Month, Year)</b> select components with a date within those date ranges.
Production Date	<b>Any / Within Last / Within Next / Exactly / Before / After / Today / Tomorrow / Yesterday / This Week /</b>

	<p><b>This Month / This Year</b></p> <p><b>Any</b> selects components with any date, including components with nothing in the Date field.</p> <p><b>Within Last</b> opens a field to enter an integer, and a drop-down menu with days, weeks, months, and years.</p> <p><b>Within Next</b> opens a field to enter an integer, and a drop-down menu with Days, Weeks, Months, and Years.</p> <p><b>Exactly</b> opens a third menu with the current date selected. Clicking the drop-down triangle opens a calendar where you can scroll to and select an exact date.</p> <p><b>Before</b> opens a field to enter an integer, and a drop-down menu with Days, Weeks, Months, and Years.</p> <p><b>Today</b> opens a third menu with the current date selected.</p> <p><b>Tomorrow</b> opens a third menu with tomorrow's date selected.</p> <p><b>Yesterday</b> opens a third menu with the yesterday's date selected. This Week (Month, Year) select components with a date within those date ranges.</p>
Customer	<p><b>Any / Matches / Contains / Begins With / Ends With</b></p> <p>Selections other than <b>Any</b> open a text box to enter all or a portion of the Customer Name field for filtering.</p>
Active	<p><b>Either / True / False</b></p> <p><b>Either</b> displays all components, whether the Active property is set to <b>True</b> or <b>False</b>.</p> <p><b>True</b> displays only those components with an Active property of <b>True</b>.</p> <p><b>False</b> displays only those components with an Active property of <b>False</b>.</p>
Req. Quantity	<p><b>Any / Equals / Less Than / More Than</b></p> <p>Selections other than <b>Any</b> open a field to enter an exact number, or a range, for the required quantity.</p>
Finished Width	<p><b>Any / Equals / Less Than / More Than</b></p> <p>Selections other than <b>Any</b> open a field to enter a measurement establishing a range for the finished width.</p>
Finished Height	<p><b>Any / Equals / Less Than / More Than</b></p> <p>Selections other than <b>Any</b> open a field to enter a measurement establishing a range for the finished height.</p>
Grain	<p><b>(is) Any / Horizontal / Vertical / Either / Either-All Same / (Different Values)</b></p> <p><b>Any</b> selects all grain directions. <b>Horizontal</b>, <b>Vertical</b>, <b>Either</b>, and <b>Either-All Same</b> select only the components with that specified grain direction. <i>(Different Values)</i> is disabled because it is not possible for a component to have more than one grain direction.</p>
Stock	<p><b>(is)</b> Selecting the Stock property opens a second menu listing all of the stocks assigned to components in the project.</p>
Priority	<p><b>Any / Equals / Less Than / More Than</b></p> <p>Selections other than <b>Any</b> open a field to enter an integer. For <b>Equals</b>, the components must have the exact priority listed in the field to be selected. For <b>Less Than</b>, the assigned priority must be less than the integer selected. For <b>More Than</b>, the assigned priority must be more than the integer to be selected.</p>
Product Group	<p><b>(is)</b> Selecting <b>Product Group</b> opens a second menu listing all of the names of the product groups.</p>
Combined Pages	<p><b>(is)Either / True / False</b></p> <p><b>Either</b> selects all components, whether the Combined Pages is set to <b>True</b> or <b>False</b>. <b>True</b>, and <b>False</b> select only the components with that particular Combined Pages setting.</p>

Page Count	<b>Any / Equals / Less Than / More Than</b> Selections other than <b>Any</b> open a field to enter a number for the exact Page Count, or to establish a range for the Page Count.
Fold Name	<b>(is)</b> Selecting Fold Name opens a second menu listing all of the names of the folds used in any of the components, or (N/A) for those components that are not folded.
Color(s)	Selecting <b>Colors</b> opens three additional menus: Menu 1 options: <b>Both Sides</b> , meaning that both sides of the component contain the color designated in Menu 3. <b>Either Side</b> , meaning that either side of the component contains the color designated in Menu 3. <b>Side 1</b> , meaning that only side 1 of the component contains the color designated in Menu 3. <b>Side 2</b> , meaning that only side 2 of the component contains the color designated in Menu 3. Menu 2 options: <b>Is</b> , meaning the color designated on Menu 3 is the only color on the designated side(s). <b>Is Not</b> , meaning the color designated on Menu 3 is not the only color on the designated side(s). <b>Contains</b> , meaning the color designated on Menu 3 is only one of the colors on the designated side(s). <b>Does Not Contain</b> meaning the designated color is not one of the colors on the designated side(s). Menu 3 options: A pull-down menu listing all the colors used in the components.

## Using Group Filters in the Component Picker

Group filters work basically the same as the regular filters in the Component Picker. The difference is that group filters allow for more complex filtering logic, with extra visual help to set up the filtering.

The regular filters are basically a way of selecting components that meet multiple property criteria in one component—the component must have this property, AND this property, AND this property to be selected. This is usually referred to as a Boolean AND search. For example, the component must be flat, AND not wider than 3.5" AND have CMYK colors on both sides. This will result in a narrower set of components that meet all the criteria.

You can search for a set of components where there are various properties, and the component meets the criteria if it has any one of the properties. This is commonly referred to as a Boolean OR search. For example, the component must be Flat, OR not wider than 3.5" OR have CMYK colors on both sides. But the component only needs to meet any *one* of the criteria. This will result in a broader set of components that meet the criteria.

You can also search for components that have one property, but do not have another (Flat, but not CMYK). This is known as a Boolean NOT search. This is most obvious in those menus that have **Either**, **True**, and **False** options. If you select **Either**, then you are doing a Boolean OR search. Components with either **True** OR **False** in the property field will be selected. But if you select **True**, then all components with **False** in the field will be excluded. Thus, you are saying "this," but NOT "that," and you are performing a Boolean NOT search.

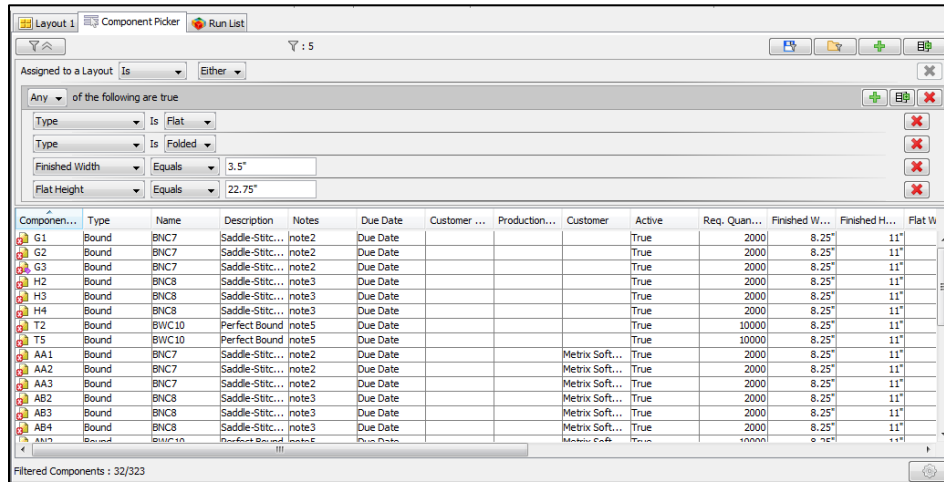
Group filters look a little different from the regular filters, but they add and remove filters in the same way. The biggest difference is probably with the first line of a group filter. It is in the first line that you establish what kind of filtering you want to perform.

The first line has a menu with **Any** or **(All)** as options. This gives you two options:



- Any of the following are true.
- All of the following are true.

Since the “Any of the following are true” option produces an extended Boolean OR filter (this, or this, or this, or this, etc.), it can be easier to arrange than trying to use the standard filters to do the same.

Here is an example of a group filter that selects components with a Flat Type, or Folded Type, or components with a Finished Width of 3.5”, or components with a Finished Width of 22.75”.



## To create a group filter

1. Click , and then select **Any** or **All** from the drop-down menu.
2. Click , and then select what your criteria you want to use from your filter.
3. Create additional layers, if needed.

**Notes** Group filters can be nested under other filters, including other group filters, for even greater refinement of the selection parameters.


Each of the filters in a group filter are counted separately.

Deleting a group filter deletes the group, and all of the regular filters associated with it.

## Saving and Loading Filter Sets

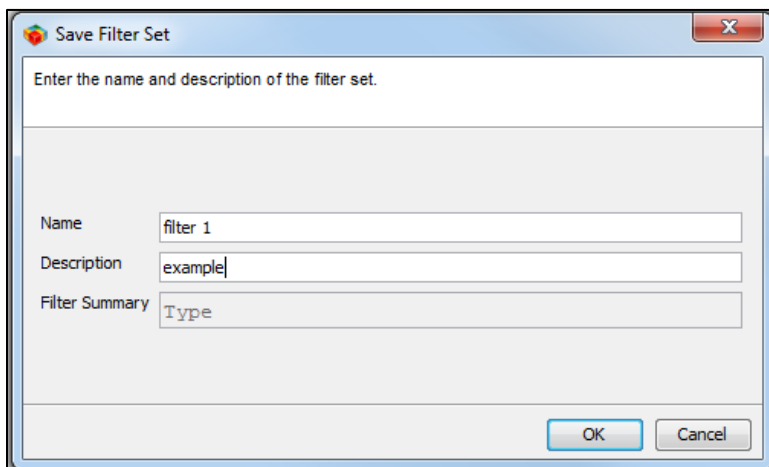
### Saving a filter set

When you are working in the Component Picker and have established a set of filter parameters you wish to use more than once, you can save the filters as a set to be re-loaded later.

1. Click  to open the Save Filter Set window.

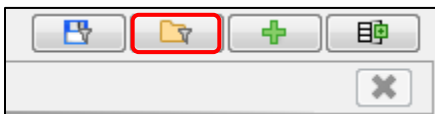
There are two fields in the window, one for the name of the filter, and one for a description of the filter set. Only the **Name** field is required.

2. Click **OK** to save the filter set.



## Loading a filter set

If you open the Component Picker and wish to apply a saved filter set to the components in the current project, click the Load Filters icon above the View Window.



A window will open showing all saved filter sets in the Database.

To load a filter set, first click its name in the list to select it, and then click **ADD**. If no filter set is open, Metrix will open the selected set. If a filter set is open, Metrix will add the selected set to the current set.

If you have a filter set open, but wish to replace it with a different set, select the filter set, and then click **Replace**.

If you need to find a certain filter set among numerous sets, you can use the filter field to type in text from the name of the set.

## Managing Filter sets in the Database

The Metrix Database keeps track of the saved filter sets for the Component Picker. If you need to edit, delete, or clone a set, you can do so by opening the Database window with no project open. Follow these steps to perform one of the previously mentioned actions.

1. Select **Database** from the Settings menu to open the Database window.
2. Select the filter set you wish to edit.
3. Select one of the buttons on the right side to choose one of the actions listed below.

There are three actions available for filter sets in the Database:

- **Variation** – You can make a variation, or clone, of a filter set by selecting its name in the list, clicking **Variation**, and then editing the set in the Variation window that opens. You can only change the Name and Description entries.
- **Edit** – You can edit a filter set's Name and Description data by selecting the set in the list and clicking **Edit**. In the Edit Filter Set window that opens you can change the **Name** and **Description** fields.
- **Delete** – If you wish to delete a filter set from the Database, you select the set in the list, and then click **Delete**.

When you return to the Component Picker, the changes you made in the Database will be reflected in the Load Filters window.

## The Run List

## What is the Run List?

The Run List is a mechanism allowing multiple source files to be associated with a single component via a kind of file browser that allows you to view the parameters of various source files and then associate some or all those files to various pages of components in a project.

The Run List allows you to split source files, rearrange page, allow for missing pages, and use a single source file in multiple products.

### Advantages of the Run List

Past versions of Metrix allowed only a single source PDF file to be associated with a component (Flat, Folded, Bound Text, or Bound Cover). There are many scenarios where this is not sufficient. Source files may be supplied in pieces or incorrect order, and pages within source files may change at the last minute. Some example cases that the Run List can address are:

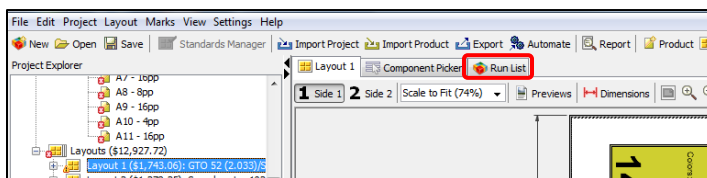
- **Split source files:** Contiguous (for example, a 200-page bound product that comprises 10 sequenced 20-page PDFs). Non-contiguous (for example, a 56-page bound project that comprises a 56-page PDF plus a 4-page PDF that replaces 4 of the pages in the 56-page PDF)
- **Page reassignment:** After the initial page assignment is complete, you can move or reassign pages to place them in a different order from the original source file. One example is a folded product in which the individual pages were designed in an order that did not anticipate the Metrix "drill down" method of page ordering
- **Missing pages:** Often, particularly with respect to bound projects, a customer will submit PDF source files in sections, requiring Metrix to allow an incomplete Run List. The Run List permits exporting some of the layouts of the project (to imposed PDF) if all the pages on those layouts are present while others, on other layouts, are missing
- **Multiple Products in a single file:** The Run List allows splitting out individual products from a single multi-page content file. A specific example is 100 double-sided card products with the content supplied as a single 200-page PDF file

### How to open the Run List

When a project opens, the View Area tab is selected, normally with a layout displayed in the View Area. If there is nothing to display, the View Area tab appears as a gray rectangle and the View Area is empty.

To the right of the View Area tab is the Component Picker tab, and to the right of that is the Run List tab.

Click the Run List tab (next to the Component Picker tab) to display the Run list for the selected project.



## The Run List Window

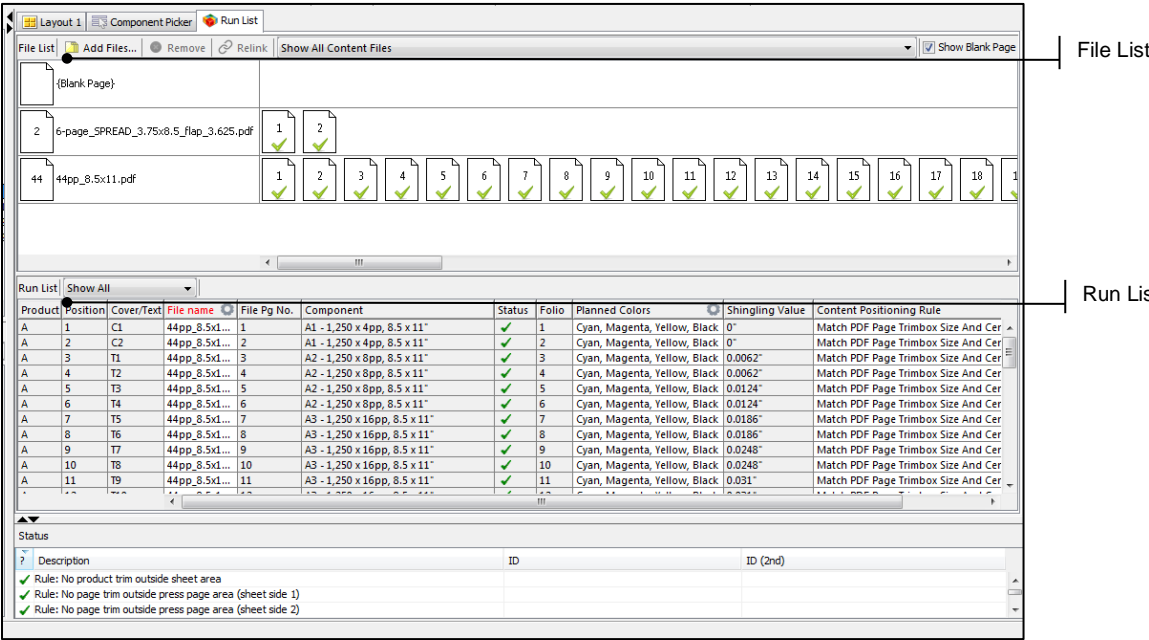
The two major parts of the Run List window are the File List and the Run List.

The File List displays all content files added to the project, whether or not they are assigned to product. The File List contains two sections. The File List is on the left while the Page list is on the right.

The Run List displays either some or all products in the project and the properties of the content associated with those products.

Previously, you could only add files by associating them with a component. The File List provides a separate mechanism by allowing you to import any number of content files independently of components, and manipulate their page position associations with a much greater degree of control.




The Status column below the Run List is also useful for checking the status of the items in the Run List, especially when there are problems.




# The File List window

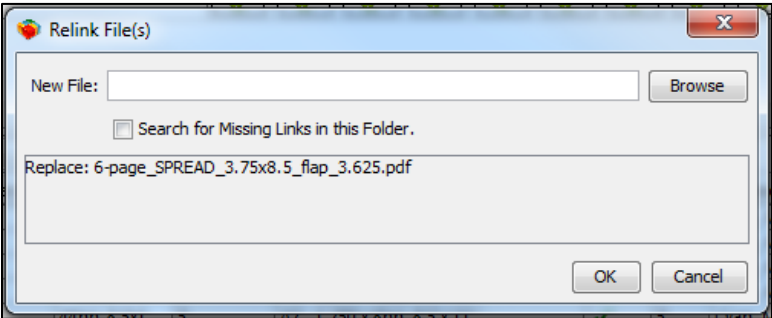
The files in this list appear in alphanumerical order. Green checkmarks appearing in page icons indicate how many pages the content is assigned to.

At the top of the File List window are three buttons and a menu. They are:

- **Add Files** (  Add Files... ): Clicking **Add Files** opens a standard browsing window where you can navigate the file subsystem to choose PDF content files. You can select multiple files and add them simultaneously to the File List. Files appear and are added in alphanumeric order. You can add them prior to creating products.
- **Remove** (  Remove ): This removes the selected file(s) from the File List. Any pages from among the files selected that assigned to the Pages List will also be removed.
- **Relink** (  Relink ): This allows you to link to a new file if the original file is missing or needs to be replaced for any reason.

# The Relink window

Clicking **Relink** (  Relink ) opens the Relink File(s) window. When the Relink window opens, the name of the file selected in the File window appears in the Relink File(s) window. You can use this window to browse and select the file to replace the missing content.



When you select the “Search for Missing Links in this Folder,” all unlinked files (files that have been moved or renamed) will be listed in the Relink File(s) window. If they are found in the same folder, they will be automatically linked when you click **OK**.

**Note** The **Remove** and **Relink** buttons are only available when you select a file in the File List window.

## The Show Files menu

The Show Files menu appears in the top section of the File List. It has options for displaying content files for the entire project, or just the content files for the selected product(s). **Show All Content Files** is the default setting.

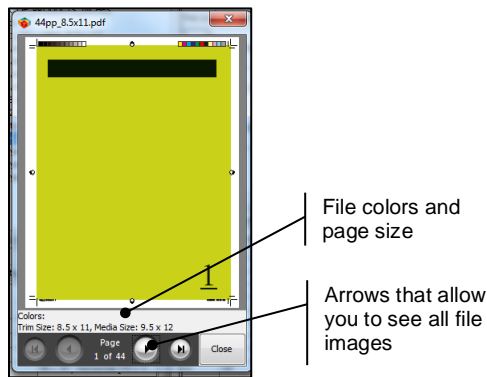
To the right of the Show Files menu is the **Show Blank Page** check box. Clicking this check box adds a Blank Page option to the pages in the File List window. From there you can drag the Blank Page into the Run List window to add or insert blank pages into the Run List.

## Displaying the Content of the File Pages

Right-clicking on a page in the File List brings up an image of that page.

Page size and page colors are displayed in the Preview window.

There are also page selection arrows at the bottom of the image allowing you to move back and forth, page by page, through the images in the file.



## Adding Content to the File List

You can add content files in the following ways.

- **The Add Files button:** As described in the File List window section, clicking the Add Files button opens a browse window. You can then locate the content file you want and import it into the File List.

## Drag and drop

- From the Finder/Explorer into the File List: Pages are added to the File List in alphanumeric order
- From the Finder/Explorer directly into the Run List: Files are automatically added to both the Run List and the File List

**Note** Since the files are added to both lists, this is a dual copy function. Thus, if you want to undo this action, you need to use Undo twice—once to remove the file from the Run List, and again to remove the file from the File List.

## File List operations

- Files appear in the File List in alphanumeric order.
- A green checkmark appears in the page icon in the File List when a content page is assigned to a product. When two green checkmarks appear, two or more products are assigned to that content page.

- A horizontal scrollbar appears when there are more pages to display horizontally than you can view in the currently sized pane. A vertical scrollbar appears when there are more files to display than you can view.
- You can select one or more pages, or the whole file, but not both at the same time.
- You can select multiple complete files, as well as multiple individual pages from multiple files.
- Files are added to the Run List in file/page order.
- When you click an individual file icon, you select all the pages in that file.
- Files and pages appear highlighted in blue when selected.
- Pressing the **CTRL** (Windows) or **CMD** (Mac) key, and then clicking additional pages selects non-contiguous pages.
- Clicking one page, holding down the **SHIFT** key, and then clicking the last page in the range selects a contiguous range of pages. Clicking one page, holding down the **CTRL/CMD** key, and then clicking additional pages selects non-contiguous pages.

## Run List window operations

Selecting only one product means that is all that will appear in the Run List. If you multi-select two or more products, all selected products appear in the Run List.

A menu above the Run List includes the following options to filter the Run List display.

- Show All
- Show Fronts (Odds)
- Show Backs (Evens)
- Show Covers (Bound)
- Show Text (Bound)

When files are added from the File list to the Run List, they are applied only to currently displayed products.

**Note** Products in the Run List appear in the same order in which they appear in the Project Editor. To reorder products in the Run List, you must reorder them in them in the Project Editor.

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## Columns in the Run List window

### Run List Columns

Column Title	Explanation
Product	Displays the name of the product. This column will always be visible when scrolling horizontally in the Run List.
Position	Shows the page position in the product. <b>Bound Products:</b> This is the numerical value. <b>Flat Products:</b> This is described as “Front” or “Back”. <b>Combined pages:</b> Components with Combined Pages will also show as “Front” or “Back.” This column will always be visible when scrolling horizontally in the Run List.
Cover/Text	Shows whether the page is a cover component or a text component with a “C” or “T” and the page number. For Flat and Folded products, this column will be empty. The column is always visible when scrolling horizontally in the Run List.
File Name	Displays the name of the PDF if a page has been assigned from the Files List. <b>Unassigned</b> displays red and indicates that the page is awaiting content. <b>(Blank)</b> indicates that the page is intentionally left blank. For example, when all new chapters should begin on an odd-numbered page, but in the content file the previous chapter ends on an odd-numbered page. Clicking a file name opens a menu where you can reset the selected file name to “Blank,” or “Unassigned.” Clicking the gear icon in the File Name column header opens a menu where you can reset all file names to “Blank,” or “Unassigned,” or you can remove extra rows from the Run List. A tool tip on this field shows the full path of this file. A file path also appears when hovering over a file in the File List.
File Pg. No	Displays the page number from the file that was assigned to that product page number slot. If the page is “Blank” or “Unassigned,” then the File Pg. No. column will be empty.
Component	Shows the name of the product component.
Status	Shows the status of the content file. If there is a problem with the content file, a warning icon and description of the problem will appear in this column. <b>Size:</b> Indicates there is a problem with the trimbox. <b>Colors:</b> Indicates the colors in the content file do not match the colors in the Planned Colors list. <b>Missing:</b> Indicates the content file cannot be found. <b>(Multiple):</b> Indicates there is more than one problem. Hover text can provide more detailed information about the error.
Folio	Shows the Folio (e.g., FC, InFC, 1,2,3, 4, InBC, BC)
Colors	Shows the colors that are planned to be on that page.
Shingling Value	Shows the amount of shingling applied to that product page number slot.
Content Positioning Rule	Will display one of three options for the position of the content: <b>Center Each PDF Page</b> <b>Center Each PDF Page Trimbox</b> <b>Match PDF Page Trimbox Size And Center</b> Clicking in the field brings up a menu where you can select one of the three options Selecting the gear icon in the column header brings up an “apply to all” menu where you can apply the positioning rule to selected pages.

Trimbox Size | Shows what the size is for the Content Page Trimbox.

**Note** It is possible to rearrange the order of the columns. You can rearrange the first three columns *only* between themselves. It is also possible to resize them.

## N-Up Binding in the Run List

When a product is set for N-Up Binding greater than one, a Number Up selector (N-Up 1,2,3) appears at the top of the Run List so you can select which N-Up the Run List represents. This menu appears to the right of the Display Options menu.

N-Up Binding in the Run List follows the rules below.

- When changing a product from 1-up to 2- or 3-up, common content can be assigned, or the multi-up products can have different content
- N-up has no impact on content assignment or on the Run List
- Dragging one component on top of another is supported to create N-Up components when common content is enabled

## Working with the Run List

### From the Project Explorer

As described previously, you can assign entire PDF content files, individually or as a group, to product pages in the Run List by dragging and dropping from the Finder/Explorer or the File List to the Run List.

### Editable fields

Some properties are non-editable in the Run List because they are tied to the product page slot (or row), while others can be edited in the Run List because they are tied to the content files. Keep in mind the following:

- Non-editable properties appear as black text on a gray background
- Editable products appear as black text on a white background
- You can only select editable properties
- You can only select the File name, Colors, and Content Positioning Rules

### Drag and drop from the File List to the Run List

You can also assign content pages, individually or as a group, from the File List to the Run List by drag and drop.

- Drag and drop operations to the Run List may use a sequential or random selection of pages from any or all File List files. Click on the first page, then **SHIFT-click** on the last page for contiguous selection. **CTRL-click (CMD-click on Mac)** on different pages for non-contiguous selection. Clicking on the page icon to the left of the file name selects every page in the file.
- When you drag multiple, non-contiguous content pages to the Run List, they are added in File List order; pages are added in alphanumeric order.

### To select pages

- Click on the first page, then **SHIFT-click** on the last page for contiguous selection.
- **CTRL-click (CMD-click on a Mac)** on different pages for non-contiguous selection.

**Notes** Clicking the page icon to the left of the file name selects every page in the file.

When you drag multiple, non-contiguous content pages to the Run List, they are added in the File List order; pages are added in alphanumeric order.

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## Adding or inserting content pages

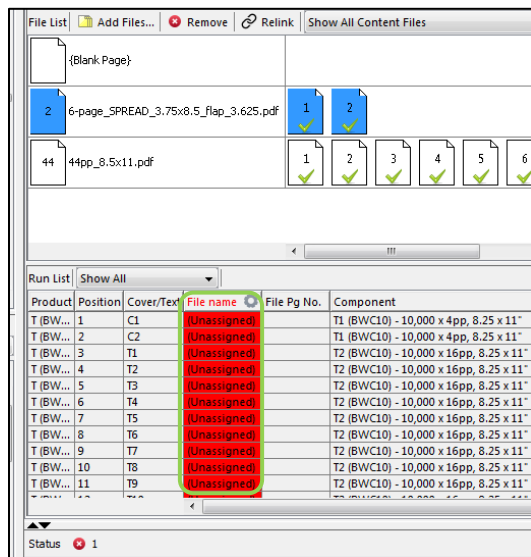
There are two ways to drag content pages or files from the File List onto the Run List. You can either:

- Add content
- Insert content

### Adding content

Adding content to the Run List occurs when you select pages or files in the File List and drag them to a page slot in the Run List. When the cursor is over a page slot, the entire row is highlighted. When you release the mouse button, a warning may appear stating that there is already content on some of these pages.

The following is an example of what the Run List might look like before content is added.

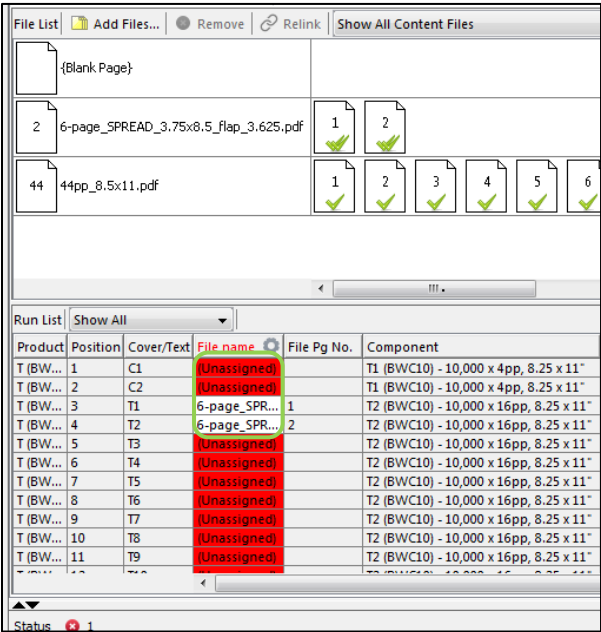


When you click **OK** in the warning window, the pages from the File List are added to the Run List, replacing the number of pages from there down that you were adding. In other words, if you had five pages selected in the File List, five pages will be replaced in the Run List.

**Important** When you *add* pages, the number of pages being copied are replaced from the selection point down. The rest of the pages, however, remain exactly as they were.

For example, if you were dragging five pages onto the third product page slot, the content of the rows from 3-7 would be changed, and the next page would be 8.

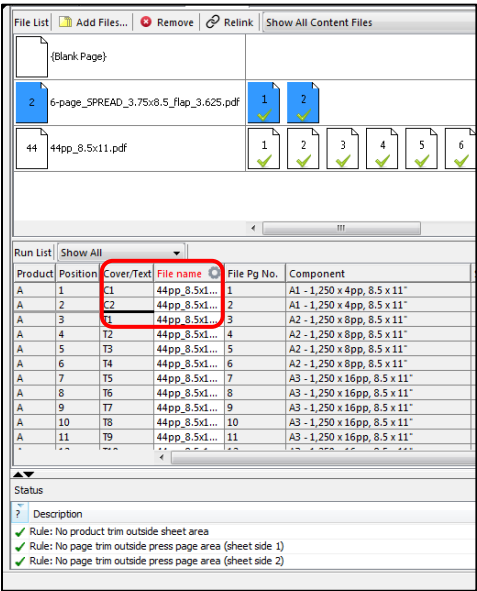
The following is an example of what the Run List might look like after adding a two-page file.



Inserting content

**Note** Inserting pages is possible only when selecting a single bound product.

Inserting pages has a different result from adding pages. When you select pages or files in the File List, and then drag the cursor between two pages in the Run List, a horizontal black line indicates where the pages will be inserted.

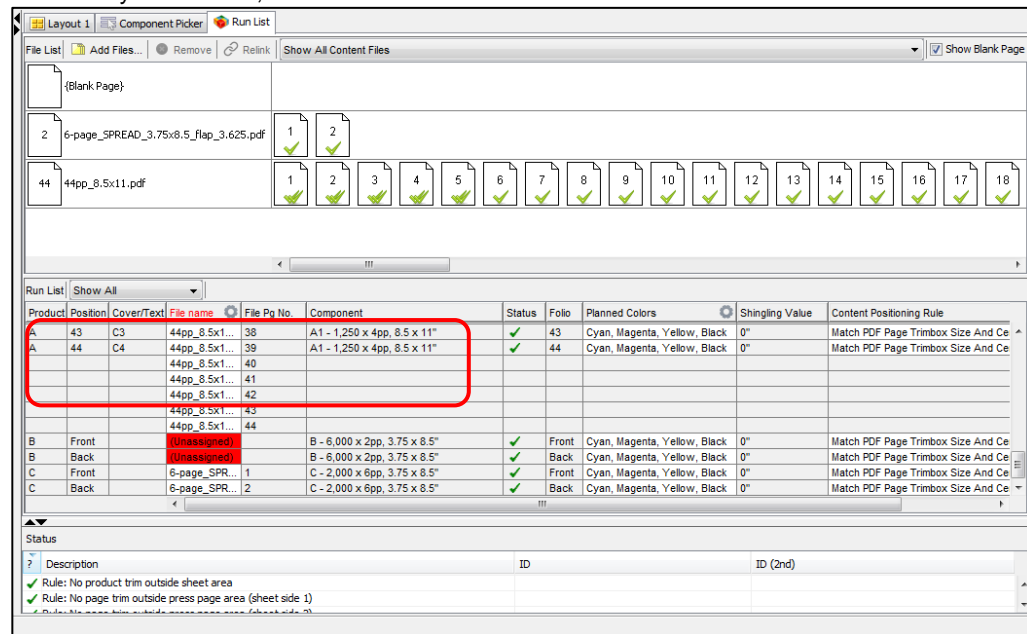


When you release the mouse button, the pages from the File List are added to the Run List between the two pages where you placed the black line.

**Important** When you insert pages (as opposed to adding), the number of pages being inserted will “push” the pages from the selection point down by the same number you inserted.

For example, if you inserted five pages between page 2 and 3 in the File Pg. No. column, the content of rows 3-7 would change and the next page (previously File Pg. No. 8) would be 3, because all pages are moved down by five. There would then be five extra rows at the end of the list of that product’s pages in the Run List; only the File name and File Pg. No. columns would

contain any information, as seen below.



Any content pages pushed past the last page in the product are ignored, since they are no longer associated with product pages.

To remove the extra rows at the end of the Run List, click the gear icon in the File name column header, and select **Remove Extra Rows** from the menu.

**Note** Since you can only add pages to bound products, if the number of content pages exceeds the number of product pages, extra pages will only be added to the bound products in the Run List. Folded and flat products respond normally in the first two pages to adding or inserting, but no extra pages are added.

## Blank or unassigned pages

A page that is awaiting content displays a red (**Unassigned**) message. To change this, you can add content to that page.

A (**Blank**) page indicates a page that is intentionally left blank so a blank page will print. For example, if all new chapters of a book should begin on an odd-numbered page, but in the content file, a chapter ends on odd-numbered page, then you should use a blank page in the Run List.

Clicking in the File name column of the Run List opens a menu where you can set the selected file name to (**Blank**) or (**Unassigned**). When there are unassigned pages in the Run List, the File name column header will turn red as a warning that there are unassigned pages in the Run List.

When there are unassigned pages in the Run List, the File name column header will turn red as a warning that there are unassigned pages in the Run List.

## Inserting blank pages

You can insert blank pages directly by using the Blank Page icon.

After you click the **Show Blank Page** check box in the File List window, a file icon with the designation {Blank Page} appears at the top of the file list. You can insert these blank pages into the Run List or use it to replace a page in the Run List.

When you drag the {Blank Page} icon to the place in the Run list where you wish to insert the blank page, a dark line appears between the two pages in the list.

**Note** When you select the {Blank Page} icon, the **Remove** and **Relink** buttons are disabled.

When you release the mouse button, a blank page is inserted between the two pages where the dark line had previously indicated.

All content pages below the blank page are now moved down by one.

**Note** After you insert blank pages in the Run List, there may be extra rows at the end of the list that have no page designation in the product. You will see those extra pages if you scroll to the bottom of the list.

### Important information about blank pages

There are two important things to remember about inserting blank pages.

First, if you need blank pages between some pages in a bound product, you should insert the pages rather than adding them. That way you preserve the order of the remaining pages.

When you insert a page, all other content pages are pushed down, but none of them are replaced. If you add pages, some of the page content is replaced by other content.

When you drag the blank page from the File List to the Run List, be sure it is inserted between two pages (indicated by a heavy black line), and does not replace any pages (indicated by the Run List row being highlighted in blue).

Second, if you created the product with the same number of pages as the content file, inserting pages means the product will need more pages, so you will need to add enough signatures to the product to include those pages.

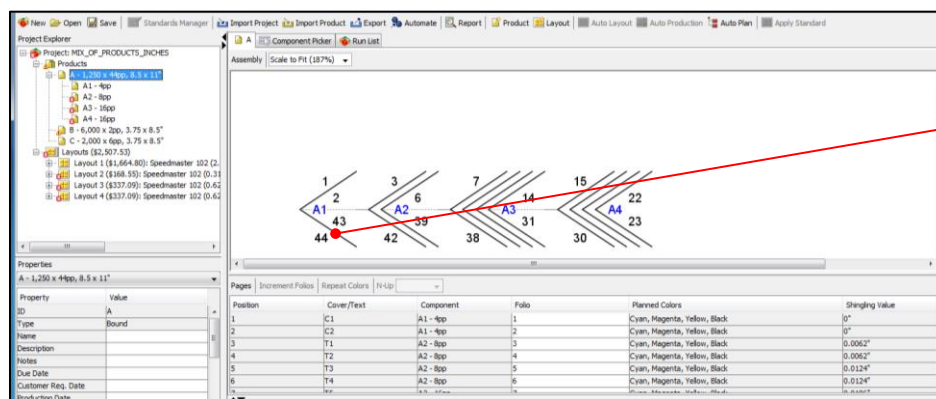
You can do this either before or after you insert the blank pages. If you know the number of blank pages you will need, you can add them to the product before you insert the blank pages. If you do not know how many you will need, you can count the extra rows at the end of the product in Run List to see how many blank pages were inserted.

**Note** After you insert a blank page in a product, you should not remove the extra rows from the end of the Run List, because those rows contain the content for the pages you are going to add to the product.

To add pages to the product, go to the Assembly View of the product. You can do this by selecting the product in the Project Explorer pane, and then clicking the View tab (located to the left of the Component Picker tab). In the Assembly View, clone enough signatures to accommodate the number of blank pages you will be inserting, or have already inserted. Then check the Run List to be sure the number of blank and content pages in the Run List matches the number of pages in the product.

Please refer to the following steps to add pages to a bound product using the Assembly View.

1. Select the Bound product in the Project Explorer.
2. Click the Layout View tab.
3. Right-click a signature to open a menu and clone the component.



4. Clone enough components to cover the number of blank pages.

### Adding one content file page to multiple product page number slots

It is possible to assign the same content page to multiple product page slots in the Run List.

For example, follow these steps if you want to assign an 11-page PDF content file to 10 flat products, with pages 1-10 applying to each of the fronts and Page 11 applying to all backs.

1. Select the 10 products in the Project Explorer.

- Limit the displayed Run List to **Show Backs (Evens)** by selecting this option from the pull-down Show menu at the top of the Run List.
- Select Page 11 from the File List. On Windows, press and hold the **CTRL** key (**CMD** key on Mac), and drag Page 11 to any of the displayed Run List page slots.

**Note** You must have only one page selected in the File menu. If multiple pages are selected in the File List, and you then press the **CTRL** (or **CMD**) key, a beep sounds, a notification appears, and (on Windows) the drag icon changes to a circle with a slash. No pages are assigned to products.

- When the mouse button is released, Page 11 will be applied to all visible page slots.

## Planned Colors

### Handling planned colors on a single selected row

When you select a single row in the Run List in the Planned Colors column, a menu appears allowing you to select different colors, including **None** (no planned colors) and **Custom** (colors set by you).

## Color warnings

### Planned Colors Status warning

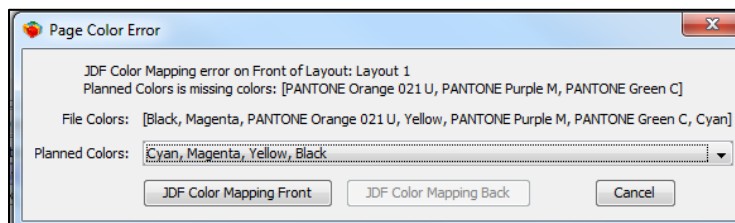
When JDF Color Mapping is enabled, and the Planned Colors and the colors of the content page do not match, the planned colors and Status column headers turn red, and a Colors warning appears in the Status column. For more information, see [JDF Color Mapping](#).

### Colors Status warning

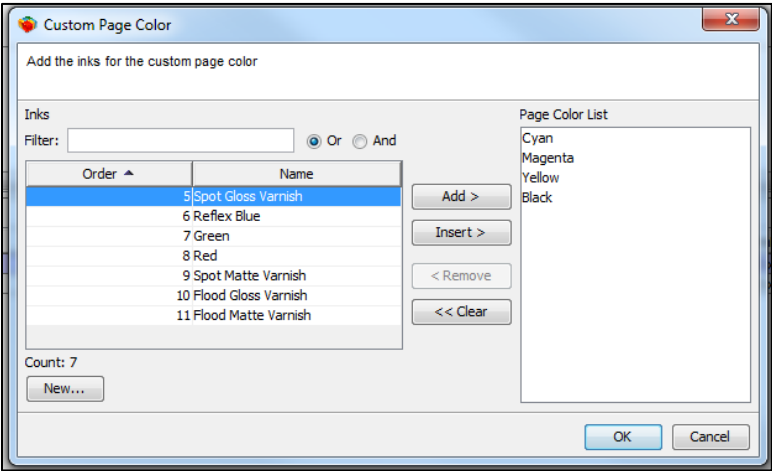
Clicking the warning in the Status column opens the Page Color Error window, where you can correct the planned colors for that page.

Here you will find information about extra colors, missing colors, the file colors, and a menu for selecting and changing the Planned Colors.

There is also a button indicating whether the Color Mapping is for the front or back of the layout on which the page is placed.



The color options on the Planned Colors menu are the same as those in the Planned Colors column. If you select the **Custom...** option, a window opens where you can select a set of custom colors for the page.



**Note** For additional information on resolving Colors errors, see the [JDF Color Mapping](#).

**Planned Colors on multiple selected rows**

You can change the Planned Colors for all rows in the Run List when either no rows are selected, or only one row is selected. To do this, click the gear icon in the Planned Colors header. When you do, a window opens allowing you to change *all* rows in the list.

**Note** The word “(All)” appears in the window title.

If multiple rows are selected, either contiguous or non-contiguous, clicking the gear icon in the Planned Colors header opens a similar window. The difference here is the only the selected rows will change.

**Note** The word “(Selected)” appears in the window title.

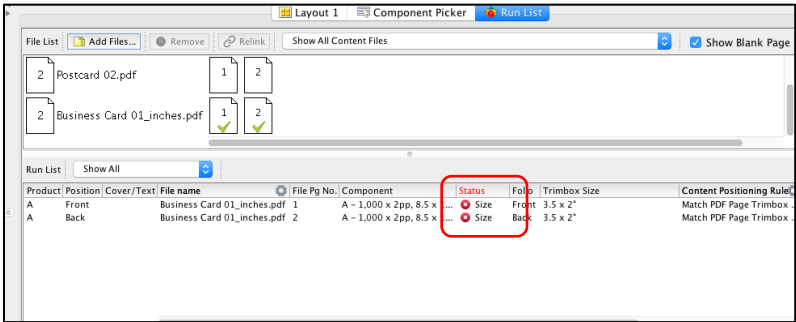
**Important** If only one row, or all the rows, are selected, then the choice will apply to all the rows—the same as if the “(All)” window were used.

**Size Errors in the Run List**

**Conditions producing Size errors in the Run List Status column**

Assigning content pages to product pages in the Run List will produce a Size error in the Status column when:

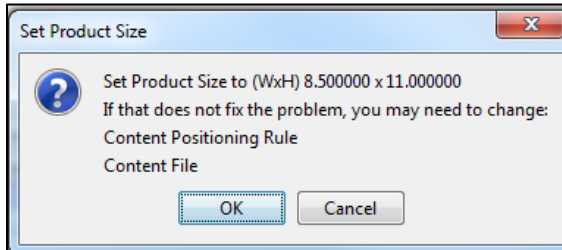
- The content and product pages are different sizes
- The content and product pages have a different rotation
- One or more of the product pages has a different leaf size than the others
- One or more of the content pages has no trimbox
- The product pages are combined, thus making the product and content pages different sizes
- The content and product pages are the same size but have different orientations



## Size error when flat and folded products and content are different sizes

Dragging content pages onto flat or folded product pages of a completely different size produces a size error. In this case 3.5" x 2" pages are added to product pages set for 8.5" x 11".

Clicking the size error in the Status column opens the Set Product Size window.



Clicking **OK** changes the product page size to 6" x 9" automatically.

If changing the product page size does not resolve the error, you may need to change:

- The Content Positioning Rule
- The Content File

## Size errors for bound products

With bound products, a size error may occur because the content file is a different size from the product pages or because one or more leaf sizes are narrower than the other leaves.

Clicking **OK** changes the product size. If that does not resolve the error, then you need to change one of the following:

- Content Positioning Rule
- Content File
- Leaf Size

**Note** When a leaf is wider than the rest of the product pages, no size error is reported because Metrix creates the extra width by adding Front Face Trim rather than changing the page size.

## Size error for rotated pages

If the product was created to be calendar style, or if it contains rotated pages, a size error occurs. Clicking in the Status column opens the Page Rotation Error window.

If the content file and product pages are different sizes, the error may be resolved by changing the size of the product pages.

When the content file and product pages are the same size, but the product pages have been rotated, you must change the rotation for either the content file or the product pages.

Alternatively, you can change the Content Positioning Rule in the User Preferences window to **Center Each PDF Page** or **Center Each PDF Page Trimbox**.

**Note** For more information about the Content Positioning Rule, see [Content Positioning Rules](#), [Content Handling Preferences](#), and the [Bound product properties](#).

## Size error for content pages with no trimbox

Dragging content pages onto product pages when one or more of the content pages has no trimbox produces a size error in the Status column in the Run List.

Clicking the size error in the Status column opens the Set Product Size window.

Clicking **OK** will change the Content Positioning Rule for that product page to center the content on the product page.

If all the content pages have no trimbox, and need to be centered on the product pages, click the gear icon in the Content Positioning Rule column and then select **Center Each PDF Page (All)**.

### Size error for product with combined pages

Dragging 8.5" x 11" content onto 8.5" x 11" pages when Combined Pages is set to **True** (for a combined size of 17" x 11") cause a size error in the Status column.

Clicking the size error in the Status column opens the Set Product Size window shown below.

Clicking **OK** dismisses the window. You must then change the Content File, Product size, or the Content Positioning rule to correct the error.

### Size error—same size product and content, but different orientation

Dragging 8.5" x 11" content onto product pages that are set for 11" x 8.5" orientation also produces a size error.

Clicking the size error in the Status column opens the Page Rotation Error window. Clicking **OK** dismisses the window. You can then:

- Change the product size to 8.5" x 11"
- Change the Content Positioning Rule
- Use a different content file
- Change the page rotation

**Note** For some bound products, this error window may also suggest changing the leaf size.

### Product size does not match PDF trimbox

- If the Content Positioning Rule is set to **Match PDF Trimbox Size And Center**, and the product and content files do not match, "Size" appears with a red X in the Status column of the Run List
- Clicking in the Status cell in the Run List opens a window that asks, "Set Product Size to (WxH)" and then gives new dimensions
- You can either select **Cancel** to cancel the window, or click **OK** to apply the new size to the product
- If the Content File does not have a trimbox, when you click in the Status cell, a window opens allowing you to change the Content Positioning Rule to "Center Each PDF Page" or "Center Each PDF Page Trimbox and Center"

## Miscellaneous Run List Rules

### Upgrading from previous Metrix versions

When upgrading from versions of Metrix prior to the introduction of the Run List (2015.4 and earlier):

- Content file references are maintained
- Products that without assigned content are considered **(Unassigned)**

### Run List Previews in the View Area

These rules apply to the preview of pages in the View Area (not the File List):

- Previews of products that have content assigned display the content
  - Previews of pages that are **Unassigned** appear as a red and white checkerboard pattern
  - Previews of "(Blank)" pages appear as blank white pages
-

## Adding too many pages to a flat or folded product

If the page count of the content file is less than the number of product pages in the Run List, **(Unassigned)** Product and Position rows are left at the end of the Run List.

When only one flat or folded Product is selected, if the page count of the content file is greater than the product page count, or greater than the number of pages after the one on which the content file is dropped, content is added only to the pages in the selected product. No extra content pages are added at the end of the list.

A beep will sound and a notification appears when this happens.

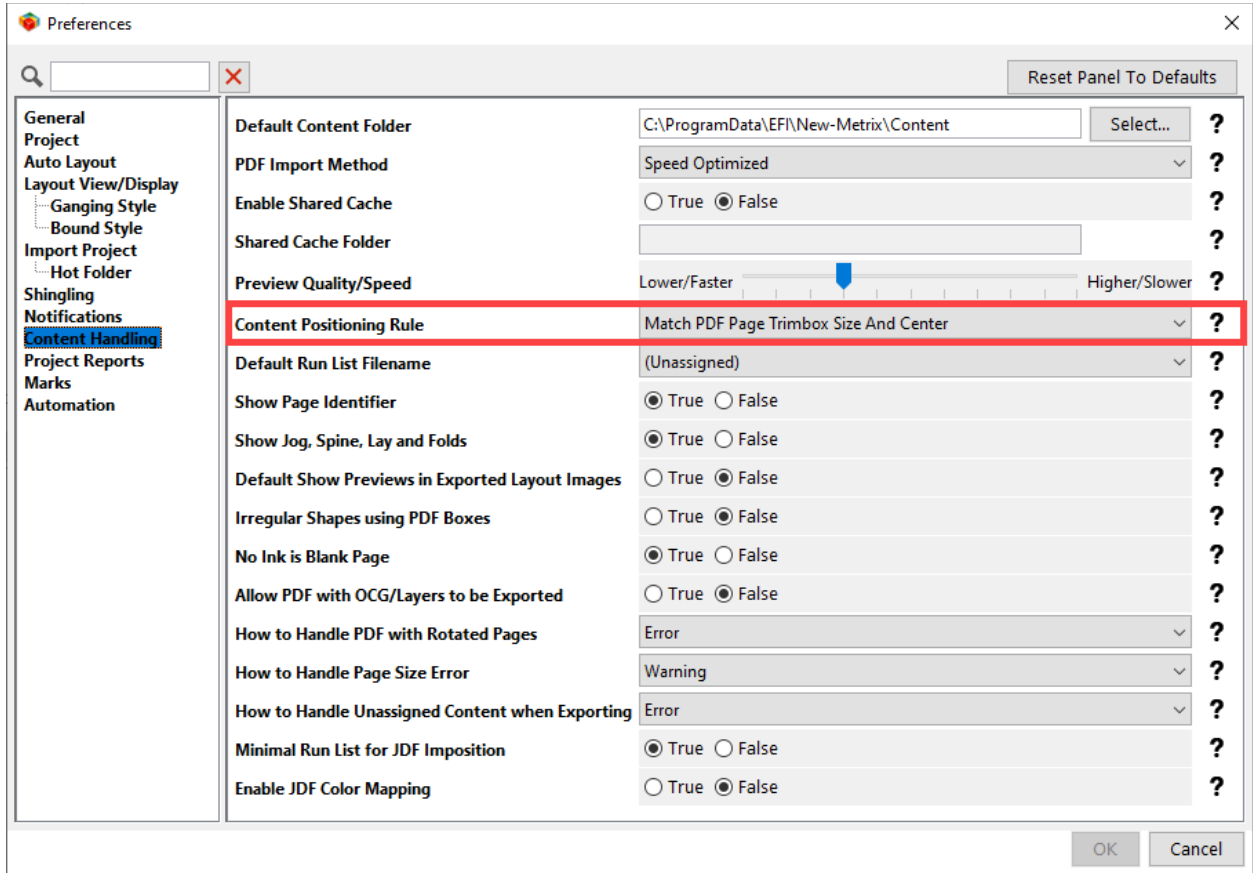
Product/PDF Content File page count mismatch. Extra pages will not be added to the Run List.  
PDF file: (44pp\_8.5x11.pdf)  
Pages dragged from File List: (5)  
Pages added to Run List: (2)

## Content Positioning Rules

- If different Content Positioning Rules are applied to pages in the same product, when that product is selected, the Content Position Rule in the Project Explorer product property shows “*Different Values*”.
- The Content Positioning Rule remains tied to the Page Position slot, and will be applied to any content page that is assigned to that slot.
- If multiple product page slots are selected, and you select a Content Positioning Rule for any of the selected Product page slots, the rule is applied to all selected pages.

## Content Positioning Rule preference

There is a user preference that globally applies content positioning rules to all new products on import. You can override this rule at the Run List level. Content positioning rules applied to a product page slot remain tied to that slot.



**Note** For more information on the Content Positioning Rule, see the [Bound product properties](#).

## Missing Content files

- If Metrix cannot find a content file, the file name appears in red text in the File List and “Missing” appears in red text in the Status column of the Run List
- You can update the link to the “Missing” content file by using the **Relink** button in the File List or by clicking on the “Missing” error in the Run List, which opens the Relink File(s) window.

## Resolving Text Mark variables

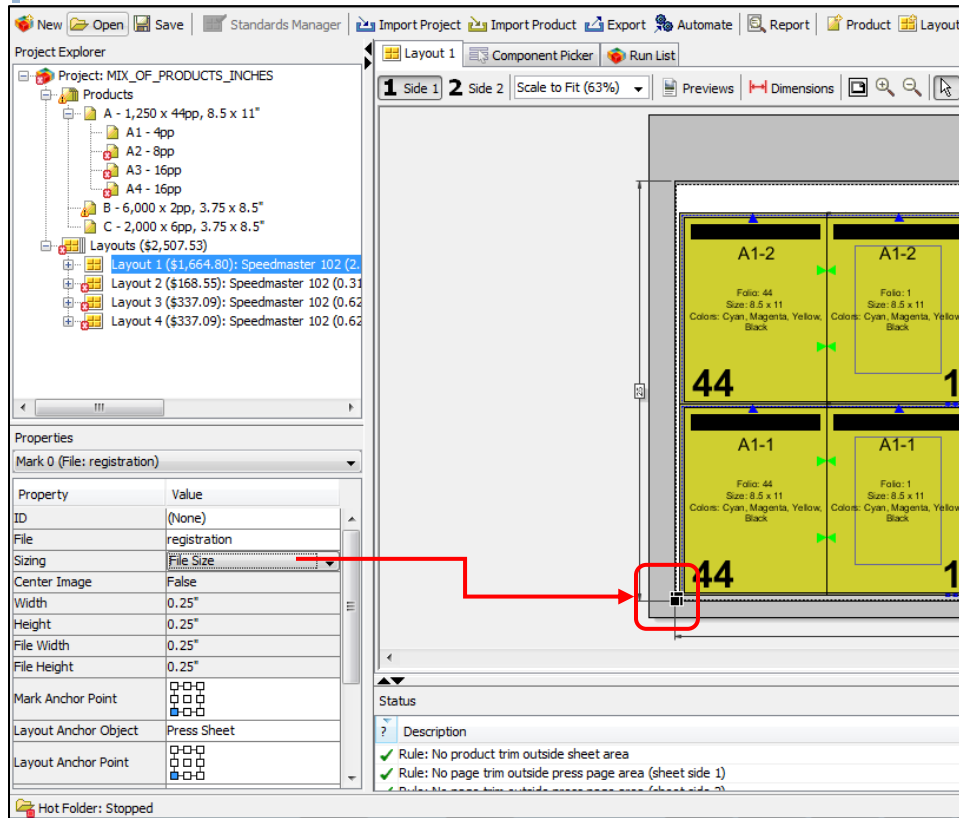
- When the text mark variable <Product.ContentFile> is placed on a layout adjacent to a component, the mark resolves to the name of the content file. If that component has more than one content file assigned, the mark resolves to “(Multiple Files).”

## Marks and Mark Sets

## Mark Arrangement

When you add any layout file mark (**Marks > Add File**), Metrix places the default file mark, using the Default Mark Anchor, Default Layout Anchor, and the Default Layout Anchor Object (Press Sheet) options. The Default Offsets (0,0) properties are also applied, placing the lower left corner of the mark in the lower left corner of the press sheet.

**Note** The default file mark is determined by the order of the file marks in the Metrix Database window – the one at the top of the list is the default. This is user definable.



Once you have selected the anchors and anchor object, you can position the mark using the offsets or by dragging and dropping.

**Notes** Positive offsets move up and right; negative offsets move left and down.

Drag-and-Drop/Nudge: Moves are in increments of 1mm or 1/16". To nudge, hold down **CTRL** (Windows) or **CMD** (Mac) and use the arrow keys.

The Sizing property refers to the mark size, and the options are: File Size; Fixed Size; Fixed Height, Variable Width; and Fixed Width, Variable Height.

## File Mark Setup

In Metrix 22.1, the PDF file marks are stored in the Metrix Database rather than in the Marks folder. This ensures that other user sharing the same database have access to the same File Marks.

**Note** If you are upgrading from a previous version of Metrix and the Marks folder resides in the Metrix folder, copy that Marks folder and paste it into the Metrix 22.1 folder.

As long as Metrix has access to the Marks folder, whether you placed a copy in the Metrix 22.1 folder or it resides in the same location defined for the previous installation of Metrix, Metrix will import the file marks from that location when you first open the Metrix Database and start Metrix.

If the Marks folder has been moved so that Metrix cannot automatically import file marks, you can edit the individual marks in the Database window and browse to and select the corresponding PDF files.

If a file mark is missing from the database after an upgrade, then it will appear in red in the **File Marks** panel of the Database window.

File marks previews are now created internally using the PDF Renderer, so it is no longer necessary to have corresponding .png files for marks.

## To set up marks

1. Select **Settings > Database**.
2. Select **File Marks**, under Resources, on left side of the Database window.
3. Click **New** on the right side of the Database window.
4. Enter the relevant information in the Filename, Width, and Height fields in the New File Mark window.

## Prioritizing file marks

When you add a file mark to your layout, Metrix automatically places the default mark (the one at the top of the list). You can change the order of the marks in the database, which will change the default mark.

**Note** You must be logged into Metrix with a user role giving you permission to re-order the file marks list. That is, you must set "Edit or Delete Database Items" to **True** in the Database window.

1. Select **Settings > Database**.
2. Select **File Marks** on the left side of the Database window.
3. Select the intended mark to reorder.
4. Use **Up** and **Down** to prioritize entries.

**Note** You can use this same process to prioritize mark sets. Select mark sets instead of file marks and use the **Up** and **Down** buttons to prioritize the list of mark sets.

## Adding a fixed size file mark

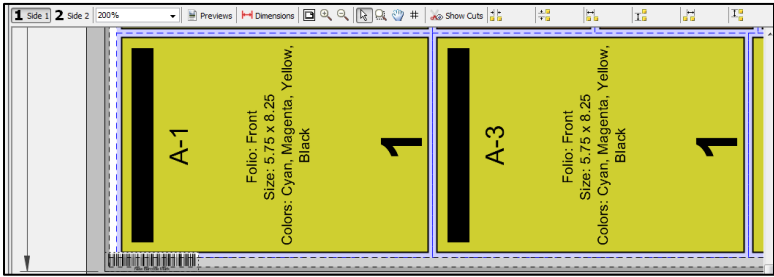
1. Select **Marks > Add File** in the Project Explorer.
2. Select the desired file mark using the File property in the Properties Editor.
3. Choose Anchors, Anchor Object, and Offsets values in the Properties Editor.
4. Choose other properties in the Properties Editor.

## Adding a duplicating file mark

1. Select **Marks > Add File**.
2. Select desired File Mark, Sizing, and Center Image properties in the Properties Editor.
3. Choose Anchors, Anchor Object, and Offsets properties.
4. Choose other properties in the Properties Editor.

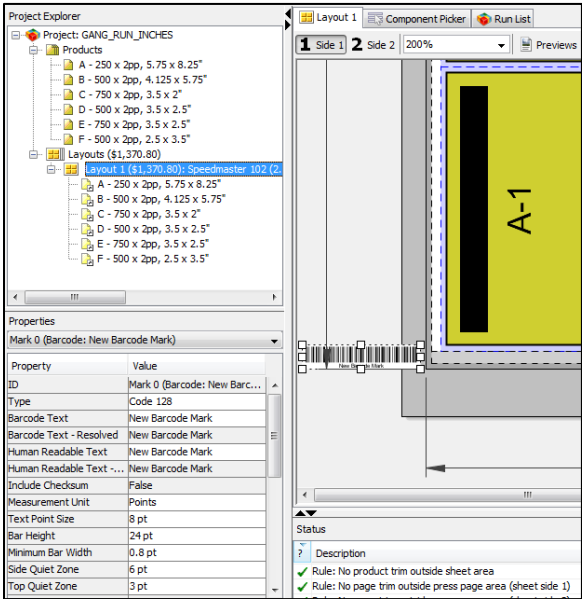
## Barcode Marks

Barcode marks provides the barcode identification of products, book components, layouts, etc. They are also used for automated finishing systems, and to speed fulfillment and invoicing.



Adding a barcode mark to a layout

To add a barcode to a mark, select **Marks > Add Barcode**. The properties that appear in the Properties Editor are those pertaining to the barcode.



Embedding the font for barcode human readable text

If your workflow requires you to have fonts embedded in the output stream, copy a TrueType font (for example arial.ttf) to the Font folder inside the Metrix installation folder. Metrix will use this font for text marks displayed in the Layout View and will embed this font in the Imposed PDF or the PDF Marks Flat in a JDF workflow.

Barcode Mark Properties

Property	Explanation
Type	<b>Code 128 / Interleaved 2 of 5</b> Barcode type to use. Determined by the barcode reader.
Barcode Text	Barcode text, static and/or variable.
Barcode Text Resolved	The static and/or variable resolved barcode text.
Human Readable Text	The human readable text to insert underneath the barcode. Use <!\> to insert line breaks.
Human Readable Text Resolved	The static and/or variable resolved human readable text.
Include Checksum	<b>True / False</b>

	For Interleaved 2 of 5 only. Determined by the barcode reader.
Measurement Unit	<b>Points / Inches or Points / Millimeters</b> The measurement unit to use for the barcode and the human readable text.
Text Point Size	Human readable text point size.
Bar Height	Barcode height.
Minimum Bar Width	Minimum width for the barcode.
Side Quiet Zone	Blank space to leave at the sides of the barcode.
Top Quiet Zone	Blank space to leave at the top of the barcode.
Width	The calculated width of the barcode mark.
Height	The calculated height of the barcode mark.
Rotation	<b>0° / 90° / 180° / 270°</b> The rotation of the barcode mark.
Mark Anchor Point	The point on the mark to use as an anchor.
Layout Anchor Object	<b>Press Plate / Press Sheet / Product Trim</b> The object to anchor the mark to.
Layout Anchor Point	The point on the Layout Anchor Object to use as an anchor.
Horizontal Offset	The horizontal distance to move the mark away from the anchor point. Positive values move up and right, negative values move left and down.
Vertical Offset	The vertical distance to move the mark away from the anchor point. Positive values move up and right, negative values move left and down.
Placement	<b>Front Only / Back Only / Both Front and Back</b> The sheet sides for placement of the barcode mark.
Mirror Backup	<b>True / False</b> When <b>True</b> , the position of the barcode mark on the Back mirrors the Front.
Over Page Content	<b>True / False</b> When <b>True</b> , the barcode mark will overprint page content.
Color	<b>All Separations / Select an Ink (from the Metrix database)</b> The color for the barcode mark.
Output	<b>Print Report Only / Exported Output Only / Both Export and Report</b> Where the barcode mark should appear.

## Barcode mark variables

Use the abbreviated variables when necessary – Metrix barcode mark input is limited to 100 characters. Metrix barcode mark variables are not case-sensitive.

Variable	Inserts	Related to
<!\>	Carriage return and line feed	Any text

<Date>	Current date	Computer
<Time>	Current time	Computer
<Project.ID>	Project ID	Project
<Project.Name>	Project name	Project
<Project.Description>	Project description	Project
<Project.Notes>	Project notes	Project
<Project.Customer> or <Project.Customers>	A comma-separated list of all customers for all products in the project	Project
<Color>	Color of each separation	Layout
<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
<Product.ID>	Product ID	Component
<Product.Name>	Product name	Component
<Product.Description>	Product description	Component
<Product.Notes>	Product notes	Component
<Product.Customer>	Product customer	Component
<Product.DueDate>	Product due date	Component
<Product.ContentFile>	Product content filename	Component
<Product.RequiredQuantity>	Product required quantity	Component
<Product.ProductGroup>	Product group	Component
<Product.Width> or <Product.Width.Unit>	Product width and unit of measure	Component
<Product.Width.NoUnit>	Product width without unit of measure	Component
<Product.Height> or <Product.Height.Unit>	Product height with unit of measure	Component
<Product.Height.NoUnit>	Product height without unit of measure	Component
<Instance.ID>	Instance ID (e.g., A-1 or A1-1)	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
<Component.Number>	Component number	Component

<TextComponent.Number>	Text component number (not counting cover component)	Component
<Component.Count>	Total number of components in the product	Component
<TextComponent.Count>	Total number of textcomponents in the product (not including cover component)	Component
<Component.PageCount>	Page count for this component (front & back)	Component
<Product.MIS_ID>*	Product MIS_ID	Component
<Component.MIS_ID>*	Component MIS_ID	Component
<Layout.MIS_ID>*	Layout MIS_ID	Component
<BarcodeText> (for Human Readable property)	Text present in Barcode Text property	Barcode Mark
<BarcodeText.Resolved> (for Human Readable property)	Resolved text present in Barcode Text Resolved property	Barcode Mark

**\*Note** MIS\_ID cannot be inserted from within the Metrix interface – product, component, and/or layout MIS ID information can only be generated from an MIS and thus its presence is only possible when the project originates from MIS.

## Muller Martini barcode marks

The Barcodes module includes special barcode marks for Muller Martini finishing equipment. These special barcode marks enable the Muller Martini binder to read a job identification number, the signature number, and the total signatures in the job.

Metrix provides all three pieces of information by calculating a special value that is inserted into the barcode automatically. You are only required to insert one variable and Metrix does the rest.

- Use any one of the project or product properties listed below to insert a numeric job identifier.
- If you are using Code 128, Metrix truncates to the last 4 digits to identify the job. If you are using Interleaved 2 of 5, Metrix truncates to the last 3 digits to identify the job.
- Any incorrect entry, that is, any other characters besides digits, will produce an incorrect value that is not usable by the Muller Martini equipment.
- The barcode mark must be placed onto a component and be resolved, that is, the “hot spot” must be green.
- Consult with Muller Martini for details on the placement, sizing, number of marks, spacing, etc.

Variable	Inserts
<MMBarcode.Project.Name>	Job Identifier (Code 128, insert 4 numbers; Interleaved 2 of 5, insert 3 numbers), Component (Signature) Number, Component Count
<MMBarcode.Project.Description>	Job Identifier (Code 128, insert 4 numbers; Interleaved 2 of 5, insert 3 numbers), Component (Signature) Number, Component Count
<MMBarcode.Project.Notes>	Job Identifier (Code 128, insert 4 numbers; Interleaved 2 of 5, insert 3 numbers), Component (Signature) Number, Component Count
<MMBarcode.Product.Name>	Job Identifier (Code 128, insert 4 numbers; Interleaved 2 of 5, insert 3 numbers), Component (Signature) Number, Component Count

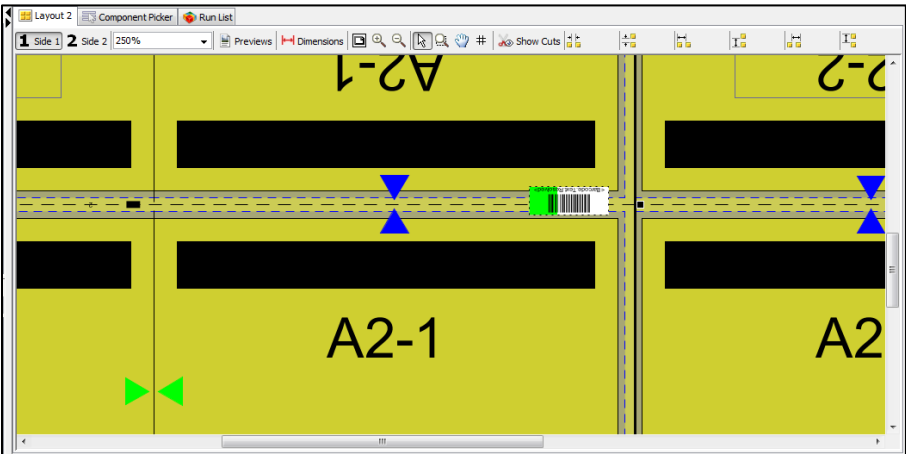
<MMBarcode.Product.Description>	Job Identifier (Code 128, insert 4 numbers; Interleaved 2 of 5, insert 3 numbers), Component (Signature) Number, Component Count
<MMBarcode.Product.Notes>	Job Identifier (Code 128, insert 4 numbers; Interleaved 2 of 5, insert 3 numbers), Component (Signature) Number, Component Count

Resolving Muller Martini barcode mark variables

In the illustration below, the job number “1234” has been placed into the Product Notes property. A Muller Martini barcode mark (Code 128) has been inserted with the variable <MMBarcode.Product.Notes>.

Metrix has calculated a value that informs the Muller Martini binder that the job number for this component is 1234 and that this is Signature 3 of 4.

**Note** The calculated value is only understandable by the Muller Martini barcodereader. You will not see, for example, “1234” or “sig 3 of 4”. Once the value is read by the Muller Martini system, however, it will be perfectly understood.

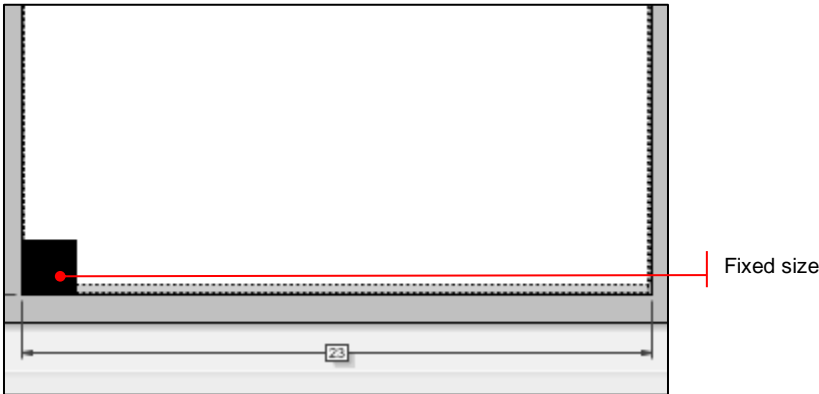


Understanding Rectangle Marks

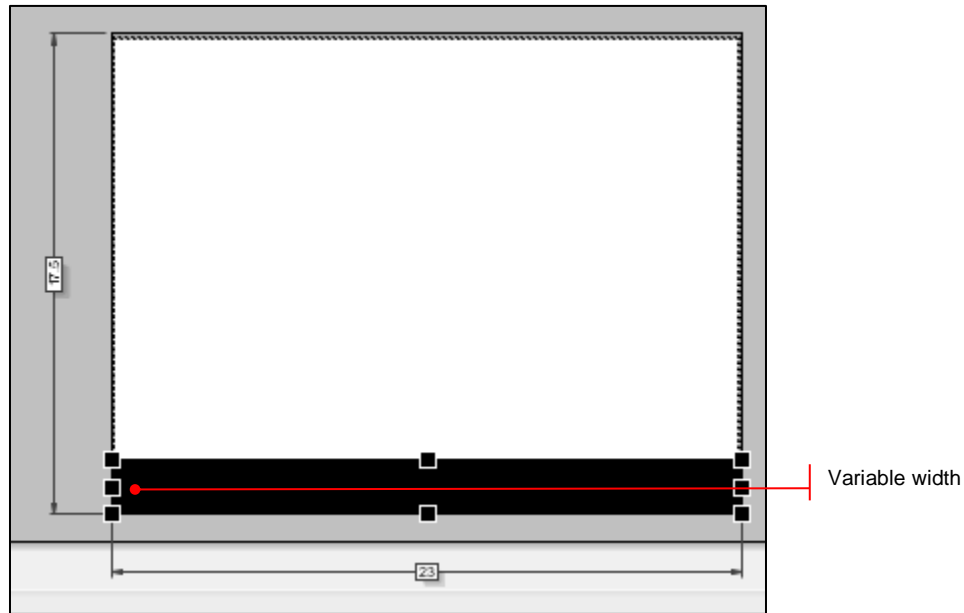
You can use rectangle marks for take-off bars and other kinds of marks requiring a filled rectangular shape.

There are three different types of rectangle marks:

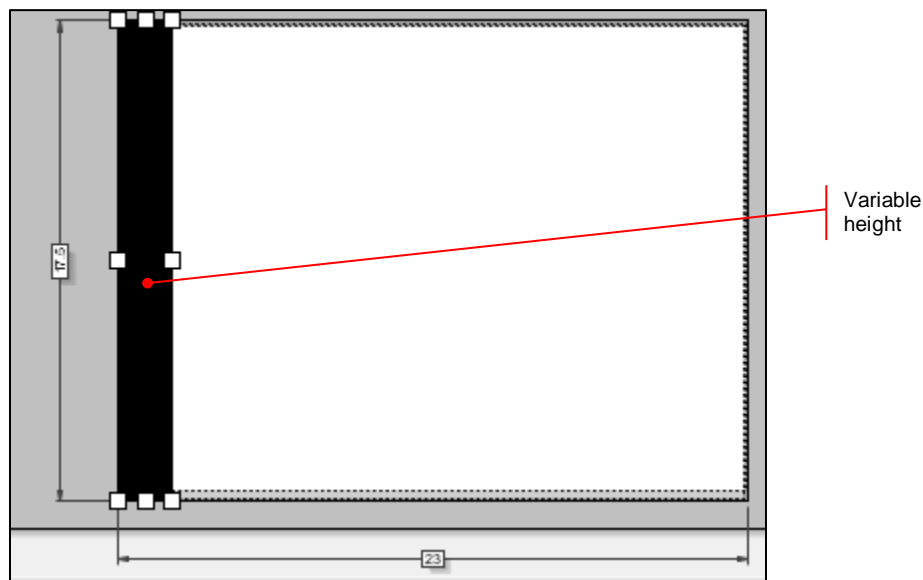
- **Fixed Size:** Specified by the Width and Height properties.



- **Fixed Height, Variable Width:** Width is sheet width; height specified by Height property.



- **Fixed Width, Variable Height:** Height is sheet height; width specified by the Width property.



## Adding a Rectangle Mark to a Layout

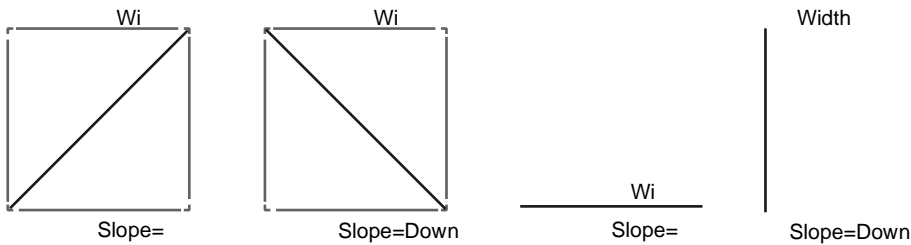
1. Select **Marks > Add Rectangle**.
2. Specify sizing in the Properties Editor.
3. Choose Anchors, Anchor Object, and Offsets properties.
4. Choose other properties in the Properties Editor.

## Line Marks

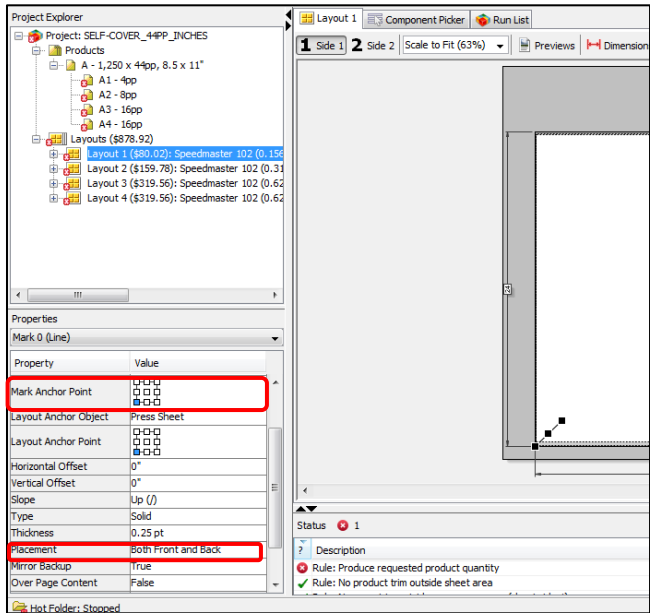
### Understanding line marks

Metrix draws line marks within the specified area. The Width, Height, and Slope properties determine the line mark area and direction (and the Thickness property determines the line mark weight).

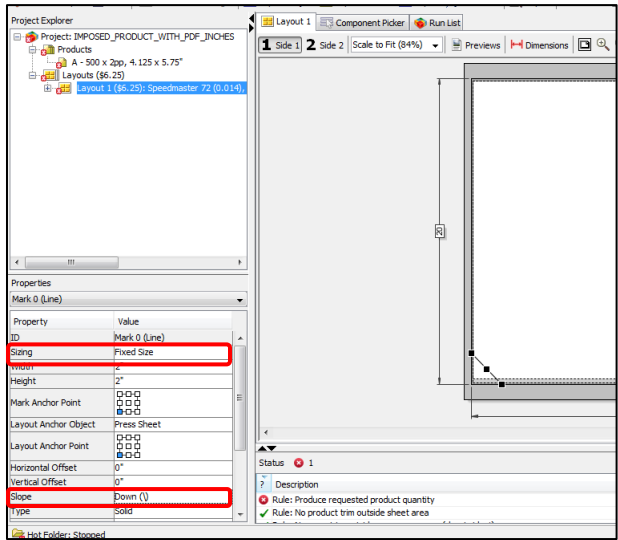
For horizontal and vertical line marks, the slope is irrelevant.



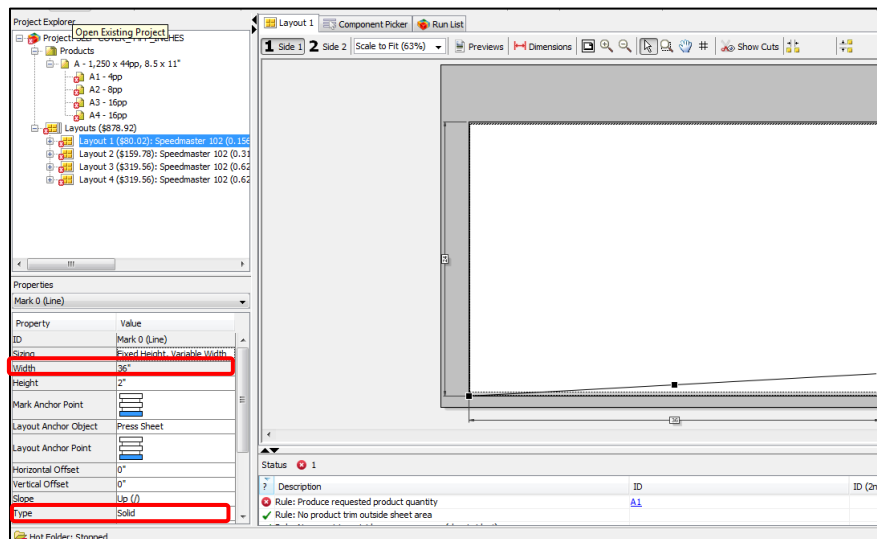
Example 1 – Fixed size, slope up



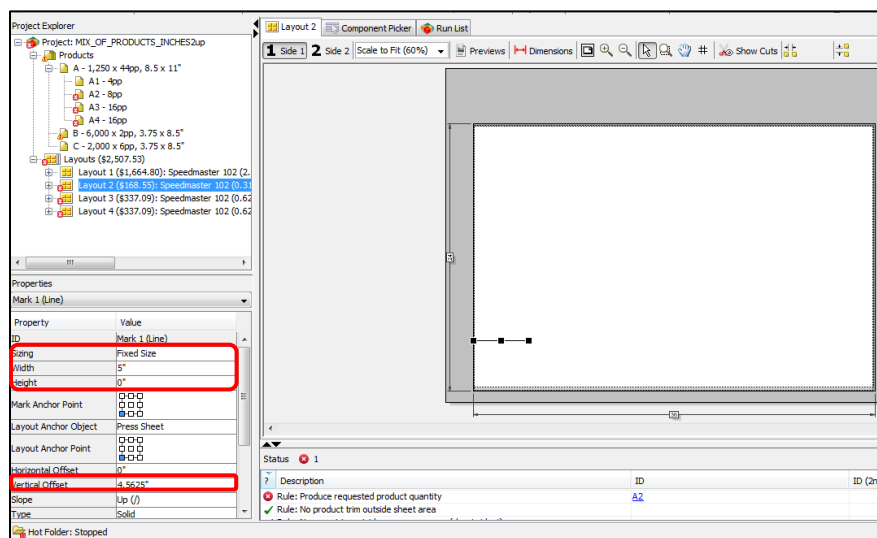
Example 2 – Fixed size, slope down



### Example 3 – Fixed height, variable width, slope up



### Example 4 – fixed size, horizontal line



## Adding a line mark to a layout

1. Select **Marks > Add Line**.
2. Choose the Sizing property in the Properties Editor.
3. Choose Anchors, Anchor Object, and Offsets in the Properties Editor.
4. Choose other properties in the Properties Editor.

## Selecting Line Marks on a Layout

Metrix has two ways to assist you in selecting line marks from a layout.

- You can select a higher magnification for the View Area, enlarging the layout.
- You can use the Object List to select any of the objects on the layout.

**Note** For more information on where to find the Object List, see [Interaction and display of the four UI areas](#).

## Copying All Marks from One Layout to Another

You can select, copy, and paste all the marks on a layout using the Marks menu.

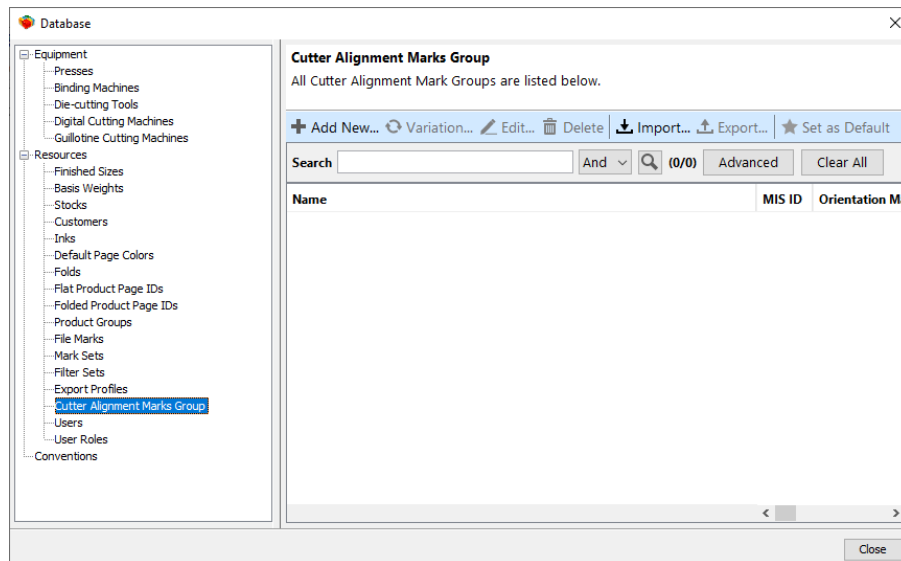
- If you need to select all the marks on a layout, go to the Marks menu and choose **Select All** (**ALT+SHIFT+A** on Windows, or **CTRL+A** on Mac).
- Once you have selected all the marks on a layout, you can copy them as a group using the Marks menu. Choose **Copy Selected** (**ALT+SHIFT+C** on Windows, or **CTRL+C** on Mac).
- Once you copy the marks on a layout, you can paste them as a group into one or more layouts. Click a layout to select it, or **SHIFT-click** multiple layouts to select more than one. Then choose **Paste** on the Selected Layout(s) from the Marks menu (**ALT+SHIFT+V** on Windows, or **CTRL+V** on Mac).
- When you paste a group of marks onto a layout, the properties assigned to the marks (such as height, width, or location) will apply to the new layout(s) regardless of the layout's size. Thus, if the width of a mark is variable, it will be 24" wide on a 24" layout, but 36" wide on a 36" layout.

## Cutter Alignment Marks

**Cutter Alignment Marks** are used by digital cutting machines to maintain registration across the sheet while performing operations such as cutting and creasing. This is especially important for very large sheets or flexible substrates.




### Adding and Editing a Cutter Alignment Mark

**Note** **Cutter Alignment Marks** can be placed onto a layout individually or as groups. To add a **Cutter Alignment Mark Group**, open the database and select the **Cutter Alignment Mark Groups** option in the **Resources** section. For more information, please see *ePS Metrix 22.1 Setup Guide and Worksheets*.



1. Select **Marks > Add Cutter Alignment Mark**.
2. Complete the fields in the Mark Properties Editor.

**Note** All fields available for editing must be completed so the Metrix algorithm can automatically place marks around each instance.

Properties	
Mark 1 (Cutter Alignment) ▾	
Property	Value
ID	Mark 1 (Cutter Alignment)
Alignment Mark Type	Black Circle on White Square
Sizing	Fixed Size
Mark Anchor Point	
Layout Anchor Object	Press Sheet
Layout Anchor Point	
Horizontal Offset	0"
Vertical Offset	0" <span style="border: 1px solid black; padding: 2px;">0"</span>
Spot Black	True
Spot White	False
UV Ink	False
Inner Size	0.236220472"
Outer Size	0.393700787"
Placement	Both Front and Back
Mirror Backup	True
Over Page Content	True
Output	Both Export and Report
Ignore Overlapping Content	False
 Hot Folder: Stopped	

- a. **Alignment Mark Types:** Choose the appropriate mark type from the drop-down list.
  - i. **Black Circle on White Square**
  - ii. **Black Circle on White Circle**
  - iii. **White Circle on Black Circle**
  - iv. **White Circle on Black Square**
  - v. **Crosshair**
- b. **Mark Anchor Point:** The point on the mark to use as an anchor.
- c. **Layout Anchor Object:** Choose the appropriate anchor object from the drop-down list.
  - i. **Press Sheet**
  - ii. **Press Plate**
  - iii. **Product Trim**
- d. **Layout Anchor Point:** The point on the layout to use as an anchor.
- e. **Horizontal Offset:** The horizontal distance to move the mark away from the anchor point. Positive values move up and right, negative values move left and down.

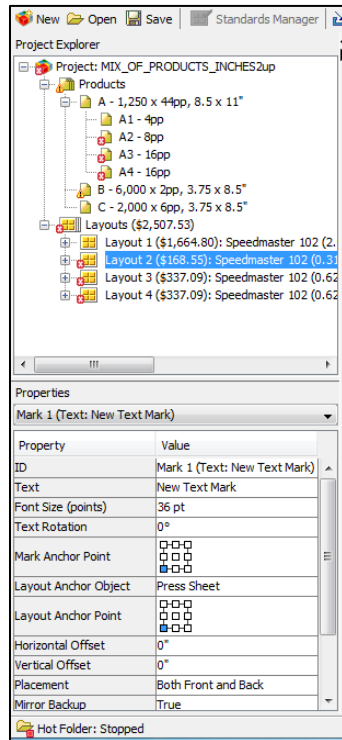
- f. **Vertical Offset:** The vertical distance to move the mark away from the anchor point. Positive values move up and right, negative values move left and down.
- g. **Spot Black:**
  - i. **True:** The black part of the mark prints in a pre-defined spot black ink.
  - ii. **False:** 100% process black is used.
- h. **Spot White:**
  - i. **True:** The white part of the mark prints in a pre-defined spot white ink.
  - ii. **False:** 0% CMYK is used (no ink, so it will be the color of the substrate).
- i. **UV Ink:**
  - i. **True:** The cutter alignment mark uses UV ink.
  - ii. **False:** The cutter alignment mark does not use UV ink.
- j. **Inner Size:** Diameter of the inner mark (black circle or white circle).
- k. **Outer Size:** Size of the outer mark (black or white square or circle).
- l. **Placement:** The side of the sheet to place the mark.
  - i. **Front Only**
  - ii. **Back Only**
  - iii. **Both Front and Back**
- m. **Mirror Backup:**
  - i. **True:** The position of the mark on the Back mirrors the Front.
  - ii. **False**
- n. **Over Page Content:**
  - i. **True:** The mark will overprint page content.
  - ii. **False**
- o. **Output:** Where the mark should appear.
  - i. **Print Report Only**
  - ii. **Exported Output Only**
  - iii. **Both Export and Report**
- p. **Ignore Overlapping Content:**
  - i. **True:** Content or mark, which is on top, overprints.
  - ii. **False:** Content or mark knocks out.

## Text Marks

### Adding a Text Mark to a Layout

**Note** Text marks may contain static and/or variable text. For more information, see [Text mark variables](#).

1. Select **Marks > Add Text**.
  2. Enter Static and Variable Text, Font Size, and Rotation properties.
  3. Choose Anchors, Anchor Object, and Offsets properties.
  4. Choose other properties.
-



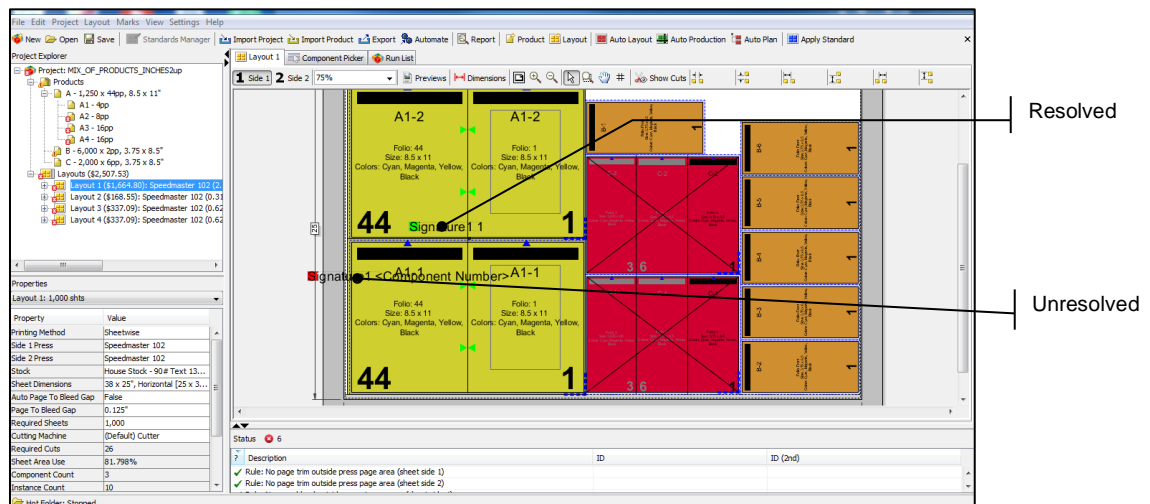
## Embedding the font for text marks

If your workflow requires fonts be embedded in the output stream, copy a TrueType font (for example arial.ttf) to a Font folder inside the Metrix installation folder. Metrix will use this font for Text Marks displayed in the Layout View and will embed this font in the Imposed PDF or the PDF Marks Flat in a JDF workflow.

## Resolving component-related text mark variables

- Red indicates Unresolved status
- Green indicates Resolved (variable text is replaced with actual data) status

To resolve it, move the text mark onto the component.



**Note** Text mark variables are computer-related, project-related, layout-related, and component-related. For more information, see [Text mark variables](#).

## Text mark variables

Use the abbreviated variables when necessary – Metrix text mark input is limited to 100 characters. Except for <Date> and <Time> Metrix text mark variables are not case-sensitive.

Variable	Inserts	Related to:
<Date>	Current date	Computer
<Time>	Current time	Computer
<Project.ID>	Project ID	Project
<Project.Name>	Project name	Project
<Project.Description>	Project description	Project
<Project.Notes>	Project notes	Project
<Project.Customer> or <Project.Customers>	A comma-separated list of all customers for all products in the project	Project
<Color>	Color of each separation	Layout
<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.Stock> or <Stock>	Layout stock	Layout
<Layout.Press.Name> or <Press.Name>	Layout press name	Layout
<Layout.Bundles>	List of all the bundles on the sheet.	Layout
<Layout.RampageSheetSideWorkflow Name>	Rampage Workflow Name for that side of sheet	Layout
<Product.ID>	Product ID	Component
<Product.Name>	Product name	Component
<Product.Description>	Product description	Component
<Product.Notes>	Product notes	Component
<Product.Customer>	Product customer	Component
<Product.DueDate>	Product due date	Component
<Product.ContentFile>	Product content filename	Component
<Product.RequiredQuantity>	Product required quantity	Component
<Product.TotalQuantity>	Product total quantity	Component
<Product.TotalQuantityPlus>	Product total quantity minus the product required quantity, e.g., 5,000 (250 extra)	Component
<Product.ProductGroup>	Product group	Component

<Product.Width> or <Product.Width.Unit>	Product width and unit of measure	Component
<Product.Width.NoUnit>	Product width without unit of measure	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>	Product binding machine	Component
<Instance.ID>	Instance ID (e.g., A-1 or A1-1)	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
<Component.Number>	Component number	Component
<TextComponent.Number>	Text component number (not counting Cover component)	Component
<Component.Count>	Total number of components in the product	Component
<TextComponent.Count>	Total number of Text components in the product (not including Cover component)	Component
<Component.PageCount>	Page count for this component (front & back)	Component
<Product.MIS_ID>*	Product MIS_ID	Component
<Component.MIS_ID>*	Component MIS_ID	Component
<Layout.MIS_ID>*	Layout MIS_ID	Component
<Component.Fold.Name>	Component fold name	Component

\* MIS\_ID cannot be inserted from within the Metrix interface – Product, Component, and/or Layout MIS\_ID information can only be generated from an MIS and thus its presence is only possible when the project originates from MIS.

## Selecting text marks on a layout

There are two ways to selecting individual line marks from a layout.

- You can select a higher magnification for the View Area, enlarging the layout.
- You can use the Object List to select any of the objects on the layout.

**Note** For more information on where to find the Object List, see [Interaction and display of the four UI areas](#).

## Creating Step and Repeat Marks

1. Select a Mark.

2. Hold down the **ALT** key on Windows (**OPTION** on Mac) and drag. The new mark appears at the end of the original mark.
3. Select the New Mark and edit properties.

**Note** Continuous dragging produces more marks. Diagonal dragging produces marks horizontally and vertically.

## About Mark Sets

### Sample presses and mark sets

The Metrix Database no longer comes pre-populated with sample presses and mark sets. If you want this data as part of your setup, you must import it from the EFI/Metrix/Imports folder.

**Note** When importing multiple mark sets, a Mark Set Presses window opens for each mark set. If the mark sets you are importing are not intended for use with the same set of presses, we recommend that you import one mark set at a time so you can differentiate between them.

### Saving a mark set

Mark sets can save you a lot of time. If you have positioned your marks using the appropriate anchors and offsets, you can apply them to dissimilar layouts.

1. Select a layout in the Project Explorer.
2. Select **Marks > Save Marks As Mark Set**.
3. Enter the mark set name, and then click **OK**.

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

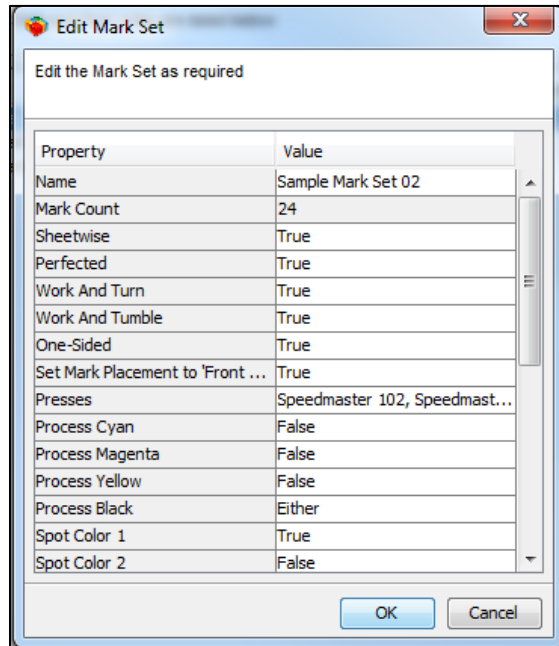
### Editing mark sets

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

Editing Mark Set properties is especially helpful for those running Automation Lite, 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 added manually by an operator or automatically by Automation Lite.

### How to edit a mark set

1. With no project open select **Mark Sets** in the Database window. Then select the mark set you wish to edit and click **Edit** to open the Edit Mark Set window.
  2. You can edit the following Mark Set properties in the Edit Mark Set window.
-



### Mark Set Properties

Property	Explanation
Name	The name of the mark set
Mark Count	The number of marks in the set.
Sheetwise	<b>True / False</b> Whether or not the mark set is eligible to be applied to sheetwise layouts.
Perfected	<b>True / False</b> Whether or not the mark set is eligible to be applied to perfected layouts.
Work and Turn	<b>True / False</b> Whether or not the mark set is eligible to be applied to work and turn layouts.
Work and Tumble	<b>True / False</b> Whether or not the mark set is eligible to be applied to work and tumble layouts.
One-Sided	<b>True / False</b> 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	<b>True / False</b> 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	<b>True / False / Either</b> <b>True</b> insures that this mark set will only be eligible for layouts that contain this ink.

	<p><b>False</b> insures that this mark set will not be eligible for layouts that contain this ink.</p> <p><b>Either</b> allows this mark set to be eligible whether or not the layout contains this ink.</p>
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 edit mark set properties and modify them 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 mark sets to layouts

You can add whole Mark Sets to one or more layouts at a time by following these steps.

1. Select the layout or layouts in the Project Explorer.
2. Next, go to the Marks menu, and select **Add Mark Set**.
3. Select the mark set you wish to add from the Add Mark Set window, then click **OK**.

**Note** You can filter the list of mark sets by typing criteria in the **Filter** field, separated by spaces.

- Filtering with **Or** selected finds those mark sets that meet any of the criteria listed. This is a broader, less restrictive search.
- Filtering with **And** selected finds only those mark sets that meet all listed criteria. This is a narrower, more restrictive search.
- Removing all data from the Filter field makes all the mark sets appear again.
- After you add the mark set to the layout, all marks are fully editable. You can create a new mark set from an existing one by making the necessary changes and saving it as another mark set.

## Deleting a mark set

To delete a mark set, with no project open, use the following steps.

1. Select **Settings > Database**.
2. Under Resources, click **Mark Sets**.
3. Select the Mark Set you want to delete and click **Delete**.

## Deleting all marks on a layout

1. Select the layout.
2. Select **Marks > Delete All Marks**.

## Changing the Spot Color for Marks

You cannot change the spot color embedded in a file mark, but you can change the spot color for:

- Rectangle marks
- Line marks
- Text marks

Use the following steps to change the Spot Color for Marks.

1. Select layout.
2. Select **Marks > Set All Mark Spot Colors...**
3. Choose a new spot color in the Spot Color Marks window, and then click **OK**.

**Note** The new spot color must already exist in the Metrix database.

## Collation Marks Overview

There are two major kinds of collation marks – automatic and custom. These options provide great flexibility for those wishing to add collation marks to a product.

You can add automatic collation marks by adjusting the collation marks settings for each binding machine in the Database window. These settings then apply to any new product that uses that binding machine. Thus, all future products can have “set-and-forget” collation marks applied automatically.

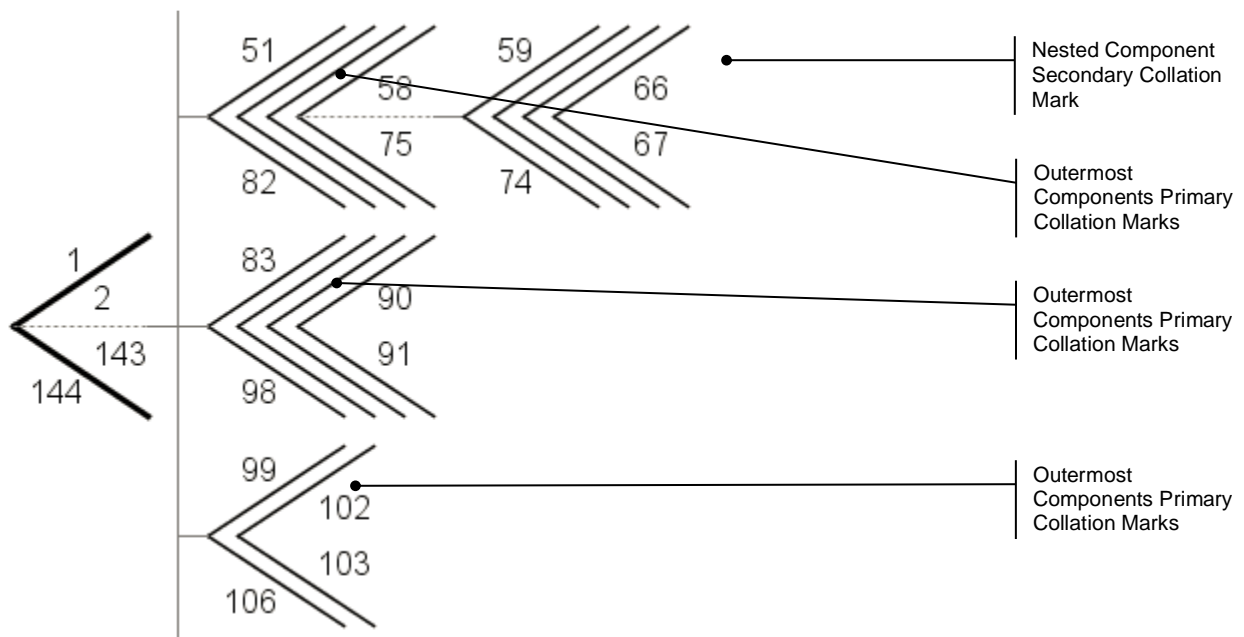
Metrix comes with the Stitcher Trimmer set with collation marks on the jog edge. The Perfect Binder has collation marks set on the spine. Thus, by selecting the binding machine when making a new product, you also set the position of the collation marks.

You can add custom collation marks to a product by adjusting the Collation Marks settings in the Properties Editor. You can change these settings individually to override the settings of the binding machine.

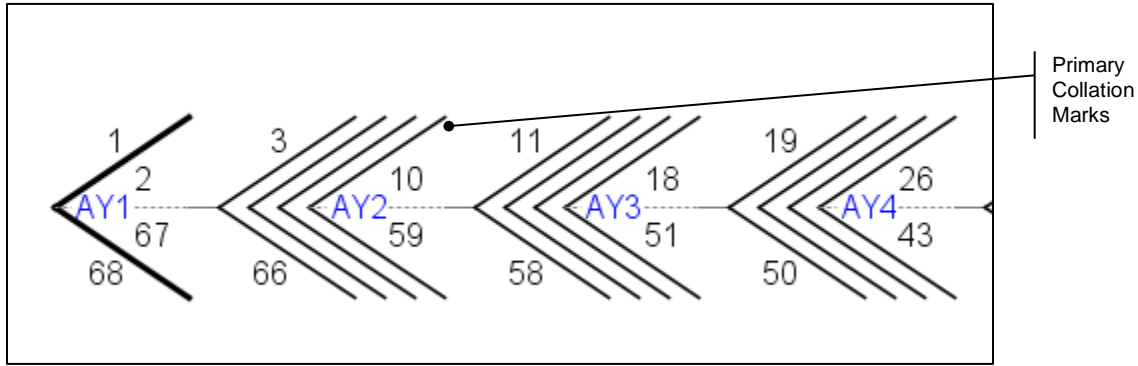
### Primary and secondary collation marks

Collation marks appearing on the outermost, or non-nested components of a perfect bound product are referred to as primary collation marks. Collation marks on nested components are referred to as secondary collation marks.

Although a few perfect bound products may contain nested components, most will have only outermost components, and thus display only primary collation marks. Those marks will appear sequentially along the spine edge of the components.



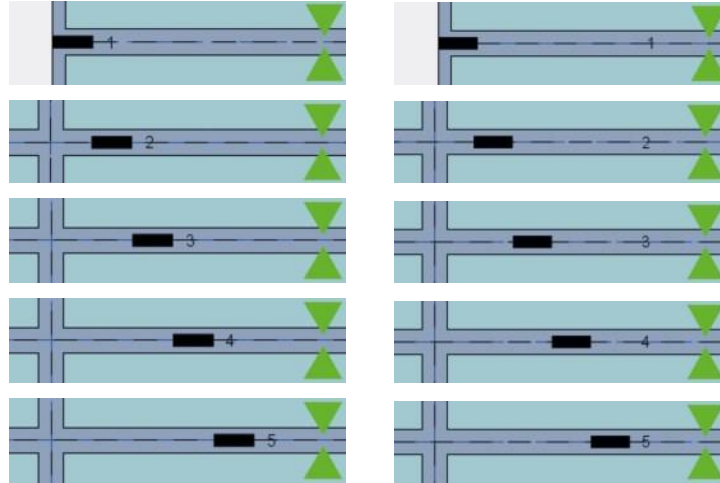
In a saddle-stitched product, all components will have primary collation marks along the jog edge.



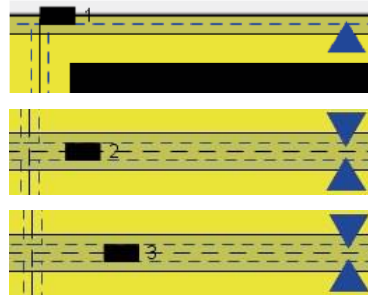
**Note** Collation marks do not appear on the cover of the product.

## Collation mark positions



You can position collation marks text using the Anchor Trailing Text To option so text immediately follows the individual marks, as on the left, or follows the whole block of marks, as on the right. These examples are from a bound product with the collation marks on the spine edge and no secondary (nested) components.



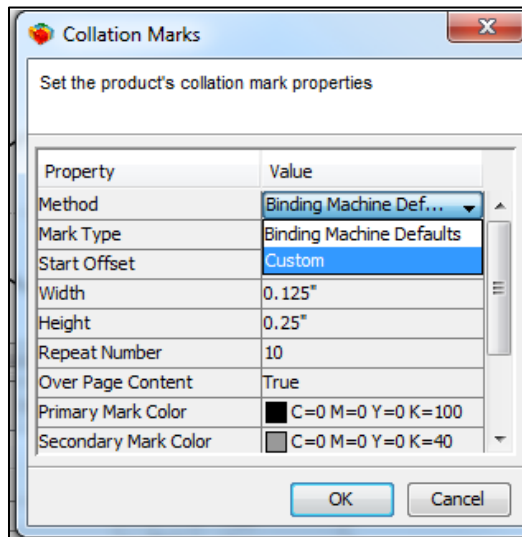
Collation marks are positioned sequentially along the jog edge of saddle-stitched products. You can anchor text variables to the individual marks, or to the entire block of marks, as for spine collation marks.



## Changing collation marks settings

1. In the Properties Editor go to Collation Marks and click inside the Value column next to Binding Machine Defaults. This will make  appear.
2. Click  to open the Collation Marks window.
3. In the Collation Marks window, select **Custom** from the Method menu.

The Collation Marks properties will now become available.




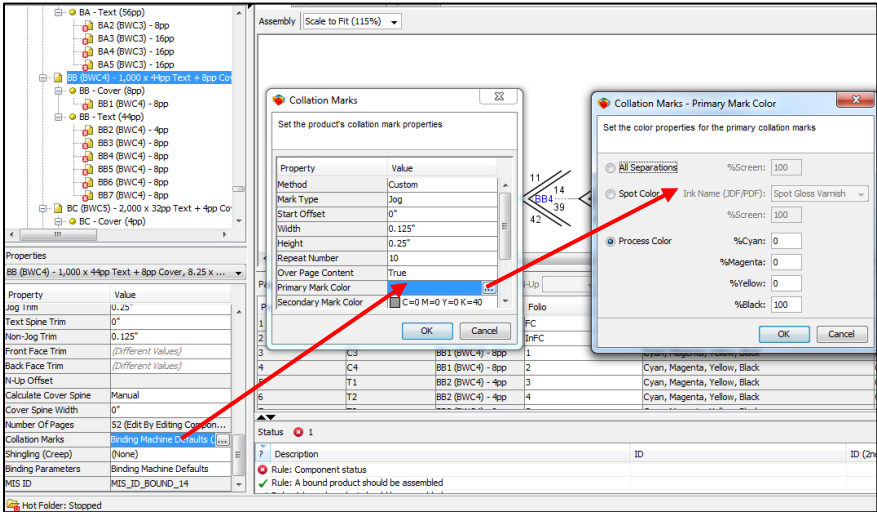
4. Set the Collation Marks properties using the following descriptions as a guide.

#### Collation Marks Properties

Property	Explanation
Method	<b>Binding Machine Defaults / Custom</b> Collation Marks properties should follow those of the selected binding machine or be custom settings.
Mark Type	<b>(None) / Spine / Jog</b> Placement of the collation mark.
Start Offset	The distance from the jog/spine intersection to place the first collation mark.
Width	The collation mark width.
Height	The collation mark height.
Repeat Number	The number of collation marks to step before beginning at the start offset again.
Over Page Content	<b>True / False</b> Whether or not collation marks print over other text.
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.
Secondary Mark Color	Type of color, color, and percentage of color for collation marks on nested components. Secondary marks appear on nested components of a perfect bound product.
Trailing Text	Default is <TextComponent.Number>, but many other pertinent variables are also available. (For more information, see the table of <b>Collation Mark Text Variables</b> in the <a href="#">Changing collation marks settings</a> section.)
Anchor Trailing Text To	<b>Block of Marks / Individual Marks</b>

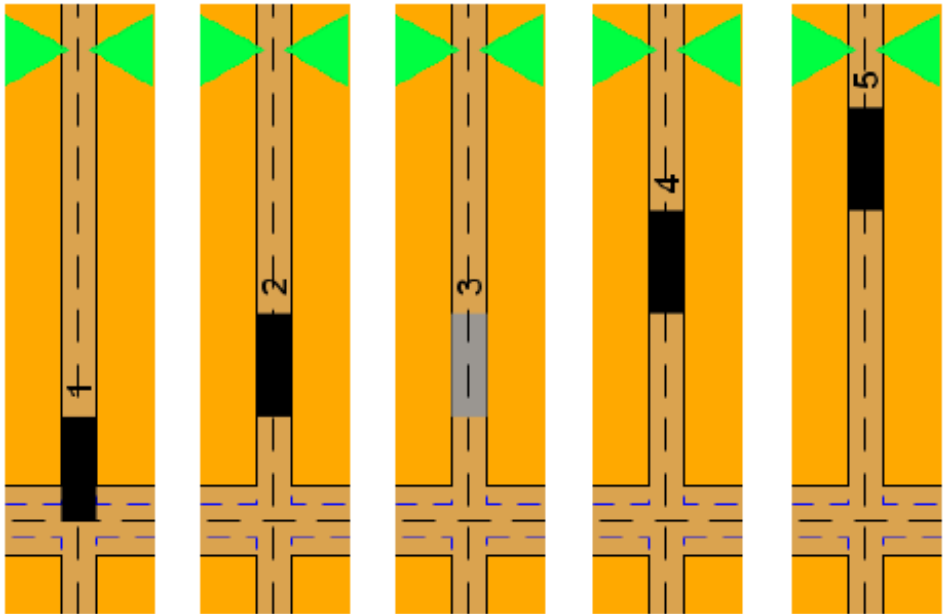
	You can position trailing text relative to the whole set of collation marks, or relative to the individual marks.
Distance From Anchor	The distance the trailing text will be from the individual collation marks or the block of marks.
Trailing Text Point Size	The point size of the trailing text.

In the Collation Marks window, you can click  next to Primary Mark Color and Secondary Mark Color to make your selections for the mark colors and saturation.



**Notes** The trailing text is always drawn in solid inks, not screens. So, all inks used for the relevant Mark Color (either the Primary Mark Color or Secondary Mark Color) are converted to 100% for the text.

Here is an example of different positions of collation marks relative to the spine. Notice that since collation mark three is on a nested component of a perfect bound product, it is in the same position as collation mark two, and is in the Secondary Mark Color, which is 40% black.



**Note** Collation marks for saddle-stitched products work similarly. The major difference is that the collation marks will always be primary collation marks, and they will be along the jog edge of the product.

The default setting for the Trailing Text is <TextComponent.Number>, but there are many other useful variables that you can use with collation marks.


### Collation Mark Text Variables

Variable	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	Component
<Component.PageCount>	Page count for this component (front & 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 measure	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>	Instance ID (e.g., A-1 or A1-1)	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

## Applying Default Collation Mark settings to an existing product

Projects created before automatic collation marks were set up for the binding machine may have the Collation Marks property set to **None**. You can set custom collation marks, as previously described, or you can apply the binding machine defaults to the product as a whole. To change the custom settings, use the following steps.

1. Select the product from the Project Explorer.
2. Choose the appropriate binding machine from the Binding Machine property.
3. Open the Collation Marks window by clicking  next to the Collation Marks field value.
4. Select **Binding Machine Defaults** from the Method property of the Collation Marks window. In this case you will not be able to adjust the settings manually, since they have already been established for binding machine in the Database window.
5. Click **OK** to change the Collation Marks from Custom to Binding Machine Defaults.

## Making a variation binding machine with Alternate Collation Mark settings

**Note** You must have the appropriate permissions to change the Database.

1. With no project open, select **Settings > Database**.
2. Select **Binding Machines** under **Equipment**.
3. Click **Variation** on the right side of the Database window to make a duplicate of the binding machine. You may want to add a descriptive word to the name of the binding machine to indicate that it includes alternate collation marks.
4. Scroll to the end of the list in the New Variation Binding Machine window where you will find the Collation Mark options. When you select **Spine** or **Jog** from Marks Type, the options become available.
5. When you are finished, click **OK**.


**Note** These settings will now apply to any new product using this binding machine. Thus, all future products can have "set-and-forget" collation marks applied automatically.

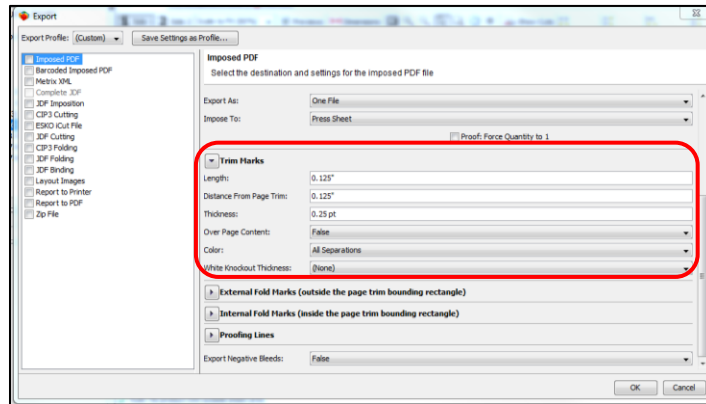
## Inserting Marks

### Inserting automatic trim marks

Metrix can add trim marks automatically using the Export window.

**Note** Enter a trim mark length of 0 (zero) to turn them off.

1. Select **File > Export** or click .
2. Select an export type.
3. Choose Trim Marks properties from the Export window by clicking the arrow next to it to open the possible options.




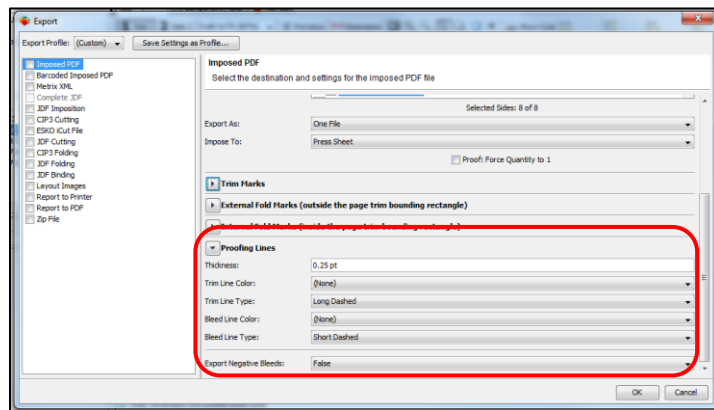
4. Click **OK**.

## Inserting automatic proofing lines

Metrix can add proofing trim and bleed lines automatically using the Export window.

**Note** Enter a trim line and bleed line color of **(None)** to turn them off.


1. Select **File > Export** or click .
2. Select export type on the left side of the Export window.
3. Choose Proofing Lines properties.

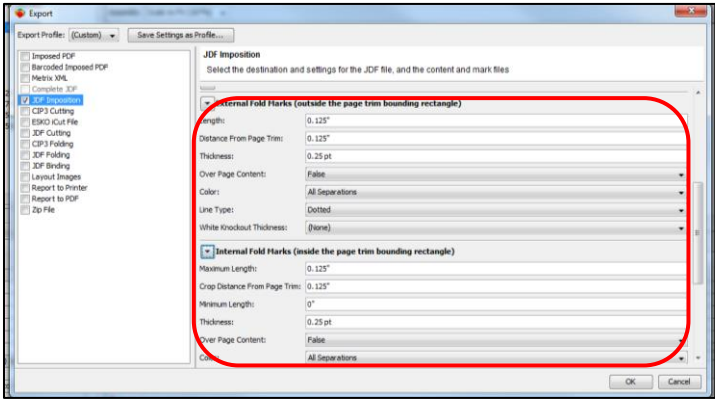


## Inserting automatic fold marks

Metrix can add fold marks automatically using the Export window.

**Note** Enter a fold mark length of **0** (zero) to turn them off.

1. Select **File > Export** or click .
2. Select the export type.
3. Choose **Folding Marks Properties** from the Export window, and then click **OK**.

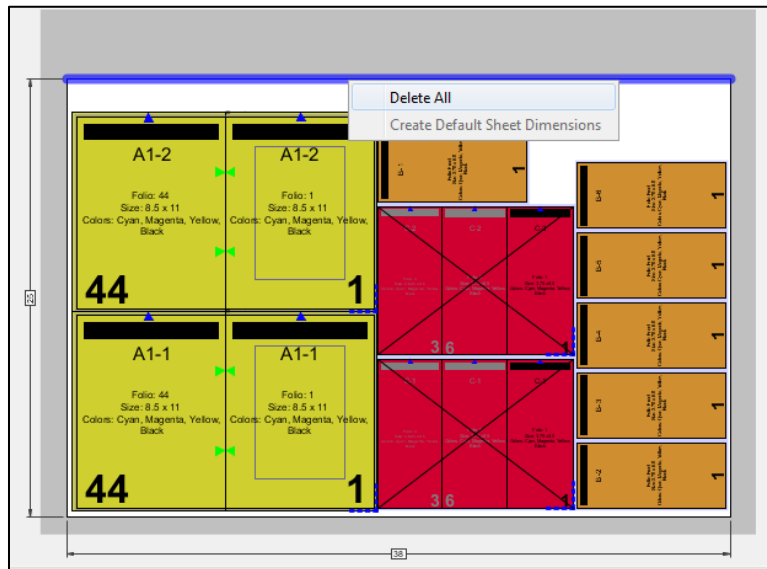


# Dimensions

## Adding Dimensions to the Layout

### Dimensions – Overview

- To enter or exit Dimensions mode, click **Dimensions**.
- If you are using dimensions as notations on the report, keep in mind that they are erased during an auto layout so they should be put on the layout last.
- You can adjust the width of the anchor in the Dimensioning Preferences window.
- To add default sheet dimensions, right-click or **CTRL-click** and select **Create Default Sheet Dimensions**.
- To remove all dimensions from a layout, right-click or **CTRL-click** anywhere on the layout and select **Delete All**.
- If two or more dimensions are in the same position, Metrix will delete the duplicates when you leave the dimensioning mode.
- When you save a layout as a standard, the dimension data will be saved with that standard.
- To delete a dimension, right-click or **CTRL-click** then select **Delete**.



### Clicking to Add Dimensions

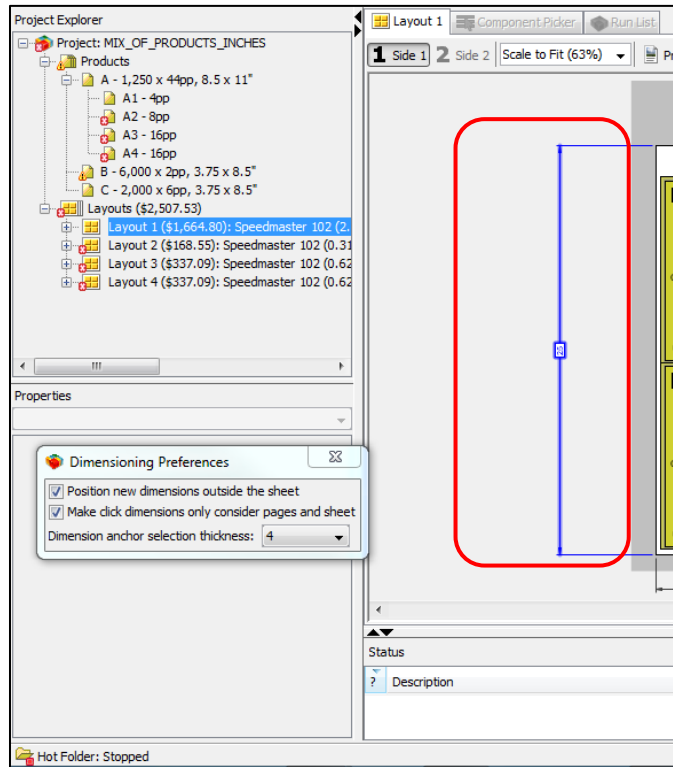
When you click in an area, Metrix looks for the nearest boundaries, and adds that dimension.

- Click to add horizontal dimensions
- **SHIFT-click** to add vertical dimensions
- In the Dimensioning Preferences box, select the option “Position new dimensions outside the sheet.” This tells Metrix that you want all the dimensions outside the sheet area, and that you want Metrix to position the dimensions for you.
- When “Make click dimensions only consider pages and sheet” is selected, Metrix will not measure between all boundaries, but only those related to the pages and sheet.

**Note** You can delete a dimension by right-clicking and choosing **Delete**.

## Manual Dimensions

- You can also create dimensions manually, by dragging, rather than by clicking.
- As you move your mouse over the layout, the cursor will change to a “crosshairs” shape when it is positioned over an eligible item. Drag it to another item to add the dimension.



- You can move any dimension (including a sheet dimension) by selecting and dragging it to a new location.

# Standards

## Saving, Applying, and Updating Metrix Standards

The purpose of standards is to ensure layout standardization and to eliminate repetitive work. While you can save standards and apply them for any type of work, they are particularly useful for bound layouts.

Standards should not be confused with templates. Metrix has one, and only one, standard for a specific set of properties. You can apply a saved standard layout to a new layout when the following properties match:

- Product Width and Product Height (multiple product sizes are supported, though this would not be common)
- Product Type – Flat, Folded, Bound Cover, or Bound Text (multiple product types are supported, though this would not be common)
- Fold
- Binding Machine
- Jog Trim and Spine Trim (bound work)
- Press
- Printing Method
- Sheet Size

After Metrix determines that all above properties match, Metrix also applies the following from the saved standard:


- Product Instance positions on the Layout
- Marks
- Dimensions
- Non-Jog Trims, Front Face Trims, and Back Face Trims (bound work)


## Saving a Layout as a Standard

**Note** Only users with the appropriate permissions may save standards.

1. Select the layout.
2. Then choose **Layout > Save Layout as Standard**.

When other layouts in the project meet the matching requirements, Metrix will ask whether you want to apply the standard to those other layouts.

**Note** When Metrix applies a standard, the Layout icon changes to this: .

After applying a standard, the layout remains fully editable. The Layout icon will immediately change to this: , indicating that the layout is no longer a standard.

## Applying Standards Automatically


A setting in the User Preferences window controls the automatic application of standards:

1. Select **Settings > User Preferences**.
2. Select **Import Project**.
3. Set Substitute Metrix Standard to **True**.

**Note** When Substitute Metrix Standard is set to **True**, Metrix automatically applies existing standards to matching layouts – whether imported or added in the Metrix user interface.

## Applying standards manually

### *To apply a standard manually*

1. Select a layout or product.
2. Click  **Apply Standard** on the Metrix toolbar.
3. If a matching standard exists, Metrix will apply it to the layout.

## Updating a standard

A standard might require updating from time to time.

When you select **Layout > Save Layout As Standard**, Metrix searches for an existing standard. If one is found, you will be prompted to overwrite or replace the existing one or leave it as is.

**Note** Only users with the appropriate permissions may save or replace standards.

## Deleting a standard

To delete a standard, select a layout to which the standard has been applied, then choose **Layout > Delete Standard**. Alternatively, you can delete a standard in the Standards Manager.

**Note** Only users with the appropriate permissions may delete standards.

## Using the Standards Manager

### About the Standards Manager

You can filter the standards in a project by the properties of those standards, find only the standard or standards you want to change, and then save the changes to the standard.

You can filter the standards using the Standard Manager with various parameters under these general categories:

- Press
  - Die-Cutting Tool
  - Binding Machine
  - Type
  - Printing Method
  - Fold Name
  - Finished Dimension
  - Finished Dimensions
  - Sheet Width
  - Sheet Height
  - Sheet Grain
  - Lap
  - Spine Trim
  - Jog Trim
  - Creator
  - Creation Date
-

We will explain the above categories in detail in a table at the end of this chapter.

The Standards Manager functions much like the Component Picker, so if you have used that Metrix feature, you will find the Standards Manager operates in a similar fashion.

## Opening the Standards Manager

You can only open the Standards Manager when no Metrix project is open. Either close the current project, or start the Standards Manager just after you start Metrix, but before you open a project.

You can open the Standards Manager by clicking  **Standards Manager** in the upper left corner.







## The Standards Manager window

After you open the Standards Manager, you will see a list of the standards Metrix has stored in the database.



The Standards Manager opens with the standards collapsed to display more standards in the window. Click the triangle to the left of a standard to expand the standard and view the components.

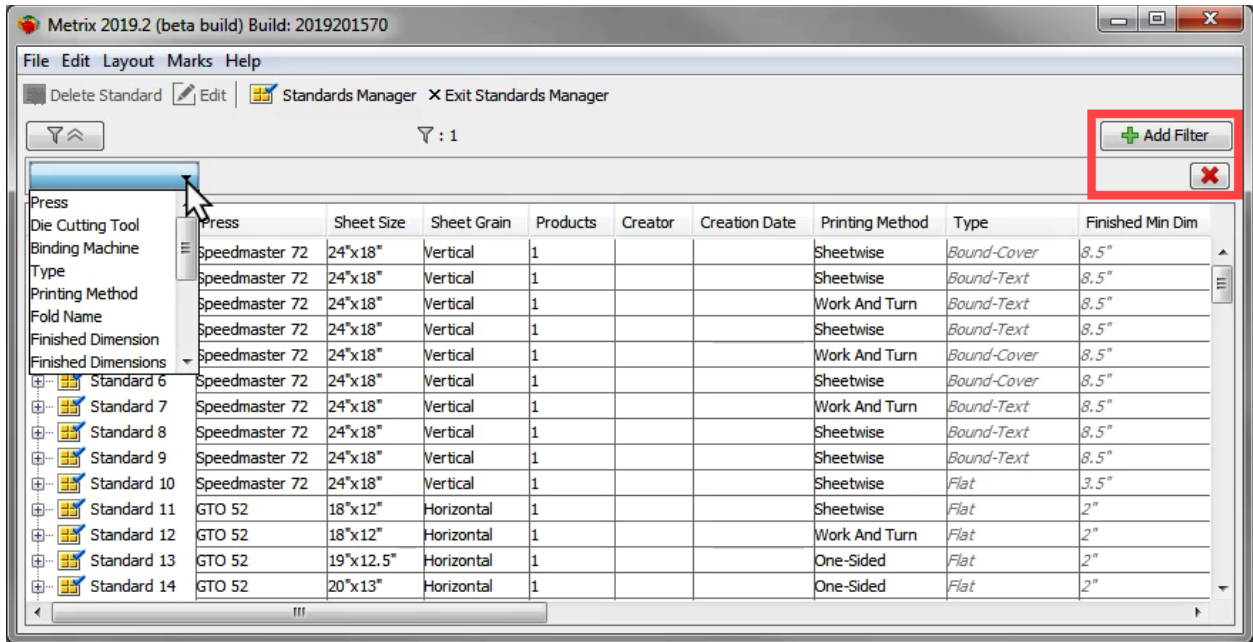
**Note** Some property fields may be empty, depending on whether the property applies to the whole standard or only to a component. The description “*(Different Values)*” indicates that the components in the standard have different values for that particular property.

This window also has the buttons you will use to filter and edit your standards. They are as follows.

- Expand/Collapse Filter View (  )
- Delete Standard (  Delete Standard )
- Edit Standard (  Edit )
- Exit the Standards Manager (  Exit Standards Manager )
- Number of Active Filters (  :0 )
- Add Filter (  Add Filter )

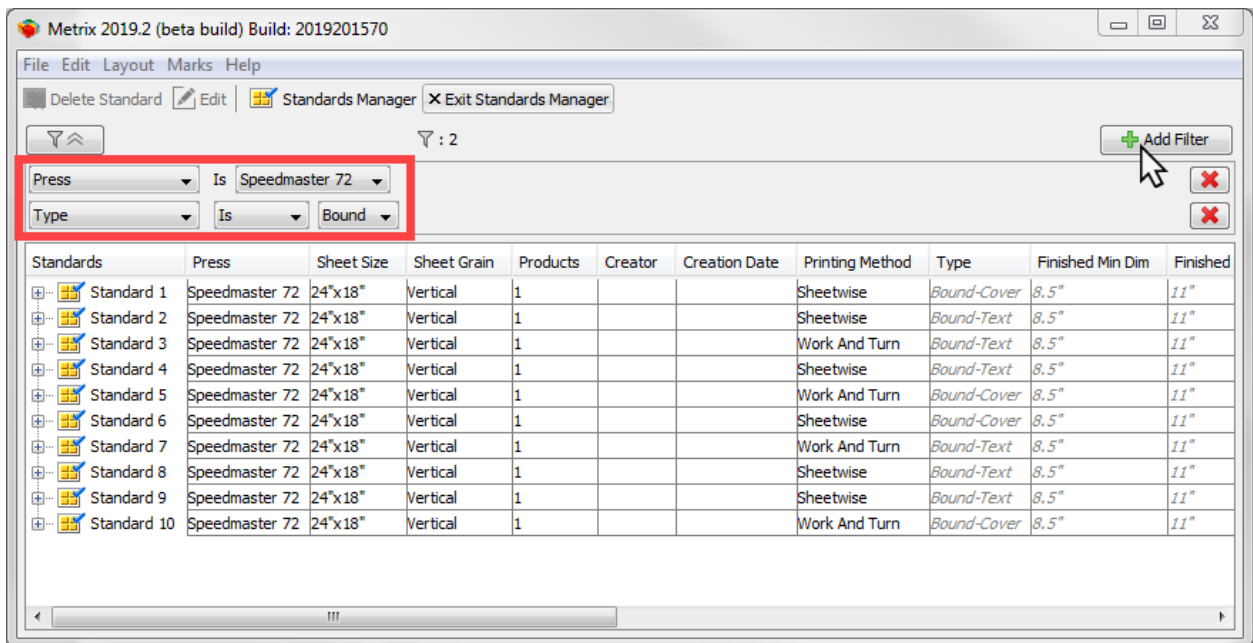
## Filtering standards with the Standards Manager

When you click  Add Filter, an **Options** menu will open that lets you select which property you would like to use for the filter. To delete a filter, click .



After you make a selection on the **Filter Options** menu, additional menus or text fields will open so you can refine which properties should be used to filter the standards.

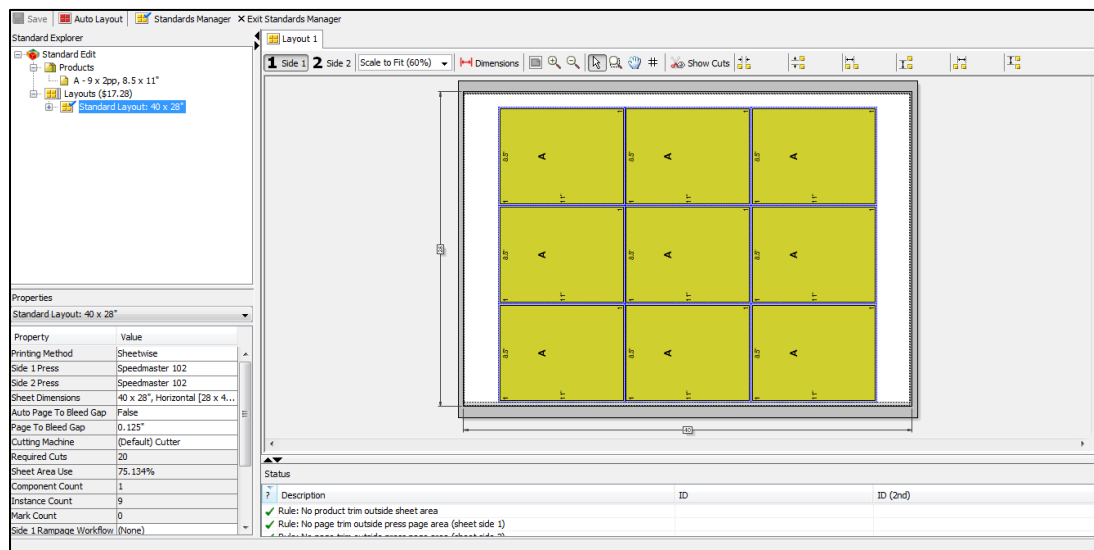
Click **Add Filter** each time you want to add an additional filter option.



A complete table listing and explaining all the properties on this menu, as well as the additional menu items or text fields that can be added to filter the standards, is included in [The Standards Manager Filter options](#).

Editing, saving, or deleting a standard

1. Find the standard you wish to modify.
2. Select it from the Standards list.
3. Click **Edit** to open the Standard Explorer window where you can edit the standard and then save the changes.



In the Standard Explorer window, you can edit the properties of the standard, run an auto layout if necessary, and save your changes by clicking **Save**.

You can also modify various components of the layout if necessary.

**Note** When editing a standard, the following properties changes to products are not saved: Content Position Rule, Tagged, Required Qty., Display Color, Grain, Bleeds, Allow Nesting, Priority, and Product Group. For layouts, Cutting Machine is not saved.

If you need to add marks to the standard, the Marks menu is available while editing in the Standard Explorer.

The elements in the layout will be more generic than the regular layout since many of the elements (e.g., head and jog or component dimensions) are not specific to the standard being displayed.

When you want to return to the Standards Manager window, click **Standards Manager**. Or click **Exit Standards Manager** to exit the Standards Manager altogether.

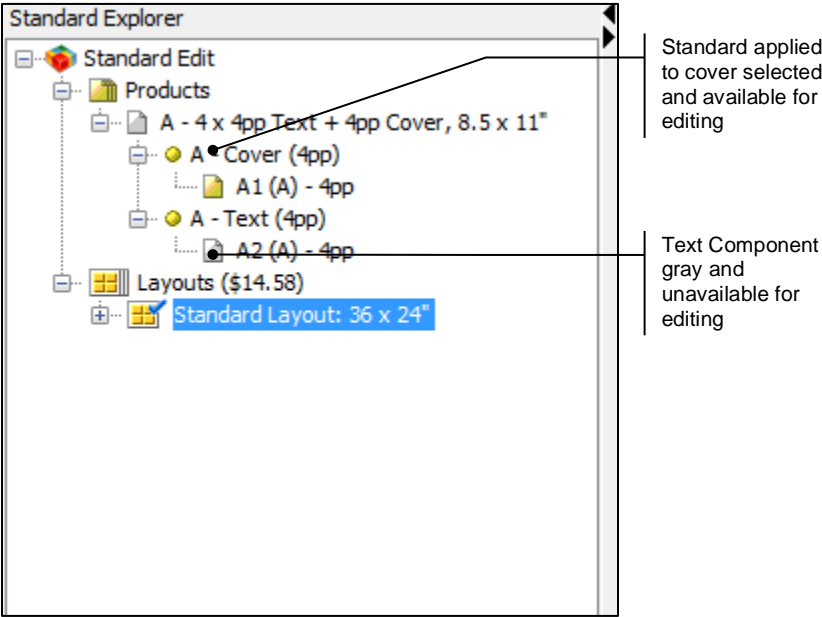
## Editing a standard

**Note** You must enter the Standards Manager before executing the following steps.

1. Edit the properties you wish to change in the Properties Editor.
2. Run an auto layout, if necessary.
3. Click **Save** on the top left to save changes.
4. Click **Standards Manager** to return to the Standards Manager window.

## Editing covers and text in a bound product

In bound products, text components can appear by themselves, but a cover will always have a text component associated with it. Thus, in the Standards Manager, standards applied to the cover of a bound product will appear with a text component, but the text component will be unavailable for editing. The icon for the component will be gray indicating that it cannot be edited.



Also, if a standard contains a cover component and text component on the same layout, the text component may be listed in the Standards Explorer as a different product. You do not need to be concerned about this since it doesn't affect how Metrix applies the standard.

Deleting a standard from the File menu

If you need to delete a standard, you can click **Delete Standard**, or you can do that from the File menu. Just select the standard, and then select **File > Delete Standard**.

Exiting the Standards Manager from the File menu

You can exit the Standards Manager by clicking **Exit Standards Manager**, or you can exit the Standards Manager by selecting that option from the File menu. You can also exit the Standards Manager using **CTRL-W** on Windows (**CMD-W** on Mac).

The Standards Manager Filter options

Use the table below of the Filter options (the first menu on a filter) for the Standards Manager, and the additional options for that property. The additional options can be pull-down menus or text fields.

Standards Manager Filter Options

Filter Option	Second, Third, or Fourth Option (Menu or Text Field)
Press	(is) Opens a second menu with the names of all the presses used by any standards in the Database window.
Die-Cutting Tool	(is) Opens a second menu with the names of all the die-cutting tools used by any standards in the Database window.
Binding Machine	(is) Opens a second menu with the option <b>None</b> and a list of the binding machines used by any standards in the Database.
Type	<b>Is / Contains</b> <b>Is</b> restricts the filtering to those standards that have only the product type designated on the second menu. <b>Contains</b> finds those standards that contain the designated product type, but may also have other product types in the standard. <b>Flat / Folded / Bound</b> – Select the product type for filtering.

Printing Method	<b>(is)</b> Opens a second menu with a list of the printing methods used by any standards in the Database.
Fold Name	<p><b>Is / Contains</b></p> <p><b>Is</b> restricts the filtering to those standards that have only the fold name designated on the second menu.</p> <p><b>Contains</b> finds those standards that contain the designated fold name, but may also have other fold names in the standard.</p> <p>Fold Name Menu – Shows the fold names used in the standards.</p>
Finished Dimension	<p><b>Equals / Less Than / More Than / Text Field</b></p> <p>Displays standards where at least one of the finished dimensions (width OR height) is equal to, less than, or greater than the number entered in the text field.</p>
Finished Dimensions	<p><b>Equals / Less Than / More Than / Two Text Fields</b></p> <p>Displays standards where at least one set of finished dimensions (width AND height) is equal to, less than, or greater than the numbers entered in the text fields.</p>
Sheet Width	<b>Equals / Less Than / More Than</b> – and a text field to enter a number for the sheet width.
Sheet Height	<b>Equals / Less Than / More Than</b> – and a text field to enter a number for the sheet height.
Sheet Grain	<b>(is)</b> Opens a second menu where choose <b>Vertical / Horizontal</b> .
Lap	<b>Equals / Less Than / More Than</b> – and a text field to enter a number for the lap size.
Spine Trim	<b>Equals / Less Than / More Than</b> – and a text field to enter a number for the spine trim size.
Jog Trim	<b>Equals / Less Than / More Than</b> – and a text field to enter a number for the jog trim size.
Creator	<b>(is)</b> Opens a second menu with the names of the creators of any standards in the Database.
Creation Date	<p><b>Any</b> allows you to enter any creation date.</p> <p><b>Within Last</b> opens a text field for a number, and a menu with Days / Weeks / Months / Years.</p> <p><b>Within Next</b> opens a text field for a number, and a menu with Days / Weeks / Months / Years.</p> <p><b>Exactly</b> opens a text field with a pull-down menu. You can enter an exact date in the field, or you can click the menu, and an interactive calendar will appear where you can find and enter a date by clicking.</p> <p><b>Before</b> opens a text field with a pull-down menu. You can enter an exact date in the field, or you can click the menu, and an interactive calendar will appear where you can find and enter a date by clicking.</p> <p><b>After</b> opens a text field with a pull-down menu. You can enter an exact date in the field, or you can click the menu, and an interactive calendar will appear where you can find and enter a date by clicking.</p> <p><b>Today</b> enters today's date in the field and is not editable.</p> <p><b>Yesterday</b> enters yesterday's date in the field and is not editable.</p> <p><b>This Week</b> selects only those standards created this week.</p> <p><b>This Month</b> selects only those standards created this month.</p> <p><b>This Year</b> selects only those standards created this year.</p>

# Imports, Exports, and Reports

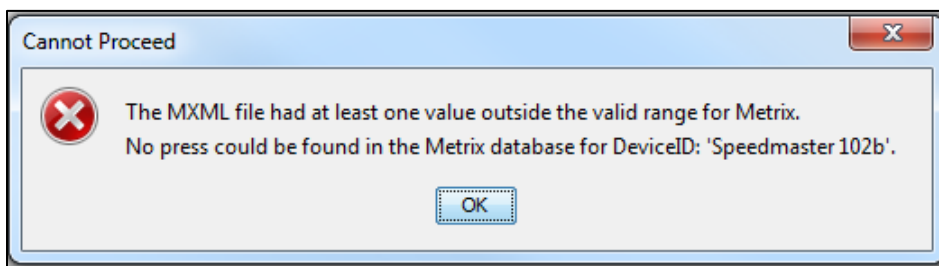
## Importing in Metrix

### JDF/Metrix XML import project prerequisites

To successfully import JDF or Metrix XML projects, the database of the Metrix installation must have identical resources to those specified in the incoming file. These include (but are not limited to):

- The Press ID specified in the JDF or Metrix XML.
- The Binding Machine ID specified in the JDF or Metrix XML.

When errors do occur, Metrix will detail the source of the problem as seen in the following.



### Database resources added by JDF/ Metrix XML import

When JDF or Metrix XML projects are successfully imported, some resources are automatically added to the Metrix Database on the fly. These may include:

- Customer and Customer Contact
- Ink
- Stock and Stock Sheet
- Product Group

### Importing JDF and Metrix XML projects

There are two ways to import JDF or Metrix XML Projects into Metrix:

- Use **Import Project** on the toolbar
- Drop the project into the hot folder

Whichever method you use, the imported Metrix project is fully editable.

### Using the hot folder

When a JDF or Metrix XML project is dropped into the hot folder, it automatically opens for editing as soon as the Metrix interface is available. You can drop more than one project into the hot folder – each project opens automatically in turn as the Metrix interface becomes available.

When a project is open, the hot folder is stopped.

### Metrix XML projects

Metrix XML projects contain all project and product data, but not all layout data; when importing Metrix XML projects, some layouts may require an auto layout. Layouts that match previously saved standards do not require an auto layout.

### Importing a JDF, Metrix XML, or CSV project

Metrix can import three types of project data: Metrix XML, JDF, and CSV.

Follow these steps to import a sample Metrix XML project.

1. Click **Import Project** on the toolbar.
2. Choose the file appropriate for your Metrix installation. All of the sample files are located inside the Metrix installation Imports folder.

For metric:

- Windows: Choose C:\Program Files\EFI\Imports > Metric > 05\_SELF-COVER\_44PP.mxml
- Mac: Choose MacintoshHD/Applications/EFI/Metrix/Imports

For inches:

- Windows: Choose C:\Program Files\EFI\Metrix\Imports > Inches > 05\_SELF-COVER\_44PP\_INCHES.Mxml
- Mac: Choose Macintosh HD/Applications/EFI/Metrix/Imports

3. Click **Import**. The Import window will open.

**Note** The layouts require an auto layout. This is because a Metrix XML project contains project, product, and layout information, but not layout product positioning information.

If you saved a standard for a particular type of layout, and Metrix discovers that the new project contains layouts that match the trims, marks, dimensions, and positioning information, the standard will automatically be applied to the new layout.

You can set Metrix preferences so that standards are applied automatically or manually.

Select **Settings > User Preferences... > Import Project** to change the settings.

## Importing products

Metrix can import three types of product data: Metrix XML, JDF, and CSV (comma-separated or semicolon-separated). Metrix can now also import flat, folded, or bound products.

To import a CVS product:

1. Click **Import Product** on the toolbar.
2. Browse and select a .CSV file. Metrix ships with sample files located in the Metrix Imports folder.
  - For inches you can navigate to:
    - C:\Program Files\EFI\Metrix\Inches on Windows
    - Macintosh HD/Applications/EFI/Metrix/Inches on a Mac
  - For metric you can navigate to:
    - C:\Program Files\EFI\Metrix\Metric on Windows
    - Macintosh HD/Application/EFI/Metrix/Metric on a Mac
3. Select the stock for the products. Choose House Stock - 80# Text 115 gsm.

**Note** If a CSV file contains stock information, you will not be prompted to select a stock.

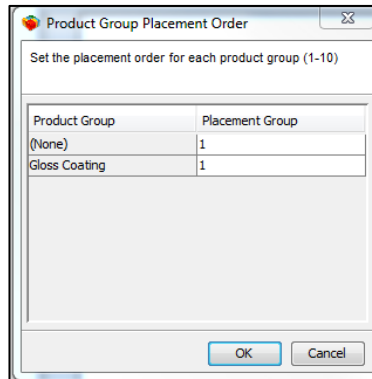
4. Click **OK**. The new products B, C, D, E, F, and G are added to the project. They now appear in the Project Explorer.
5. Drag each new product onto a layout, or you can assign a product to a layout by first selecting the product, and then choosing **Assign Component(s) to Layout** from the Project menu.

**Note** On Windows, the cursor changes shape (↔) to indicate a valid drop location.

6. Select a layout and click **Auto Layout** so Metrix can generate the layout with the new products added.

**Notes** If the imported CSV products were assigned a group, they will be automatically segregated from the other products on the sheet.

If Metrix asks you to enter a number for a placement group as seen below, enter the number and then click **OK**.



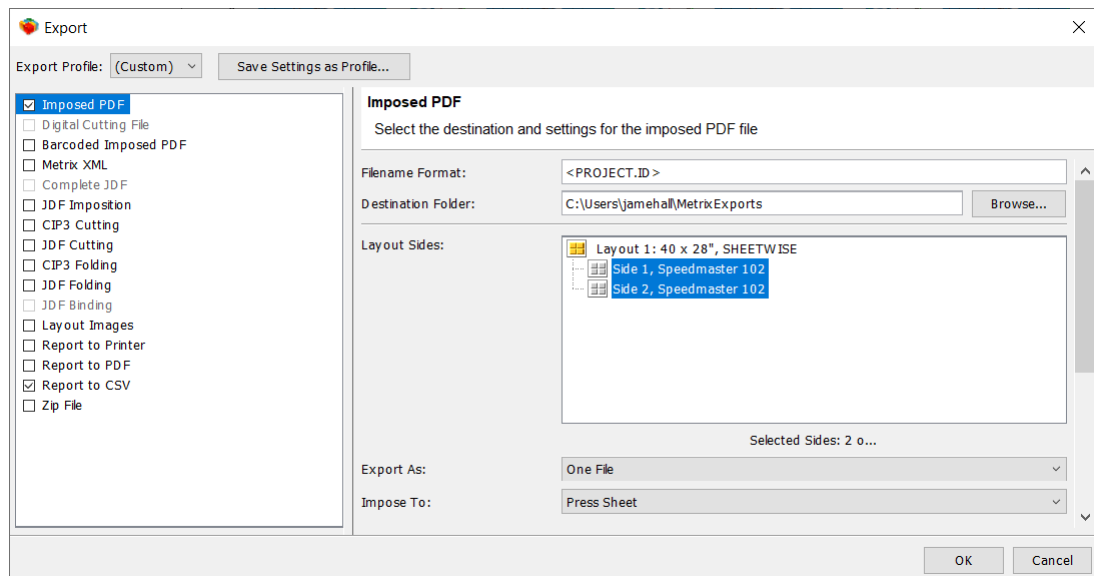
Metrix can automatically insert space between the placement groups. Select **Settings > User Preferences... > Auto Layout > Gap Between Placement Groups** to enter your preferred amount of space.

## Exporting in Metrix

### The Export window

You can output one or many kinds of data using the Export window.

- Click **Export** to open the Export window
- Clicking an option displays the window for that option on the right
- Clicking the option checkbox activates its Export



### Exporting an imposed PDF

To export an imposed PDF:

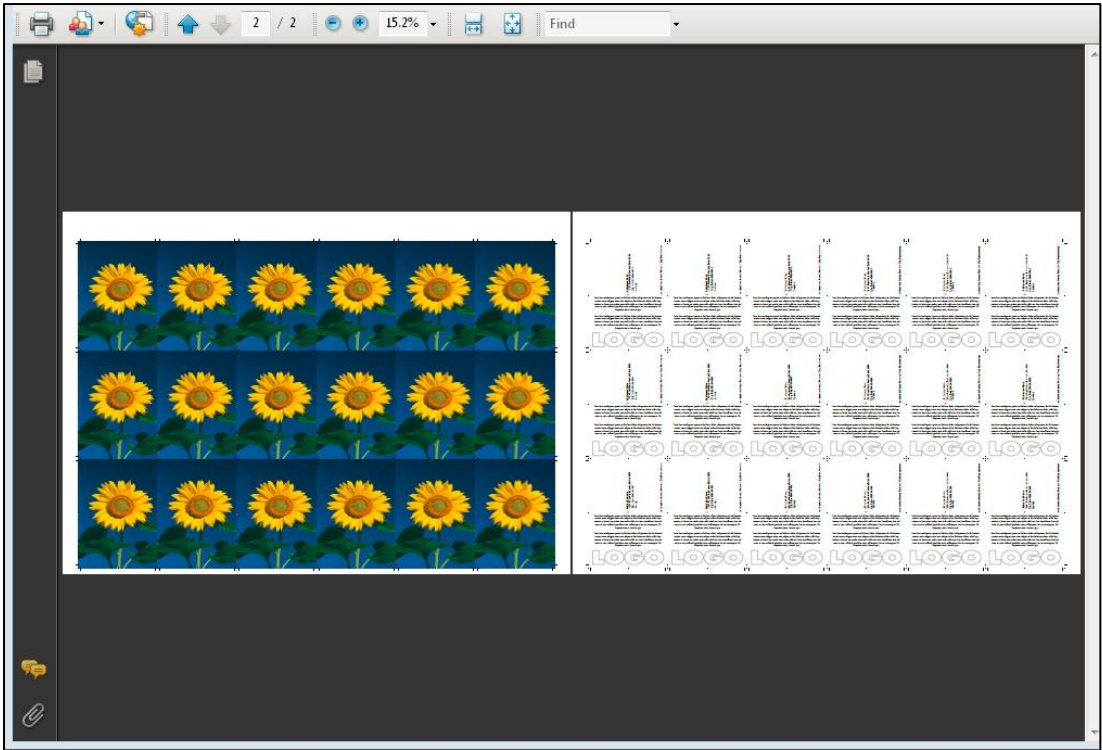
1. Click **Export** on the toolbar.
2. Select (highlight) and enable (check) imposed PDF.

**Note** Clicking the checkbox enables/disables the export. Clicking the export Type (e.g., Imposed PDF) displays its settings.

- 3. Make note of the destination folder or select a new destination folder using **Browse**. Select the properties for the Imposed PDF export, then click **OK**.
- 4. Review the Imposed PDF. In this example, you see both sides of the layout.

**Notes** You can open the imposed PDF with any PDF reader and if desired, output to any networked printer, either scaled or full-size.

Metrix automatically names the imposed PDF using the Project ID. This project is IMPOSED\_PRODUCT\_WITH\_PDF\_INCHES, so the PDF file is also named IMPOSED\_PRODUCT\_WITH\_PDF\_INCHES.



Imposed PDF Settings

Setting	Explanation
Filename Format	Enter the name of the export file. The automatic naming algorithm is ProjectID.PDF.
Destination Folder	Save the PDF to this location. The automatic naming algorithm is ProjectID.PDF.
Layout Sides	The layout sides to export. <b>SHIFT-click</b> to select a range of layout sides. <b>CTRL-click</b> (Windows) or <b>CMD-click</b> (Mac) to select multiple layout sides.
Export As	<b>One File / Separate File for Each Layout / Separate File for Each Layout Side / Separate File for Each Bundle</b> The PDF file(s) to create.
Impose To	<b>Press Sheet / Plate</b> The area to impose to.
PDF Sheet Bleed	Value that specifies the PDF Sheet Bleed margin (default is 0") You can specify a PDF Sheet Bleed margin when exporting Imposed PDF, Barcoded Imposed PDF, and JDF. This bleed margin setting is in the Export window; it adds the specified

margin to the mediabox all around the sheet and sets the trimbox to the exact sheet size. This ensures that marks can bleed off the edge of the sheet.

### Trim Marks

Length	The trim mark length. <b>0</b> (zero) length turns off trim marks.
Distance from Page Trim	The distance from the page trim to the beginning of the trim mark.
Thickness	The trim mark thickness or weight.
Over Page Content	<b>True / False</b> When <b>True</b> , trim marks will overprint page content.
Color	<b>All Separations / Select an Ink (from the Metrix database)</b> The color for trim marks.

### External Fold Marks (outside the page trim bounding rectangle)

Length	The fold mark length. <b>0</b> (zero) length turns off external fold marks.
Distance from Page Trim	The distance from the page trim to the beginning of the fold mark.
Thickness	The fold mark thickness or weight.
Over Page Content	<b>True / False</b> When <b>True</b> , fold marks will overprint page content.
Color	<b>All Separations / Select an Ink (from the Metrix database)</b> The color for trim marks.
Line Type	<b>Solid / Dashed / Dotted</b> The fold mark line type.

### Internal Fold Marks (inside the page trim bounding rectangle)

Maximum Length	The maximum length for the fold mark. 0 (zero) length turns off internal fold marks.
Crop Distance from Page Trim	The distance from the page trim to the beginning of the fold mark.
Minimum Length	The minimum length for the fold mark.
Thickness	The fold mark thickness or weight.
Over Page Content	<b>True / False</b> When <b>True</b> , fold marks will overprint page content.
Color	<b>All Separations / Select an Ink (from the Metrix database)</b> The color for trim marks.
Line Type	<b>Solid / Dashed / Dotted</b>

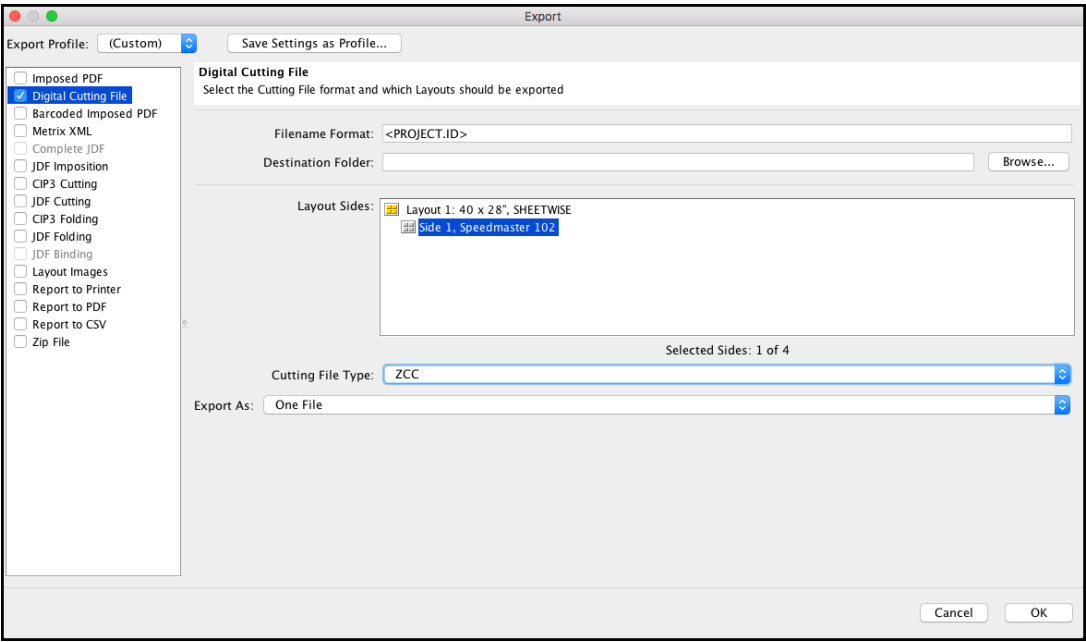
### Proofing Lines

Thickness	The thickness of all proofing lines.
Trim Line Color	<b>(None) / Select an Ink (from the Metrix database)</b> Insert a trim line of the selected color around the bleed of each page.
Trim Line Type	<b>Solid / Long Dashed / Short Dashed</b> Insert a trim line of the selected type around the trim of each page.
Bleed Line Color	<b>(None) / Select an Ink (from the Metrix database)</b>

	Insert a bleed line of the selected color around the bleed of each page.
Bleed Line Type	<b>Solid / Long Dashed / Short Dashed</b> Insert a bleed line of the selected type around the bleed of each page.
Export Negative Bleeds	<b>True / False</b> When <b>True</b> , any Negative Bleed area specified in Metrix will be cropped.

### Exporting a Digital Cutting File

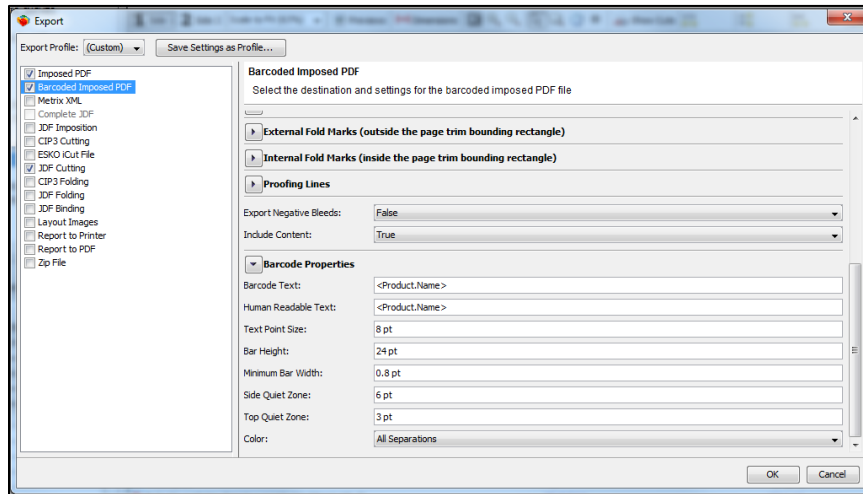
You can export a cutting file for a digital cutting machine in ZCC, ICut, ICut JDF, or DXF format. Select the format you prefer from the Cutting File Type menu as seen in the following:



### Exporting barcoded imposed PDF

You can use barcoded (code 128) imposed PDF to speed sorting and shipping. The barcoded imposed PDF is output full size, put on top of the stack, then cut with the printed sheets. Each job stack then has barcoded information on top.

**Note** Metrix uses the following syntax: Project ID\_Barcoded.PDF.



### Barcoded Imposed PDF Settings

Setting	Explanation
Filename Format	Enter the name of the export file. The automatic naming algorithm is ProjectID.PDF.
Destination Folder	Save the PDF to this location.
Layout Sides	The layout sides to export. <b>SHIFT-click</b> to select a range of layout sides. <b>CTRL-click</b> (Windows) or <b>CMD-click</b> (Mac) to select multiple layout sides.
Export As	<b>One File / Separate File for Each Layout / Separate File for Each Layout Side / Separate File for Each Bundle</b> The PDF file(s) to create.
Impose To	<b>Press Sheet / Plate</b> The area to impose to.
PDF Sheet Bleed	Value that specifies the PDF Sheet Bleed margin (default is 0") You can specify a PDF Sheet Bleed margin when exporting Imposed PDF, Barcoded Imposed PDF, and JDF. This bleed margin setting is in the Export window; it adds the specified margin to the mediabox all around the sheet and sets the trimbox to the exact sheet size. This ensures that marks can bleed off the edge of the sheet.

### Trim Marks

Length	The trim mark length. 0 (zero) length turns off trim marks.
Distance from Page Trim	The distance from the page trim to the beginning of the trim mark.
Thickness	The trim mark thickness or weight.
Over Page Content	<b>True / False</b> When <b>True</b> , trim marks will overprint page content.
Color	<b>All Separations / Select an Ink (from the Metrix database)</b> The color for trim marks.

### External Fold Marks (outside the page trim bounding rectangle)

Length	The fold mark length. 0 (zero) length turns off external fold marks.
--------	--

Distance from Page Trim	The distance from the page trim to the beginning of the fold mark.
Thickness	The fold mark thickness or weight.
Over Page Content	<b>True / False</b> When <b>True</b> , fold marks will overprint page content.
Color	<b>All Separations / Select an Ink (from the Metrix database)</b> The color for trim marks.
Line Type	<b>Solid / Dashed / Dotted The fold mark line type</b> The fold mark line type.
<b>Internal Fold Marks</b>	
Maximum Length	The maximum length for the fold mark. 0 (zero) length turns off internal fold marks.
Crop Distance from Page Trim	The distance from the page trim to the beginning of the fold mark
Minimum Length	The minimum length for the fold mark
Thickness	The fold mark thickness or weight
Over Page Content	<b>True / False</b> When <b>True</b> , fold marks will overprint page content.
Color	<b>All Separations / Select an Ink (from the Metrix database)</b> The color for trim marks
Line Type	<b>Solid / Dashed / Dotted</b>
Thickness	The thickness of all proofing lines
Trim Line Color	<b>(None) / Select an Ink (from the Metrix database).</b> Insert a trim line of the selected color around the bleed of each page
Trim Line Type	<b>Solid / Long Dashed / Short Dashed</b> Insert a trim line of the selected type around the trim of each page.
Bleed Line Color	<b>(None) / Select an Ink (from the Metrix database)</b> Insert a bleed line of the selected color around the bleed of each page.
Bleed Line Type	<b>Solid / Long Dashed / Short Dashed</b> Insert a bleed line of the selected type around the bleed of each page.
Export Negative Bleeds	<b>True / False</b> When <b>True</b> , any Negative Bleed area specified in Metrix will be cropped.
Include Content	<b>True / False</b> When <b>False</b> , only the barcodes and any human readable text will image.
<b>Barcode Properties</b>	
Barcode Text	The text to be transformed into barcodes. This can be static text, Metrix barcoded imposed PDF variables, or both. For more information, see <a href="#">Variables for Barcoded Imposed PDF</a> .

Human Readable Text	The readable text to insert below the barcode. This can be static text, Metrix barcoded imposed PDF variables, or both. For more information, see <a href="#">Variables for Barcoded Imposed PDF</a> .
Text Point Size	The human readable text point size
Bar Height	The bar code height
Minimum Bar Width	The minimum bar width
Side Quiet Zone	The amount of white space to insert on the sides of the barcode
Top Quiet Zone	The amount of white space to insert on the top and bottom of the barcode
Color	<b>All Separations / Select an Ink (from the Metrix database)</b> The color for the barcodes

## Variables for Barcoded Imposed PDF

### Metrix Variables for Barcoded Imposed PDF

Variable	Inserts
<!\>	Carriage return, line feed
<Product.ID>	The product ID (A, B, C, etc.)
<Product.Name>	The product name
<Product.Customer>	The product customer
<Product.RequiredQuantity>	The required quantity for the product
<Product.Notes>	Any notes entered into the Product Notes property
<Product.DueDate>	The product due date
<Product.ProductGroup>	The product group
<Product.Width>	The product width and the unit of measure (e.g., 210mm, 8.5")
<Product.Width.Unit>	The product width and the unit of measure (e.g., 210mm, 8.5")
<Product.Width.NoUnit>	The product width without the unit of measure (e.g., 210, 8.5).
<Product.Height>	The product height and the unit of measure (e.g., 297mm, 11")
<Product.Height.Unit>	The product height and the unit of measure (e.g., 297mm, 11")
<Product.Height.NoUnit>	The product height without the unit of measure (e.g., 297, 11)
<Product.Description>	The product description
<Product.ContentFile>	The content filename for this product

<Product.BindingMachine.Name>	The product binding machine
<Instance.Number>	The instance number (for example, the “1” in “A-1”)
<Instance.Count>	The number of instances on the layout. You can use this in combination with <Instance.Number> to label each instance with the total, e.g., “1 of 10” (“<Instance.Number> of <Instance.Count>”).
<Instance.RequiredQuantity>	The required quantity for each product instance. Functional when Layout View preferences have been set to <b>GangingStyle</b> for flat and folded products
<Instance.ID>	The ID for each product instance (e.g., A-1, A-2, etc.)

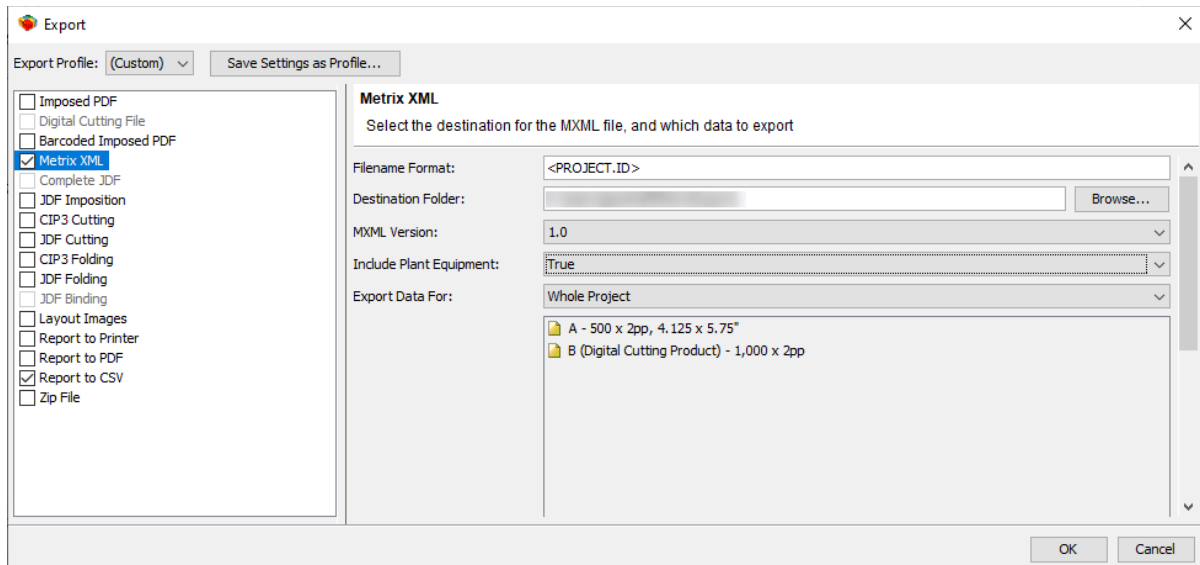
**Note** For those users whose languages include characters from the upper ASCII range in a font (German, French, Spanish, Swedish, etc.), those characters will be converted on export to their lower ASCII (basic English range) equivalents. Thus, accented characters will lose their accents (á becomes a, ç becomes c, ä becomes a, ß becomes s, etc.), and alternate punctuation marks will also be converted (¡ becomes !, ¿ becomes ?). Those characters without a lower-ASCII equivalent will be converted to a hyphen (-).

## Exporting Metrix XML

You can export products (and entire projects) to Metrix XML, which can then be reimported into Metrix.

You can export Metrix XML (MXML) in version 1.0, 1.5, or 1.6. Select the appropriate version from the **MXML Version** drop-down list.

Set the **Include Plant Equipment** field to **True** if you want to include the equipment definition in the exported MXML so systems that consume MXML can determine the equipment used in the project.



**Note** Metrix automatically names exported Metrix XML files with the Project ID and a MXML extension.

## Exporting complete JDF

Complete JDF means that Metrix will append the JDF imposition data to the original JDF imported into Metrix. This node is gray when the open project did not originate as JDF.

**Note** Guidelines are the same as for JDF Imposition.

## Exporting JDF imposition

**Notes** Metrix uses the following syntax: Project ID.JDF.

To export JDF for Fujifilm XMF or Screen Trueflow, see the relevant appendices.

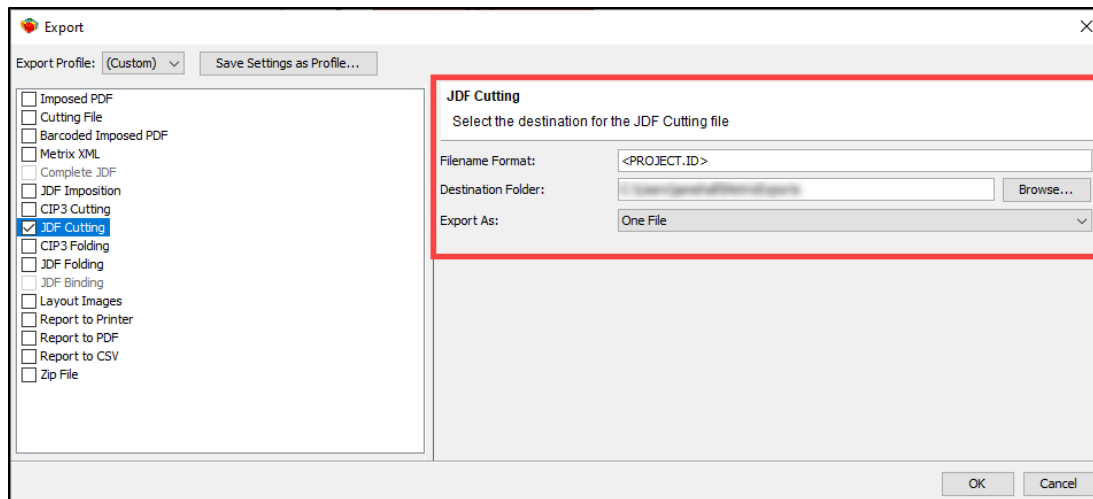
### JDF Imposition Settings

Setting	Explanation
Filename Format	Enter the name of the export file. The automatic naming algorithm is ProjectID.PDF.
JDF Destination Folder	The destination for the JDF file exported by Metrix. This is a location accessible to the JDF consumer (the prepress system).
Content Destination Folder	Often a sub-folder of the JDF Destination folder, this is the destination for the PDF Marks Flat. This is also the destination for PDF content files when Copy Content Files= <b>True</b> and when the content has been assigned within Metrix (populated JDF).
Content Source Folder	As the window states, this folder is “relative to the JDF Destination folder” – most often the same name as the Content Destination folder above. The syntax of this folder name is different than the Content Destination folder, however. Be sure to enter the folder name using the proper syntax, as in the example illustrated.
Impose To	<b>Press Sheet / Plate</b> The area to impose to.
Copy Content Files	<b>True / False</b> When <b>True</b> , Metrix will copy any assigned content files to the Content Destination folder. When <b>False</b> , no assigned Content will be copied.
Handle File Marks	<b>Embed in PDF Marks Flat / Reference in JDF File</b> The generally accepted JDF procedure is to <b>Embed in PDF Marks Flat</b> . This means that any file marks used in the job are part of the data stream processed by the JDF Consumer. When Reference in JDF file is selected, File marks must be copied to the Content Destination folder so the JDF Consumer has access to them for processing.
<b>Trim Marks</b>	
Length	The trim mark length. <b>0</b> (zero) length turns off trim marks.
Distance from Page Trim	The distance from the page trim to the beginning of the trim mark.
Thickness	The fold mark thickness or weight.
Over Page Content	<b>True / False</b> When <b>True</b> , fold marks will overprint page content.
Color	<b>All Separations / Select an Ink(from the Metrix database)</b> The color for trim marks.
<b>External Fold Marks (outside the page trim bounding rectangle)</b>	
Length	The fold mark length. <b>0</b> (zero) length turns off external fold marks.
Distance from Page Trim	The distance from the page trim to the beginning of the fold mark.
Thickness	The fold mark thickness or weight.
Over Page Content	<b>True / False</b> When <b>True</b> , fold marks will overprint page content.
Color	<b>All Separations / Select an Ink (from the Metrix database)</b> The color for trim marks.
Line Type	<b>Solid / Dashed / Dotted</b>

	The fold mark line type.
<b>Proofing Lines</b>	
Thickness	The thickness of all proofing lines.
Trim Line Color	<b>(None) / Select an Ink (from the Metrix database)</b> Insert a trim line of the selected color around the bleed of each page.
Trim Line Type	<b>Solid / Long Dashed / Short Dashed</b> Insert a trim line of the selected type around the trim of each page.
Bleed Line Color	<b>(None) / Select an Ink (from the Metrix database)</b> Insert a bleed line of the selected color around the bleed of each page.
Bleed Line Type	<b>Solid / Long Dashed / Short Dashed</b> Insert a bleed line of the selected type around the bleed of each page.
Export Negative Bleeds	<b>True / False</b> When <b>True</b> , any Negative Bleed area specified in Metrix is cropped.

## Exporting JDF cutting data

Check with your vendor to determine which type of finishing data your equipment can handle. When you click **Export**, and then select JDF Cutting, in the JDF Cutting section you can set the Destination folder for the cutting data, and select whether you want the data to be one file, or a separate file for each layout.



## To export JDF cutting data

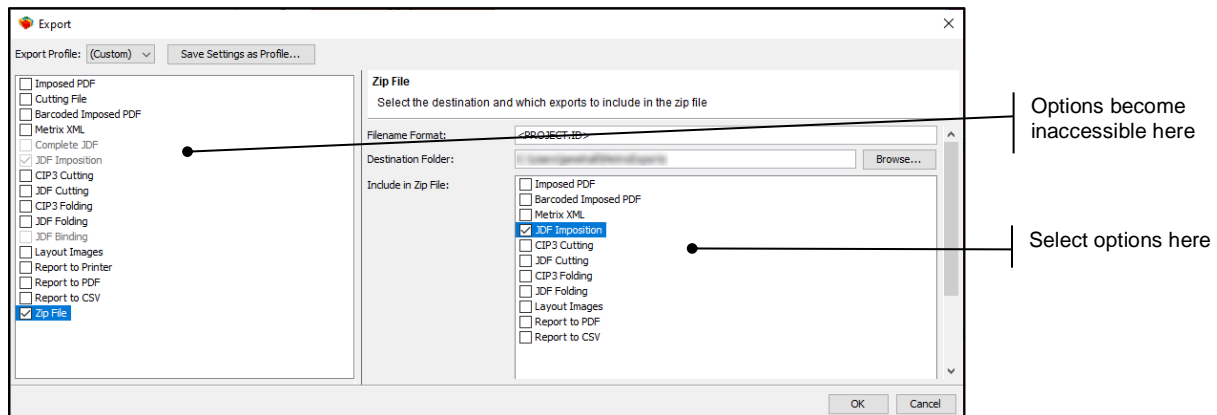
1. Select the bound product then choose a path.
2. Select the data you want to include in the report file created from JDF cutting data, and then click **OK**.

**Note** The report mentioned above is the file created when you export JDF cutting data.

## Exporting data as a ZIP file

When you are ready to export your data as a ZIP file, click **Export**. Click in the box to select the ZIP File option. On the right, you have the list of data options you can select for inclusion in the ZIP file. You can leave the Destination folder set as it is, or you can use **Browse** to change the destination folder for the ZIP file.

As you select the data options on the right, those options become inaccessible in the list of export options on the left.



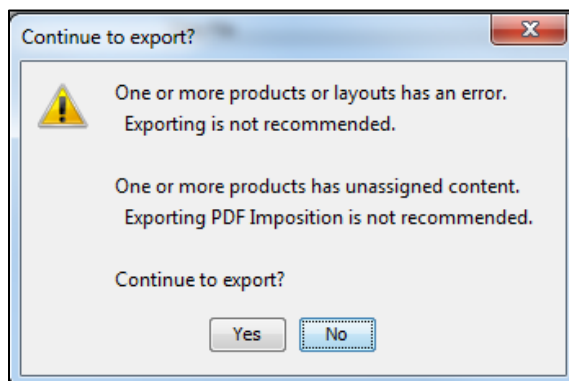
If you attempt to select an export method for data that is already assigned to the ZIP file, a note on the right will inform you that the data you are trying to select is already selected for export in the ZIP file.

Data types that are not assigned to the ZIP file are still available for export separately.

Once you select the various formats for data export, clicking **OK** will send the ZIP file to the destination folder.

## Exporting with errors

If you try to export a project with errors, Metrix will warn you that your project needs correction. If there are errors, you see a warning like this:



If you still wish to export the project, you may do this, as long as the user roles are set in the Database window to allow exporting with errors. Use the following steps.

1. With no project open, select **Settings > Database**, then select the User Roles option.
2. Next, select your user name, then click **Edit**.
3. Check whether the "Allow Export with Errors" is set to **True**. If it is not, then set the option for **True**, and click **OK** to accept the change.
4. Close the Database window.

As long as the "Allow export with errors" option is set for **True**, you will be able to export projects even through Metrix gave you a warning.

## Export profiles

Metrix now can save multiple export settings as an Export Profile. This allows you to quickly and consistently select between multiple export file types.

For example, you might have one Export Profile that exports a PDF to a hot folder on a RIP without exporting JDF cutter data, another Profile to write populated JDF to one workflow hot folder with cutting data, and yet another profile to export unpopulated JDF to a different workflow hot folder with JDF cutting and binding machine data.

Export profiles make complex exports simple and consistent across multiple users.

### To export a profile

1. Click **Export**.
2. Adjust the export settings to your preferred specifications.
3. Click **Save Settings as Profile...** to save the settings as a set.

The profile will then be available for selection on the Export Profile menu.

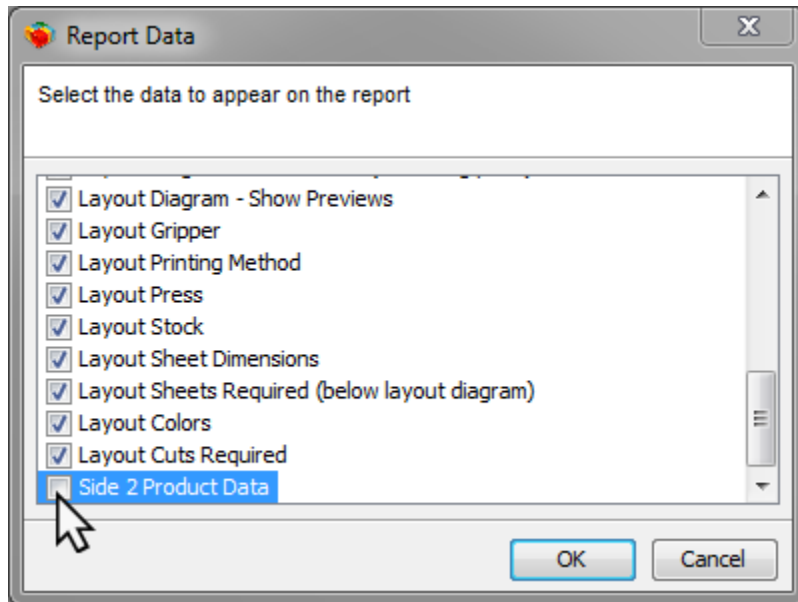
## Previewing and Printing the Metrix Report

Metrix produces a comprehensive report of your project that you can print on any network printer.

Follow these steps to preview and print the Metrix report.

**Note** On Windows, you must have at least one printer installed to select **Preview** or **Print**.

1. To preview the report before printing, click **Report** on the toolbar.
2. Select the Page Setup settings, then click **OK**.
3. Select the Report Data settings, then click **OK**.
  - a. For large products, you can create a report that does not include identical product information for side 2 of 2-sided pieces by de-selecting the **Side 2 Product Data** option.



- b. You can print a report in black and white by selecting **Layout Diagrams – No Color**, and then de-selecting **Layout Diagrams – Color Component Backgrounds**, **Layout Diagrams – Shade Page Bleeds**, and **Layout Diagrams – Show Previews**.
4. Review the report. An example is seen following this step.

Metrix 2017.3		Project ID: MIX_OF_PRODUCTS_INCHES	
November 29, 2017		Page 1 of 16	
Name:	-		
Description:	-		
Notes:	-		
Printed By:	-		
Product:	A - 1,200 x 4800, 1 x 11"		
Name:	-		
Description:	-		
Notes:	-		
Due Date:	-		
Customer:	ABC Print, John Bloggs (Phone: 425-455-6888 / Email: john.bloggs@abcprint.com)		
Total Quantity:	0 (1,200 Sheets)		
Product:	B - 6,000 x 2pp, 3.75 x 8.5"		
Name:	-		
Description:	-		
Notes:	-		
Due Date:	-		
Customer:	-		
Total Quantity:	6,000 (10 Extra)		
Product:	C - 2,000 x 8pp, 3.75 x 8.5"		
Name:	-		
Description:	-		
Notes:	-		
Due Date:	-		
Customer:	-		
Total Quantity:	2,000 (10 Extra)		

- Print the report on any network printer by clicking **Print** in the toolbar of the Preview Project Report window. When you have finished printing, close the Preview Project Report window to return to the **Layout View**.

**Note** You can print the report to PDF on Windows using a PDF printer, or on the Mac by using **Save to PDF**.

## Exporting a report directly to printer, PDF, or CSV

If you prefer to skip the process of viewing a report before you print it, or to save the report directly to PDF or CSV, you can do any of these using **Export**.

- When you are ready to export the report, click **Export**, and then select Report to Printer, Report to PDF, or Report to CSV.
- If you are exporting the report to a printer, select the target printer from the Printer menu, select the options you want from the Include in Report list, and then click **OK**.
- If you are exporting the report to PDF or CSV, browse to the desired destination for the exported file in the Destination folder: field, select the options you want from the Include in Report list, and then click **OK**.

Export

Export Profile: (Custom) Save Settings as Profile...

☐ Imposed PDF

☐ Digital Cutting File

☐ Barcoded Imposed PDF

☐ Metrix XML

☐ Complete JDF

☐ JDF Imposition

☐ CIP3 Cutting

☐ JDF Cutting

☐ CIP3 Folding

☐ JDF Folding

☐ JDF Binding

☐ Layout Images

☐ Report to Printer

☒ Report to PDF

☐ Report to CSV

☐ Zip File

Report to PDF

Set the report properties.

Filename Format: <PROJECT.ID>

Destination Folder: Browse...

Page Layout: Top: 0.5" Bottom: 0.5" Left: 0.5" Right: 0.5" Page Width: 8.5" Page Height: 11" Page Setup...

Include in Report:

☒ Project Name

☒ Project Description

☒ Project Notes

☒ Printed By

☒ Product Summary

☒ Product Name

☒ Product Description

☒ Product Notes

☒ Product Due Date

☒ Product Customer

☒ Product Total Quantity

☒ Layout Sheets Required (in header)

☒ Layout Diagram - No Color

☒ Layout Diagram - Color Component Background

☒ Layout Diagram - Shade Page Bleeds

☒ Layout Diagram - Draw Plate

☒ Layout Diagram - Shade Plate (if drawing plate)

☒ Layout Diagram - Show Previews

☒ Layout Gripper

☒ Layout Printing Method

☒ Layout Press

☒ Layout Stock

☒ Layout Sheet Dimensions

☒ Layout Sheets Required (below layout diagram)

☒ Layout Colors

☒ Layout Cuts Required

☒ Side 2 Product Data

☒ Bundles:

OK

Cancel

## **The JDF Color Mapping Option**

## JDF Color Mapping

JDF Color Mapping allows the mapping of spot colors to other spot colors, mapping of spot colors to individual process colors, conversion of spot colors to process builds, and disabling of individual colors on a layout-by-layout basis in order to control the color information exported from Metrix. It also facilitates the renaming of spot colors to other standard color names to support automation.

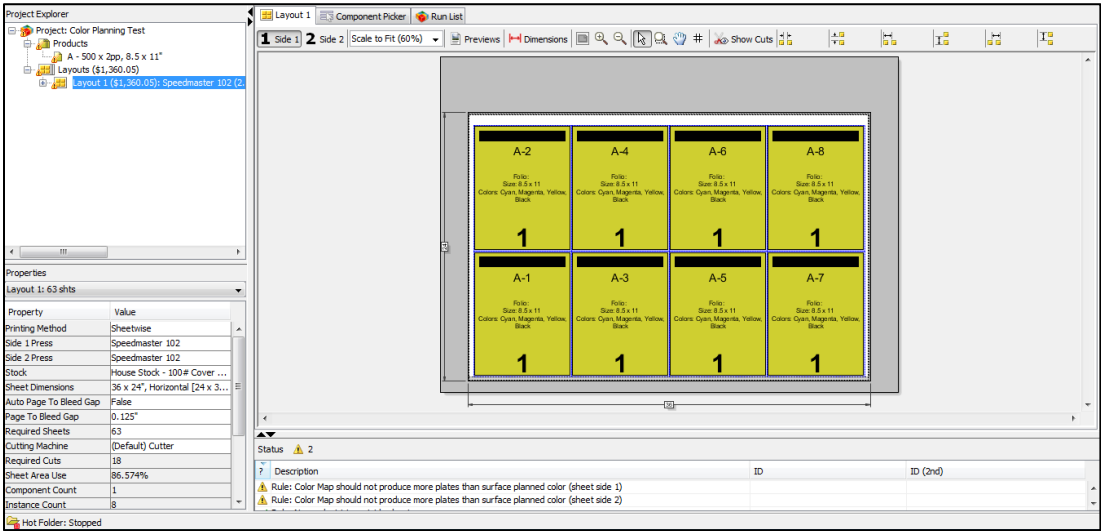
Color remapping happens on a project-by-project basis, so the color remapping configured in one project is not transferrable to another project.

At this time, Color Mapping works only with JDF.

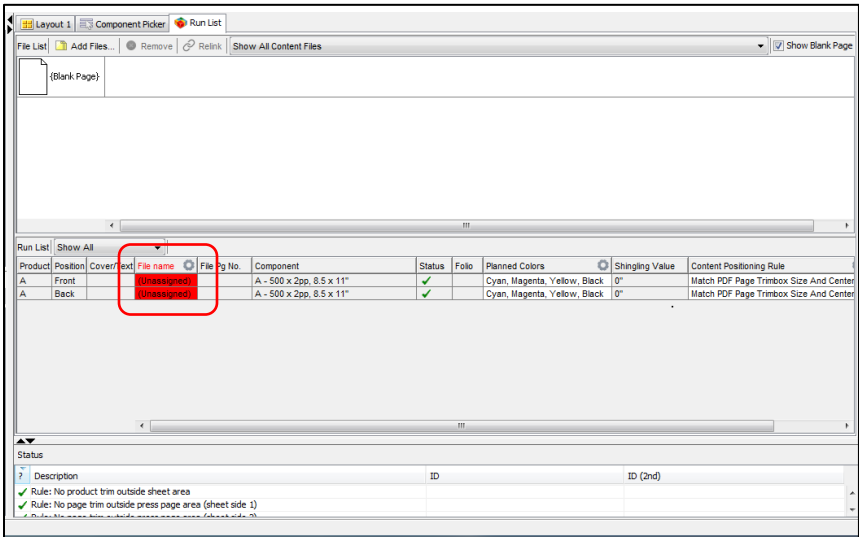
**Note** For more information on how to turn on the JDF Color Mapping feature, see [The JDF Color Mapping user preference](#).

## Working with JDF Color Mapping

When you create a project (e.g., with one flat product having 8.5x11" pages) and a layout is selected, the first side of the layout might look something like this:

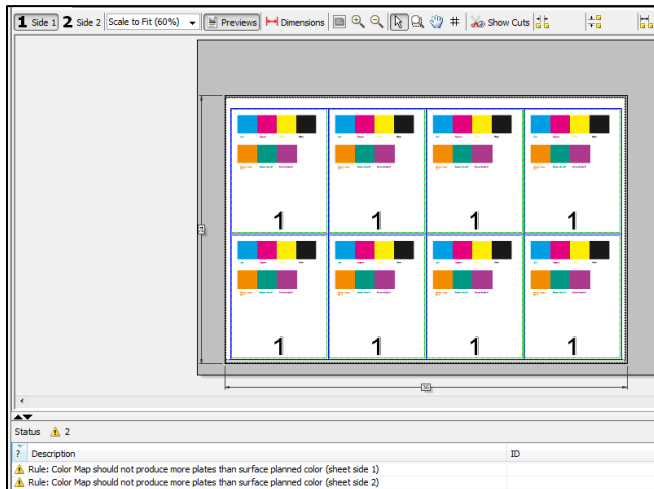


Switching to the Run List, it becomes evident that there is no content assigned to the pages of the product.



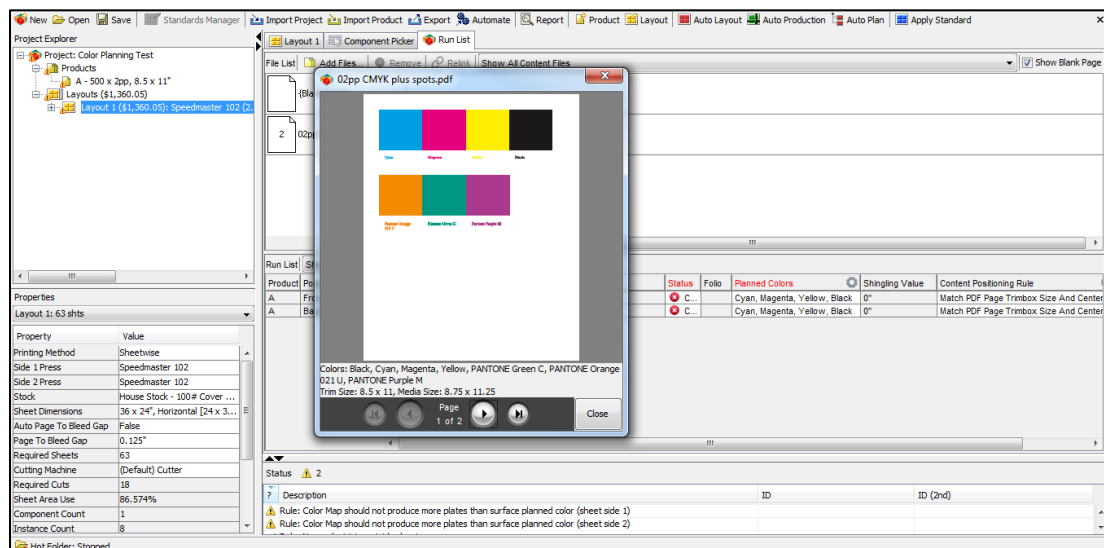
**Note** For more information about the Run List, see [What is the Run List?](#)

After adding a content file to the File List, and dragging the pages onto the Run List, the pages are populated with content, as can be seen in the Previews mode in the Layout View:



Returning to the File List, the color included in the pages of the PDF can be viewed. In the example below, the content file includes both process and spot colors:

- Page 1: C, M, Y, K PANTONE Orange 021 U, PANTONE Green C, and PANTONE Purple M.
- Page 2: C, M, Y, K PANTONE Red 032 C, Custom Spot Orange, Custom Spot Green, and Custom Spot Purple.



Because the planned colors for the product were set for CMYK, there is a difference between the planned colors and the file colors.

When the planned colors and file colors are different, the headers of the "Planned Colors" and "Status" columns turn red, and there is a "Colors" error, with a red and white "X" in the "Status" column.

**Note** There are warnings in the "Status" list at the bottom of the window that more plates may be produced than the Planned Colors for the project allow.

## Changing planned colors

There are two ways you can change the planned colors list to include the file colors.

The first method can be started from the two locations. Either:

- Select “Custom” from the “Planned Colors” column in the Run List, or,
- Select “Custom” from the “Planned Colors” menu in the Page Color Error window.

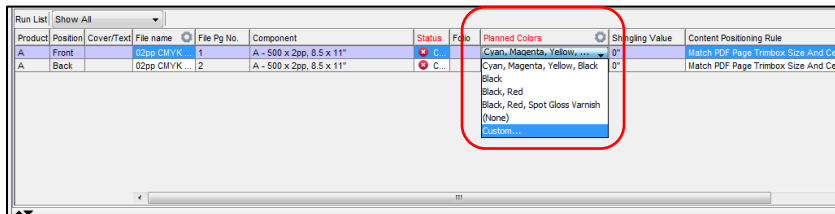
Either of these selections will open the Custom Page Color window where you can make new planned colors and add them to the list.

The second method is to use the “Add Planned Color” button in the JDF Color Mapping window.

### First method


If you need to add file colors to the Planned Colors list, select a row in the Planned Colors list. A pull-down menu opens with the following options:

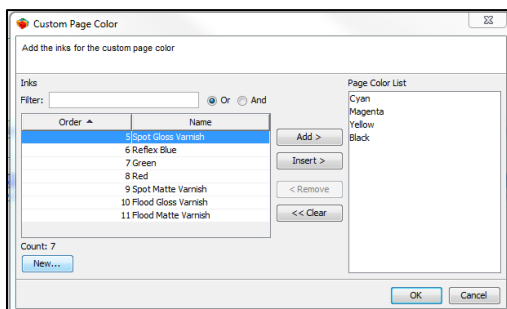
- **All of the Default Page Colors listed in the database**
- **(None)**
- **Custom...**



**Note** As mentioned previously, you can also create a Custom set by selecting “Custom” from the “Planned Colors” menu in the Page Color Error window.

When you select **Custom...** from the menu, the Custom Page Color window opens where you can make new planned colors and add them to the list.

1. Clicking **New...** (lower, left-hand corner of the Custom Page Color window) opens the New Ink window. Type the name to the file ink color you wish to add. (Names are case-sensitive so must match the File Color name exactly.)
2. Now click  in the CMYK Representation field to open the CMYK Color window. Set the percentages of the colors you want for the visual representation; these percentages do not affect the process color builds used for output.
3. When you click **OK**, the CMYK Representation is added to the New Ink window.
4. When you click **OK** in the New Ink window, the color is added to the Name list in the Custom Page Color window.
5. Select the new ink color in the Custom Page Color window.
6. When you click **Add>**, the ink will be added to the Page Color list. Repeat steps 1-6 to add other colors to the Page Color list.
7. Lastly, when you click **OK** in the Custom Page Color window, the custom set of planned colors are added to the menu in the Run List, and the Custom set will become the planned colors for the layout side you selected.

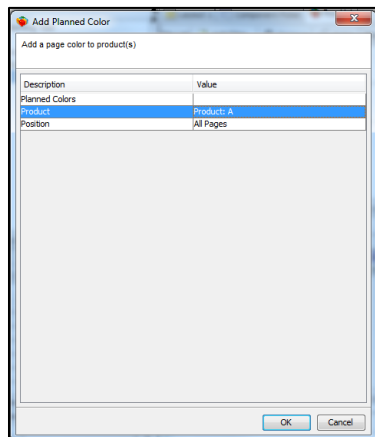


## Second method

Here is another way to add all the file colors to the planned colors so the lists are the same.

You start this process by clicking **Add Planned Color** in the JDF Color Mapping window. When you do, another window opens that allows you to add colors to the Planned Color list. To add colors:

1. Click the Planned Colors line in the “Value” column. All ink colors in the database appear in the Planned Colors pull-down menu. If the color you need does not appear in this list, you must add it to the database either by using the first method previously described, or by opening the database and adding it to the Inks list.
2. Click the Product line in the “Value” column and select the product to which you are adding the planned color—either an individual product or all products.
3. Click the Position line in the “Value” column and select whether the Planned Color is being added to side one or side two of the layout. (If you selected **All Products** on the Product line, the only option under Pages will be **All Pages**.)
4. When you click **OK**, the color will be added to the Planned Color list on the same line as the File Color of the same name.



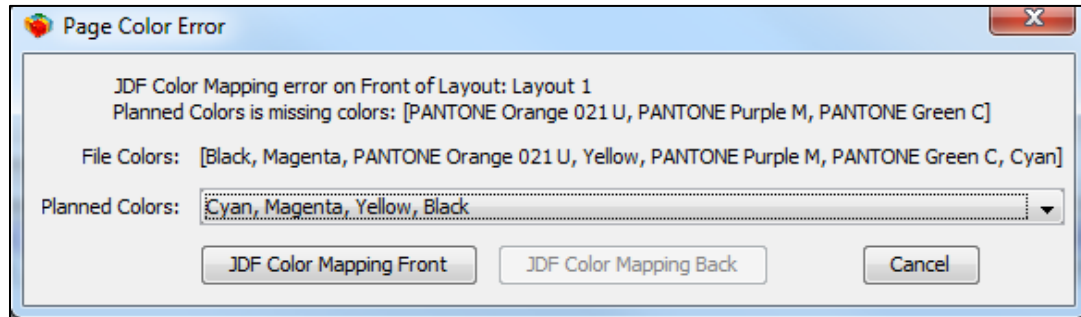
5. Continue adding planned colors until the Planned Colors list is complete.
6. When you click **Apply**, the “Colors” error should be removed from the “Status” column in the Run List. This is because the list of planned colors and file colors are the same.

## The Page Color Error window

Clicking the “Colors” error in the “Status” column opens the Page Color Error window for the selected page. Here the essential data is displayed about the colors in the content file, the Planned Colors for the product page, and the differences between them.

The Page Color Error window contains the following information:


- Which side of the layout contains the error.
- Any extra colors in the planned colors.
- Which colors the planned colors are missing.
- Which colors are contained in the content file for that side of the layout.
- The planned colors for that side of the layout.
- The “JDF Color Mapping” button for the layout side(s) on which the page appears will be active. (There are some rare circumstances where both buttons could be active.)



## Resolving Color Mapping problems

There are several ways the differences between the planned colors and the content colors can be resolved. These resolutions all happen in the JDF Color Mapping window, with the exception of editing the planned colors for a page, which is done in the “Planned Colors” column.

There are two ways to access the JDF Color Mapping window. One is through the JDF Color Mapping properties fields in the Layout Properties. The other is by clicking **JDF Color Mapping (Front or Back)** in the Page Color Error window.

The JDF Color Mapping window contains the resources to resolve any color-mapping issues. To access it, click  in the Value column next to JDF Color Mapping (Front or Back) in the Properties Editor.

## Rule Sets

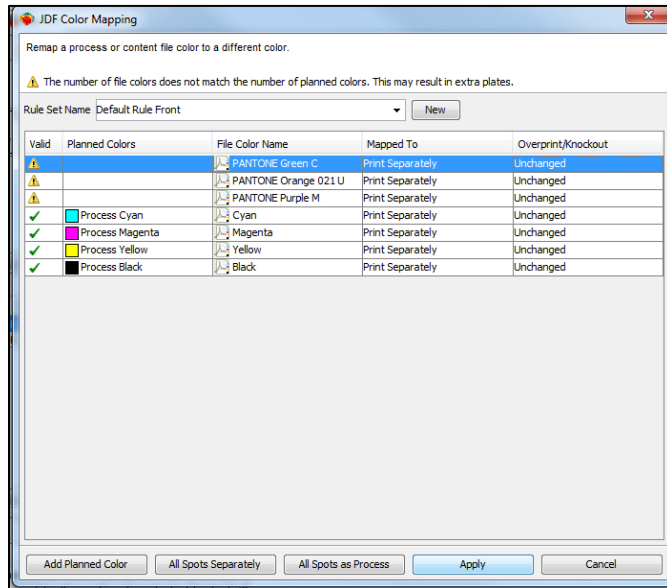
You can use rule sets to configure Color Remapping and Overprint/Knockout settings once so they can then be applied to multiple layouts. The Default Rule Set (Front) and Default Rule Set (Back) settings are automatically applied to the respective sides of each layout, but you can create custom Rule Sets as well.

The JDF Color Mapping window shows all planned colors and file colors in the entire project, and the Default Rule Sets have those colors mapped to “Print Separately,” with Overprint/Knockout set to “Unchanged.”

You can edit these settings, and any changes made are applied to all layouts that use that rule set. Using the default rule sets makes sense for projects that have the same colors on all layouts, but because different layouts may contain different sets of colors, creating custom rule sets allows you to configure the settings separately.

For example, a book may have a cover that prints CMYK while the text is black plus a spot color. If the content file for the cover contains spot colors that should be converted to process builds, you can create a custom rule set that has those spot colors converted to process and have a separate rule set for the text layouts that have cyan, magenta, and yellow set to “Do Not Print” and black and the spot color set to “Print Separately.”)

To create a custom rule set, click **New** next to the Rule Set Name pull-down menu. A new, editable Rule Set Name appears: “Color Remapping 2.” Change the “Mapped To” and “Overprint/Knockout” settings as required, and then click **Apply**.



If you wish to use this same rule set on another layout, select the layout and then select the new rule set in the **JDF Color Mapping (Front)** or **(Back)** properties. Alternatively, you can open the JDF Color Mapping window for a layout and select the custom rule set from the Rule Set Name menu.

## “Mapped To” options

Clicking the row of a file color in the “Mapped To” column opens a menu with all colors in the project plus three other options:

- **Convert to Process:** The spot color is converted to the process build that is defined in the content file.
- **Print Separately:** The color will print on its own plate.
- **Do Not Print:** The color will not print.

If another file color or planned color is selected from the “Mapped To” menu, the spot color will print on the same plate as the selected color.

Clicking the row of a process color in the “Mapped To” column pulls down a menu with only two options: **Print Separately**, and **Do Not Print**. This is because a process color cannot be mapped to another color, so it will either print separately, or will not need to be printed, depending on the job.

## Print Separately

If all colors need to be printed separately, it is possible to click **All Spots Separately** in the JDF Color Mapping window.

A warning will now appear in the top part of the window:

“Check that the number of plates to be out put matches the number of Planned Colors.”

This warning has appeared because the number of plates will now be equal to the number of colors in the file, but the number of planned colors is still only four (CMYK).

## Convert to Process

You can map individual spot colors to “Convert To Process,” or click **All Spots as Process** to change all of the spot colors to process color builds as defined in the content file. In the example below, all the colors on this side of the layout are process.

If the planned colors are set to CMYK, once all of the spot colors are converted to process, if you click “Apply,” the warning in the “Status” column of the Run List should change to a green checkmark. Since all the colors—

process and spot—are now treated as process, the Planned Colors (CMYK) match the file colors, and the warning is removed.

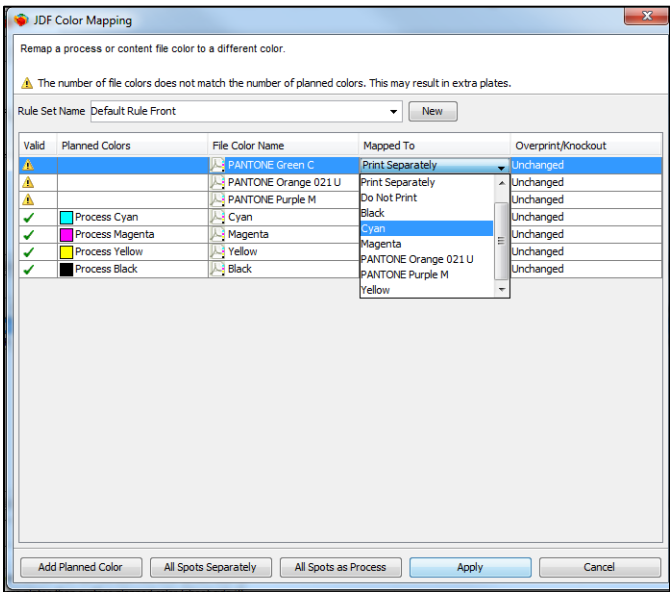
**Note** Side Two still has a “Colors” status error. This is because the spot colors on side two of the layout are different from those on side one, and the sides are handled independently.

Mapping one color to another

In the JDF Color Mapping window, clicking in the “Mapped To” column opens a menu with all colors on that side of the layout.

When a file color or planned color is mapped to another color, all elements that use the original color will print on the same plate as the “Mapped To” color.

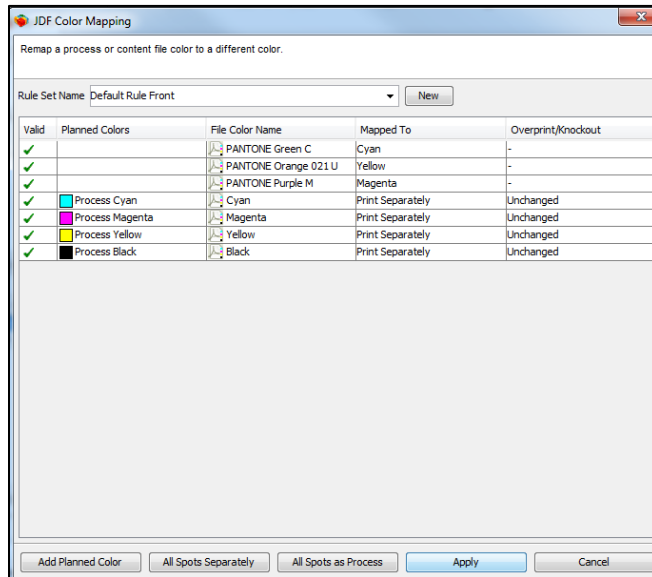
In the example below, the spot color PANTONE Green C is being mapped to the process color Cyan, so all PANTONE Green C elements on that side of the layout will print on the Cyan plate.



Here is the same JDF Color Mapping window with the three spot colors remapped.

- PANTONE Green C is remapped to the process color Cyan
- PANTONE Orange 021 is remapped to the process color Yellow
- PANTONE Purple is remapped to the process color Magenta

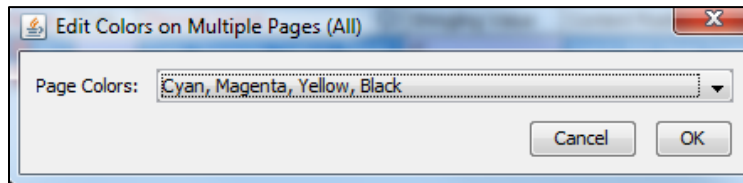
This remapping, together with having the same planned colors as file colors, will resolve the Color error in the “Status” Column of Run List.



## Planned colors on multiple selected rows

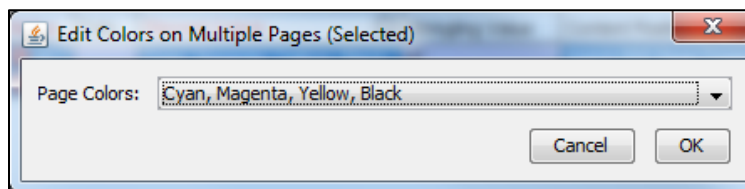
You can change the planned colors for all the rows in the Run List when only one row is selected, or when all rows or no rows are selected. To do this, click the gear icon in the “Planned Colors” header. When you do, a window opens allowing you to change all rows in the list.

Take note of the word “(All)” in the window title.



If multiple rows are selected, either contiguous or non-contiguous, clicking the gear icon in the Planned Colors header opens a similar window. The difference here is that only the selected rows will be changed.

Take note of the word “(Selected)” in the window title.



## Color mapping and JDF export

### The PDF Export error

Since JDF Color Mapping works only with JDF export, if “Imposed PDF” is selected in the Export window, a warning will display.

The warning reads

“Any JDF Color Mapping that has been defined for this project will be ignored for PDF Output. JDF Color Mapping is supported only in JDF output.”

### JDF export color options

Under the “Colors To Output” section of the Export window, the “Colors To Output” and “Export Rules” options are available.

The “Export Rules” option allows three different settings:

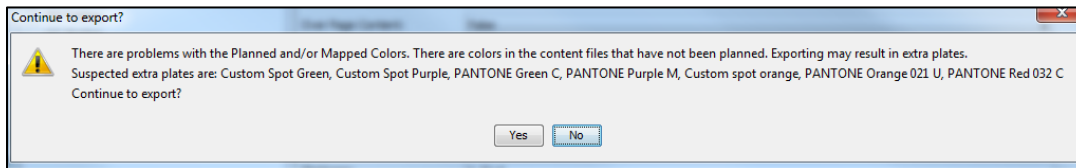
- **Use Layout Settings**—the default
- **Ignore Color Mapping**—When this option is selected, colors are output as they are defined in the content file(s).
- **All to Process**—All colors are converted to the process builds defined in the PDF content files.

**Note** This overrides color-mapping settings only for this export operation, but does not change the JDF Color Mapping for the project.)

The “Colors To Output” section allows three different output options. If the box is:

- **Checked**—Color exists on all layouts. All plates shall be output for that color.
- **Unchecked**—Color exists on no layouts. No plates shall be output for that color.
- **Gray**—Color exists on some layouts. Plates shall be output only for those layouts on which the color exists.

Trying to export the JDF when the JDF Color Mapping profile does not contain all colors that are in the content files(s) results in this warning:

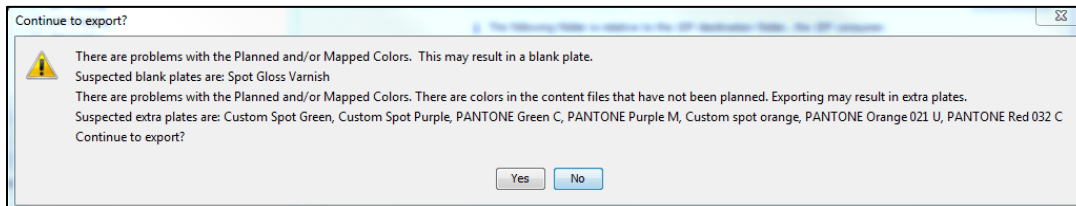


If **No** is clicked, the warning is dismissed and you return to the Export window.

If **Yes** is clicked, the files are exported and the colors that are not handled by the profile are processed according to default settings:

- The default “Map To” setting is “Print Separately.”
- The default “Overprint/Knockout” setting is “Unchanged.”

Trying to export the JDF when the JDF Color Mapping profile contains colors that do not exist in the content file(s) results in this warning:



- If **No** is clicked, the warning is dismissed and you return to the Export window.
- If **Yes** is clicked, the files are exported and, if you have not overridden the Colors check box settings, only plates that contain content will be output.

## **Metrix User Preferences**

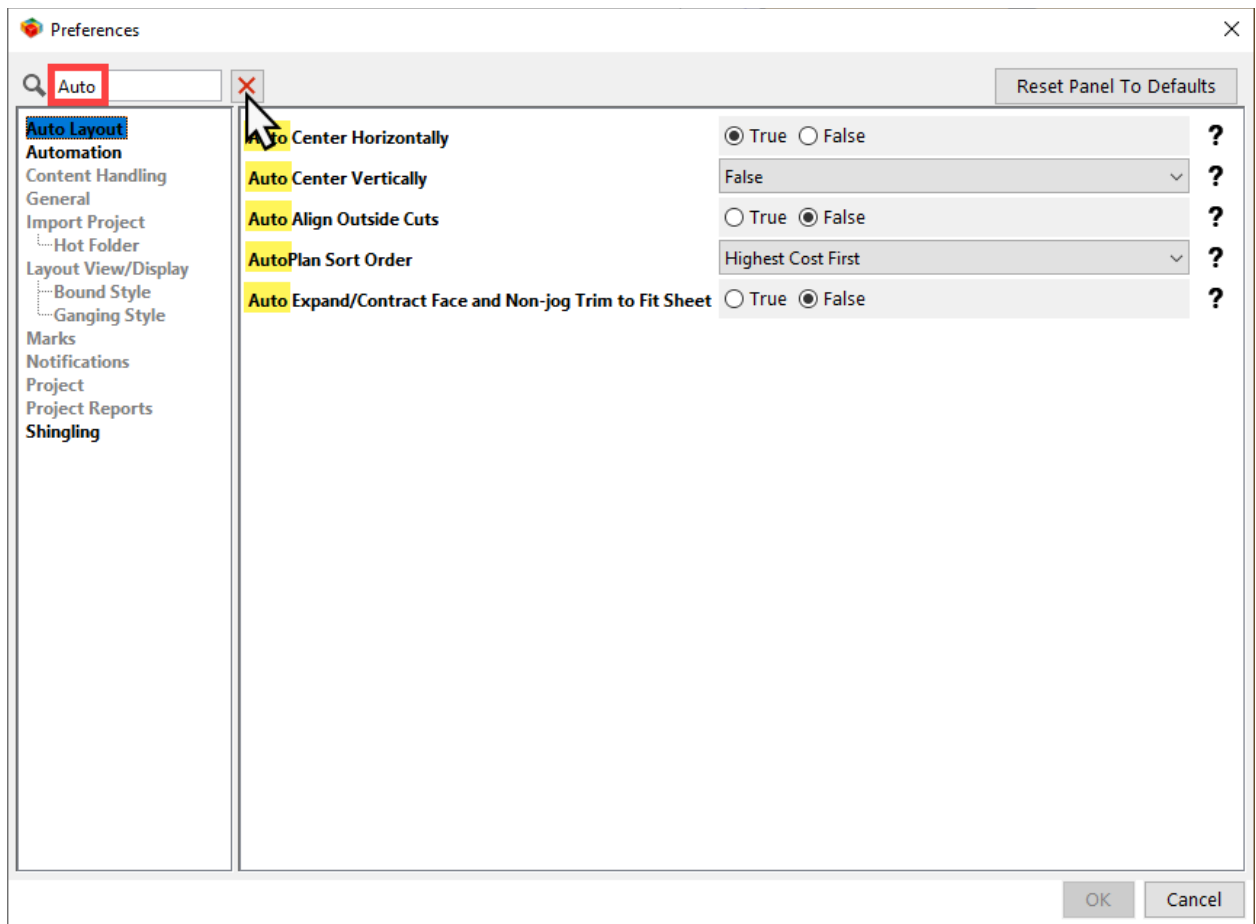
## User Preferences Overview

Some of the Metrix User Preferences are Global, which apply to all workstations; these are stored in the database. Other User Preferences are specific to each Metrix user, and some are specific to the computer on which Metrix is installed. These preferences are stored in a file named **Metrix 2022.1.Properties**, which is created at the root level of the User folder when you install Metrix.

- For Windows, the User folder is found in:  
DriveLetter:\Documents and Settings\UserName
- For Mac, the User folder is found in:  
MacHardDiskName > Users > UserName

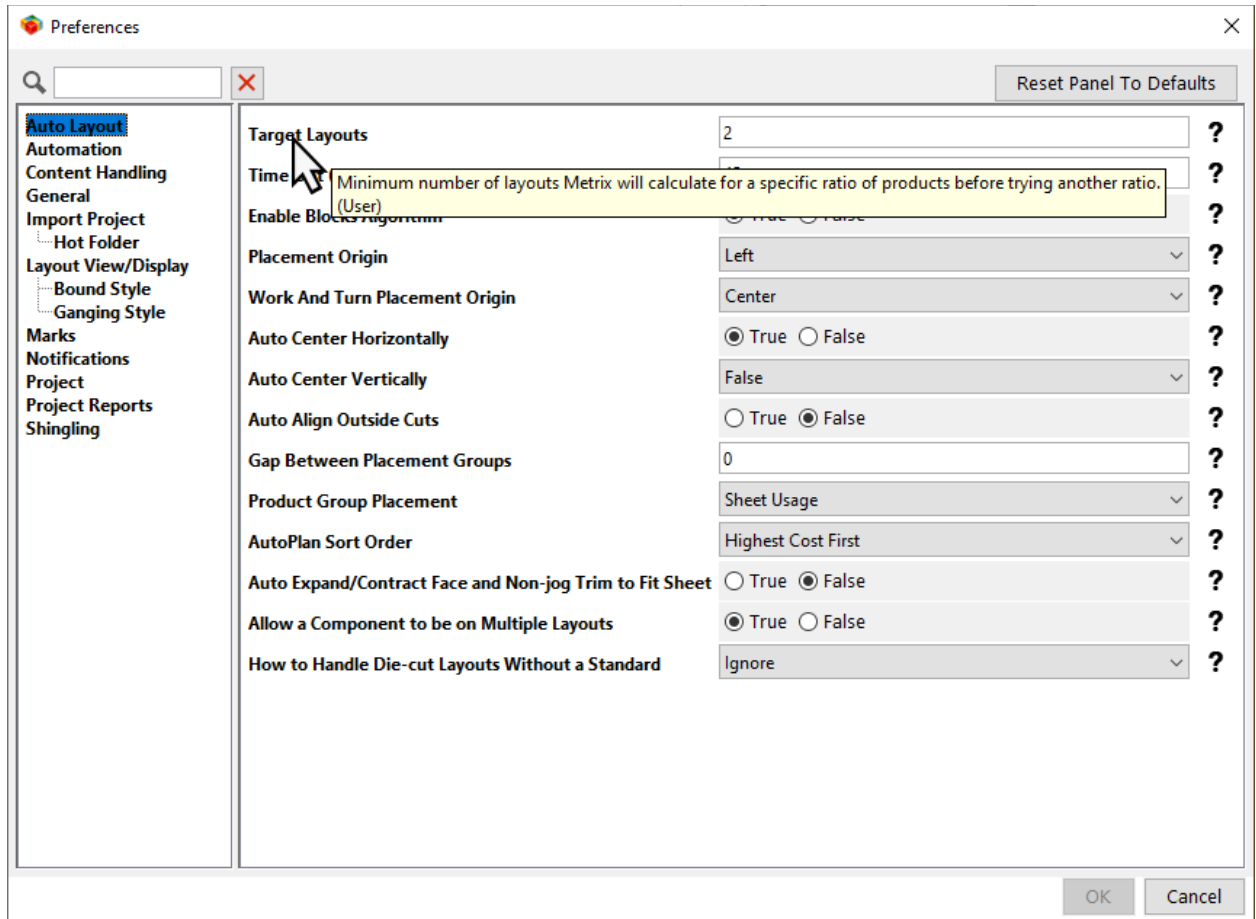
### Global search for the User Preferences:

- **Search:** Enter a search term into the **Search** field, and each tab where the search term can be found will appear in bold. When you select the tab, only the fields that contain the search term will be available. Click the red X to remove the search filter and view all the fields in the selected tab.

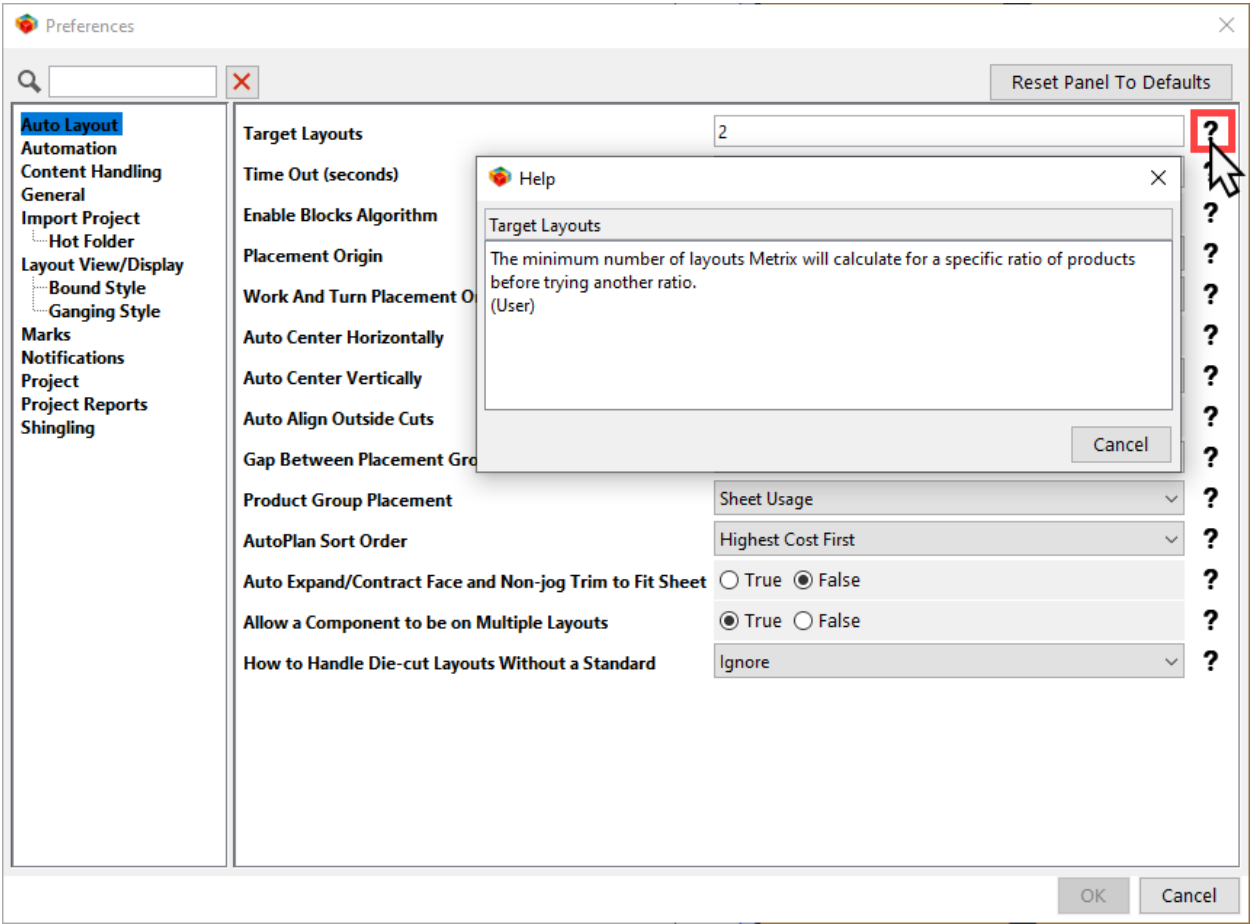


Each tab in the Preferences window contains the following functionality:

- **Reset Panel To Defaults:** Click the **Reset Panel to Defaults** button to clear your changes and revert the tab back to the default options.
- **Tooltips:** Hover the mouse cursor over the name of the User Preference to view a tooltip regarding its functionality.



- **Help:** Click the question mark icon next to the appropriate field to view a pop-up window containing additional helpful information about the User Preference.



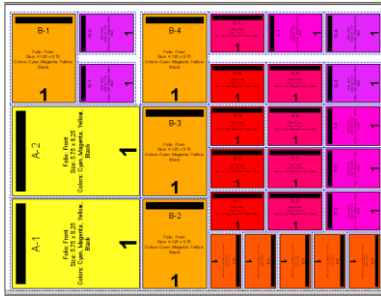
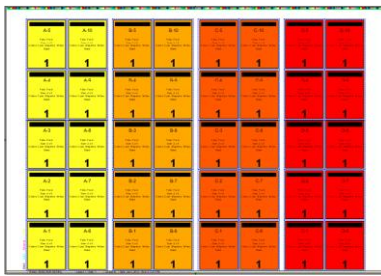
## Auto Layout Preferences

- To view the Auto Layout preferences, select **Settings > User Preferences...** and then click **Auto Layout**.

Field	Value	Help
Target Layouts	2	?
Time Out (seconds)	45	?
Enable Blocks Algorithm	<input checked="" type="radio"/> True <input type="radio"/> False	?
Placement Origin	Left	?
Work And Turn Placement Origin	Center	?
Auto Center Horizontally	<input checked="" type="radio"/> True <input type="radio"/> False	?
Auto Center Vertically	False	?
Auto Align Outside Cuts	<input type="radio"/> True <input checked="" type="radio"/> False	?
Gap Between Placement Groups	0	?
Product Group Placement	Sheet Usage	?
AutoPlan Sort Order	Highest Cost First	?
Auto Expand/Contract Face and Non-jog Trim to Fit Sheet	<input type="radio"/> True <input checked="" type="radio"/> False	?
Allow a Component to be on Multiple Layouts	<input checked="" type="radio"/> True <input type="radio"/> False	?
How to Handle Die-cut Layouts Without a Standard	Ignore	?

### Auto Layout Preferences

Field	Explanation
Target Layouts	The minimum number of successful layouts Metrix will calculate for a specific ratio of products before trying a better ratio. For more information, see <a href="#">Target Layouts and Time Out</a> .
Time Out (seconds)	The longest amount of time Metrix will work on calculating layouts before timing out. Increase this number if you want to give the Metrix engine more calculation time. For more information, see <a href="#">Target Layouts and Time Out</a> .
Enable Blocks Algorithm	<b>True/ False</b> Allows you to enable the blocks algorithm feature, which organizes the layout into blocks of similar size products. Disable the feature to group larger products at the bottom of the sheet. Blocks Algorithm works with Classic and Same Size but has no effect with Media Optimization or Display Graphics.
Placement Origin	<b>Left / Right</b> Metrix begins placing products on this edge of the sheet.

Work And Turn Placement Origin	<b>Center / Outside Edge</b> Metrix begins placing products at this point on a work and turn layout.
Auto Center Horizontally	<b>True / False</b> Centers the entire layout horizontally on the sheet. Setting this preference to <b>True</b> automatically centers all layouts horizontally. When this preference is set to <b>False</b> , you can still center layouts horizontally by the operator as needed.
Auto Center Vertically	<b>True / False</b> When set to <b>True</b> this centers the entire layout vertically on the sheet. When this preference is set to <b>False</b> , the operator can still center layouts vertically as needed.
Auto Align Outside Cuts	<b>True / False</b> Aligns the outside (horizontal and vertical) cuts of products on layouts, leaving any extra space in the interior of the layout. 
Gap Between Placement Groups	The amount of space to insert between placement groups originating from one or more product groups. <a href="#">Flat/Folded Work</a> chapter has complete details on this. You can also see <a href="#">Assigning product groups</a> . 
Product Group Placement	<b>Rows/ Columns/ Sheet Usage</b> Placement of product groups on the sheet. You can arrange the groups in <b>Rows</b> from bottom to top, <b>Columns</b> from left to right, or <b>Metrix</b> will choose the most efficient way if you select <b>Sheet Usage</b> .
AutoPlan Sort Order	<b>Highest Cost First / Project Component Order / Sheet Area Use</b> Choose how the <b>Auto Plan</b> option will sort layouts. You can sort your layouts by the highest cost first, by project component size starting with the largest component, or by sheet area use starting with the highest sheet area use. This setting affects the order in which the layouts appear in the Layout Editor.
Auto Expand/Contract Face and Non-jog trim to Fit Sheet	<b>True/ False</b> Automatically expands or contracts the face and non-jog trim to fit the selected sheet size.
Allow a Component to be on Multiple Layouts	<b>True/ False</b> Allows the same component to be manually placed on multiple layouts.

How to Handle Die-cut Layouts Without a Standard

**Error/ Warning/ Ignore**  
Choose how Metrix will respond if you use the **Auto Layout** option on a die-cut product that does not have a standard. You can display an error message, a warning message, or ignore the setup and create a layout without a message appearing first.

## Target Layouts and Time Out

### Target Layouts

If you do a lot of complex layouts, you may want to increase the number of Target Layouts. Otherwise, the default (2) is usually enough.

### Time Out

The minimum Time Out is 10 seconds. Adjust this value upwards to allow Metrix to calculate for a longer period.

For more information, see [The Metrix User Interface](#) chapter and [Using the Metrix Auto Layout Engine](#).

**Note** **Stop** does not mean cancel – it only means that Metrix will stop calculating and present the solutions already found.

## Automation Preferences

- To view the Automation Preferences, select **Settings > User Preferences...** and then click **Automation**.

The screenshot shows the 'Preferences' dialog box with the 'Automation' tab selected. The left sidebar lists various preference categories, with 'Automation' highlighted. The main area contains settings for SMTP configuration and automatic restarts. The 'SMTP Host' field is empty, 'SMTP Port' is set to 25, 'SMTP Account' and 'Password' are empty, and 'Email From Address' is empty. The 'Automatic Restart Day' section has checkboxes for Sunday through Saturday, all of which are unchecked. The 'Auto Restart Hour (0-23)' is set to 1. At the top right of the dialog is a 'Reset Panel To Defaults' button. At the bottom right are 'OK' and 'Cancel' buttons.

Auto Layout	SMTP Host:	
Automation	SMTP Port:	25
Content Handling	SMTP Account:	
General	Password:	
Import Project	Email From Address:	
Hot Folder	Automatic Restart Day	<input type="checkbox"/> Sunday <input type="checkbox"/> Monday <input type="checkbox"/> Tuesday <input type="checkbox"/> Wednesday <input type="checkbox"/> Thursday <input type="checkbox"/> Friday <input type="checkbox"/> Saturday
Layout View/Display	Auto Restart Hour (0-23)	1
Bound Style		
Ganging Style		
Marks		
Notifications		
Project		
Project Reports		
Shingling		

Automation Preferences

Preference	Explanation
SMTP Host	Enter the address of the SMTP account. The address is site specific.
SMTP Port	<p>Enter the port number of the SMTP account. Examples of SMTP ports include 587 (most common), 456, 25, and 2525.</p> <p><b>Note</b> If you do not know the port number, then contact your IT department or email hosting service.</p>
SMTP Account	Enter the name of the SMTP account.
Password	Enter the password for the SMTP account.
Email From Address	Enter the email address Metrix uses as the from address when sending emails to the Administrator and Planners.
Automatic Restart Day	<p><b>Sunday / Monday / Tuesday / Wednesday/ Thursday / Friday/ Saturday</b></p> <p>Select the day(s) of the week for an automatic restart of the Automation Server.</p> <p><b>Note</b> Auto restart allows you to configure the Automation Server to safely restart without losing any jobs that are currently running or in the queue.</p>
Auto Restart Hour (0-23)	<p>Enter the hour to restart the Automation Server.</p> <p><b>Note</b> You can only enter a whole number (i.e., 1, 2, 3, etc.) into the <b>Auto Restart Hour</b> field. 0 represents 12:00AM and 23 represents 11:00PM.</p>

**Notes** Automation Preferences are global and changes will be applied to all workstations.  
 For more information on the Automation Preferences, see [The Metrix Automation email process](#).

## Content Handling Preferences


- To view the Content Handling preferences, select **Settings > User Preferences...** and then click **Content Handling**.

The screenshot shows the 'Preferences' dialog box with the 'Content Handling' tab selected. The left sidebar lists various preference categories, with 'Content Handling' highlighted. The main area displays 18 settings, each with a control element (text box, dropdown, radio buttons, or slider) and a help icon (?). At the bottom are 'OK' and 'Cancel' buttons.

Preference	Value / Control	Help
Default Content Folder	C:\ProgramData\EFI\New-Metrix\Content [Select...]	?
PDF Import Method	Speed Optimized [v]	?
Enable Shared Cache	<input type="radio"/> True <input checked="" type="radio"/> False	?
Shared Cache Folder	[Empty text box]	?
Preview Quality/Speed	Lower/Faster [Slider] Higher/Slower	?
Content Positioning Rule	Match PDF Page Trimbox Size And Center [v]	?
Default Run List Filename	(Unassigned) [v]	?
Show Page Identifier	<input checked="" type="radio"/> True <input type="radio"/> False	?
Show Jog, Spine, Lay and Folds	<input checked="" type="radio"/> True <input type="radio"/> False	?
Default Show Previews in Exported Layout Images	<input type="radio"/> True <input checked="" type="radio"/> False	?
Irregular Shapes using PDF Boxes	<input type="radio"/> True <input checked="" type="radio"/> False	?
No Ink is Blank Page	<input checked="" type="radio"/> True <input type="radio"/> False	?
Allow PDF with OCG/Layers to be Exported	<input type="radio"/> True <input checked="" type="radio"/> False	?
How to Handle PDF with Rotated Pages	Error [v]	?
How to Handle Page Size Error	Warning [v]	?
How to Handle Unassigned Content when Exporting	Error [v]	?
Minimal Run List for JDF Imposition	<input checked="" type="radio"/> True <input type="radio"/> False	?
Enable JDF Color Mapping	<input type="radio"/> True <input checked="" type="radio"/> False	?

### Content Handling Preferences

Preference	Explanation
Default Content Folder	The default location for PDF content files for products imported via CSV and MXML and in the user interface. Applies to this Metrix client only.
PDF Import Method	<b>Speed Optimized / Size Optimized</b> Use the default (Speed Optimized) unless you experience difficulties assigning PDF content and/or exporting an imposed PDF of large or memory-intensive PDF files.
Enable Shared Cache	<b>True / False</b> <b>Note:</b> Metrix 22.1 allows you to place the PreviewCache folder on a shared network drive so it can be accessed by multiple installations of Metrix. This allows all users to access previews more quickly.
Shared Cache Folder	Click <b>Browse...</b> and navigate to the shared PreviewCache folder, select it, and then click <b>Open</b> . <b>Note:</b> The change will be applied to all workstations.
Preview Quality/Speed	This slider controls the quality of the Content Previews images. The farther left the slider's position is, the lower the quality of the displayed image, but the faster the image

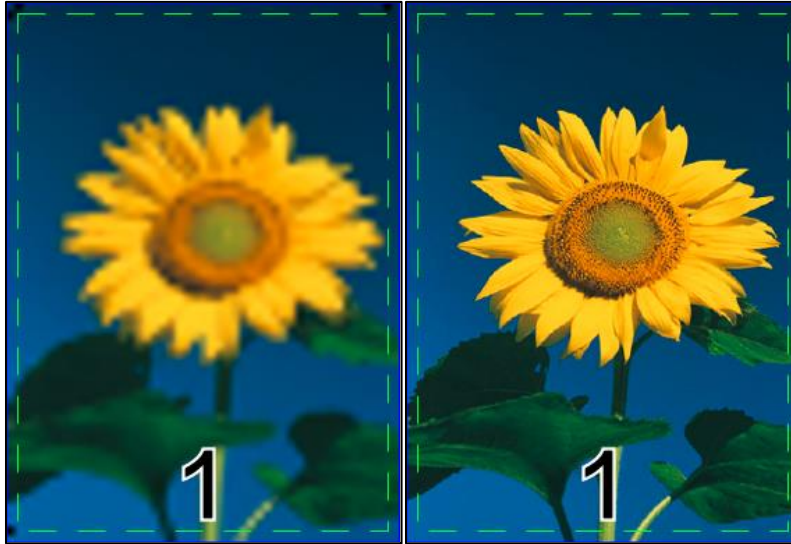
	<p>processing. The farther right the slider's position is, the higher the quality of the displayed image, but the image processing will be slower. For more information, see <a href="#">Setting Content Handling preferences</a>.</p>
Content Positioning Rule	<p><b>Match PDF Page Trimbox Size and Center</b> The content file contains a trimbox for each page that matches precisely the Metrix page size.</p> <p><b>Center Each PDF Page Trimbox</b> The content file contains a trimbox for each page that does <i>not</i> necessarily match precisely the Metrix page size. Metrix centers the PDF page trimbox on the Metrix page, and crops any PDF content falling outside Metrix page size plus bleed.</p> <p><b>Center Each PDF Page</b> The content file does <i>not</i> necessarily contain a trimbox for each page. Metrix centers the PDF page on the Metrix page, and crops any PDF content falling outside Metrix page size plus bleed.</p> <p><i>You can override this default at the content file level.</i></p>
Default Run List Filename	<p><b>(Unassigned) / (Blank)</b> Sets the default filename for product pages that do not have PDF content to <b>(Unassigned)</b> or <b>(Blank)</b>, depending on the setting.</p>
Show Page Identifier	<p><b>True / False</b> The page identifier—page number of folio—will display on the Content Preview image (<b>True</b>), or not (<b>False</b>), depending on the setting.</p>
Show Jog, Spine, Lay and Folds	<p><b>True / False</b> Jog, spine, lay, and fold marks display on the Content Preview image (<b>True</b>), or not (<b>False</b>), depending on the setting.</p> 
Default Show Previews in Exported Layout Images	<p><b>True / False</b> Default setting for whether or not to show preview images for MXML output when using the ExportLayoutImages command. Used only when an Automation process reads an MXML command file that specifies ExportLayoutImages. This setting is then used as the default value if the MXML file does not contain a value for that field.</p>
Irregular Shapes using PDF Boxes	<p><b>True / False</b> Select <b>True</b> to be able to create Irregular Shape products using the rectangular Media Box or Trim Box in content files that do not contain any contour lines.</p>
No Ink is Blank Page	<p><b>True / False</b> When set to <b>True</b>, a page side that is <b>Unassigned</b> with no planned colors is considered blank and Auto Plan or Auto Layout considers one-sided layouts to be valid. When set to <b>False</b>, the page side is not considered blank.</p> <p><b>Note</b> If a page side filename is set to Blank in the Run List, then it is considered blank even if there are planned colors on the page. If the</p>

	<p>page side has content assigned, then it is never considered blank even if there are no planned colors on the page.</p>
Allow PDF with OCG/Layers to be Exported	<p><b>True / False</b></p> <p>If set to <b>True</b>, you can export PDF content files with OCG (Optional Content Groups) / Layers as flattened Imposed PDF files.</p> <p>If set to <b>False</b>, the PDF content files' layers must be resolved before importing into Metrix.</p> <p><i>This setting does not apply to JDF export, because no processing is done on the content files.</i></p>
How to Handle PDFs with Rotated Pages	<p><b>Error / Warning / Ignore</b></p> <p>This setting governs how Metrix handles PDF files with rotated pages on import.</p> <p>If you select <b>Error</b>, an error message appears stating, "The PDF content file contains page rotations that may cause unexpected results. (file:&lt;path and file name&gt;)," and the content file will <i>not</i> be imported.</p> <p>If you select <b>Warning</b>, a warning message appears, same as for <b>Error</b> but with a warning symbol, and the content file is imported.</p> <p>If you select <b>Ignore</b>, no message appears and the content file is imported.</p>
How to Handle Page Size Error	<p><b>Warning/ Error</b></p> <p>This setting lets you choose how Metrix will handle a product whose page size and content file page size do not match.</p> <p>If you select <b>Warning</b>, the yellow <b>Warning</b> icon will appear in the status area and you can either address the issue or ignore it.</p> <p>If you select <b>Error</b>, the red <b>Error</b> icon will appear in the status area and you will be unable to export the project.</p>
How to Handle Unassigned Content when Exporting	<p>This setting governs how Metrix handles products that do not have content assigned on export.</p> <p>If you select <b>Error</b>, the result depends on the current user role permissions. If your role has permission to export with errors, a warning message appears stating, "One or more products has unassigned content. Exporting PDF Imposition is not recommended. Continue to export?" If your user role does not have permission to export with errors, an error message appears stating, "This action is not authorized for your role. User: (username) Role: (user role) One or more products has unassigned content. Exporting PDF Imposition is not permitted."</p> <p>If you select <b>Warning</b>, the warning message appears regardless of the current user role permissions.</p> <p>If you select <b>Ignore</b>, no messages appear and the project is exported.</p> <p>For more information, see <a href="#">Exporting with errors</a>.</p>
Minimal Run List for JDF Imposition	<p>Drops unused pages from JDF export. This specifically applies to inactive components and back sides of one-sided products.</p>
Enable JDF Color Mapping	<p><b>True / False</b></p> <p>Turns on the JDF Color Mapping feature (<b>True</b>), or not (<b>False</b>), depending on the setting. For more information on JDF Color Mapping, see "JDF Color Mapping" below.</p>

## Setting Content Handling preferences

Select **User Preferences** from the Settings menu, and then click **Content Handling** in the User Preferences window, to see a slider bar for setting the display quality of your previews to Lower/Faster or Higher/ Slower. “Lower/Faster” means the resolution is lower, but the generation is faster. “Higher/Slower” means the resolution is higher, but the generation of the previews is slower.

If you set the Quality/Speed bar in the Content Handling window to Lower/ Faster, you should see an image like that below on the left. If you set the bar to the Higher/Slower setting, you should see an image like that below on the right.



As Metrix works to rasterize the previews, you may see a progress bar appear to the right of the hot folder status indicator in the lower, left corner of your Metrix window. How long Metrix takes to rasterize and display the previews depends on the Quality/Speed settings in the Content Handling window, the size and/or complexity of file being imported, the speed of CPU where Metrix is running, and whether the files are on a local drive or being accessed over a network.

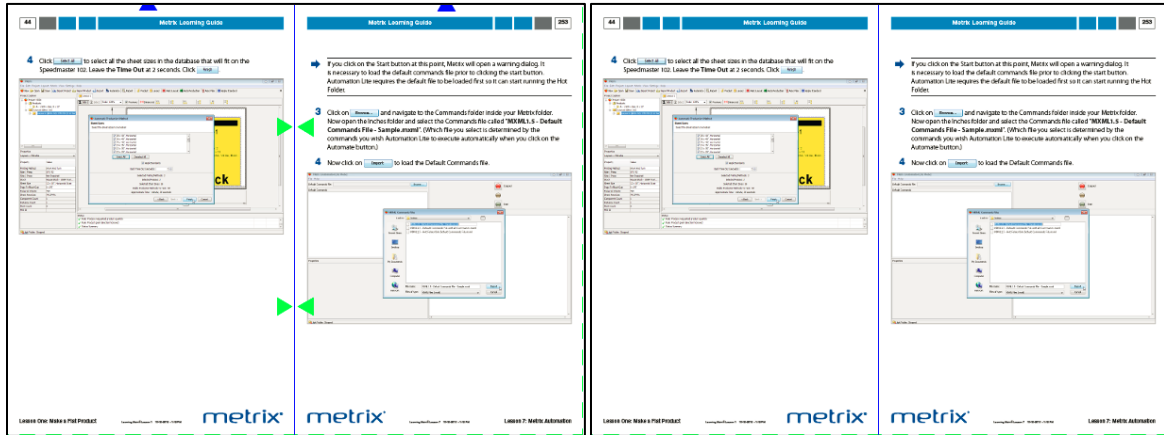
Another option you have in the Content Handling window is to show or not show the page identifier in your product or layout display. If you select **False** on the Show Page Identifier menu, the identifiers are not displayed.

Here is an example of how the display either shows or hides the page identifier, depending on whether you set the menu to **True** or **False** in the Content Previews window.



Using the Content Handling window, you can also display or hide the jog, spine, lay and folds indicators on a layout. Selecting **True** sets them to display. Selecting **False** hides them.

Here is an example of how the display either shows or hides the jog, spine, lay and folds, depending on whether you set the menu to **True** or **False** in the Content Previews window.



**Note** For a list of options available with this feature, see [Content Handling Preferences](#).

## Problems with content files

When there is a problem with your content files, the preview will not be displayed. Possible potential problems include:

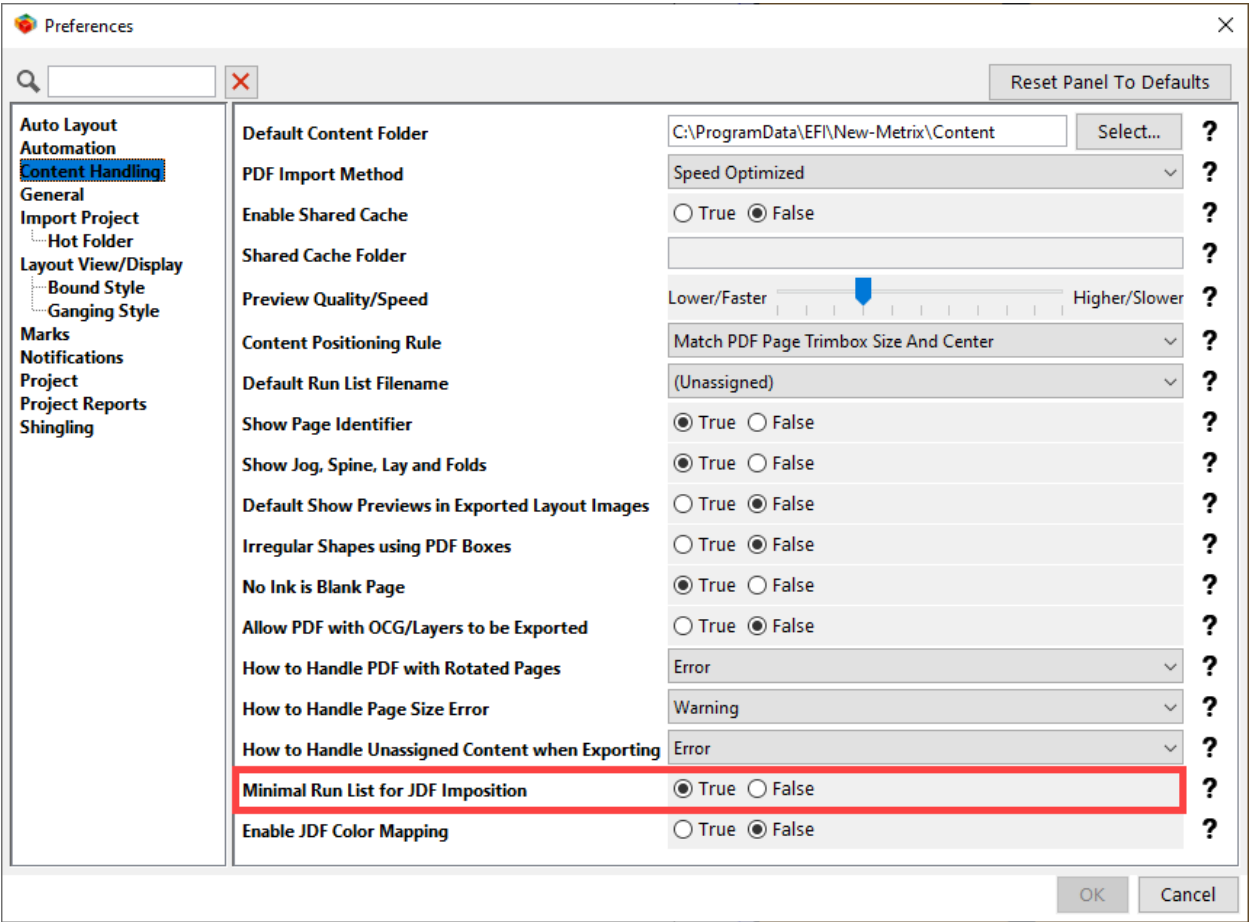
- Files that do not match the product specifications
- Files that cannot be found
- Files that are corrupted

When any of these occur, a red checkerboard pattern, like the following, will be displayed.



## Minimal Run List

The **Minimal Run List for JDF Imposition** feature drops unused pages from JDF export. This specifically applies to inactive components and back sides of one-sided products. In previous versions of Metrix, the Minimal Run List was configured by adding a line to the **metrix.properties** file. In Metrix 22.1, you can enable Minimal Run List directly in the User Preferences on the Content Handling window.



## The JDF Color Mapping user preference

JDF Color Mapping can be turned on or off in the Content Handling node of the User Preferences window. Select **User Preferences** from the Settings menu, and then click **Content Handling**. On the right, from the “Enable JDF Color Mapping” menu, select **True** to turn JDF Color Mapping on, and **False** to turn it off. The default setting is **False**.

## General Preferences

- To view your General preferences, select **Settings > User Preferences...** and then click **General**.

The screenshot shows the 'Preferences' dialog box with the 'General' tab selected. The left sidebar lists various preference categories: Auto Layout, Automation, Content Handling, General (highlighted), Import Project, Hot Folder, Layout View/Display, Bound Style, Ganging Style, Marks, Notifications, Project, Project Reports, and Shingling. The main area displays settings for Date Format (YYYY-MM-DD (2014-01-17)), Display Numbers and Currency using System Locale (False), Language (English), Company Name (empty), MIS Workflow (None), and Prepress Workflow (Generic). Each setting has a help icon (?) to its right. At the top right is a 'Reset Panel To Defaults' button. At the bottom right are 'OK' and 'Cancel' buttons.

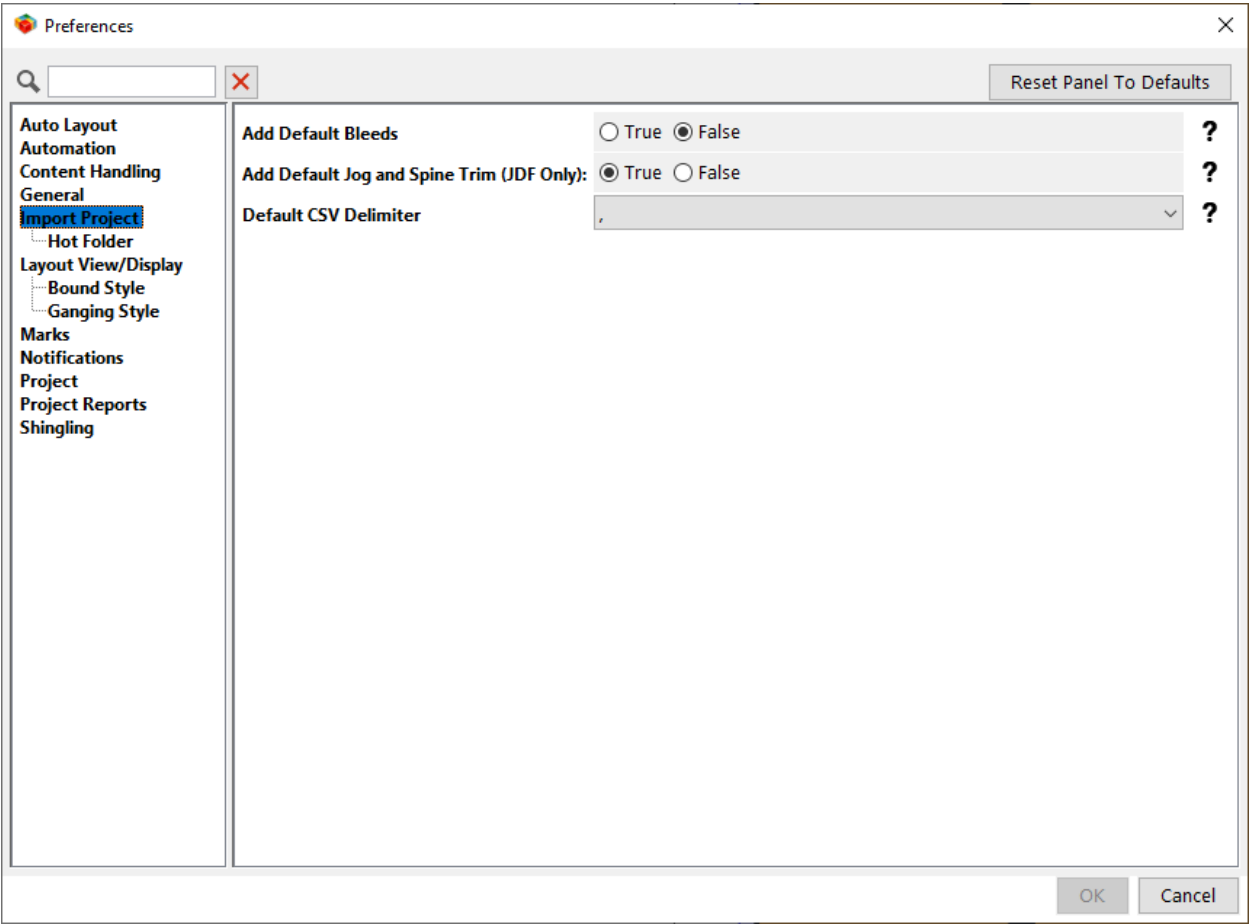
### General Preferences

Preference	Explanation
Date Format	<p>Select your preferred date format from the drop-down menu. Changes to the format take effect when you restart Metrix. Dates already entered in the Properties Editor will be updated to the new format on restart. This data is only used in those fields in the Properties Editor requiring a date format. Dates typed in text-formatted fields will not be affected (e.g., the Due Date field).</p> <p>YYYY-MM-DD (2014-01-17)  MM/DD/YYYY (01/17/2014)  MM/DD/YY (01/17/14)  M/D/YY (1/17/14)  DD/MM/YYYY (17/01/2014)  DD/MM/YY (17/01/14)  D/M/YY (17/1/14)</p>
Display Numbers and Currency using System Locale	<p><b>True / False</b></p> <p>This setting allows Metrix to display numbers and currency based on the OS System Locale when the selected language is not supported by Metrix. To enable the setting, set to <b>True</b> and restart the program.</p>

Language	English / German / Spanish / French/ Italian/ Simplified Chinese / Swedish/ Japanese
Company Name	Enter the company name to appear on the Metrix reports.
MIS Workflow	<b>(None) / Select from List</b> Choose your MIS or choose <b>(None)</b> or <b>(Other)</b> if it isn't listed. This change will take effect the next time you start Metrix.
Prepress Workflow	<b>Generic / Select from List</b> Choose your prepress workflow or choose <b>Generic</b> if it isn't listed. The change will take effect the next time you start Metrix. See the relevant appendix for your chosen workflow at the end of this guide for information on each workflow.

Import Project Preferences

- To view the Import Project preferences, select **Settings > User Preferences...** and then click **Import Project**.



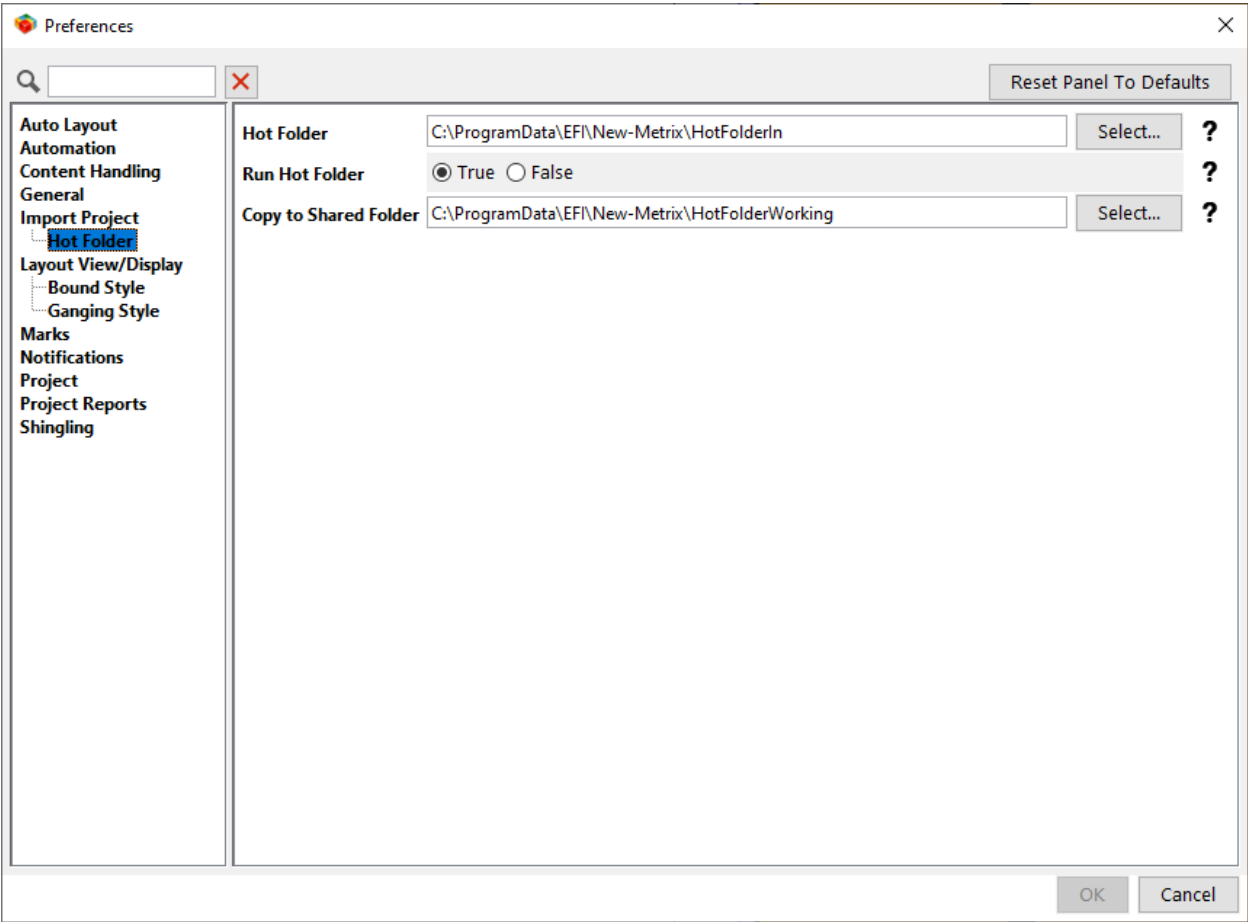
Import Project Preferences

Preference	Explanation
Add Default Bleeds	<b>True / False</b> Adds the default bleed amount to all imported products when bleed has not been specified.

	<p>The default bleed amount is specified in the Conventions node of the Metrix Database window. This setting will overwrite bleed amounts specified in the imported data when using <b>Import Project</b> and will <i>not</i> overwrite bleed amounts when using <b>Import Products</b>.</p>
Add Default Jog and Spine Trim (JDF Only)	<p><b>True / False</b></p> <p>Adds the default jog and spine trim amounts to all products imported via JDF, when jog and/or spine trim have not been specified.</p> <p><b>Notes</b> The jog and spine trim amounts added are relative to the binding machine specified. This setting will overwrite jog and spine trim amounts specified in the imported data when using <b>Import Project</b> and will not overwrite jog and spine trim amounts when using <b>Import Products</b>.</p>
Default CSV Delimiter	<p>Allows you to set the comma or the semicolon for the default delimiter in imported CSV files.</p>

Hot Folder Preferences

- To view the Hot Folder preferences, select **Settings > User Preferences...** and then click **Hot Folder**.



Hot Folder Preferences

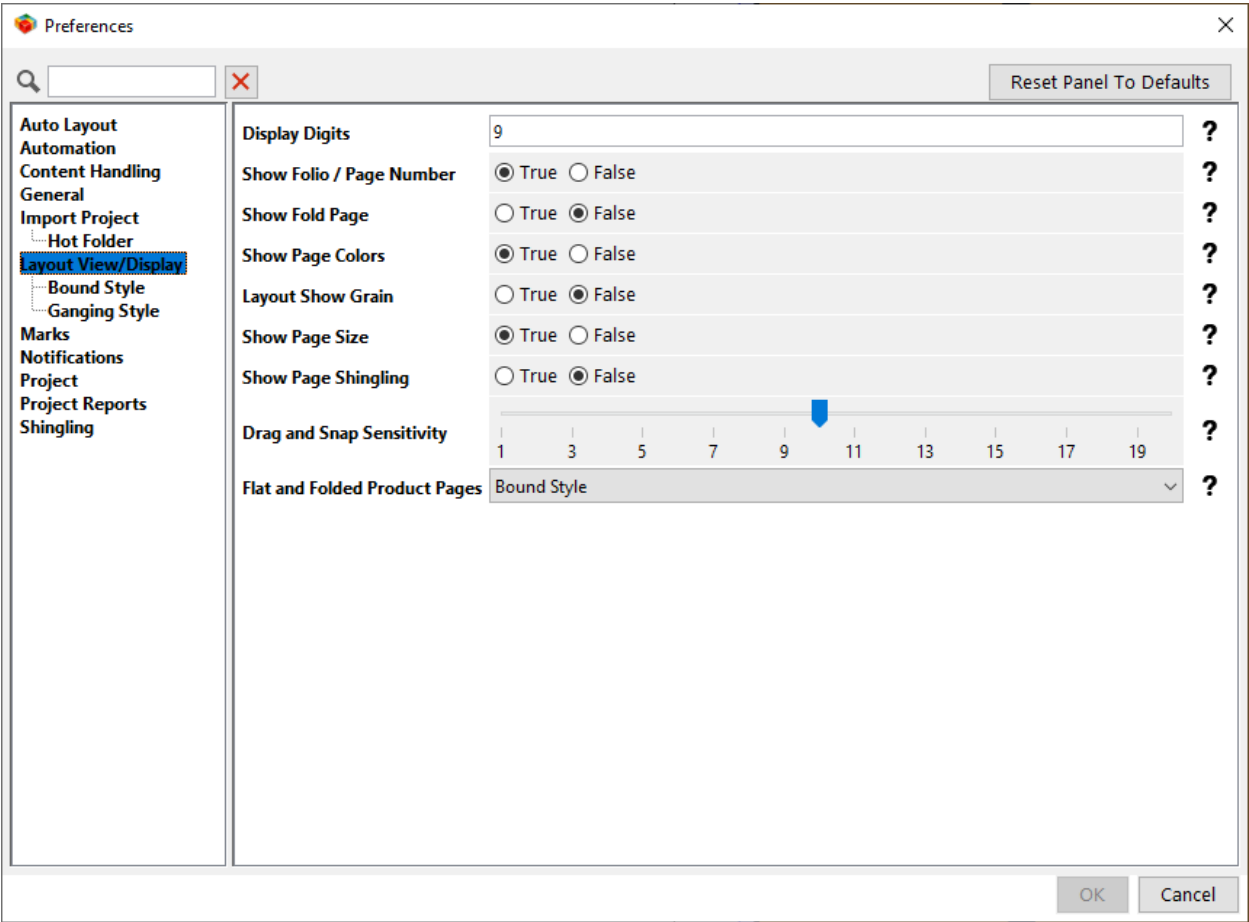
Preference	Explanation

Hot Folder	The name and location of the Hot Folder for imported JDF and MXML projects.
Run Hot Folder	<b>True / False</b> Starts the hot folder when this Metrix client is launched.
Copy to Shared Folder	The name and location of the shared working folder for imported JDF and MXML projects. When a JDF or MXML project is imported via hot folder, the network hot folder location may only be available temporarily, so Metrix copies the incoming JDF or MXML to the shared folder. Mostly used in a complete JDF environment – that is, where Metrix projects are imported as JDF and are then exported as Complete JDF to the prepress system.

**Notes** The hot folder should be accessible to MIS and Metrix operators. The shared folder is where Metrix copies the incoming JDF.  
Both folders are in the Program Data folder on Windows.

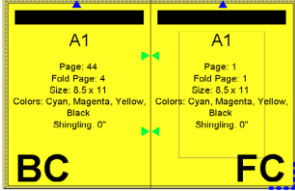
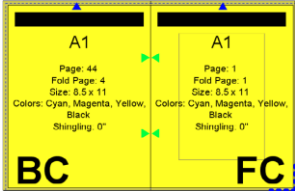
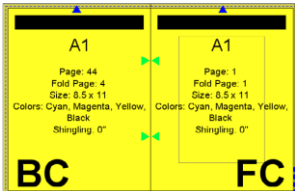
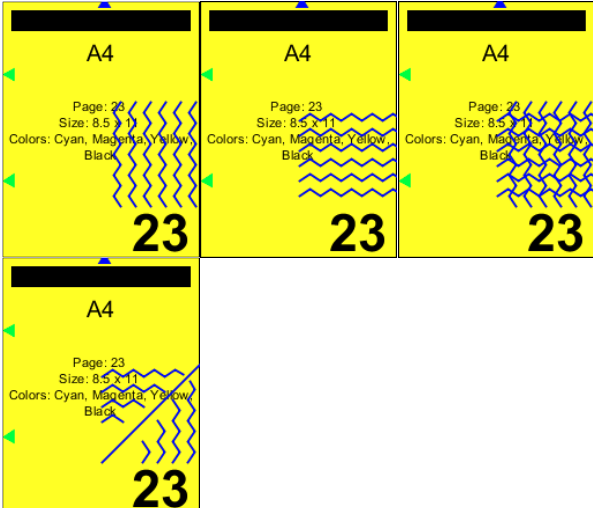
## Layout View/Display Preferences

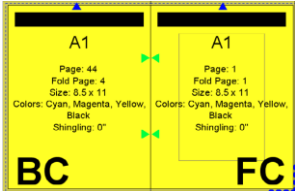
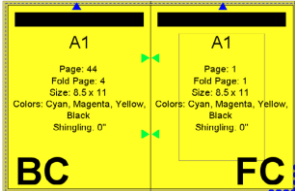
- To view the Layout View preferences, select **Settings > User Preferences...** and then click **Layout View/Display**.



Layout View/Display Preferences

Preference	Explanation
<hr/>	

Display Digits	Sets the number of digits displayed after the decimal point.
Show Folio / Page Number	<p><b>True / False</b></p> <p>When you select Folio as the Bold Page ID, the Page Number is displayed. When you select Page Number as the Bold Page ID, the Folio is displayed.</p> 
Show Fold Page	<p><b>True / False</b></p> <p>Displays the fold page number.</p> 
Show Page Colors	<p><b>True / False</b></p> <p>Displays the page colors (inks).</p> 
Layout Show Grain	<p><b>True / False</b></p> <p>Displays the grain direction indicator.</p> <p>Grain can be <b>Vertical</b>, <b>Horizontal</b>, <b>Either</b> (Instances of component can face either direction), or <b>Either-All Same</b> (Instances of component can face either direction, but all instances of the component must face the same direction).</p> 
Show Page Size	<p><b>True / False</b></p> <p>Displays the page size.</p>

	
Show Page Shingling	<p><b>True / False</b></p> <p>Displays the page shingling amount.</p> 
Drag and Snap Sensitivity	<p>A slide bar allows you to adjust the sensitivity for components snapping into place relative to other components on the layout. A sensitivity of 1 requires the closest proximity, while 20 allows the farthest distance. The default of 10 will probably suit most.</p>
Flat and Folded Product Pages	<p><b>Bound Style / Ganging Style</b></p> <p>Set flat and folded (not bound) products to “ganging style” or “bound style” for display in the View Area and project reports <i>Bound products are always displayed as bound style.</i></p>

## Bound Style Preferences

- To view the Bound Style preferences, select **Settings > User Preferences....** and then click **Bound Style**.

Preferences

Reset Panel To Defaults

Auto Layout

Automation

Content Handling

General

Import Project

Hot Folder

Layout View/Display

**Bound Style**

Ganging Style

Marks

Notifications

Project

Project Reports

Shingling

Bold Page ID

Page Number

?

Relative Font Size % - Bold Page ID

20

?

Outline Bold Page ID

☐ True ☒ False

?

Relative Font Size % - Other

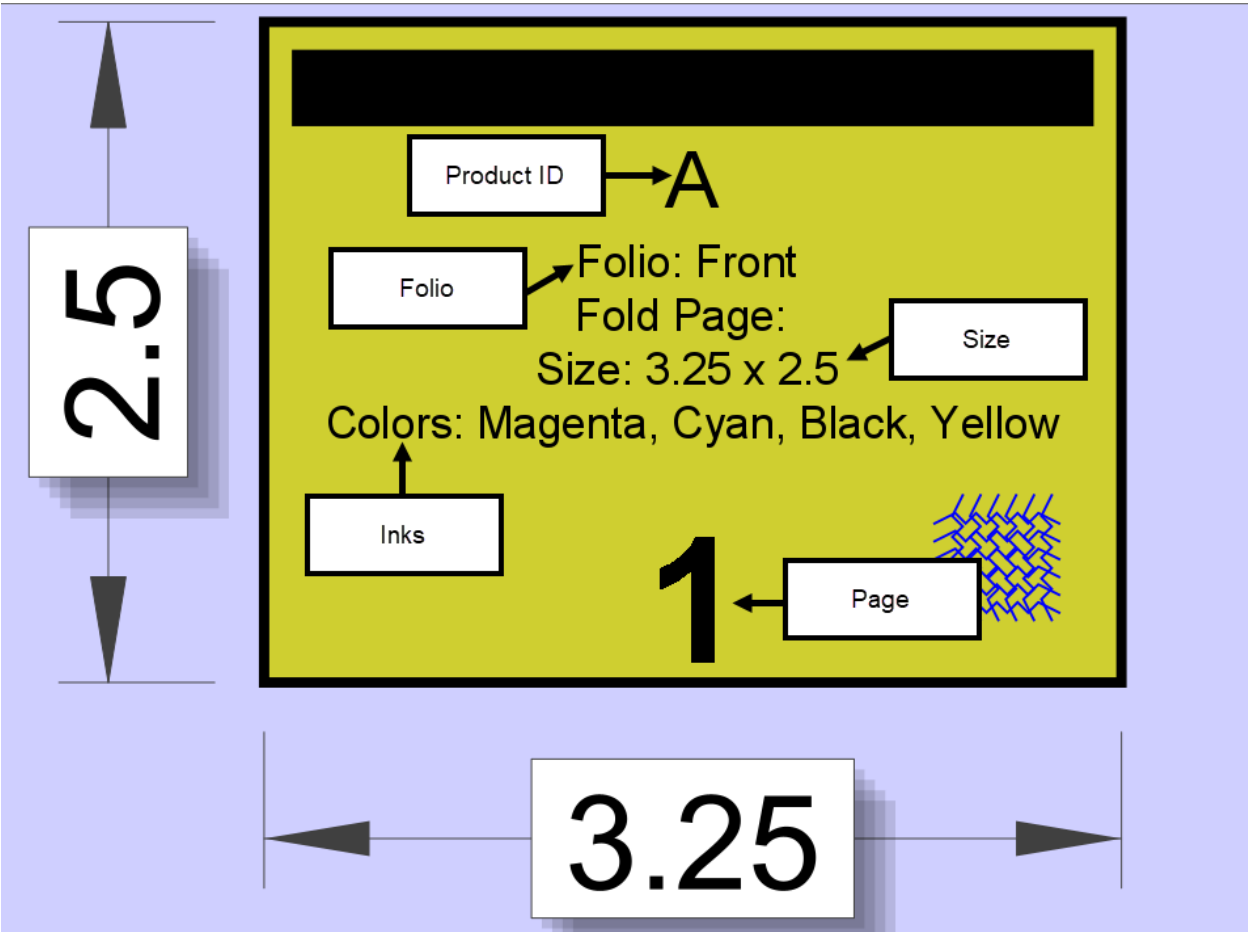
5

?


OK

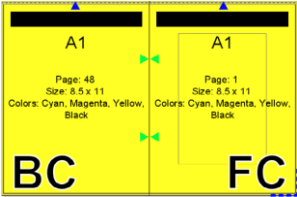
Cancel

Bound style



Bound Style Preferences

Preference	Explanation
Bold Page ID	<p><b>Folio / Page Number</b></p> <p>For bound work, it indicates which page identifier to make larger and bold.</p> 
Relative Font Size % – Bold Page ID	<p>For bound product components, it controls the relative font size for the display of the Bold Page ID. The font size is calculated as a percentage of the smallest page dimension. For example, 20% of 8.5" when the Page Size is 8.5x11".</p> <p><i>When the text won't fit at the selected Font Size percentage, the font size will be reduced so the text will fit.</i></p>
Outline Bold Page ID	<p><b>True / False</b></p> <p>For bound product components, this option creates an outline around the page ID. This can make the page ID easier to read on dark backgrounds.</p>



Relative Font Size % – Other

For bound product components, this controls the relative font size for the display of all other selected properties. The font size is calculated as a percentage of the smallest page dimension. For example, 20% of 8.5" when the Page Size is 8.5x11".

*When the text won't fit at the selected Font Size percentage, the font size will be reduced so the text will fit.*

Ganging Style Preferences

- To view the Ganging Style preferences, select **Settings > User Preferences...** and then click **Ganging Style**.

Preferences

Reset Panel To Defaults

Auto Layout

Automation

Content Handling

General

Import Project

Hot Folder

Layout View/Display

Bound Style

Ganging Style

Marks

Notifications

Project

Project Reports

Shingling

Relative Font Size % - Name

8

?

Outline Name

True

False

?

Relative Font Size % - Other

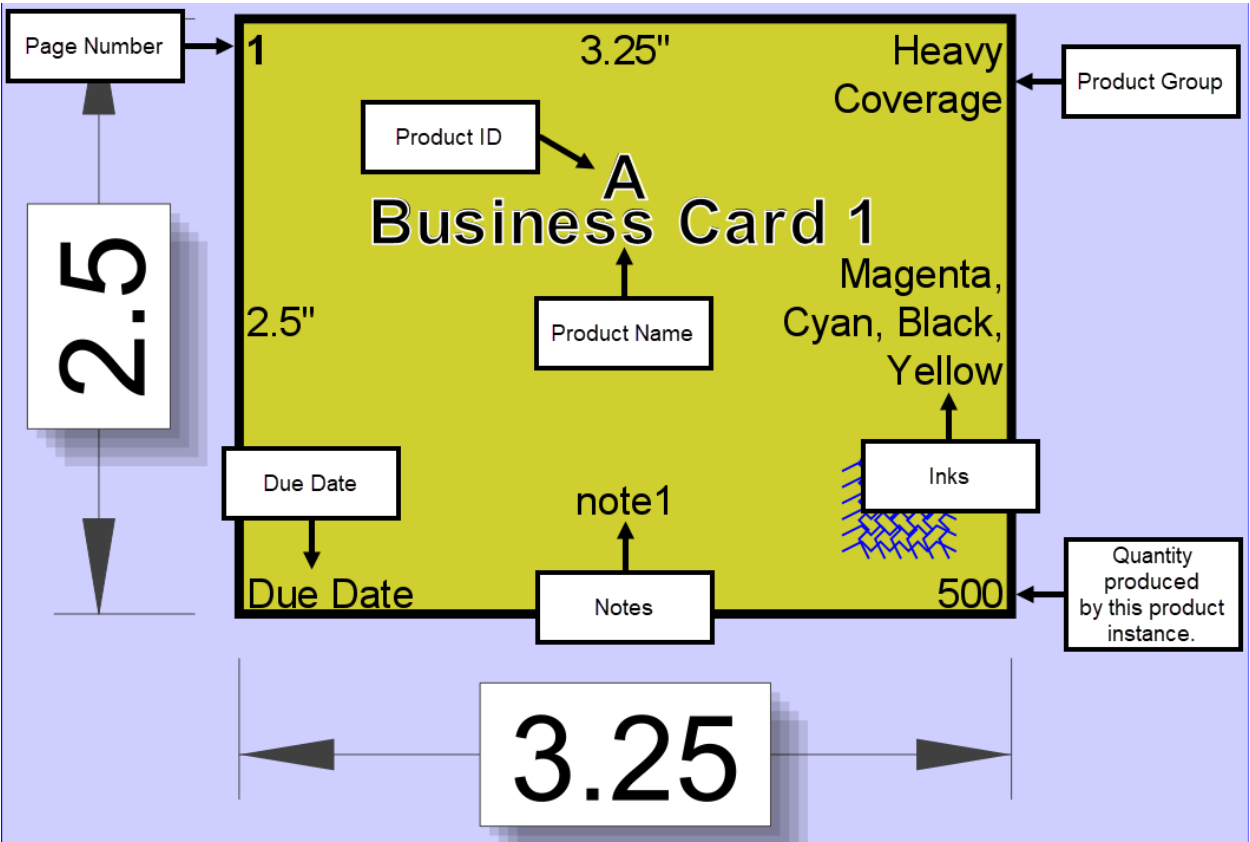
5

?

OK


Cancel

Ganging style



**Note** The above is an example of bound work component with all Page properties set to **True**.

Ganging Style Preferences

Preference	Explanation
Relative Font Size % – Name	<p>When you select ganging style for non-bound products, it controls the relative font size for the display of the product name. The font size is calculated as a percentage of the smallest page dimension. For example, 5% of 8.5" when the page size is 8.5x11".</p> <p><i>When the text won't fit at the selected Font Size percentage, the font size will be reduced so the text will fit.</i></p>
Outline Name	<p><b>True / False</b></p> <p>When you select ganging style for non-bound products, this option creates an outline around the name of the product. This can make the product name easier to read on dark backgrounds.</p> 

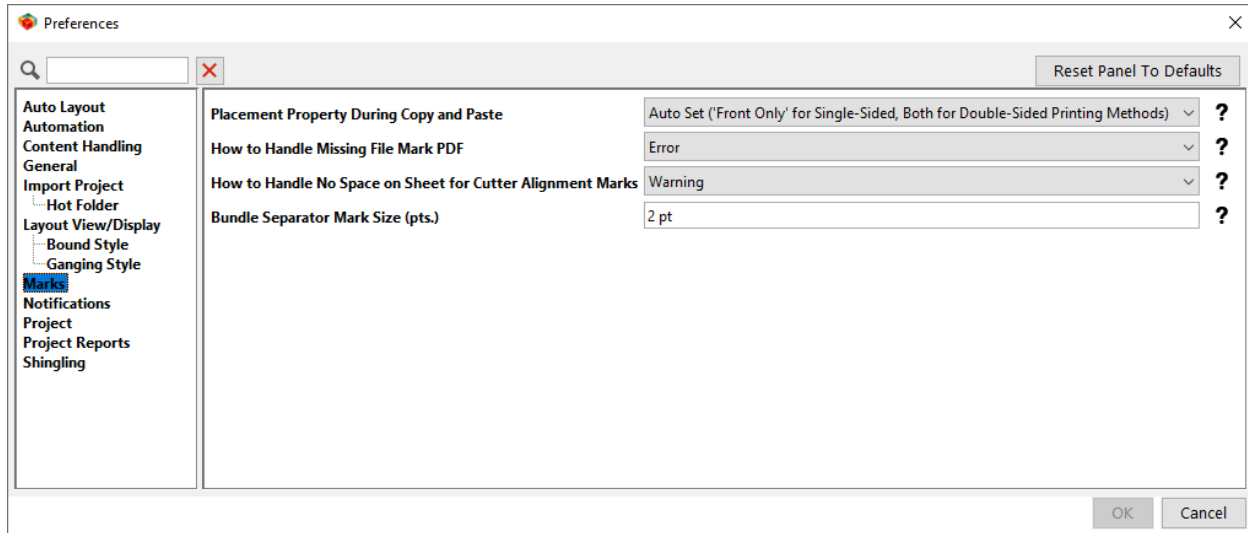
### Relative Font Size % – Other

When you select ganging style for non-bound products, it controls the relative font size for the display of all other active properties. The font size is calculated as a percentage of the smallest page dimension. For example, 5% of 8.5" when the Page Size is 8.5x11".

*When the text won't fit at the selected Font Size percentage, the font size will be reduced so the text will fit.*

## Marks Preferences

- To view the Marks preferences, select **Settings > User Preferences...** and then click **Marks**.



The Marks user preference allows you to choose whether marks sets will be:

- Automatically applied to one or both sides of single-sided or double-sided layouts (respectively)
- Left as set originally, or
- If you should be prompted for a selection when necessary, and
- What to do with missing file mark PDFs

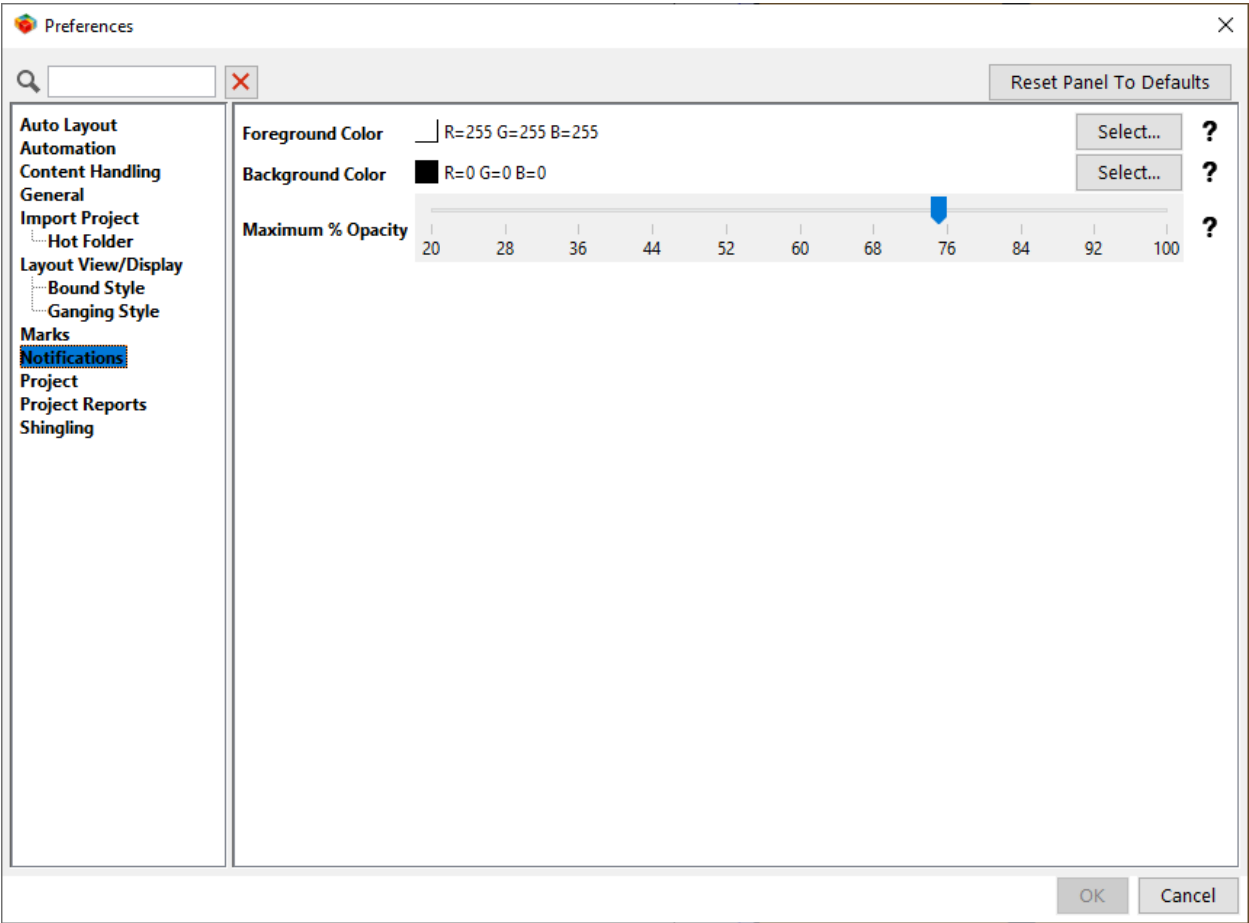
### Marks Preferences

Preference	Explanation
Placement Property During Copy and Paste	<p><b>Auto Set ('Front Only' for Single-Sided, Both for Double-Sided Printing Methods) / Leave As Original / Prompt Whenever Relevant</b></p> <p>This determines the placement settings for marks that are copied and pasted.</p>
How to Handle Missing File Mark PDF	<p><b>Error / Warning / Ignore</b></p> <p>If you select <b>Error</b>, the result depends on the current user role permissions.</p> <ul style="list-style-type: none"> <li>If your role has permission to export with errors, a warning message appears stating, "One or more products or layouts has an error. Exporting is not recommended. Continue to export?"</li> <li>If your user role does not have permission to export with errors, an error message appears stating, "This action is not authorized for your role. User: (username) Role: (user role) One or more products or layouts has an error. Exporting PDF Imposition is not permitted."</li> </ul>


	<p>If you select <b>Warning</b>, the warning message appears regardless of the current user role permissions.</p> <p>If you select <b>Ignore</b>, no messages appear and the project is exported.</p> <p><b>Note:</b> For more information, see <a href="#">Exporting with errors</a>.</p>
How to Handle No Space on Sheet for Cutter Alignment Marks	<p><b>Error/ Warning/ Ignore</b></p> <p>Choose how Metrix will respond if you use <b>Auto Layout</b> and there is no space on the sheet for cutter alignment marks. You can display an error message, a warning message, or ignore the setup and create a layout without a message appearing first.</p>
Bundle Separator Mark Size	<p>The thickness in points of the mark that separates different bundles that appear on the same sheet.</p>


Notifications Preferences

- To view the Notifications preference, select **Settings > User Preferences....** and then click **Notifications**.



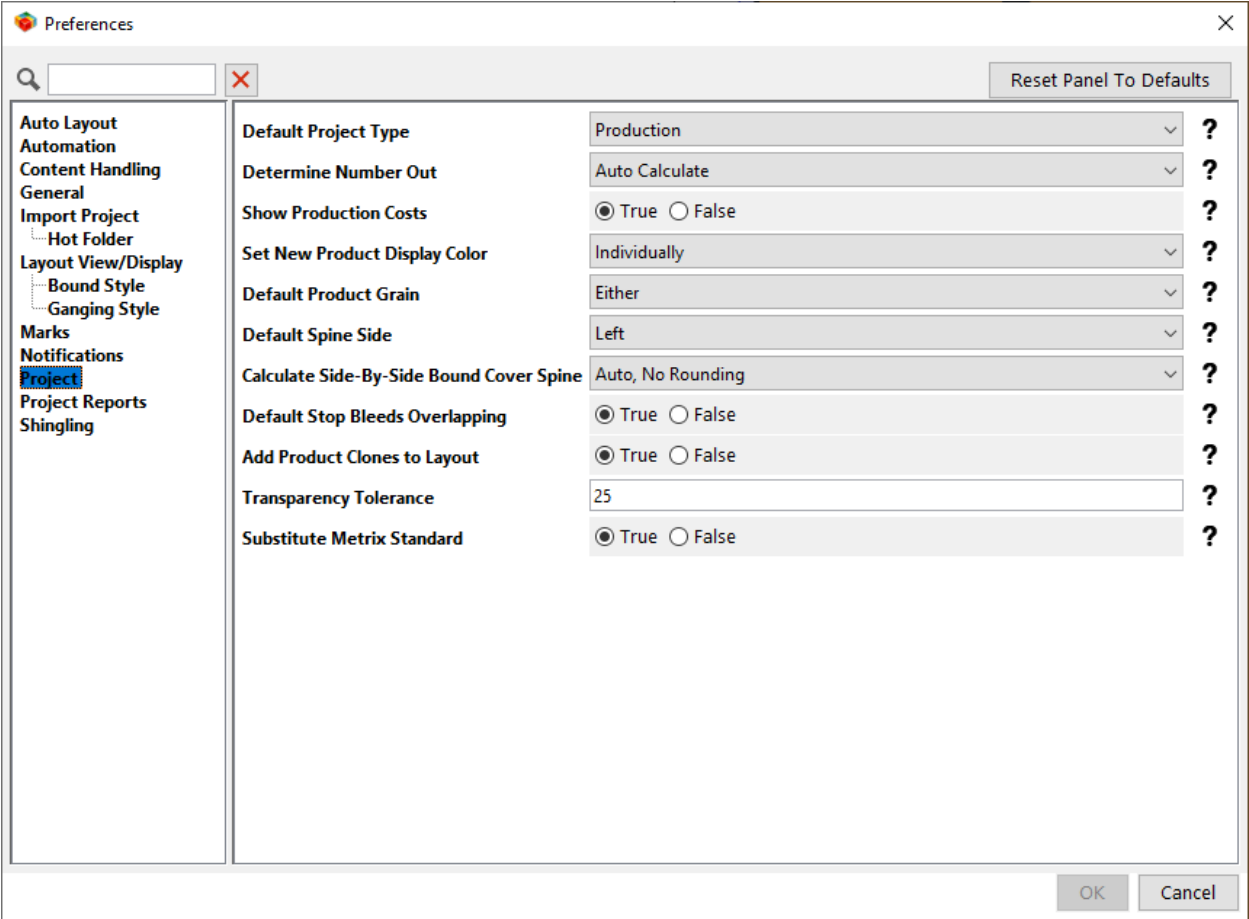
Notifications Preferences

Preference	Explanation
Foreground Color	Clicking  allows you to change the foreground color (color of the text) in non-modal notification boxes. The default is set for white text. Here is an example.

	<div>This is a test notification message. Foreground Color: R=255 G=255 B=255 Background Color: R=0 G=0 B=0 Maximum Opacity: 75%</div>
Background Color	<p>Clicking  allows you to change the background color (color of the box) in non-modal notification boxes. The default is set for black. Here are examples of the default, and a box with the background set for red.</p> <div>This is a test notification message. Foreground Color: R=255 G=255 B=255 Background Color: R=0 G=0 B=0 Maximum Opacity: 75%</div> <div>This is a test notification message. Foreground Color: R=255 G=255 B=255 Background Color: R=255 G=0 B=51 Maximum Opacity: 75%</div>
Maximum % Opacity	Controls how much of the Metrix interface will show through the notification box. Lower opacity=more showing through. Higher opacity=less showing through. The opacity of the box will also influence how easily the text can be read. A sample will be displayed each time you change a setting.

Project Preferences

- To view your Project preferences, select **Settings > User Preferences....**and then click **Project**.



Project Preferences

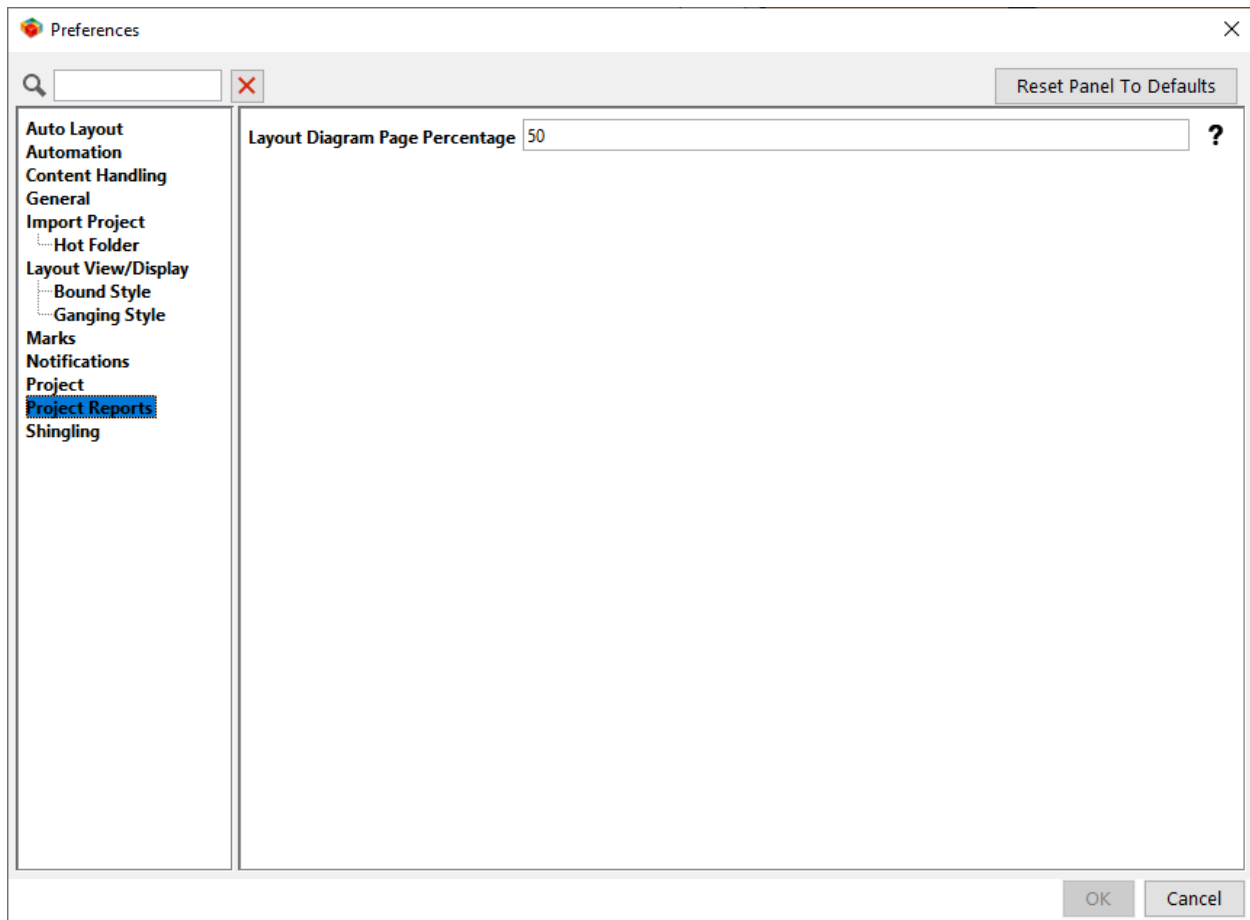
Preference	Explanation
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Default Project Type	<p><b>Production/ Estimate / Template</b></p> <p>The default project type for all new projects. The project type is a tag only.</p> <p><i>You can override this default at the project level.</i></p>
Determine Number Out	<p><b>Auto Calculate / User Define</b></p> <p>The default method for determining the number of product instances placed onto the layout.</p> <p><i>You can override this default at the project level.</i></p>
Show Production Costs	<p><b>True / False</b></p> <p>Displays the layout cost and production time calculated by Metrix, based on the cost-associated properties of the selected press and stock/sheet size.</p>
Set New Product Display Color	<p><b>Individually / By Product Group</b></p> <p>When you add new products to a Metrix project where product groups are used, you can set the display color as unique for each product or unique for each product group.</p> <p><i>You can override this default by selecting <b>Project &gt; Set All Product Display Colors</b>.</i></p>
Default Product Grain	<p><b>Horizontal / Vertical / Either / Either-All Same</b></p> <p>Allows you to set the default grain direction for new products.</p>
Default Spine Side	<p><b>Left / Right</b></p> <p>The default spine side for new products.</p> <p><i>You can override this default at the project level.</i></p>
Calculate Side-by-Side Bound Cover Spine	<p><b>Manual</b></p> <p>No automatic calculation of side-by-side (perfect bound) cover spine – the spine amount will be entered manually for each product.</p> <p><i>You can override this default.</i></p> <p><b>Auto, No Rounding</b></p> <p>The spine amount for side-by-side covers is calculated automatically, without any rounding.</p> <p><i>You can override this default.</i></p> <p><b>Auto, Round Up to Next: 0.5 mm or 0.03125"</b></p> <p>The spine amount for side-by-side covers is calculated automatically, rounding up to the nearest 0.5 mm or 0.03125".</p> <p><i>You can override this default.</i></p> <p><b>Auto, Round to Nearest: 0.5mm or 0.03125"</b></p> <p>The spine amount for side-by-side covers is calculated automatically, rounding up or down to the nearest 0.5 mm or 0.03215".</p> <p><b>Auto, Round Up to Next: 1 mm or 0.0625"</b></p> <p>The spine amount for side-by-side covers is calculated automatically, rounding up to the nearest 1 mm or 0.0625".</p> <p><i>You can override this default.</i></p> <p><b>Auto, Round to Nearest: 1 mm or 0.0625"</b></p> <p>The spine amount for side-by-side covers is calculated automatically, rounding up or down to the nearest 1 mm or 0.0625".</p> <p><i>You can override this default.</i></p>
Default Stop Bleeds Overlapping	<p><b>True / False</b></p> <p>Allows you to stop bleeds from overlapping (<b>True</b>) or not (<b>False</b>) as a default for Metrix projects. The selected default is applied to all new projects.</p>
Add Product Clones to Layout	<p><b>True / False</b></p>

	This setting lets you choose whether or not clones of a product assigned to a layout will be placed on the existing layout. The default setting is <b>True</b> . Set to <b>False</b> if you do not want clones of a product to be assigned to a layout.
Transparency Tolerance	The Transparency Tolerance is used in conjunction with the transparent color of a thumbnail Image, a low-resolution JPG, PNG, or GIF used to assist in the nesting of irregularly shaped objects. This preference is the default range of red, green, and blue (RGB) values, either side of the selected transparent color's values, to be rendered transparent for the thumbnail image. Pure white pixel values are R=255, G=255, B=255, but the thumbnail image background may not be pure white. With a tolerance of $\pm 20$ , all pixels within the following range are rendered transparent: R=215-255, G=215-255, B=215-255. <i>You can override this default at the product page level.</i>
Substitute Metrix Standard	<b>True / False</b> Automatically applies matching Metrix standards to new layouts. Applicable to imported projects as well as those generated within Metrix.

## Project Reports Preference

- To view the Project Reports preference, select **Settings > User Preferences...** and then click **Project Reports**.



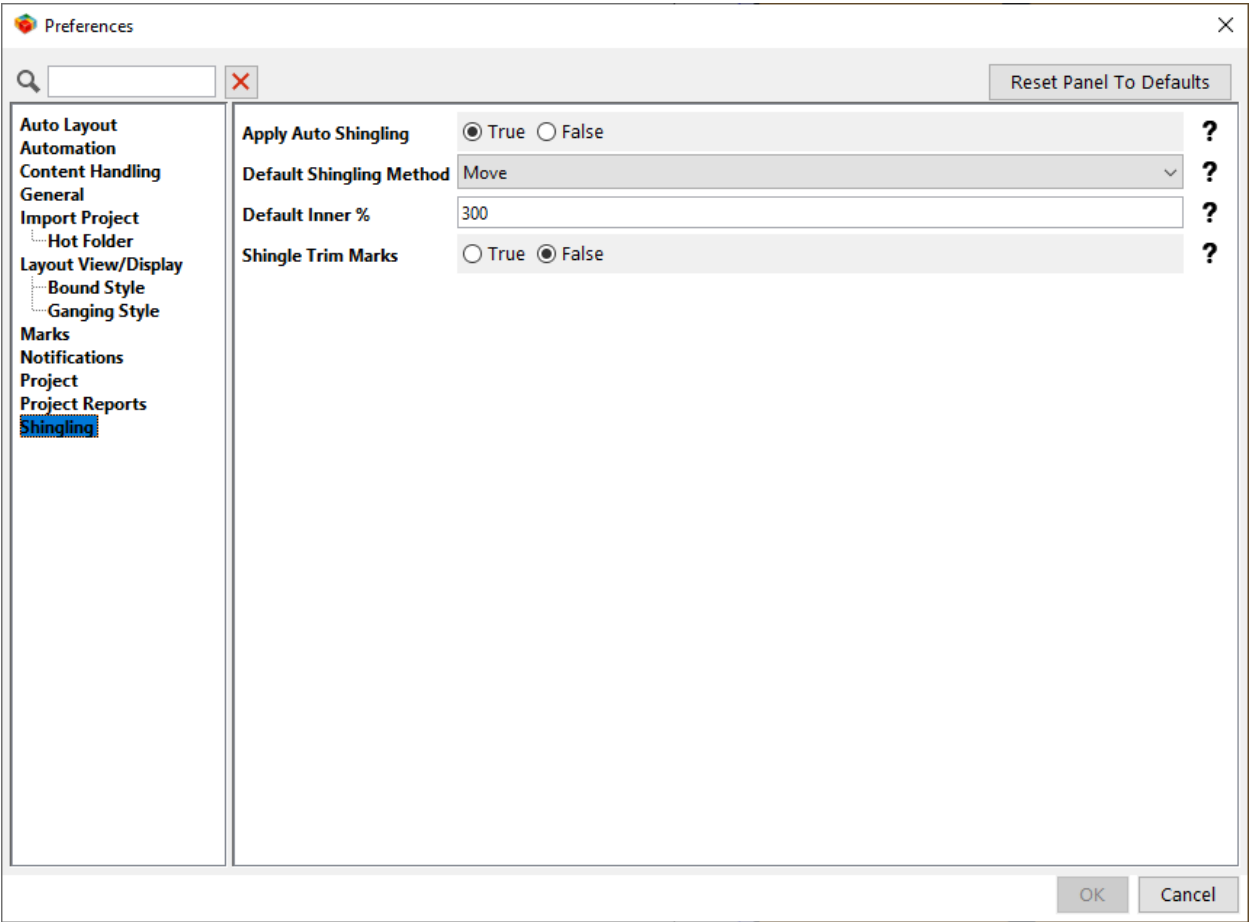
**Project Reports Preferences**

Preference	Explanation
Layout Diagram Page Percentage	This determines what percentage of the page the layout diagrams use when printing project reports.

**Note** Selecting a percentage on the slider bar changes the size of the diagram on the report page. For example, if the slider bar is set for 50%, Metrix sizes the diagram to 50% of the report page. If there is not enough room for the diagram on the page, together with the other elements on the page, Metrix moves the diagram to the next page.

## Shingling Preferences

- To view the Shingling preferences, select **Settings > User Preferences...** and then click **Shingling**.



### Shingling Preferences

Preference	Explanation
Apply Auto Shingling	<b>True / False</b> Automatically applies shingling to each set of 4 pages based on the Inner % specified, the set's placement relative to the spine, the total number of 4-page sets, and the stock thickness(es) used. This preference is a default only and can be overridden for specific products by selecting the Product node and changing the Shingling property. <b>Note</b> Metrix applies shingling (automatic and/or manual) to the following Export formats: —Imposed PDF

	<p>—JDF Imposition</p> <p>—Complete JDF</p>
Default Shingling Method	<p><b>Move / Scale</b></p> <p>Metrix shingles the pages either by moving them, or by scaling them.</p>
Default Inner %	<p><b>0 – 300</b></p> <p>The default percentage of the total calculated shingling amount to be applied to the center (inner) 4-page set of the product. For more information, see <a href="#">Shingling Calculations – Inner %</a>. These are defaults <i>only</i>. You can change shingling values on a Product or Page level.</p>
Shingle Trim Marks	<p><b>True / False</b></p> <p>Trim marks either move with the shingled pages (<b>True</b>) or they do not move (<b>False</b>).</p>

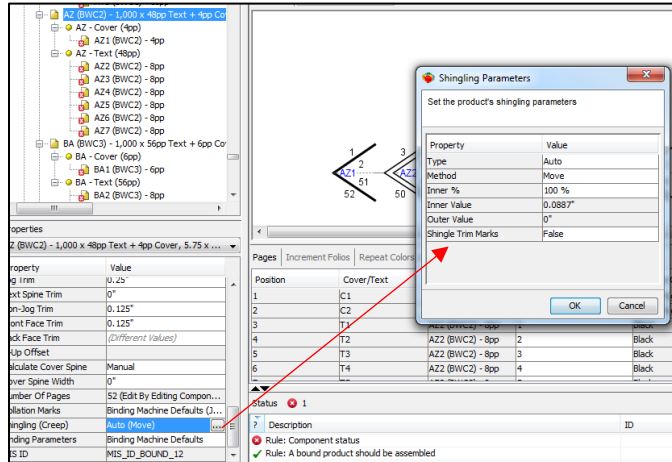
## Shingling calculations – Inner %

**Note** Metrix applies the default shingling parameters in the User Preferences window to all new projects. You can use the Shingling (Creep) property in the Properties Editor to change the parameters in an open project (as in the following examples).

A few examples will illustrate how the Inner % value of Metrix shingling works.

### Example 1: 100% inner

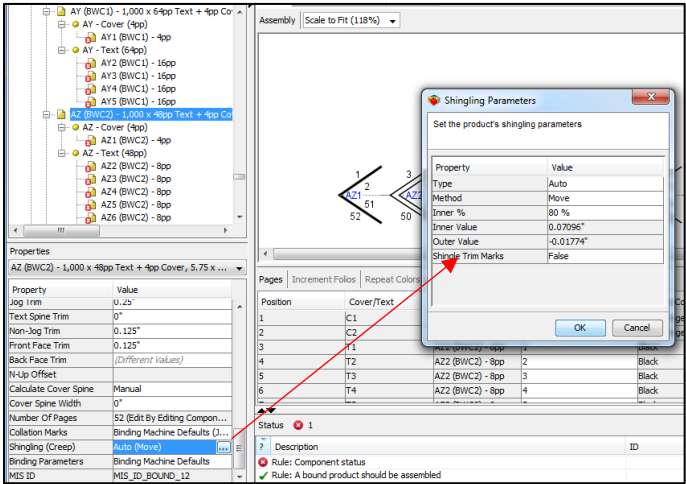
We have inserted 100% of the total shingling amount calculated for this product (.061") on the innermost pages, feathering out to 0" for the outermost pages.



### Example 2: 80% inner

We have inserted +80% of the total shingling amount calculated for this product (.0488") on the innermost pages, feathering out to -20% (-.0122) for the outermost pages.

**Note** We are changing these settings in an open project using the Shingling (Creep) property in the Properties Editor. If you want these parameters to apply to all new projects, you can set them in the User Preferences window (Settings menu).



## Database

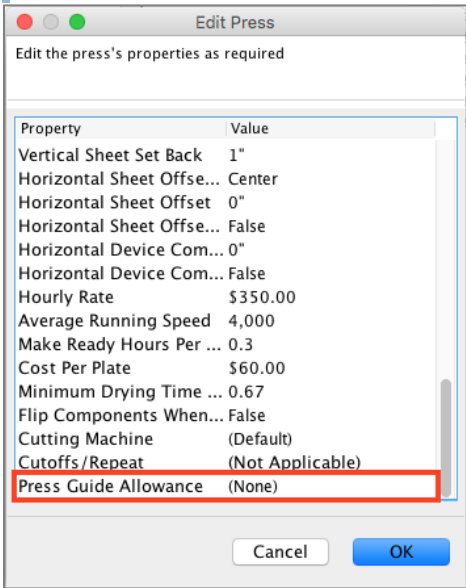
# Press Properties and Gutters



**Note** Press guide allowance refers to the functionality previously called vertical press gutters. The press guide allowance refers to the press wheel allowance, which is a reserved area on the sheet. Metrix 22.1 contains enhancements to handling press guide allowances, including the ability to configure gutters directly in the Database window.

## Setting up gutters

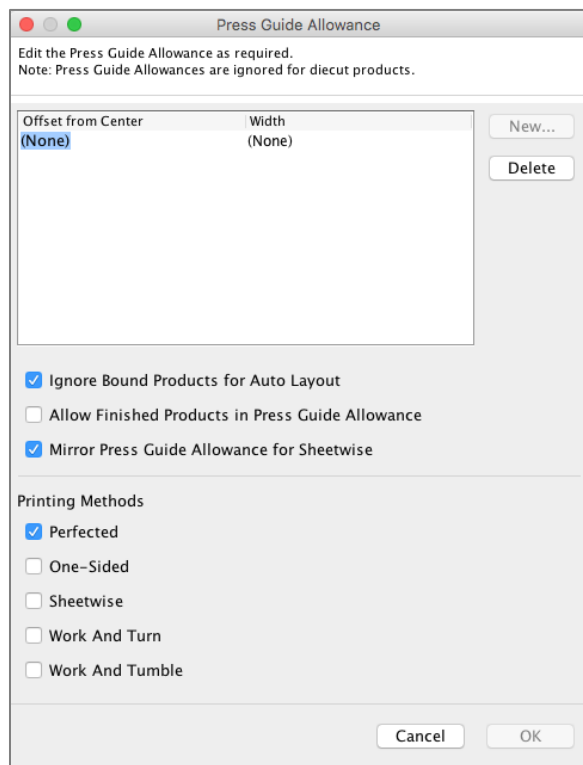
- Note** The maximum number of press guide allowances for each press is 5.
1. Select **Equipment > Presses** and either select the existing press you want to edit or create a new press.

**Note** The image below shows the Edit Press window.



2. Scroll down to **Press Guide Allowance** and click .
- Note**  is at the right edge of the field. The button does not appear until you click on it.
3. On the **Press Guide Allowance** screen, click **New** and choose the appropriate value to **Offset from Center**.

**Note** The **Offset from Center** value determines the position of the gutters. Entering a negative number places the center of the gutter that distance to the left of the center of the sheet; a positive number places the center of the gutter that distance to the right of the center of the sheet. Entering **0** places the gutter in the center of the sheet.



4. Enter the width of the press guide allowance in the **Width** column.
5. Select other press guide allowance options:
  - **Ignore Bound Products for Auto Layout:** Select this option if you want Metrix to ignore press guide allowances for layouts that contain bound products.
  - **Allow Finished Products in Press Guide Allowance:** Select this option if you want to allow non-ink areas (e.g., areas with negative bleeds) to intrude into the press guide allowances.
  - **Mirror Press Guide Allowance for Sheetwise:** Select this option when you are printing with a Sheetwise printing method with just one pass through the press, using the same lead edge.
  - **Printing Methods:** Select the appropriate printing method(s):
    - Perfected
    - One-sided
    - Sheetwise
    - Work And Turn
    - Work And Tumble
6. When you are finished configuring the press guide allowances, click **OK** to exit the Gutters window.
7. Click **OK** again to exit the Edit Press window.

**Notes** To see the specifications for the press guide allowances you created, scroll horizontally across the Database screen.

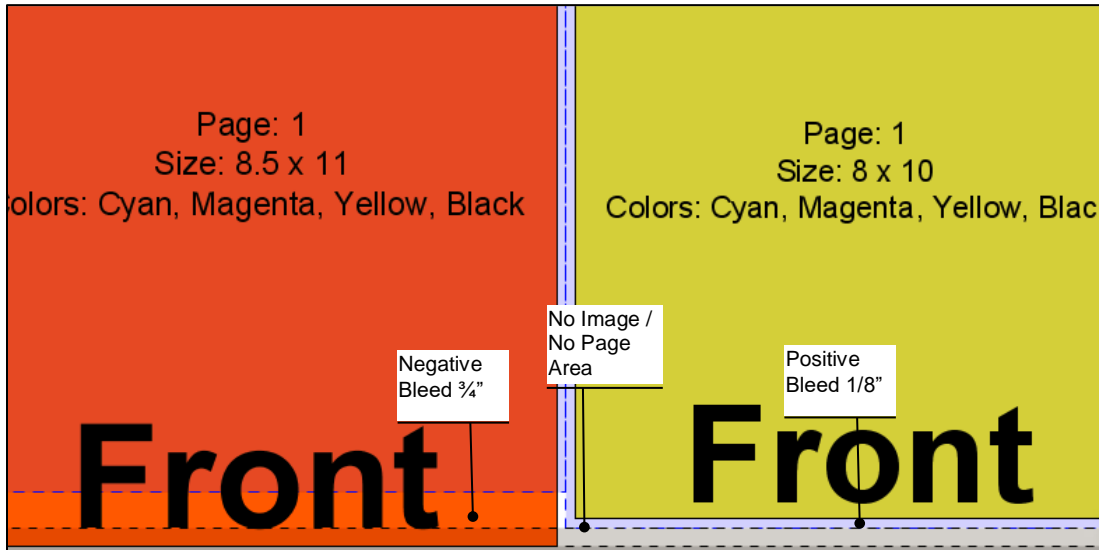
For more information about setting up presses, see the *Setup Guide*.

## Grip Edge rules

Each press in the Metrix database has properties for no image and no page areas. These areas are considered when Metrix calculates a layout.



- **No Image:** Metrix will not place any image into this area, but Negative Bleed area is allowed. The no image areas are measured from the edge of the sheet inward.
- **No Page:** Metrix will not allow any product trim into this area but will allow product bleed. The no page areas are measured from the edge of the sheet inward.

#### Example



## Using Custom Sheet Sizes

If you assign products to a layout, using **Assign Component(s) to Layout...** from the Project menu, and the stocks for the products and layout do not match, a warning window informs you which layouts match the product stock, and which do not. But Metrix will still allow you to assign those products to the mismatched layout.

If you then want to assign the same stock to the layout as the products, the sheet size of the current stock may not exist for the stock you are attempting to assign to the layout. If this is the case, you will see a warning icon  or  to the right of the name of the stock in the Stock Selector window.

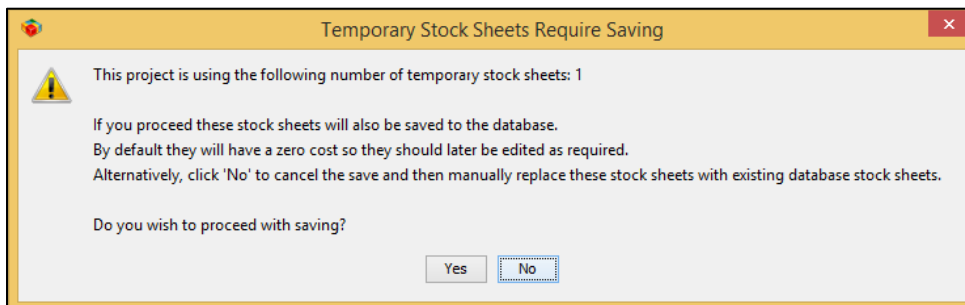
If you click **OK** and continue to change the stock, the Properties Editor will now display the above warning icons for the stock and sheet size you have selected.

**Note** The Status area warns “A temporary stock sheet is in use and will require saving before exporting.”

When you click **Save** to save the project, Metrix displays the window below, giving you the opportunity to cancel the action, or proceed with saving the temporary stock sheet.

**Note** The window states “By default they will have a zero cost so they should later be edited as required.”

When you click **Yes**, the warnings in the Properties Editor and Status area will be resolved.

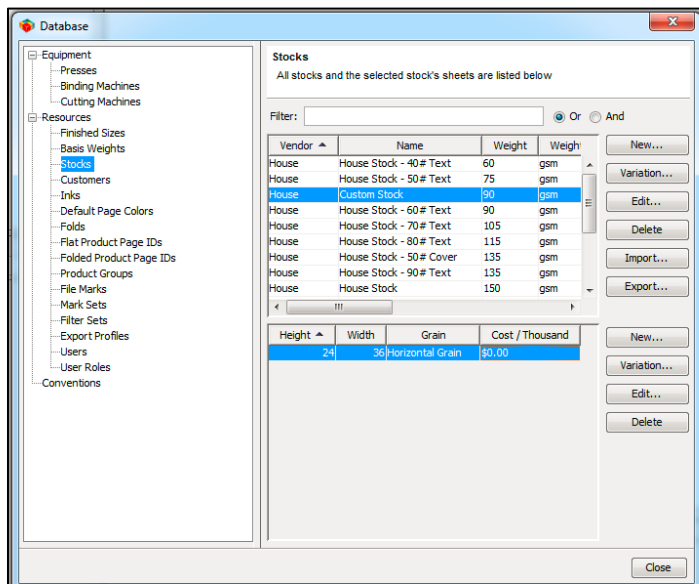


Though you could proceed to export the project at this point, the recommendation is to follow these steps.

1. Close the project.

2. Open the Database (**Settings** menu).
3. Select **Stocks**.
4. Then, select the stock with the custom sheet size, and change the **Cost / Thousand** option.

**Note** If you do not adjust the cost for this new sheet size, any calculations Metrix performs using this sheet size will be inaccurate.



## Setting Up Grainless Stocks

Metrix 22.1 supports for stocks or substrates that have no grain. When products are planned on stock that has no grain, they are planned the same as when **Either** is selected.

### *To set up and use stocks with no grain*

1. Select **Database > Stocks**.
2. Click **New** in the upper portion of the window to create a new stock.
3. From the **No Grain** menu, select **True**.

**Note** In the New Product wizard, the Stock window now appears before the Grain screen. When you select a stock with no grain, **Either** is selected by default on the Stock Grain window and all other grain options are disabled. Grain is also uneditable in the Product Properties.

## Using Optional Modules

## The Auto Plan Module

- The Auto Plan module is optional for Metrix.
- Auto Plan automatically and dynamically determines how many layouts are required for the products in the project – flat products, folded products, bound products, and die-cut products.
- Plans and simultaneously imposes across multiple press sheets and even multiple presses.
- Auto Plan does not take product inks into consideration – products must be pre-sorted to ensure layouts contain only common ink sets (Page Colors).
- Uses real costing data from the Metrix database.
- Applies standards where appropriate.
- Uses proprietary and sophisticated algorithms to consider dozens, hundreds, or even thousands of options to find the most cost-effective project solution.

### What does Auto Plan do?

- Auto Plan analyzes all the products in your project and generates the layouts based on the lowest production cost and most efficient use of press time.
- Auto Plan makes this calculation based on the cost and time entries in the Metrix database for the selected Press and Stock. These entries are explained in the *MetrixSetup Guide*.
- The Auto Plan engine considers the selected Algorithm, type of press (digital or offset), make-ready time, number of plates, and passes through the press and so considers the inks (the Page Colors) of product pages (but not marks) when making its cost calculations. Thus, it is very important to correctly identify the product page colors, since this will significantly impact the solutions generated by Auto Plan, from a cost perspective. Auto Plan does not consider inks when determining which products go on which layouts – so products must be pre-sorted for common inks.
- Auto Plan can generate all the layouts for one press and sheet size or can divide the work between two different presses and/or sheet sizes.
- The layouts generated by Auto Plan are fully editable.
- You can apply standards automatically to Auto Plan layouts, or you can apply them manually after the layouts are created. For more information, see [Saving, Applying, and Updating Metrix Standards](#).

### Creating an Auto Plan project

There is no difference between creating an auto plan project and any other, except that you don't have to create the layouts and assign the products to them.

You can create an auto plan project and populate it with products in any of the following ways:

- Create a new Metrix project and add/clone the products you want to plan.
- Create a new Metrix project and import JDF, MXML, or CSV products.
- Import a JDF or MXML project that contains the products you want to plan.

Keep in mind these constraints:

- Auto Plan generates the layouts for one stock at a time. Though you could theoretically have a project containing many different stocks, it may be more efficient to pre-sort the products so each Auto Plan project contains a few stocks. After you experiment, you will find the best method for your specific production needs.
- Auto Plan can generate all the layouts for one press and sheet size or can divide the work between two different presses and/or sheet sizes. Metrix tracks both cost and parallel printing time and allows you to sort the results by either.
- Auto Plan uses the ink colors to calculate cost. However, it does not sort products according to colors used. Therefore, all the products in your project should be limited to the number of colors your press or presses can handle and share the color combinations being planned for.

- Metrix configured with the optional Capacity Plus module allows up to 2000 products per project, and up to 200 different products per layout.

## Using Auto Plan

### To run an auto plan

1. Select products from the Project Explorer.
2. Click **Auto Plan** to open the Auto Plan window and begin the planning process.

The Auto Plan window is divided into five sections, each containing customizable preferences. Many of these sections can be opened and closed by clicking the heading. The customizable preferences can be configured through drop-down list, check-boxes, radio buttons, or number fields. The five sections include:

- **Main:** This section contains the primary preferences for Auto Plan. These preferences are **Stock**, **Components**, and **Algorithm**.

**Notes** You sort the **Components** field by **All**, **Selected**, **Tagged**, or **Filtered**. Metrix then tells you which components meet those criteria. This gives you precise control over which components it will add to layouts in the auto plan run.

You need to run the **Auto Plan** feature once for each stock in the project.

You can only select the **Same Size** option for **Algorithm** when the product size, bleed, and offcut are the same. **Same Size** then becomes available as a preference in the **Algorithm** drop-down list. Using this option can greatly increase the speed of calculations. Otherwise, the only preferences are **Automatic**, **Classic**, **Media Optimization**, and **Display Graphics**.

The **Media Optimization** algorithm is designed to address customer concerns about inefficient use of expensive substrate media. This algorithm works well with offset or digital presses, and it is best suited for projects that contain 8 or fewer different products. **Media Optimization** places each component on only one layout, but unlike the **Same Size** or **Classic** algorithms, **Media Optimization** provides better results by using more complex product combinations to find the best optimization.

The **Display Graphics** algorithm is designed specifically for digital presses with expensive substrate media. This complex algorithm produces a dense imposition layout which helps to minimize media waste. **Display Graphics** may impose a component on multiple layouts, which can result in a greater number of layouts, but reduces calculation time by employing all CPU cores.

For more information on the **Media Optimization** and **Display Graphics** algorithms, please see [EFI Metrix Tech Note-Media Optimization and Display Graphics](#).

The **Automatic** algorithm will assign the **Digital Graphics** algorithm when any digital press is selected in one of the **Press** fields. If you select a specific algorithm from the **Algorithm** drop-down list, then Metrix will use that algorithm for both presses. For more information on how the **Automatic** algorithm makes a selection, please see [EFI Metrix Tech Note-Auto Plan Dialog and "Automatic" Algorithm Selections](#).

Metrix will not include any digital cutting machines in the **Cutting Machine** lists that cannot accommodate the selected **Stock**, because digital cutting machines have minimum and maximum stock thickness parameters. If the selected stock is not supported by the digital cutting machine, the default cutting machine will be selected; if the default cutting machine is not compatible, then **(None)** will be selected.

- **Production 1:** This section contains the preferences available for press one.
- **Production 2:** This section contains the preferences available for press two.
- **Settings:** This section contains the secondary preferences for Auto Plan.
- **Overrides:** This section contains settings from the **User Preferences** that you can override for the current Auto Plan event. The override is temporary, so to make the changes permanent you need to update the appropriate preferences in the Preferences window.

**Auto Plan** [X]

**Stock:** House Stock - 100# Text 150gsm

**Components:** All (1)

**Algorithm:** Automatic = Media Optimization(1)

▼ Production 1

**Press:** Speedmaster 102

**Cutting Machine:** (None)

**Printing Method:** Sheetwise

**Sheet:** 40 x 28", Horizontal [28 x 40", Long]

**Page to Bleed Gap:** 0.125" ☐ Auto

▼ Production 2

**Press:** (None)

**Cutting Machine:** (None)

**Printing Method:** Sheetwise

**Sheet:** No Suitable Sheets In The Database

**Page to Bleed Gap:** 0.125" ☐ Auto

▼ Settings

**Apply Standards:** ☒

**Use Die-cutting Tool Geometry:** ☐

**Area to Start Tests (%):** 80

**Each Time Out (seconds):** 1

**Total Time Out (minutes):** 60

▼ Overrides

**Blocks Algorithm:** ☒

**Bundling:** ☐

**Bundles Start on New Sheet:** ☐ ☐ Separator Marks **Spacing:** 0

**Auto Center Horizontally:** ☒

**Auto Center Vertically:** ☒ False ☐ Center On Sheet ☐ Center In Imageable Area

**Align Outside Cuts:** ☐

**Layout Sort Order:** Highest Cost First

**OK** **Cancel**

3. Set the preferences for **Auto Plan** by following the descriptions in the following table, and then click **OK**.

#### Auto Plan Properties

Property	Explanation
<b>Main</b>	
Stock	The stock to be used for this particular run of Auto Plan.
Components	<b>All / Selected / Tagged / Filtered</b> <b>All</b> = All components in the project that match the selected stock <b>Selected</b> = Only the selected components that match the selected stock <b>Tagged</b> = Only the tagged components that match the selected stock <b>Filtered</b> = Only the components that are filtered in the Component Picker that match the selected stock
Algorithm	<b>Classic / Same Size / Media Optimization / Display Graphics / Automatic</b> The kind of algorithm used in the Auto Plan process. The default selection is <b>Classic</b> . When the product size, bleed, and offcut are the same, <b>Same Size</b> becomes available. <b>Media Optimization</b> and <b>Display Graphics</b> algorithms are designed for digital presses using expensive substrate media. Selecting <b>Automatic</b> allows Metrix to determine which algorithm(s) will create the most cost-effective layouts by considering the types of products, their sizes, and the selected press(es) in the project. Different algorithms may be used for different product types.
<b>Production 1</b>	
Press	List of presses in the Metrix database. Creates layouts for this press.
Cutting Machine	<b>(None) / (Default) / Specific**</b> List of cutting machines in the Metrix database. Choose <b>(None)</b> to calculate no cutting cost. Choose <b>(Default)</b> to calculate cutting cost based on the cutting machine designated as the default for the selected press. Choose a specific cutting machine from the list to calculate costing cost based on that cutting machine.
Printing Method	<b>One-Sided / Sheetwise / Work And Turn / Perfected / Work And Tumble*</b> The printing method to use for Production 1 layouts.
Sheet	Drop-down menu with a list of available sheet sizes in the Metrix database compatible with Press 1. Use this sheet size for Production 1 layouts.
Page To Bleed Gap	Use this value for page to bleed gap for Production 1 layouts.
Auto	Click the check box to use the largest bleed amount to determine the <b>Page to Bleed Gap</b> for all instances on the Production 1 layout.
<b>Production 2</b>	
Press	<b>(None) / (Default)</b> List of presses in the Metrix database Calculate layouts using a second press. The work may be divided between the two presses, or one press may provide a more cost-effective solution. <i>This may be a different press or the same press with different properties selected.</i>
Cutting Machine	<b>(None) / (Default) / Specific**</b>

	<p>List of cutting machines in the Metrix database</p> <p>Calculate layouts using a second cutting machine. The work may be divided between the two cutting machines, or one cutting machine may provide a more cost-effective solution.</p> <p><i>This may be a different cutting machine or the same cutting machine with different properties selected.</i></p>
Printing Method	<p><b>Sheetwise / Work And Turn / Perfected / Work And Tumble*</b></p> <p>Use this printing method for Production 2 layouts.</p>
Sheet	<p>List of sheet sizes in the Metrix database compatible with Press 2.</p> <p>Use this sheet size for Production 2 layouts.</p>
Page to Bleed Gap	<p>Use this value for page to bleed gap for Production 2 layouts.</p>
Auto	<p>Select the check box to use the largest bleed amount to determine the <b>Page to Bleed Gap</b> for all instances on the Production 2 layout.</p>
<b>Settings</b>	
Apply Standards	<p>Select the check box to automatically apply a matching standard if one is found for a layout created.</p>
Use Die-cutting Tool Geometry	<p>Select the check box to use the die-cutting tool geometry. Do not select the check box to use the nesting algorithm for irregular shapes when creating an auto layout using a die-cut product.</p>
Area to Start Tests (%)	<p>The minimum percentage Metrix will fill each sheet before running tests with the Auto Layout engine. Think of this parameter as a “start test threshold.”</p>
Each Time Out (seconds)	<p>The amount of time given to the Metrix Auto Layout engine to find a solution before it times out. When no solution is found, Metrix typically uses the entire amount specified.</p> <p><i>After each failure, Metrix takes one product out of the test set and tries again. Therefore, setting the <b>Area to Start Tests</b> too high will be counter-productive, particularly when <b>Each Time Out</b> is also set to a high number. When you begin working with Auto Plan, we suggest you use the default values for these parameters until you have a better understanding of how to modify them to get the desired results in the shortest amount of time.</i></p>
Total Time Out (minutes)	<p>The total amount of time given to the Metrix Auto Layout engine to find a solution before it times out.</p>
<b>Overrides (used to change some settings for the current Auto Plan event only)</b>	
Blocks Algorithm	<p>Select the check box to enable the blocks algorithm feature, which organizes the layout into blocks of similar size products. Disable the feature to group larger products at the bottom of the sheet. Blocks Algorithm works with Classic and Same Size but has no effect with Media Optimization or Display Graphics.</p>
Bundling	<p>The check box will selected by default if you have configured product bundling for the project. Click the check box to turn off bundling for this Auto Plan event only. You cannot turn on bundling with this override option.</p>
Bundles to Start on New Sheet	<p>Select the check box to make each new bundle populate on a new sheet.</p>
Separator Marks	<p>Select the check box to add separator marks that divide bundles that appear on the same sheet.</p> <p>This preference is not available if you select the <b>Bundles Start on New Sheet</b> check box.</p>

Spacing	The amount of space between product bleeds and the marks. Spacing is measured in the <b>Measurement Units</b> , inches or millimeters, you selected when setting up Metrix.
Auto Center Horizontally	Select the check box to automatically center the entire layout horizontally on the sheet. When this preference is not enabled, you can still center layouts horizontally by the operator as needed.
Auto Center Vertically	<b>False / Center On Sheet / Center In Imageable Area</b> Set to <b>Center On Sheet</b> to center the entire layout vertically on the sheet. Set to <b>Center In Imageable Area</b> to center the entire layout vertically in the imageable area. When this preference is set to <b>False</b> , the layout will be positioned to the bottom of the sheet.
Align Outside Cuts	Select the check box to align the outside (horizontal and vertical) cuts of products on layouts, leaving any extra space in the interior of the layout.
Layout Sort Order	<b>Highest Cost First / Project Component Order / Sheet Area Use / Bundle Order / Finishing Group</b> Choose how the <b>Auto Plan</b> option will sort layouts. You can sort your layouts by the highest cost first, by project component size starting with the largest component, by sheet area use starting with the highest sheet area use, by bundle number starting with the first number, and by Finishing Groups starting with the first alphabetically. This setting affects the order in which the layouts appear in the Layout Editor.

**\*Note** When planning projects that contain both one-sided and two-sided products, Metrix will not place the one-sided products on a separate layout from the two-sided products. If you select **One-Sided** as the printing method for this type of project, there will be errors. You can resolve the errors by using Auto Production and selecting a compatible printing method for the layout.

When you are setting up the **Auto Plan Production Properties** with two presses, both presses must be set to **One-Sided**, or neither press must be set to **One-Sided**.

If you select **One-Sided** as the printing method for **Press 1** (Printing Method 1), the printing method for **Press 2** (Printing Method 2) will be restricted to **One-Sided**.

If you select any printing method other than One-Sided for Press 1 (Printing Method 1), the One-Sided option will not be available for Press 2 (Printing Method 2).

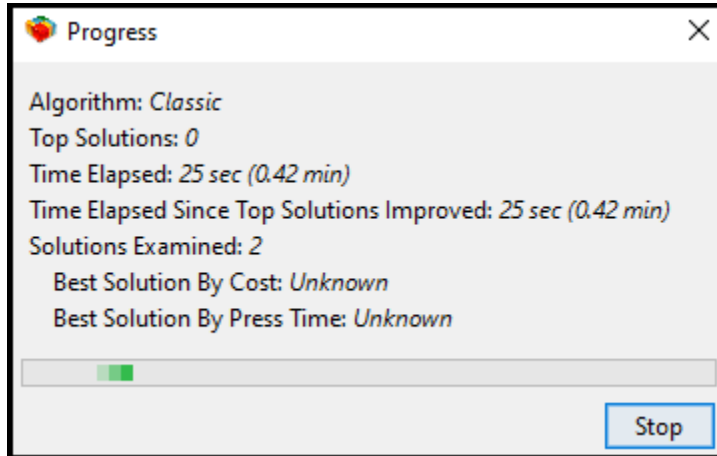
**\*\*Note** Metrix will not include any digital cutting machines in the cutting machine list that cannot accommodate the selected **Stock**. If the selected stock is not supported by the digital cutting machine, the default cutting machine will be selected. If the default cutting machine is not compatible, then **None** will be selected.

4. Auto Plan may jump immediately to the Auto Plan Selector window, when the solution is calculated. Or, for more complex projects, Auto Plan displays the Progress window below, and **Stop** becomes available. When you see that the total cost is not declining and are satisfied with the efficiency displayed, click **Stop**.

**Notes** **Stop** means to stop calculating.

When using the **Media Optimization** or **Display Graphics** algorithm, there is a **Cancel** button instead of a **Stop** button. Clicking **Cancel**, cancels all calculations and no workable layouts will be shown. Only one solution can be found with the **Media Optimization** or **Display Graphics** algorithm, so you will not see multiple options.

For complex projects, the number of potential solutions could be in the millions or more, and to exhaust all possible combinations could take hours or even days. For these types of projects, Metrix may not finish finding solutions – in almost all such cases you will probably want to click **Stop** when you see that the solutions are not getting any better.

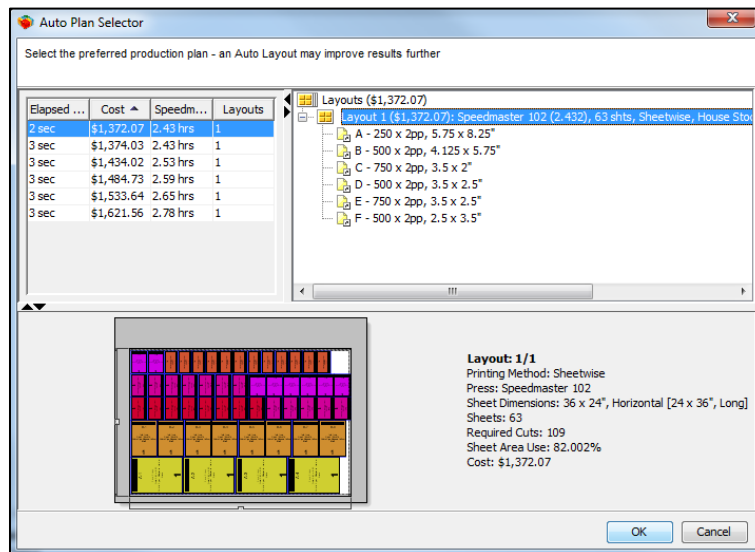


Auto Plan ranks the plans it generates according to cost and printing time. You can sort the solutions by clicking any of the column headers. This is especially useful when you are planning for two presses at once.

The Auto Plan Selector window has three sections: 1) the different plans, 2) the layouts included in the plans, and 3) a display of the layout.

In the first section, you can select the plan you prefer. In the second section, you can look at the layouts in the plan, and see which components have been assigned to the layout. In the third section, you will see the layout displayed the same as it would be in the View Area of the Project Explorer.

5. Select one of the solutions, and then click **OK**.



You may improve on your results by altering the Area to Start Tests (%) and the Time Out properties in the Production Properties window.

A subsequent Auto Layout or Auto Production, particularly for complex ganged layouts, may result in further optimization.

## The N-Up Binding Module

- The N-Up Binding module is an option you can add to Metrix.
- The N-Up Binding module automates the setup of products that print and fold, or print, fold, and bind 2- or 3-up on a press sheet.

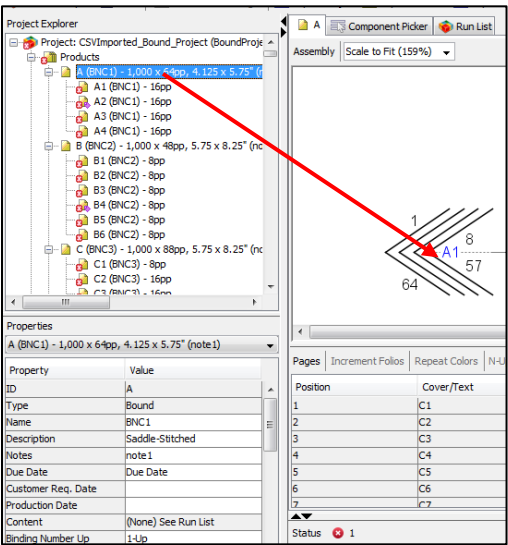
- Customers who need this functionality generally own binding equipment that can accommodate 2- or 3-up binding, such as a book saw or specialized knife-trimmer. N-Up Folding does not necessarily require this specialized equipment.
- This module provides instant visual feedback on how the project will fit on a press sheet with the new manufacturing configuration.
- The Metrix N-Up Binding module is easy to work with – even editing the options are easy.
- Metrix takes care of all the details like shingling/creep compensation automatically.

Descriptions of N-Up Binding and N-Up Folding

- N-Up Binding: 2-up takes two full products of the same dimensions through to the binding process; 3-up binding does the same with three products. The content can be different, as long as the dimensions are the same.
- N-Up-Folding: The operator can select common signatures from a single product or across multiple products and print and fold them together to save folding time and costs. Signatures can be from different products but must be structurally the same.

How N-Up Binding Works: N-Up Folding

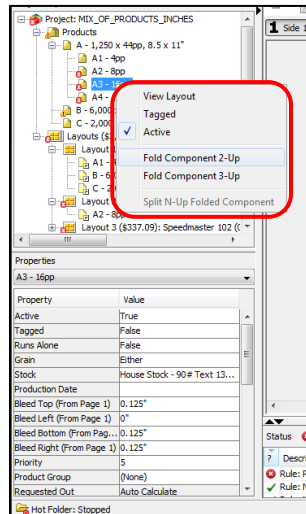
The Assembly View of Product A automatically displays in the View Area. Components are given labels for easy recognition and arrangement.



**Note** The View Area displays the item currently selected in the Project Explorer. When a bound product is selected, the Assembly View displays.

Folding components 2-Up

1. Right-click (**CTRL-click** for Mac) a component in the Project Explorer to open a contextual menu. Select the option Fold Component 2-Up. This will produce a 2-up fold of the component.



2. Perform an auto layout on the layout containing the product, and then select the layout to view the results.

## Folding components 3-Up

1. Right-click (**CTRL-click** for Mac) a component in the Project Explorer to open a contextual menu.
  2. Select the option **Fold Component 3-Up**. This will produce a 3-up fold of the component.
- Note** Another way to perform a 3-up fold is to perform the 2-up fold twice from the contextual menu.
3. Perform an auto layout on the layout containing the product, and then select the layout from the window to view the results.

## Splitting an N-Up folded component

To “unfold” folded components:

- Right-click (or **CTRL-click** for Mac) the folded component(s) in the Project Explorer, and then select Split N-Up Folded Component on the contextual menu.

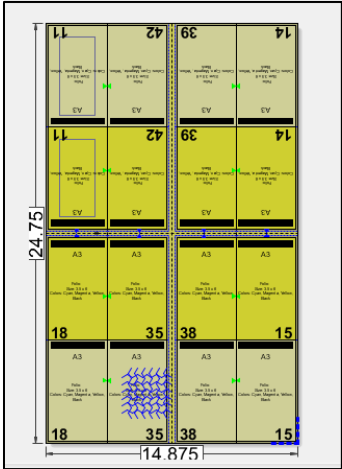
## Folding different components together

You can also fold different components together (from the same or different products) by dragging one component over another in the Project Explorer. To do so:

1. Click one of the components you want to fold and drag it over the other.
2. When the regular cursor changes to a drag cursor, release the mouse button.

**Notes** When you fold two different components together, as opposed to making a 2-up fold of the same component, the components must be the same size. Otherwise the component you are dragging may change its size to match the component with which it is being folded.

If you drag another component onto the two you have already folded together, you can make a 3-up fold of the three different components.



N-Up binding machine

To create 2- or 3-Up layouts, you must first have a binding machine capable of N-Up binding in your Metrix database.

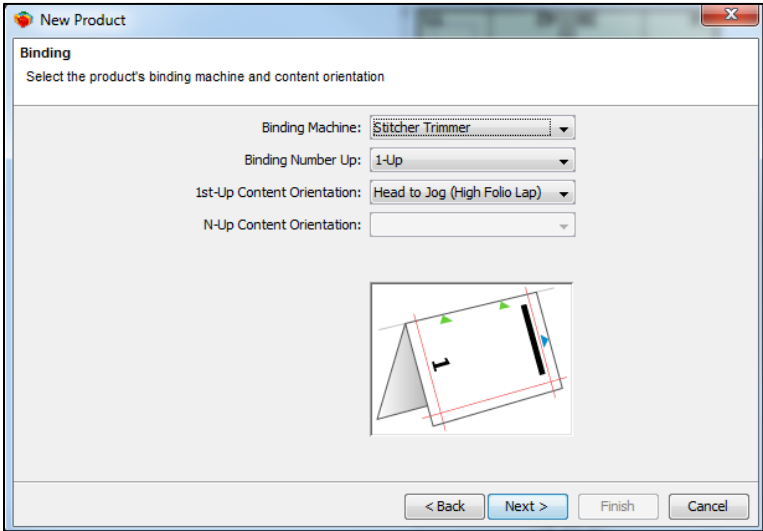
**Note** For more information about setting up your binding machine in the Database window see the *Metrix Setup Guide*.

N-Up Binding Machine Properties

Property	Explanation
Maximum Binding Number Up	<b>1-Up/2-Up/3-Up</b> 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.

Adding an N-Up product

When you add a new product with the New Product Wizard, the N-Up properties are specified on the New Product Binding window.



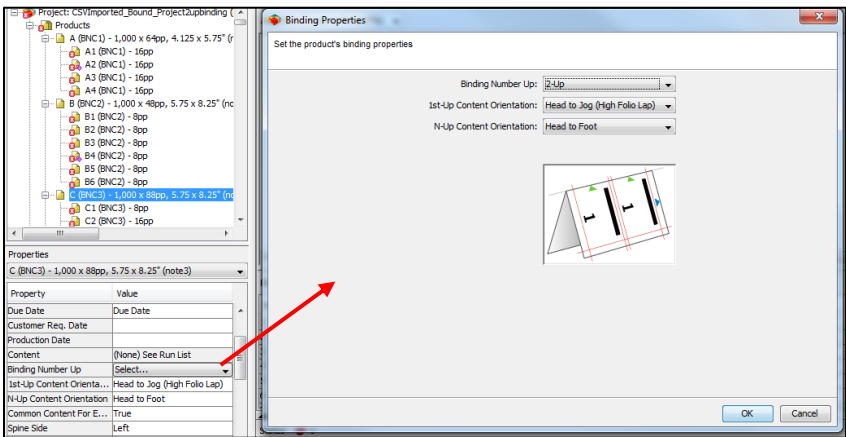
N-Up Product Properties, Binding window

Property	Explanation
Binding machine	Select a binding machine capable of binding 2-Up or 3-Up.
Binding Number Up	Select the number up.
1st-Up Content Orientation	The content orientation of the 1-Up product.
N-Up Content Orientation	The content orientation of the N-Up product(s), relative to the 1-Up.

Editing N-Up properties

You can change the N-Up Binding properties after you create the product using the following steps.

1. Select a product from the Project Explorer.
2. From the Properties Editor, Select **Binding Number Up > Select...**
3. Edit properties.



## Populated and unpopulated content

### Populated workflows: Content

For populated JDF and imposed PDF workflows, the N-Up product is assigned after the product is added. For each product instance, the content can be common or unique.

1. Select a product in the Project Explorer.
2. In the Properties Editor, select **Content > Select...**
3. In the Content window, select **Common Content > True / False**.
4. Navigate to your content file(s).

### Unpopulated workflow: Content

For unpopulated JDF, the specific content file is not assigned within Metrix. However, you do need to specify content characteristics for each N-Up – whether the content is common or unique. To do this, follow the steps below.

1. Select a product in the Project Explorer.
2. In the Properties Editor, select **Common Content > True / False**.

### N-Up Common Content: True

When all N-Up product instances have the same content (the default), there is one page list for both product instances.

Any page edits on one N-Up instance (e.g., Page Colors, Custom Shingling, Folios, etc.) are automatically applied to the other(s).

**Note** To make each N-Up Common Content, **True** is the default.

### N-Up Common Content: False

When you change the Common Content setting for Each N-Up property to **False**, there are multiple Page Lists, one for each N-Up instance. They are label based on the number N-Up that you are working on.

Page edits on one N-Up instance (e.g., page colors, custom shingling, folios, etc.) are completely independent of the other instances.

**Note** When Common Content is **False** but layouts have already been generated with Common Content set to **True**, then Metrix needs to re-calculate the number of sheets required because the press run cannot be halved as it was previously. Select a layout in the Project Explorer, and then select **Layout> Set Required Sheets** to have Metrix calculate the number of sheets required.

### Common Content=False, partly populated

When you set Common Content to **False**, you can specify one product as populated and another as unpopulated.

## The Irregular Shapes Module

### Support for irregular shapes and die-cut products

Metrix now supports irregularly shaped products, such as labels and packaging, with the Irregular Shape Using Contour Line in Content File product type and the Die-Cutting Tools and Multi-up Die Standards feature. Irregular Shape products can be nested to optimize space on the sheet.

Use of the Die-Cutting Tools feature involves several tasks:

1. Creating a die-cutting tool that references a single-up die and a multi-up die
  2. Creating a multi-up die standard (optional)
-

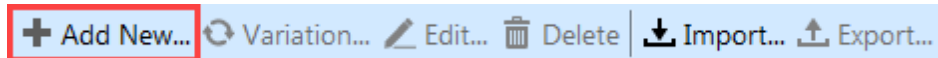
3. Creating a die-cut project
4. Planning the project and applying the standard
5. Planning a die-cut product with another type of product

#### (1) Creating a Die-cutting Tool

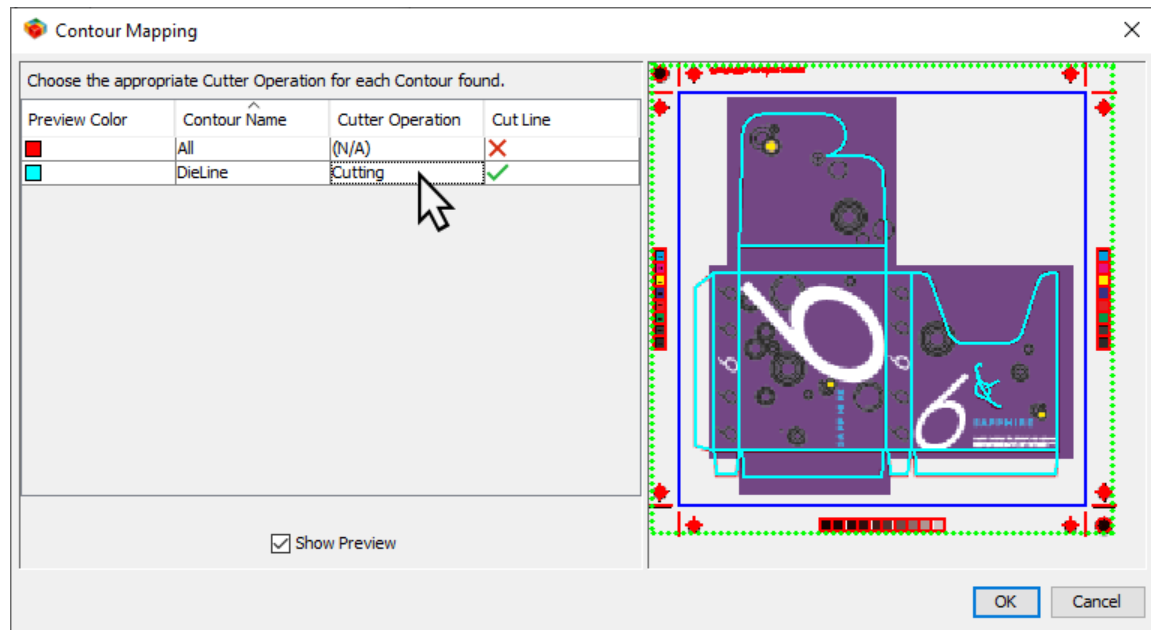
Die-cutting tools are used in the creation of multi-up die standards and projects. A die-cutting tool uses the geometry of a multi-up die to position die-cut products on a press sheet.

### To add a Die-Cutting Tool to the Metrix Database

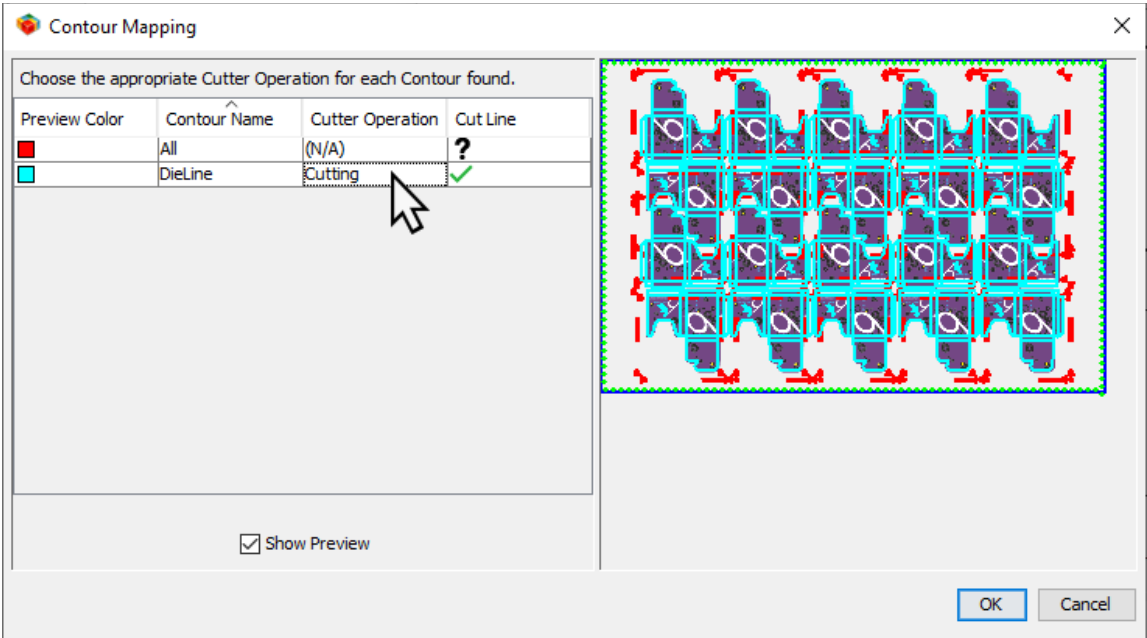
1. Select **Database > Equipment > Die Cutting Tools**.
2. Choose **Add New** in the **Die-Cutting Tools** toolbar.



3. Click **Select** to open a PDF file for the **1-up Die** in the New Die Cutting Tool window.
4. Assign a **Cutter Operation** from the drop-down list to the appropriate **Contour Name** in the 1-up die Contour Mapping window.



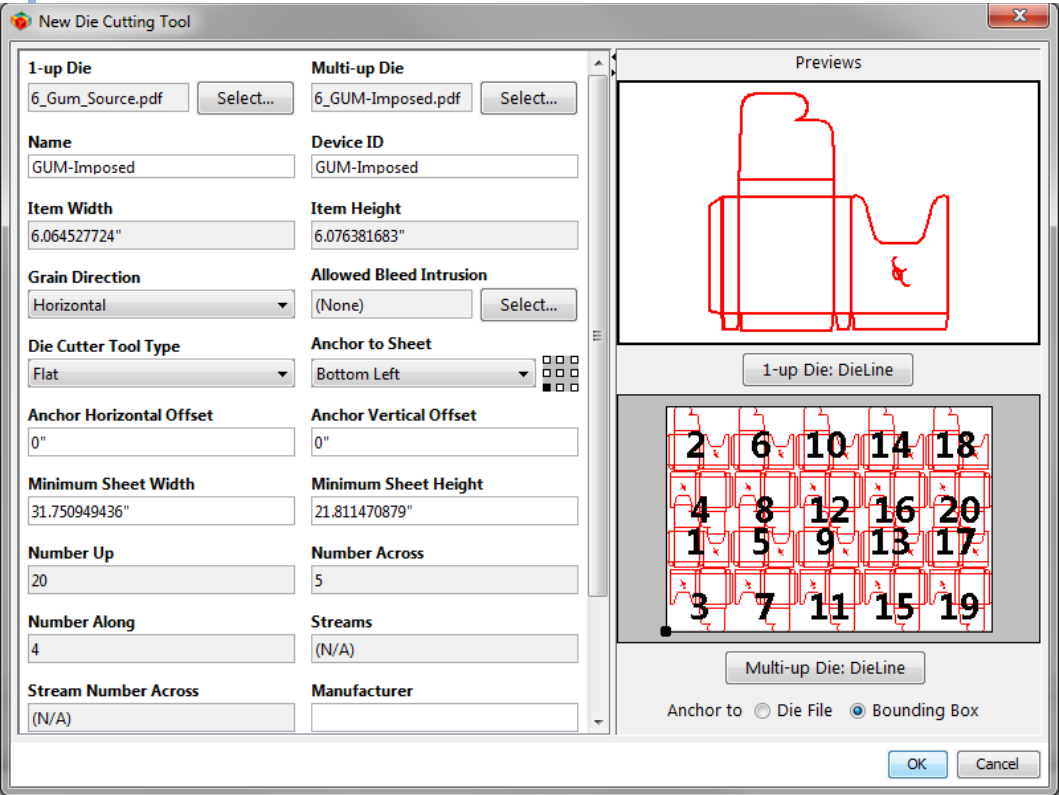
- Note** Operations such as **Crease** and **Perforation** can be assigned to other contours.
5. Click **Select** to open a PDF, CFF2, or DXF file for the **Multi-up Die** in the New Die Cutting Tool window.
- Note** The multi-up file is a PDF, the **Contour Mapping** dialog opens. DXF and CF2 files are unaware of colors.
6. Assign a **Cutter Operation** from the drop-down list to the appropriate **Contour Name** in the multi-up die Contour Mapping window.



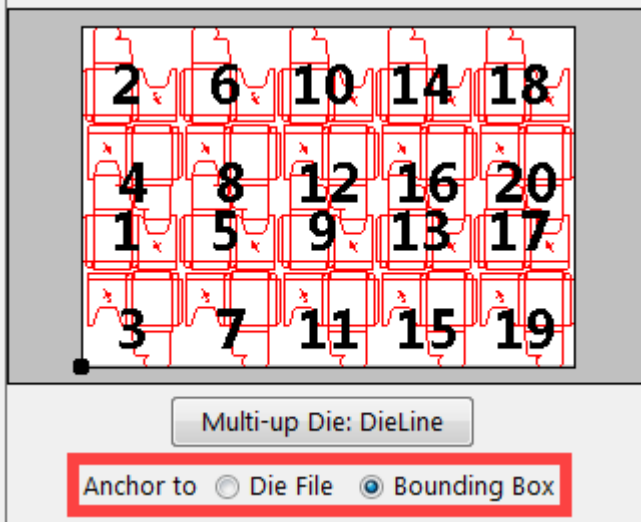
**Note** The multi-up die Contour mapping window will not open for **DXF** or **CF2** files because those filetypes are unaware of color.

7. Edit the fields if necessary.

**Note** Many of the fields will automatically populate.



Property | Explanation

1-Up Die	Select a file of a single die-cut item. A preview of this file will appear in the <b>1-up Die</b> 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 <b>Multi-up Die</b> 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. Settings are applied when the product property <b>Resolve Bleed Conflicts</b> is set to <b>True</b> .
Die Cutter Tool Type	<b>Flat/ Rotary</b> Select the die-cutter tool type.
Anchor to Sheet	Position of the die tool relative to the sheet. To change the anchor point, select the <b>Die File</b> or <b>Bounding Box</b> radial button in the <b>Anchor to</b> field. 
Anchor Horizontal Offset	Distance from the lower left corner of the sheet to the anchor on the X axis. <i>If the <b>Anchor Horizontal Offset</b> is 0, the die-cutting tool may infringe on the no-page or no-image areas defined for the press.</i>
Anchor Vertical Offset	Distance from the lower left corner of the sheet to the anchor on the Y axis. <i>If the <b>Anchor Vertical Offset</b> is 0, the die-cutting tool may infringe on the no-page or no-image areas defined for the press.</i>
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.

**Note** The properties in red are required.

8. Select the **1-up Die: DieLine** button or the **Multi-up Die: DieLine** button to change dieline colors.

**Note** **Dieline** buttons are only available if there are multiple possible dielines in a file, and/or it is a new die-cutting tool.

9. To define the **Allowed Bleed Intrusion**, click **Select**.

- The **Allowed Bleed Intrusion** screen shows one die station in the multi-up die in relation to the others surrounding it.

- The areas where the bleeds overlap are highlighted.
- The bleeds are shown as light red lines.
- The red rectangles encompass the areas where bleed intrusion occurs.

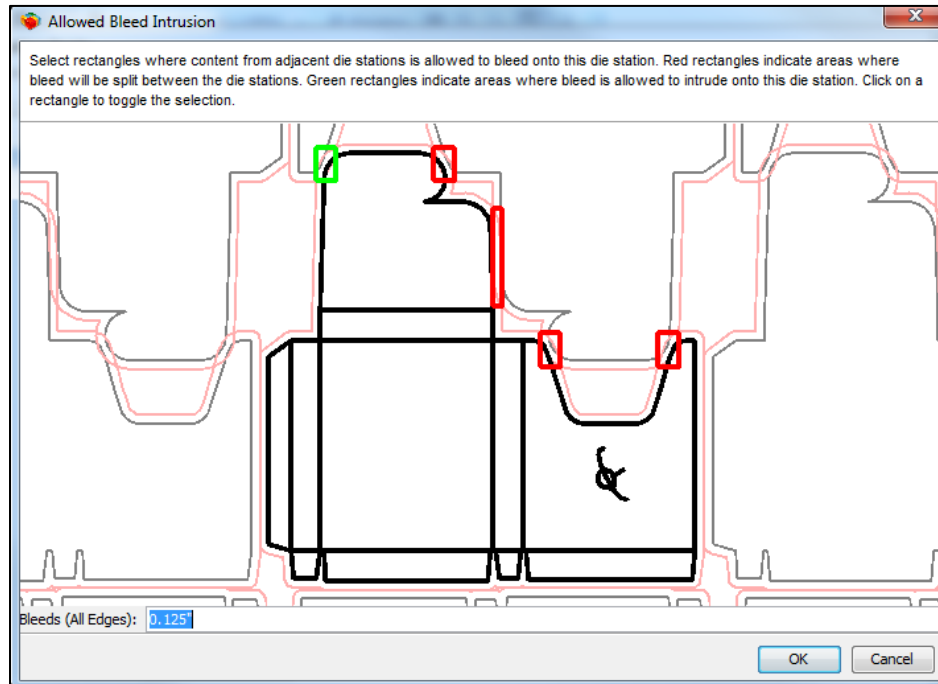
**Note** Selecting a red rectangle (which will turn it green) allows the bleed from the adjacent die station to intrude into the present die station (illustrated with thick black lines).

- The **Bleeds (All Edges)** value simulates how the bleeds will appear in a project, but does not affect the bleed amount in the **Die-Cutting Tool**.

**Note** The actual bleed amount in a project is determined by the value entered in the **Product Properties**.

The bleed amount in the **Multi-up Die Standard** is determined by the **Default Bleed** setting in the Metrix **Database > Conventions**.

- The image below shows an example of what the **Allowed Bleed Intrusion** screen might look like for a die-cut product.



- When you are finished, click **OK**.
- Then click **OK** in the New Die Cutting Tool window.

**Note** You should now see the new die-cutting tool listed in the database under **Die Cutting Tools**.

## (2) Creating a Multi-up Die standard for Die-Cutting Tools

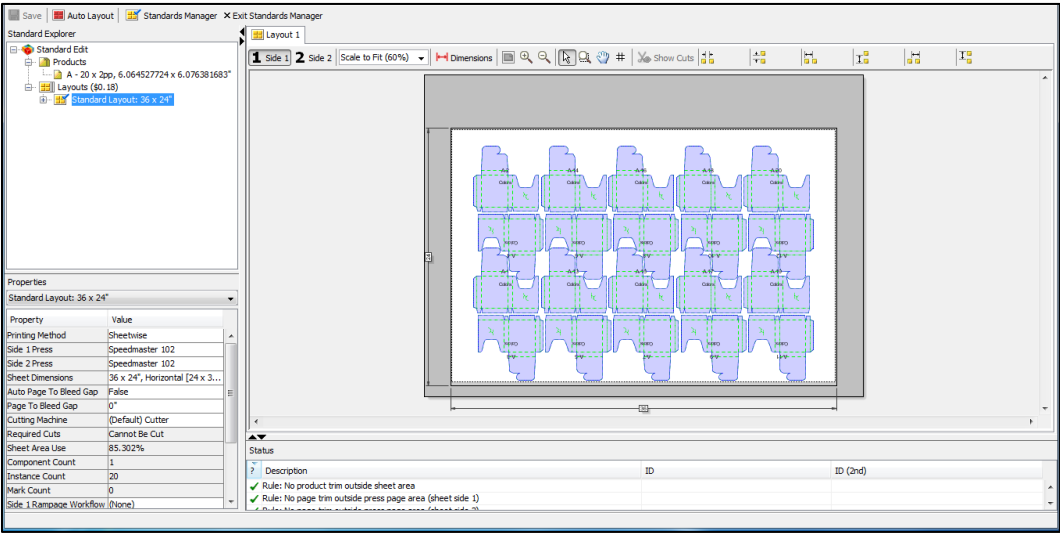
Creating multi-up die standards is the next step in producing die-cut products. This step is optional. The **Anchor Horizontal Offset** and **Anchor Vertical Offset** settings determine the position of the die-cutting tool relative to the selected sheet.

### To create a multi-up die standard

1. Select **Standards Manager >File >New Standard: Multi-up Die**.
2. Click **Select** and choose your **Multi-up Die** from the Select Die-cutting Tool window.
3. Choose the **Press, Printing Method**, and **Sheet** from the appropriate drop-down lists.
4. When you are finished, click **OK**.


**Notes** You will then see the **Multi-up Die Standard** and can edit it as necessary.


The **Multi-up Die** can only be moved as a unit. It is not possible to edit or move an individual die station.



(3) **Creating a die-cut product**

**To create a die-cut product**

1. Click  **Product**.
2. Enter the product properties.

 **New Product** ✕

**Name, Description And Customer**  
Enter the product's properties

Name:

Description:

Notes:

Due Date:

Customer Req. Date:

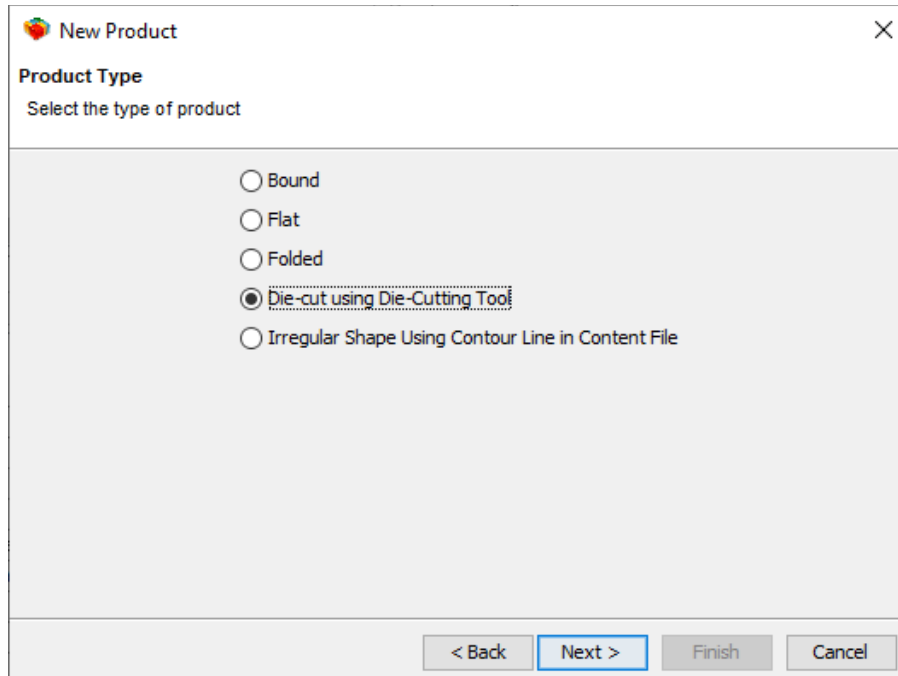
Filter:  ☒ Or ☐ And

Compan...	Contact N...	Phone	Fax	Email	Sal...
(None)					
ABC Print	John Bloggs	425-455-...	425-455-...	john.blogg...	MR
ARC Print	Pam Bloggs	425-455-...	425-455-...	nam.bloggs...	MR

Count: 4

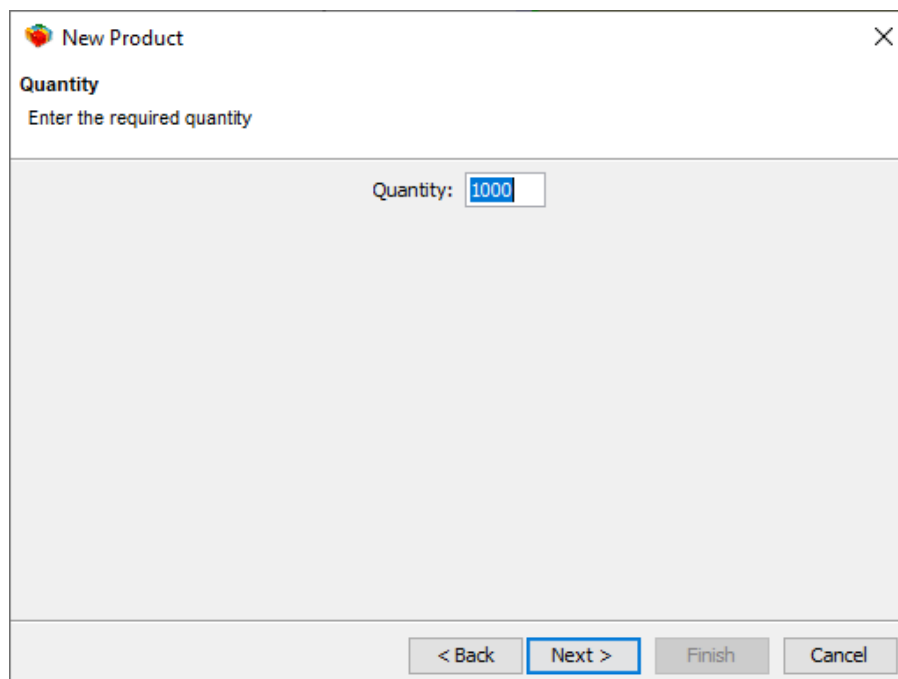
3. Select the **Die-cut using Die-Cutting Tool** product type.

**Note** The **Irregular Shape Using Contour Line in Content File** option replaced the **Die-cut using Dieline in Content File** option. It is designed for products that use a digital cutting machine, but can be used to add die-cut products without a die cutting tool.



The dialog box is titled "New Product" with a close button (X) in the top right corner. Below the title bar, the text "Product Type" is followed by the instruction "Select the type of product". The main area contains five radio button options: "Bound", "Flat", "Folded", "Die-cut using Die-Cutting Tool" (which is selected), and "Irregular Shape Using Contour Line in Content File". At the bottom, there are four buttons: "< Back", "Next >" (highlighted with a blue border), "Finish", and "Cancel".

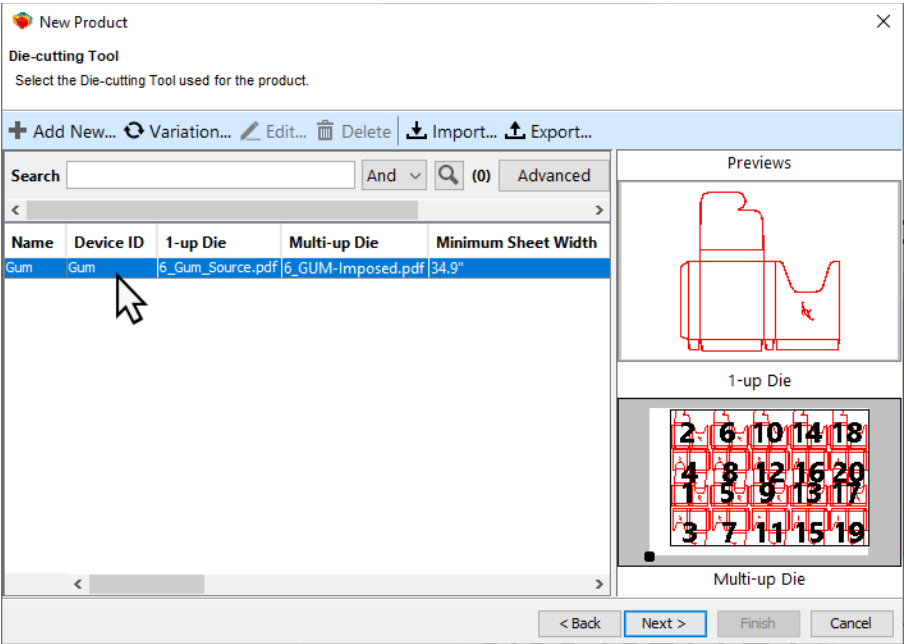
4. Enter a **Quantity**.



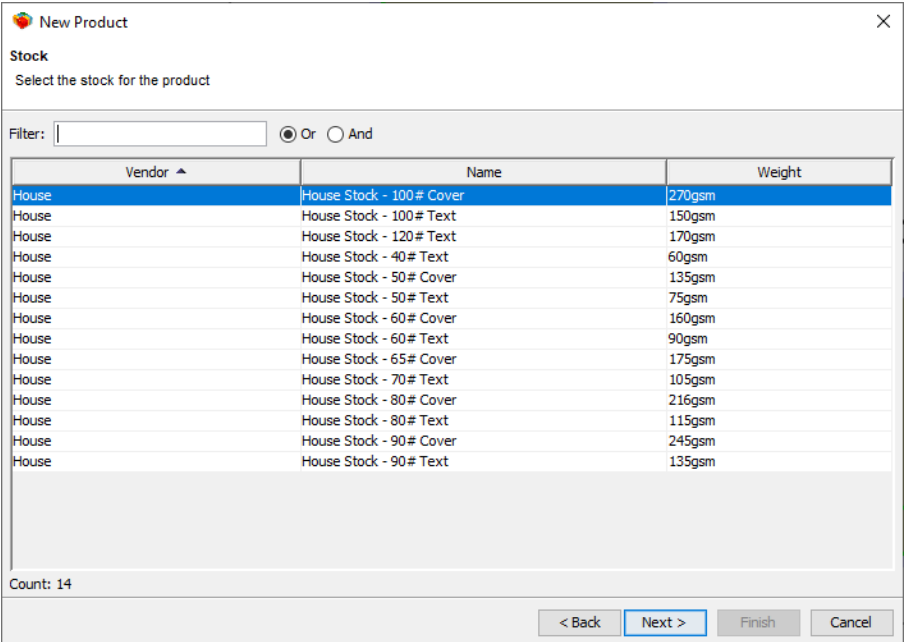
The dialog box is titled "New Product" with a close button (X) in the top right corner. Below the title bar, the text "Quantity" is followed by the instruction "Enter the required quantity". The main area contains a label "Quantity:" followed by a text input field containing the value "1000". At the bottom, there are four buttons: "< Back", "Next >" (highlighted with a blue border), "Finish", and "Cancel".

5. Select the **Die-Cutting Tool** from the list or **Add New**.
- a. If you choose **Add New**, fill out the New Die-Cutting Tool window.

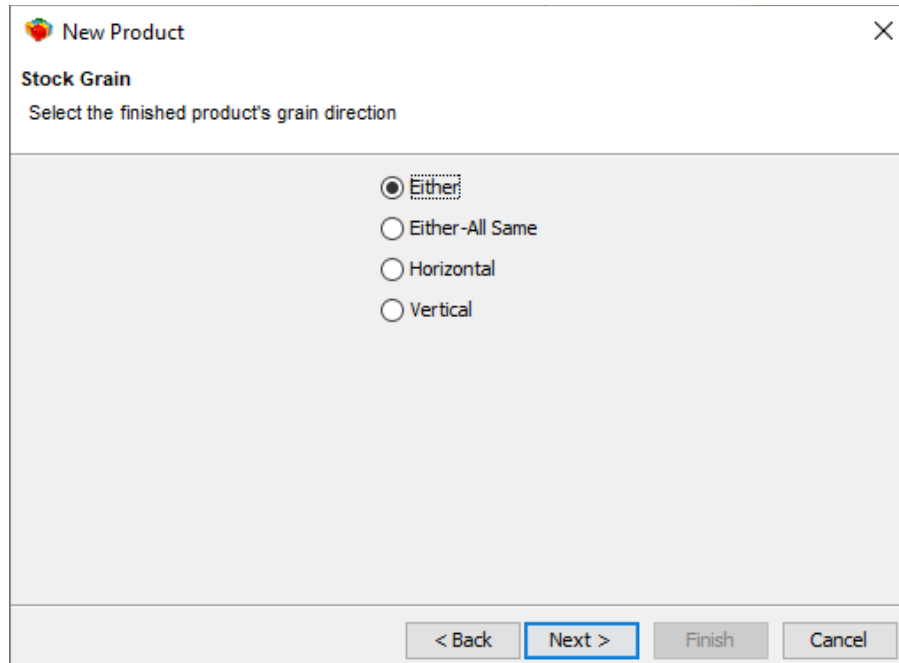
**Note** For information on adding a new die-cutting tool, see [To add a Die-Cutting Tool to the Metrix Database](#).



6. Select the **Stock** media to use for the product.



7. Choose the **Stock Grain** (direction) for the finished product.



**New Product** [Close]

**Stock Grain**  
Select the finished product's grain direction

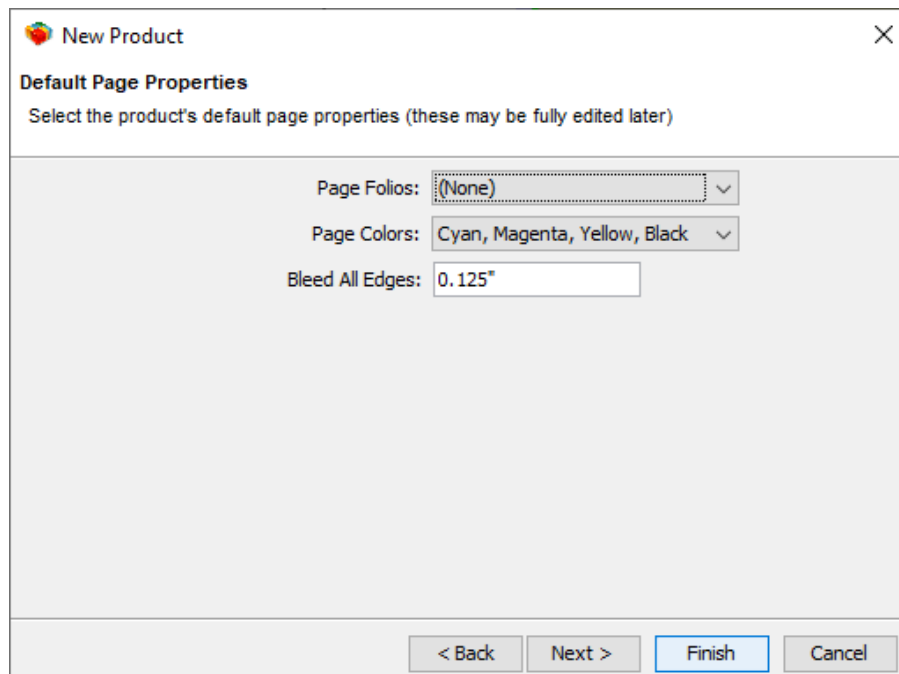
☒ **Either**  
☐ Either-All Same  
☐ Horizontal  
☐ Vertical

< Back   **Next >**   Finish   Cancel

**Note** For information on setting up grainless stocks, see [Setting Up Grainless Stocks](#).

When a grainless stock has been selected, the **Stock Grain** is restricted to **Either**.

- Define the default **Page Properties** for the product, and then click **Finish**.



**New Product** [Close]

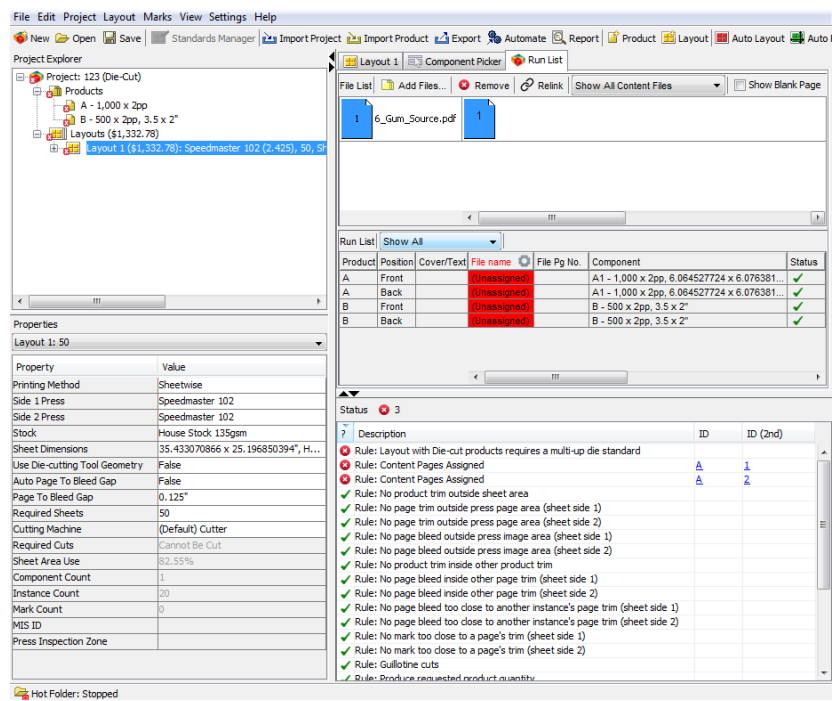
**Default Page Properties**  
Select the product's default page properties (these may be fully edited later)

Page Folios: (None) ▾  
 Page Colors: Cyan, Magenta, Yellow, Black ▾  
 Bleed All Edges: 0.125"

< Back   Next >   **Finish**   Cancel

**Note** You cannot set the bleed for each edge individually, because dies are often irregular shapes. To set the edge bleed, fill out the **Bleed All Edges** field.

- Assign PDF content files in the **Run List**. For die-cut products, you must set the **Content Positioning Rule** to **Center Each PDF Page Trimbox**. Otherwise the content may not be correctly aligned with the die.

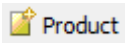



**Notes** You can open the **Contour Mapping** dialog to assign a dieline color to the product by selecting the **Dieline Color** field in the **Product** properties.

The sample files for the “Gum” Die-Cutting Tool are in the **EFI/Metrix/Content** folder. “6\_Gum\_Source\_CutCrease.pdf” is the **1-up Die** file and “6\_GUM-Imposed.pdf” is the **Multi-up Die** file. “6\_Gum\_Source\_Blue\_CutCrease.pdf” and “6\_Gum\_Source\_CutCrease.pdf” can both be used as content files.

The PDF files used for die-cutting tools and die-cut products cannot contain layers. The files must be flattened so they can be exported.

To create an irregular shape product

- 1. Click  .
- 2. Enter the product properties.

 **New Product** ✕

**Name, Description And Customer**  
Enter the product's properties

Name:

Description:

Notes:

Due Date:

Customer Req. Date:  ▼


Filter:  ☒ Or ☐ And

Compan...	Contact N...	Phone	Fax	Email	Sal...
(None)					
ABC Print	John Bloggs	425-455-...	425-455-...	john.blogg...	MR
ARC Print	Pam Bloggs	425-455-...	425-455-...	pam.bloggs...	MR

Customer: Count: 4

< Back Next > Finish Cancel

3. Select the **Irregular Shape Using Contour Line in Content File** product type.

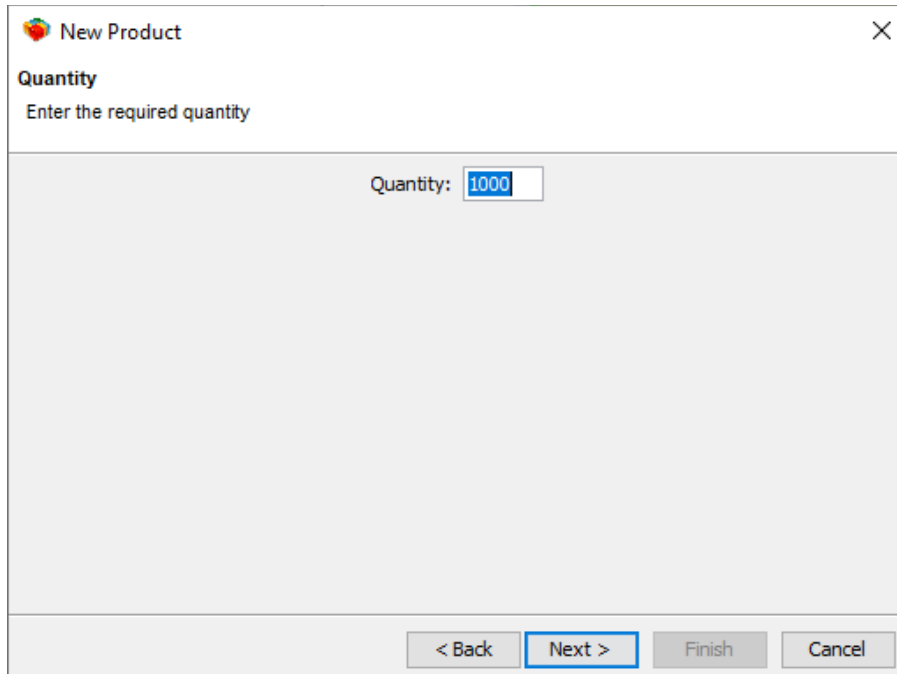
 **New Product** ✕

**Product Type**  
Select the type of product

☐ Bound  
☐ Flat  
☐ Folded  
☐ Die-cut using Die-Cutting Tool  
☒ Irregular Shape Using Contour Line in Content File

< Back Next > Finish Cancel

4. Enter a **Quantity**.



New Product

Quantity

Enter the required quantity

Quantity: 1000

< Back Next > Finish Cancel

5. Click **Select** and choose a PDF file to upload.

**Notes** The files used to create Irregular Shape products must contain at least one Contour Line in a spot color or you can use the Trim Box or Media Box as the Cutting Contour Line. To show the PDF Trim Box and Media Box set the User Preference Irregular Shapes using PDF Boxes to True and click the Use PDF Boxes checkbox.

Spot color Cut Lines must be a closed path. If there is a gap of 5 points or less, Metrix will automatically fill in the gap. If the gap is greater than 5 points, the Cutter Operation “Cutting” will not be available for that Contour Line and there will be a red X under Cut Line.

If the selected file has multiple pages, one or more of which contain Contour Lines, you can view each page in the PDF by toggling through the Page Number list to find and select the page you want to use.

- a. A preview of the file along with a list of spot colors contained in the file will appear in the New Product window.

New Product

Contour Line File

Select a PDF file with a Contour Line. This automatically assigns the content to the product.

File Name:

Select...

Width:

7.80555556"

Height:

7.939819336"

Page Number:

1

of 1

Choose the appropriate Cutter Operation for each Contour found.

Preview Color	Contour Name	Cutter Operation	Valid for Cut Line
<div></div>	All	(N/A)	<div></div>
<div></div>	Crease Line	(N/A)	<div></div>
<div></div>	DieLine	Cutting	<div></div>
<div></div>	Media Box	(N/A)	<div></div>
<div></div>	Trim Box	(N/A)	<div></div>

☒ Show Preview

☒ Include PDF Boxes

< Back

Next >

Finish

Cancel

- i. The **Preview Color** column shows the color of the contour line as it appears in the preview.
- ii. The **Contour Name** column shows the name of the color as described by the PDF file.
- iii. The **Cutter Operation** column shows the operation associated with the specific color.

**Note** **Cutter Operations** for digital cutting machines are defined in the Cutter Operations window accessed through the database.

Cutter Operations

Cutting

New

Delete

Spot Color Name Patterns for Cutting

die\*

OK

Cancel

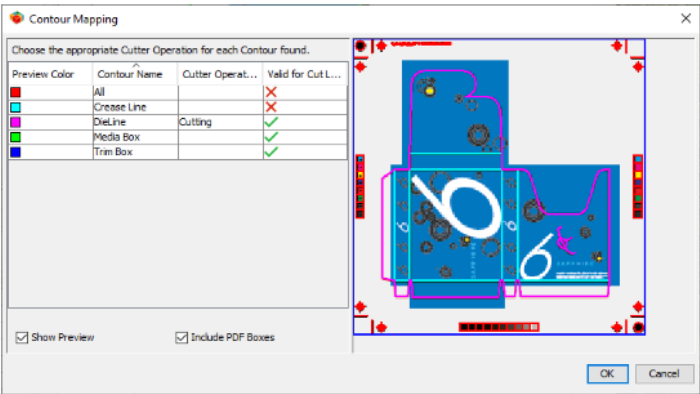
- iv. The **Cut Line** column shows the status for each **Contour Line**.
  - 1. A green checkmark indicates the **Contour Line** is a valid cut line.
  - 2. A red X indicates the **Contour Line** is not a valid cut line so it cannot be associated with the **Cutter Operation**.

- 3. A black question marks indicates Metrix is validating the **Contour Line**. Complex **Contour Lines** can take up to several minutes to validate.

**Note** If the **Contour Line** is not validated within several minutes, click **Cancel** and select a different file or edit the file to be less complex.


- b. To assign the **Preview Color** to a different **Cutter Operation**, select the appropriate **Cutter Operation** box, and choose an option from the drop-down list.
  - i. **Cutter Operations** can be reassigned from the **Product Properties** editor:
    - 1. Select the **Cutting Line Color** field.
    - 2. Click **...**.
    - 3. Reassign the **Cutter Operation** in the Contour Mapping window.
    - 4. Click **OK**.

Properties	
B (Digital Cutting Product) - 500 x 2pp	
Property	Value
ID	B
Type	Irregular Shape Using Contour Li...
Name	Digital Cutting Product
Description	
Notes	
Due Date	
Customer Req. Date	
Production Date	
Content File	(Populated) See Run List
Content Positioning Rule	Match PDF Page Trimbox Size An...
Cutting Line Color	DieLine
Tool	(N/A)
Cutting Complexity	1 (100% Speed)
Customer	(None)
Active	True
Required Quantity	500
Produce Exact Quantity	False
Runs Alone	False
Display Color	R=255 G=175 B=0
Finished Width	6.064527724"
Finished Height	6.076381683"
Grain	Either
Stock	House Stock - 100# Cover 270gsm
Bleed All Edges	0.125"
Allow Nesting	True
Folio Pattern	(None)
Finishing Group	(None)
Priority	5
Product Group	(None)
Requested Out	Auto Calculate
Number Out	0
Total Quantity	0 (500 Short)
Flat Width	6.064527724"
Flat Height	6.076381683"
MIS ID	



**Note** You cannot edit the **Width** and **Height** since they are determined by the 1-up file.

- 6. Select the **Stock** media to use for the product.

 New Product ✕

**Stock**  
Select the stock for the product


Filter:  ☒ Or ☐ And

Vendor ^	Name	Weight
House	House Stock - 100# Cover	270gsm
House	House Stock - 100# Text	150gsm
House	House Stock - 120# Text	170gsm
House	House Stock - 40# Text	60gsm
House	House Stock - 50# Cover	135gsm
House	House Stock - 50# Text	75gsm
House	House Stock - 60# Cover	160gsm
House	House Stock - 60# Text	90gsm
House	House Stock - 65# Cover	175gsm
House	House Stock - 70# Text	105gsm
House	House Stock - 80# Cover	216gsm
House	House Stock - 80# Text	115gsm
House	House Stock - 90# Cover	245gsm
House	House Stock - 90# Text	135gsm

Count: 14

< Back **Next >** Finish Cancel

7. Choose the **Stock Grain** (direction) for the finished product.

 New Product ✕

**Stock Grain**  
Select the finished product's grain direction

☒ **Either**  
☐ Either-All Same  
☐ Horizontal  
☐ Vertical

< Back **Next >** Finish Cancel

- Note** For information on setting up grainless stocks, see [Setting Up Grainless Stocks](#).  
When a grainless stock has been selected, the **Stock Grain** is restricted to **Either**.
8. Define the default **Page Properties** for the product, and then click **Finish**.

New Product

Default Page Properties

Select the product's default page properties (these may be fully edited later)

Page Folios:

(None)

Page Colors:

Cyan, Magenta, Yellow, Black

Bleed All Edges:

0.125"

< Back

Next >

Finish

Cancel

- Note

You cannot set the bleed for each edge individually, because dies are often irregular shapes. To set the edge bleed, fill out the **Bleed All Edges** field.
9. Assign PDF content files in the **Run List**. For die-cut products, you must set the **Content Positioning Rule** to **Center Each PDF Page Trimbox**. Otherwise the content may not be correctly aligned with the die.

File Edit Project Layout Marks View Settings Help

New Open Save Standards Manager Import Project Import Product Export Automate Report Product Layout Auto Layout Auto

Layout 1 Component Picker Run List

Project Explorer

Project: 123 (Die-Cut)

Products

A - 1,000 x 2pp

B - 500 x 2pp, 3.5 x 2"

Layouts (\$1,332.78)

Layout 1 (\$1,332.78): Speedmaster 102 (2,425), 50, S...

Properties

Layout 1: 50

Property	Value
Printing Method	Sheetwise
Side 1 Press	Speedmaster 102
Side 2 Press	Speedmaster 102
Stock	House Stock 135gm
Sheet Dimensions	35.433070866 x 25.196850394", H...
Use Die-cutting Tool Geometry	False
Auto Page To Bleed Gap	False
Page To Bleed Gap	0.125"
Required Sheets	50
Cutting Machine	(Default) Cutter
Required Cuts	Cannot Be Cut
Sheet Area Use	82.55%
Component Count	1
Instance Count	20
Mark Count	0
MIS ID	
Press Inspection Zone	

Hot Folder: Stopped

File List

Add Files... Remove Relink Show All Content Files Show Blank Page

6\_Gum\_Source.pdf

1

Run List

Show All

Product	Position	Cover/Text	File name	File Pg No.	Component	Status
A	Front		(Unassigned)		A1 - 1,000 x 2pp, 6.064527724 x 6.076381	✓
A	Back		(Unassigned)		A1 - 1,000 x 2pp, 6.064527724 x 6.076381	✓
B	Front		(Unassigned)		B - 500 x 2pp, 3.5 x 2"	✓
B	Back		(Unassigned)		B - 500 x 2pp, 3.5 x 2"	✓

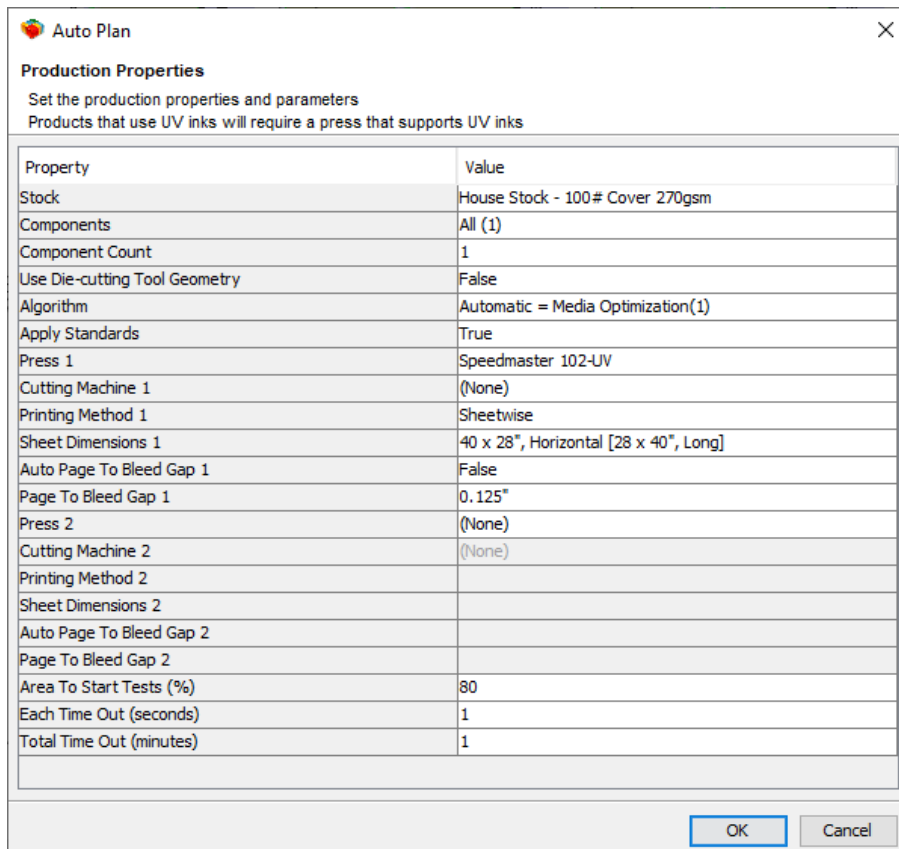
Status 3

Description	ID	ID (2nd)
Rule: Layout with Die-cut products requires a multi-up die standard		
Rule: Content Pages Assigned	A	1
Rule: Content Pages Assigned	A	2
Rule: No product trim outside sheet area		
Rule: No page trim outside press page area (sheet side 1)		
Rule: No page trim outside press page area (sheet side 2)		
Rule: No page bleed outside press image area (sheet side 1)		
Rule: No page bleed outside press image area (sheet side 2)		
Rule: No product trim inside other product trim		
Rule: No page bleed inside other page trim (sheet side 1)		
Rule: No page bleed inside other page trim (sheet side 2)		
Rule: No page bleed too close to another instance's page trim (sheet side 1)		
Rule: No page bleed too close to another instance's page trim (sheet side 2)		
Rule: No mark too close to a page's trim (sheet side 1)		
Rule: No mark too close to a page's trim (sheet side 2)		
Rule: Gullotine cuts		
Rule: Produce requested product quantity		

## Planning a die-cut project using a die-cutting tool

### To plan a die-cut project using a die-cutting tool

1. Click **Auto Plan**.



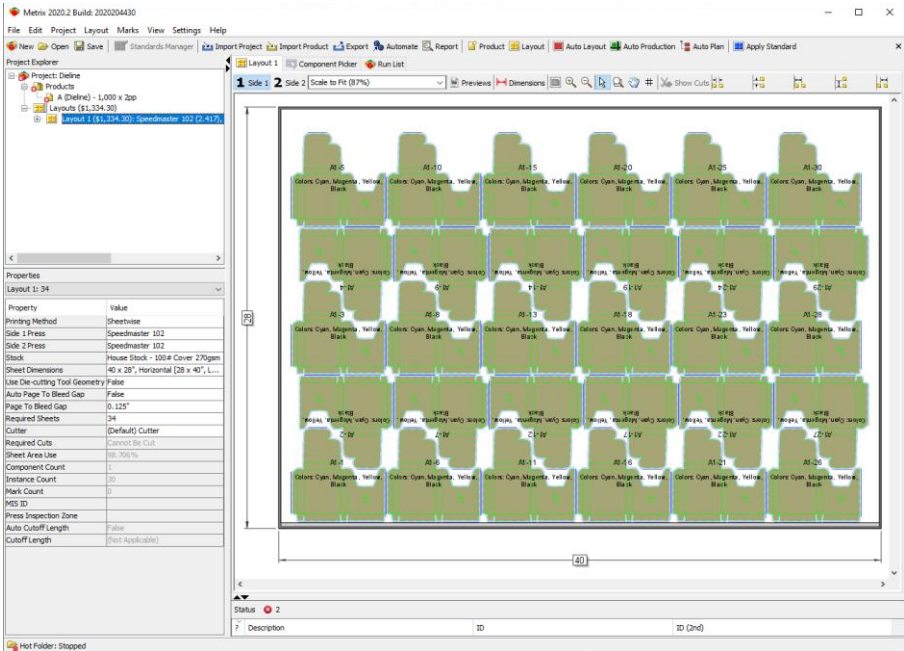
**Auto Plan** [Close]

**Production Properties**  
Set the production properties and parameters  
Products that use UV inks will require a press that supports UV inks

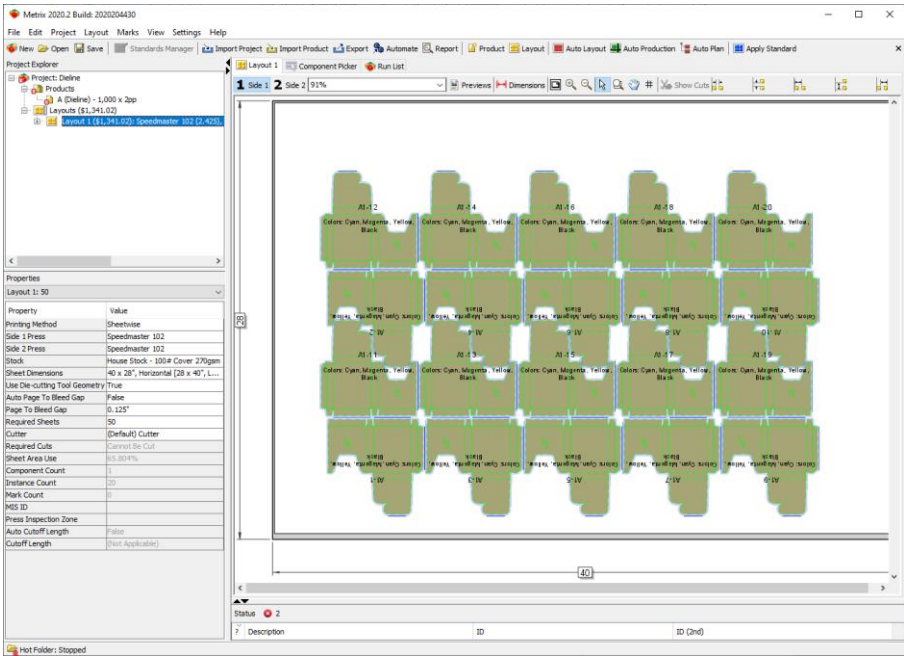
Property	Value
Stock	House Stock - 100# Cover 270gsm
Components	All (1)
Component Count	1
Use Die-cutting Tool Geometry	False
Algorithm	Automatic = Media Optimization(1)
Apply Standards	True
Press 1	Speedmaster 102-UV
Cutting Machine 1	(None)
Printing Method 1	Sheetwise
Sheet Dimensions 1	40 x 28", Horizontal [28 x 40", Long]
Auto Page To Bleed Gap 1	False
Page To Bleed Gap 1	0.125"
Press 2	(None)
Cutting Machine 2	(None)
Printing Method 2	
Sheet Dimensions 2	
Auto Page To Bleed Gap 2	
Page To Bleed Gap 2	
Area To Start Tests (%)	80
Each Time Out (seconds)	1
Total Time Out (minutes)	1

[OK] [Cancel]

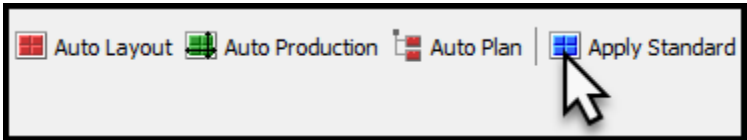
2. Complete the appropriate fields in the Auto Plan window.
  - If you select **False** in the **Use Die-Cutting Tool Geometry** property, then Metrix nests the irregular shapes to maximize the space on the sheet.



- If you select **True** in the **Use Die-cutting Tool Geometry** property, then the layout uses the same geometry as the multi-up file selected for the die-cutting tool. Metrix uses the **Anchor Horizontal Offset** and **Anchor Vertical Offset** to position the die-cutting tool on the sheet.

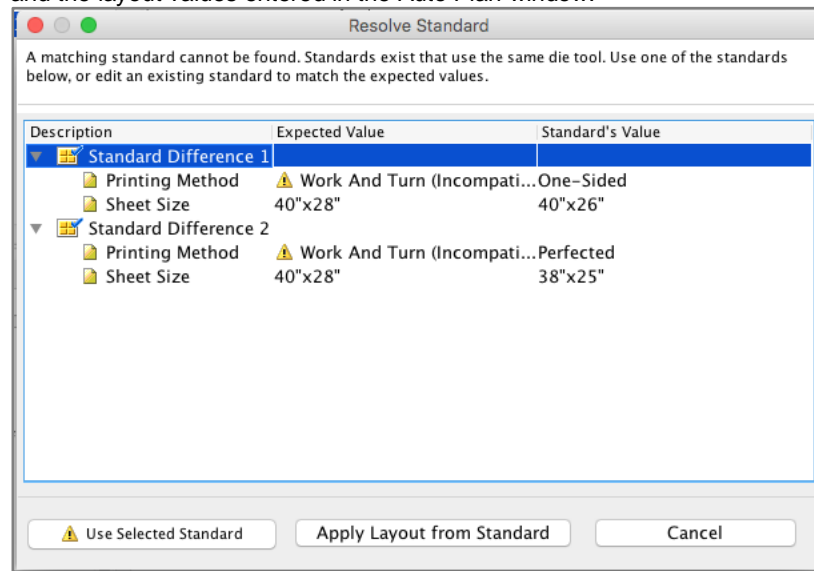


- If you want to use a multi-up die standard, click **Apply Standard**.



**Note** The Resolve Standard window shows all standards that use the same **Die-Cutting Tool** as the product. Metrix displays the differences between the existing standards

and the layout values entered in the Auto Plan window.



- You can then select one of the standards and choose one of the following options:
  - Use Selected Standard:** Metrix discards all values entered in the Auto Plan window and replaces the layout with the standard.
  - Apply Layout from Standard:** This option uses the geometry of the die-cutting tool, along with any marks that are on the standard, and applies them to the current layout. The **Press**, **Sheet Size**, and **Printing Method** used for the layout are retained whenever possible.
 

**Note** If the layout uses a printing method that is incompatible with the **Die-Cutting Tool** (for example, **Work And Turn** or **Work And Tumble** when the standard is **Sheetwise**, **One-sided**, or **Perfected** and the **Die-Cutting Tool** will not fit two-up on the sheet), a warning message appears in the Resolve Standard window. If you select **Apply Layout from Standard**, a warning message appears that says:

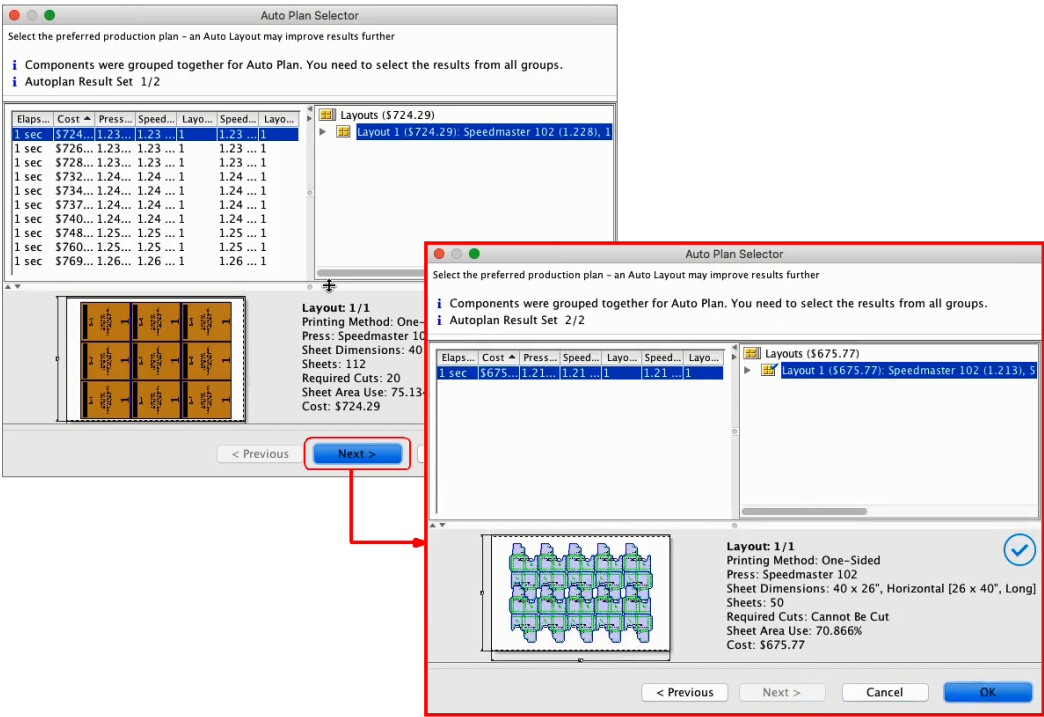
"The Printing Method of this standard is incompatible with the current Printing Method. Applying this standard will also change the Printing Method on the current layout. Continue?" You can click **Yes** or **No**.
  - Cancel:** Allows you to exit the window without making any changes.

## Planning Die-cut or Irregular Shape Products with Rectangular Products

Flat, bound, and folded (rectangular) products will not be planned on the same layout as die-cut or irregular shape products. If you want to plan rectangular products on the same layout as die-cut or irregular shape products, see [Creating an Irregular Shape Product using a Rectangular Content File](#).

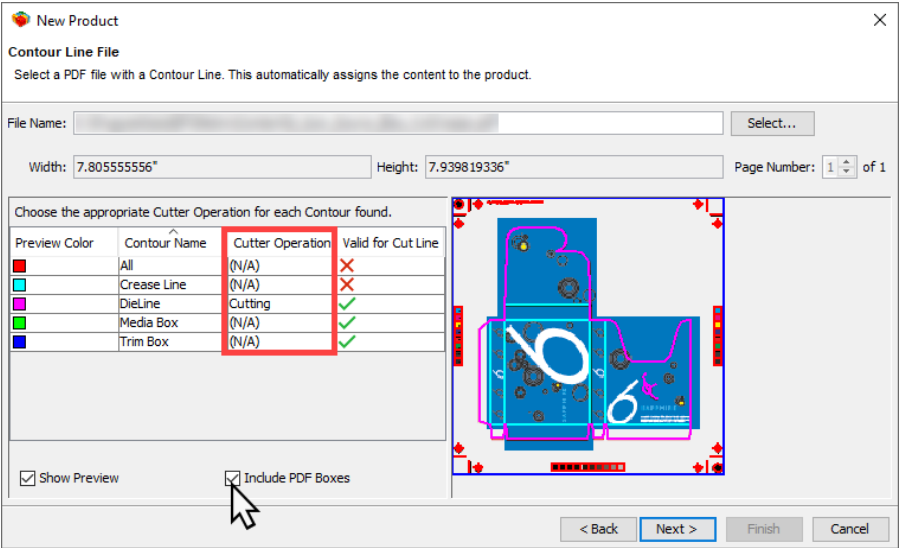
- Separate Window for Die-Cut and Irregular Shape Solutions:**

In the Auto Plan Selector window, there is an additional **Next** button so the results for the die-cut and non-die-cut layouts are not displayed in the same window. Clicking this button will open a separate window that displays solutions found for the die-cut product layouts. If you plan die-cut products using a die-cutting tool with irregular shapes or products and select **True** for the **Die-cutting Tool Geometry** field, then the die-cut products are placed on a separate layout from the irregular shape or rectangular products. If you select **False** for the **Die-cutting Tool Geometry** field, then the die-cut products are considered to be the same as irregular shape products and can be nested with them. Rectangular products cannot be planned on the same layout as die-cut or irregular shape products.

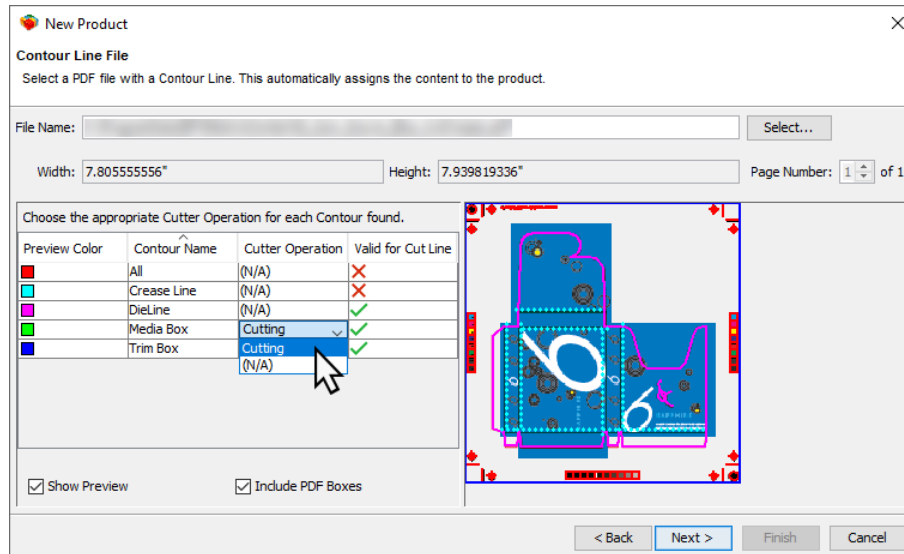


### Creating an Irregular Shape Product using a Rectangular Content File

1. Set the **User Preference > Content Handling > Irregular Shapes Using PDF Boxes** option to **True**.
2. Create a new product in the project.
3. Select **Irregular Shape Using Contour Line in Content File** on the **Product Type** screen.
4. Click **Select** and browse to the PDF content file on the **Contour Line File** screen.
5. Click **Include PDF Boxes** and the **Media Box** and/or **Trim Box** options will appear in the **Contour Line** column.



6. Select **Cutting** from the **Cutter Operation** column for the **Contour Line** (Media Box or Trim Box) you want to use.



7. Finish creating the product.

**Note** When you plan the project, Metrix can put this product on the same layout as **Irregular Shape** products that print on the same substrate.

## Nesting Products without the Irregular Shapes Module

1. Select the product in the Project Explorer and set the **Nesting** property to **True** to disable Status Area errors that would ordinarily be reported when one product instance overlaps another.
2. Optional: Disable bleed shading (**View > Shade Product Bleed**) so you can visualize the nesting more clearly.
3. Optional: Add a thumbnail image of the page. Select the Product node, then the Page (Side 1) in the View Area. Choose the Thumbnail Image property, and then select the low resolution RGB preview (JPG, PNG, or GIF) for the first side.
4. If you've assigned a Thumbnail Image, select the background color of the image as the Transparent Color property (usually white). You can change the Transparency Tolerance property if necessary. A larger number renders more colors transparent.
5. If there are no product instances currently on the layout, add one using **Layout > Add Component Instance...**
6. Add one or more product instances as required, then rotate and move product them as required for nesting. Use the Nudge function if required to move the instances into position. For more information, see [Nudging product instances](#).
7. Select the group of nested product instances. Step-and-repeat by holding down the **ALT** key (Windows) or the **OPTION** key (Mac) then dragging across the sheet horizontally and/or vertically.
8. Select and center the entire nested group horizontally and/or vertically.
9. Set the Required Sheets property.

## The Metrix Automation Modules

### Description of Automation Server

Automation Server is a separate EFI program that automatically processes incoming projects submitted via Metrix XML format, or directly from a Metrix client. Automation Server then applies Metrix algorithms and settings and analyzes potentially thousands of manufacturing options to produce optimized layout projects without human intervention. When finished, Automation Server can automatically send completed projects directly to the prepress workflow and send setup data to the finishing department. If problems occur, the project is saved into the Metrix database and operators are emailed details so they can resolve them in Metrix.

Automation Server is highly configurable and able to handle an enormous volume of work, allowing you to define a virtually unlimited number of incoming hot folders, each with unique processing options and each able to work on multiple projects simultaneously. The current number of multiple projects is ten, but you can contact EFI for options if you need to process more than ten projects at a time.

The server automatically applies sets of press sheet marks based on user-defined rules considering the press, printing method, and the number and type of ink colors on a layout. Operators no longer need to sort through lists of marks wondering if they're selecting the correct set.

Automation Server connects to your existing Metrix database, leveraging all your existing equipment, shop settings and the standard layouts you've created over time. Processed projects are saved to the shared Metrix database.

**Note** A series of movies explaining Metrix Automation is available at no cost from ePS. [Email Metrix technical support to request the movies.](#)

### Description of Automation Lite or Pro

Automation Lite or Pro is an advanced, hot-folder driven module for Metrix which accepts MXML files and fully automates their processing in Metrix. It is similar to the existing hot folder in Metrix, but much more sophisticated and automatic in its operation.

When the Metrix Automation module is licensed, a new File menu item "Automation Mode" will switch the user-interface from the traditional Metrix interface to the Automation Mode interface.

Once in Automation mode, the operator can load a Default Commands file and start the hot folder running. The Input folder will then be ready to receive and process files.

When MXML files arrive in the Automation Input Folder, Metrix applies settings, performs tasks, creates a project, and automatically exports the output (JDF, PDF, etc.).

Automation can operate in one of two modes:

- Default Commands Mode – Metrix can use a Default Commands file, like one of those included with Metrix, to process the project. In this case, the resources in the regular Metrix Database will be used to process the MXML file.
- MXML Commands Mode – If processing instructions are embedded in the incoming MXML file, Automation Pro (this will not work with Automation Lite) will ignore the Default Commands file and use the instructions in the MXML file. Further, if equipment resources are also found in the MXML file (items like presses, binding machines, stocks, inks, etc., Automation Pro will ignore the Metrix Database resources and use those found in the MXML file.

You can modify mark sets to help Metrix determine which mark sets should be used with a particular layout. Editing mark set properties is especially helpful for those running 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 Automation.

**Note** A series of movies explaining Metrix Automation is available at no cost from EFI. Email Metrix technical support to request the movies.

### Comparison of Automation Server and Automation Lite or Pro

The three major differences between Automation Server and Automation Lite or Pro are basically in licensing, input, and processing.

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- Licensing - Automation Server is a separate product, with completely separate licensing, and a separate security key. Automation Server does not use any Metrix client licenses.
- Input - Automation Lite or Pro has a single hot folder for each Metrix client used, but Automation Server can have a virtually unlimited number of hot folders.
- Processing - Whereas Automation Server can process multiple concurrent projects per hot folder, Automation Lite or Pro processes one project at a time from each hot folder. Also, Automation Server is tuned for higher performance and faster processing than Automation Lite or Pro.

## Comparison of Automation Pro and Automation Lite

Automation Module is now available as “Automation Lite” or “Automation Pro.” One difference is that Automation Pro includes the ability for incoming MXML Projects to include the processing instructions, and Automation Lite does not. In other words, “Automation Pro” is identical to what was called “Automation Lite” prior to version 2013 .0. Automation Lite has been scaled back functionally by losing this one ability. One other difference is that with Automation Lite there is no requirement to maintain an MSA.

## Overview of Metrix Automation MXML commands

Metrix Automation uses a series of MXML commands to do its work. The six basic categories of commands include:

- The Hot Folder Command
- Transform Commands
- The SaveToDatabase Command
- Email Command
- Checking Commands
- Export Commands

Here is a more detailed description of these commands:

### The HotFolder command

When run, the HotFolder Command starts watching the hot folder for an incoming MXML file to consume and process. The HotFolder Command is required and must be the first command in the list of commands.

When an incoming MXML file is found, the HotFolder Command performs these tasks:

- Moves the file from the Input Directory to the Output Directory
- Reads and interprets the MXML file, creating a Metrix project in memory (unless an error is encountered)
- Unless the incoming MXML file specifies that it should be run in memoryonly, it checks the Metrix database for a matching project ID. If a matching project ID is found, it tries appending numbers like “(2)” or “(3)” to the ID until a unique database ID is found and locked. In this way Automation will treat each new incoming MXML non-memory-only project as unique and will always be able to save it to the database.

### Transform commands

Transform Commands modify a project. For instance, one may arrange component instances on a layout, another may apply a standard layout from the database to a layout, and another may add default bleeds to all pages in a project.

Transform Commands available for Metrix Automation include:

Command	Objects Modified or Potentially Modified
---------	--

Add Default Bleed	Product Pages
Add Default Jog And Spine Trim	Bound Products
Auto Plan	Layouts
Auto Production	Layouts
Auto Layout	Layouts
Apply Standards	Layouts
Set Property	Project
Assign Layout Rampage Workflows	Layouts
Assign Page Rampage Workflows	Pages

### Assign Layout Rampage workflows command

The goal of Metrix Automation is to automate the Metrix workflow as much as possible. Rampage users often assign a Rampage workflow to each side of the Metrix layouts so this information will be passed via JDF to their Rampage system. The Assign Layout Rampage Workflows Command performs this automatically using these rules:

- The Assign Layout Rampage Workflows Command will not have any effect unless the **User Preferences > Prepress Workflow = “Rampage”**.
- The Assign Layout Rampage Workflows Command attempts to assign a Rampage Workflow to each side of layout using the following naming convention:
  - For layouts on coated stock: <Press.Name>\_Coated
  - For layouts on uncoated stock: <Press.Name>\_Uncoated

Whether the stock is coated or uncoated is determined by the stock’s Grade property. The first three grades are coated stocks, the last two are uncoated.

Property	Value
Vendor	House
Name	House Stock - 120# Text
Weight	170
Weight Unit	gsm
Thickness	0.0078"
Grade	1 - Gloss-Coated Paper
Drying Time Multiplier	1 - Gloss-Coated Paper
Height	2 - Matt-Coated Paper
Width	3 - Gloss-Coated, Web Paper
Grain	4 - Uncoated, White Paper
Cost / Thousand	5 - Uncoated, Yellowish Paper

- If Metrix does not find a Rampage workflow in the Database for the relevant name, no Rampage workflow will be assigned to the layout side.

If you want to ensure that only projects with a Rampage workflow assigned to every layout side are exported to prepress, you should set the `AssignLayoutRampageWorkflowsCommand/@OnlyExportIfAllLayoutsHaveRampageWorkflows` attribute to **True**.

## SaveToDatabase command

The `SaveToMetrixDatabase` Command saves the project to the Metrix Database.

## Email Commands

The `SendEmail` Command sends emails to either the Administrator or Planners. The subject and body of the emails must be defined in text files in the `/Automation/EmailTemplates` subfolder.

## Checking Commands

The `CheckProject` Command checks the status of all products, components, and layouts in the project, just as the Project Explorer and Status Area of the Metrix GUI display the status of each item.

The `CheckLayoutSheetAreaUse` Command checks the percentage of imposed component area divided by the sheet area and compares it to the required amount.

The Checking Commands also perform one housekeeping action – they remove any empty layouts in the project. Some incoming MXML files may deliberately include empty layout elements describing press and stock sheets to be used for Auto Plan, and under some circumstances Auto Plan will leave empty layouts behind.

The results of the Checking Commands can be used to allow or disallow the execution of the Export Commands.

## Export Commands

The Export Commands export a project's data in various formats.

The Export Commands available for Metrix Automation include:

- `ExportImposedPDF`
- `ExportBarcodedImposedPDF`
- `ExportMetrixXML`
- `ExportJDFImposition`
- `ExportCIP3Cutting`
- `ExportJDFCutting`
- `ExportCIP3Folding`
- `ExportJDFFolding`
- `ExportJDFBinding`
- `ExportLayoutImages`
- `ExportZipFile`

## The Auto Plan command

### Overview

Auto Plan sometimes requires project-specific press and sheet size parameters. For example, when planning bound work, you (like an MIS System) may want to produce all the signatures on 24 x 36" or 25 x 38" sheets.

At other times, it is desirable for Auto Plan just to run on the largest press sheet possible. This could be advantageous when gang printing, because it generally costs the same to print on large press sheets as on smaller sheets, but more products can usually be placed on larger sheets.

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**Note** There is one difference between Auto Plan and Auto Production in Metrix Automation versus the normal user-driven Metrix. Whenever Auto Plan and Auto Production create a layout where the printing method is Sheetwise or Perfected, and some component pages on side one have colors but no component pages on side two have colors, Metrix Automation changes the layout's printing method to One-Sided.

## Auto Plan use cases

There are three different ways Metrix can determine which presses and sheet sizes to use when running Auto Plan in an automation environment.

1. The first way the automation Auto Plan works would suit a gang printer with only one or two types of presses. The Commands MXML file specifies the one or two presses, and Auto Plan simply finds the largest press sheet for each press for the component stocks in the incoming MXML file. Using this method, incoming MXML files do not need to define any Layout elements.
  - Commands MXML file:
    - Set `AutoPlan@UseLargestDatabasePressSheet` = **True**.
    - Supply one or two `AutoPlanProductionMethod/PressRef` elements to specify the press or presses.
  - Incoming MXML file: Product component stocks will be read and the largest sheets of each in the database that can fit on the presses will be used.
  - Summary: Presses and production information defined: in the Commands MXML file using the `AutoPlanProductionMethod` elements. Sheet sizes defined: for each component stock in the incoming MXML file (MXML version 1.0 or 1.5) the largest sheet in the database that can fit on the press or presses.
2. The second way the automation Auto Plan works does not define the press or presses, or any other production information, in the Commands MXML file. Instead, the press or presses and other production information is read when processing an incoming MXML file. Using this method, incoming MXML files must define at least one `MetrixXML/Project/LayoutPool/Layout` element.
  - Commands MXML file:
    - Set `AutoPlan@UseLargestDatabasePressSheet` = **True**.
    - Do not supply any `AutoPlanProductionMethod` elements.
  - Incoming MXML file:
    - The first two unique production scenarios (press, printing method, and page-to-bleed gap) contained in the `MetrixXML/Project/LayoutPool/Layout` elements in the incoming MXML file will be used.
    - Product component stocks will be read and the largest sheets of each in the database that can fit on the presses will be used.
  - Summary:
    - *Presses and production information defined:* in the incoming MXML file (MXML version 1.0 or 1.5) in the first two unique production scenarios.
    - *Sheet sizes defined:* for each component stock in the incoming MXML file (MXML version 1.0 or 1.5) the largest sheet in the database that can fit on the press or presses.
3. The third way the automation Auto Plan works is similar to the second above, except even the sheet size information is read from the incoming MXML files, not the Commands MXML file. Like scenario two above, using this method incoming MXML files must define at least one `MetrixXML/Project/LayoutPool/Layout` element.
  - Commands MXML file:
    - Set `AutoPlan@UseLargestDatabasePressSheet` = **False**.
    - Do not supply any `AutoPlanProductionMethod` elements.

- Incoming MXML file:
  - The first two unique production scenarios (press, printing method, page to bleed gap, and stock sheet sizes) contained in the *MetrixXML/Project/ LayoutPool/Layout* elements in the incoming MXML file will be used.
  - Product component stocks will be read and sheet sizes of each in the database will be found that match the sheet sizes contained in the *MetrixXML/Project/LayoutPool/Layout* elements in the incoming MXML file.
- Summary:
  - Presses, production information, and sheet sizes defined: in the incoming MXML file (MXML version 1.0, 1.5, or 1.6) in the first two unique production scenarios.

One final extra comparison between cases two and three – case three reads all production information (press, printing method, page to bleed gap, and sheet size) from the incoming project MXML file, while case two does not read the sheet size but instead uses the largest sheet size for the presses.

## The Metrix Automation email process

Metrix Automation uses email to notify Administrators and Planners of events they may be interested in, or where human intervention is required.

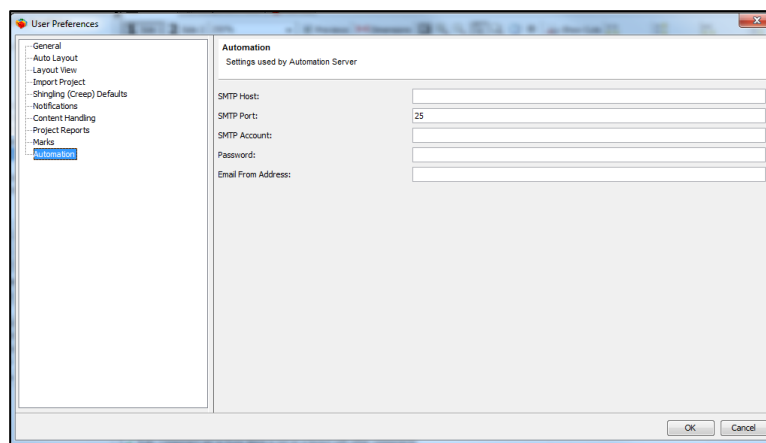
In previous versions of Metrix, users entered the Automation and Email settings in the Initial Setup window. Automation settings are now configured in User Preferences, and User email settings are configured in the Database window.

Before you can use Automation, you must enter the following information:

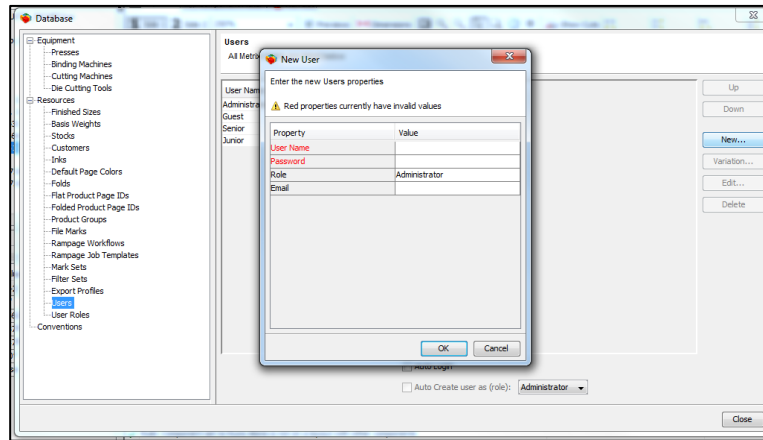
- SMTP Host
- Email From Address
- User Administrator Email
- User Senior Email

**Notes** Automation requires a Senior Planner user to exist in the Database. If there is no Senior Planner, Metrix will automatically create one with a random password.

Configure Automation settings in the User preferences on the Automation window.



Configure User Email To addresses in the Database on the User window.



If you are using Automation Lite or Pro, enter the following information in **User Preferences > Automation**:

- SMTP Host – this will be site specific.
  - Example: smtp.host=mail.comcast.com
- SMTP Port – commonly 587, but sometimes 465, 25, or 2525. If you don't know the port, ask your IT department or email hosting service.
- SMTP Account email – site specific, some ISPs require an account to be used for sending emails, others don't. This is not necessarily the recipient of any emails.
  - Example: email.username=joe\_blogs@mail.our\_isp.com
  - Example: email.username=joe\_blogs
- Password – the SMTP account password.
  - Example: email.password=top\_secret!
- Email From Address – the email address Metrix uses as its "From" when sending emails to the Administrator and Planners.
  - Example: do\_not\_reply@ourplace.com

In **Database > Users**, enter the following:

- Administrator email – 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. You can enter multiple addresses, separated with a comma.
  - Example: admin@ourplace.com
  - Example: admin@ourplace.com, big\_joe@ourplace.com
- Senior planner email – the email address for emails sent to the Senior Planner, usually when a project could not be fully automatically processed and needs someone's attention.
  - Example: planners@ourplace.com
  - Example: planners@ourplace.com, bigboss@here.com

The following items give the operator more options regarding how emails will be handled:

- **email.test** – Once Metrix is successfully sending email, the test email sent at startup can be switched off by adding the line "email.test=false" to the end of your "metrix.properties" file. If the line is already there, just delete the number sign (#) from before the line to make it active.
- **email.maxexitingtime** – When shutting down, the number of seconds to wait after any non-email threads have finished being processed, to give the emailer a chance to send all its pending emails. Open the "metrix.properties" file with a text editor and add "email.maxexitingtime=" plus a number to the end of the file.

- Example: email.maxexitingtime=120

## Description of the Metrix email system

Metrix can send many emails in short succession and some ISPs block such behavior as a strategy to combat spam. To avoid this problem, Metrix uses an internal hot folder system to handle emails.

Here is a table of the email folders with explanations of how Automation Lite or Pro uses them:

Folder	Explanation
Automation/_Email/Inbox	The watched hot folder, email files dropped into this are emailed using the configuration settings above (SMTP host, etc.).
Automation/_Email/ Outbox	Files dropped into the inbox are moved by the system to this folder. This is in effect the working area. You should not touch this folder directly, unless perhaps there are stale files that need to be removed.
Automation/_Email/ Sent	If emails are successfully delivered, the email file is moved into this folder. Old email files can and should be periodically manually deleted.
Automation/_Email/Failed	After so many attempts if an email still has not been delivered successfully, they are moved into this folder. After the email problem is rectified, files in this folder should be manually moved back into the inbox for sending.
Automation/_Email/ Holding	Some emails have the log file attached. These email files are first written to this holding folder until the Commands have all been executed and the log file has been written.

## Automation Server

The **User Preferences > Automation and Database > User** windows are now accessible from Metrix Automation Server so you can configure User email addresses and Automation settings without using Metrix Client.

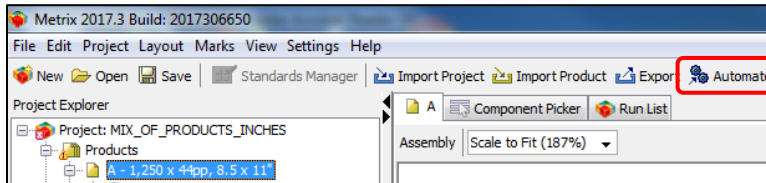
## Automation workflows

### Description of Automation workflows

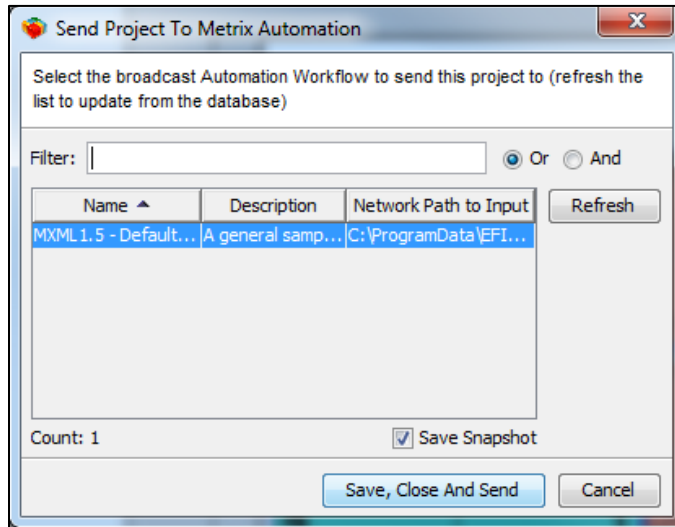
In Metrix, a great deal of an operator's time can be spent doing the same repetitive functions, such as running auto layout or auto production, applying standards, applying mark sets, exporting the project, etc.

For those who have licensed the Metrix Automation module, or are running Metrix Automation Server, Metrix allows access to Automation workflows, giving the operator the option of offloading many of these repetitive tasks.

Access to Automation workflows is available using **Automate** in the standard Metrix user interface.



When the operator presses **Automate**, Metrix presents a window with a list of available Metrix Automation workflows.



After the operator selects an Automation workflow, and clicks **Save, Close, And Send**, the project is sent from the Metrix client to the Automation workflow, fully automating its processing.

If you view the computer running Metrix Automation, you can see a list of the functions Metrix will perform, and a log of the progress.

Once all the steps to process the project are complete, the project can be automatically exported and/or saved into the Metrix Database. You can view the results of the process in the Output folder.

In many cases most of what formerly required operator involvement can now be handled in the background by Metrix Automation.

## To use Automation workflows

1. Launch a Metrix license somewhere on your network. Under the File menu, choose Automation Mode.
2. Click **Browse** and select the Commands File you wish to load. Which file you select will be determined by the commands you wish Metrix Automation to execute automatically when you click **Automate**.

Navigate to your Metrix folder, then to the Commands folder, and then to the Inches or Metric folder (depending on which measurements you are using). Select the file you wish to load and click **Import**.

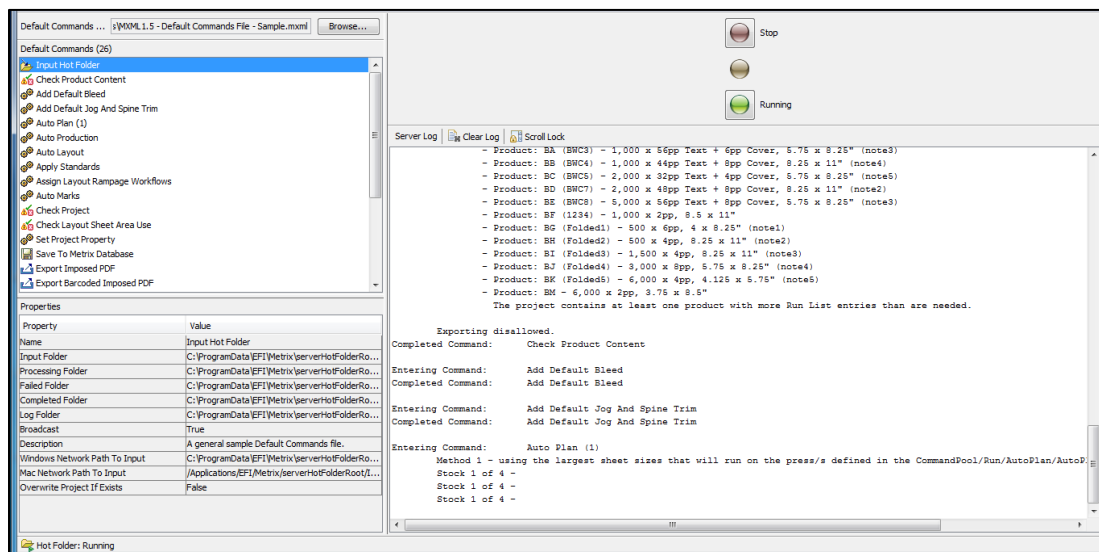
**Note** The hot folder properties in the commands file needs to have the Broadcast property set for **True**. Otherwise, Automation Lite or Pro will not be available as an Automation Workflow. Also, you may wish to have Broadcast set to **False** in the commands file if you want a particular Automation Workflow to not be available to your Metrix clients.

3. Click **Start** to start running the Hot Folder. This makes Automation Lite or Pro available as an Automation Workflow on the network.
4. On the Metrix client where you wish to do your work, create a project with at least one product, or import a project/product.
5. Click **Automate**. In the window that opens, Metrix will present you with a list of the Automation Workflows available on your network. Select the one where you wish to send your project, and then click **Save, Close And Send**.

The project is saved to the Metrix Database, it is closed, and the project is sent to the Automation workflow. Different functions will be performed on the project, depending on the commands loaded in Automation Lite or Pro.

**Note** You can use the Filter function to look for a particular Automation workflow. You can search using Boolean “And” or “Or” functions. Clicking **Refresh** will update the list of Automation Workflows from the Database.

6. During the automation process, if you view the machine running Metrix Automation, you can watch it process the project.



- When Metrix Automation is finished processing the project, you can look in the Output folder to view the results of the process.

# Appendix A: Agfa Apogee Workflow

## Setting up Metrix for Agfa Apogee

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

1. Select **Settings> User Preferences**
2. Select General from the list on the left.
3. Choose Agfa Apogee as your Prepress Workflow from the drop-down list, then click **OK**.
4. Close and restart Metrix.

## JDF Imposition for Agfa Apogee

When Agfa Apogee is selected as the Prepress Workflow, Metrix inserts special “work style” tags in the JDF Imposition file that assist proper positioning for double-sided proofing. Customer information is also added to the JDF Imposition, for better integration with Apogee, when all products in the project have the same customer.

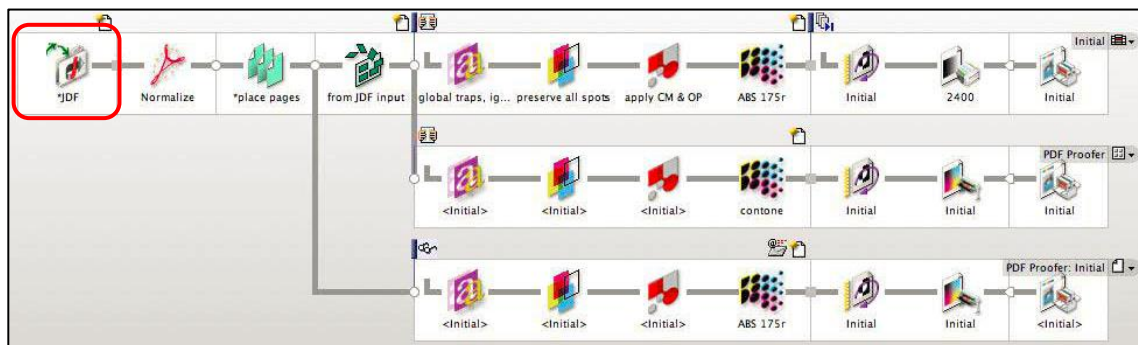
Customers of some Agfa Apogee workflows may find that when they export unpopulated (no content files assigned) JDF from Metrix, and there is an existing Apogee job with the same name, it would unlink the already assigned content in Apogee. If you encounter this problem it is recommended to try the ‘Unspecified’ option in the drop-down menu on the Export JDF Imposition screen.

**Note** This option is only available if the “Prepress Workflow” setting in **User Preferences / General** is set to “Agfa Apogee.”

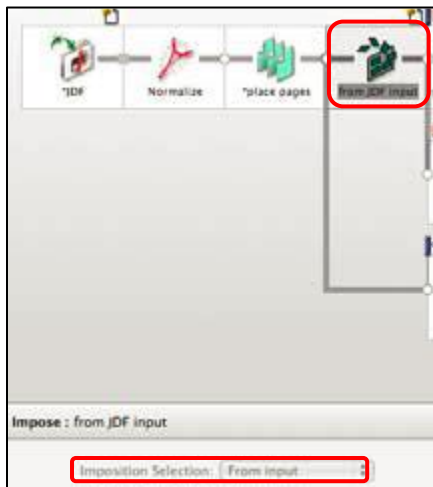
## Apogee/Metrix Integration

**Note** This plan uses JDF Input TP, and will generate 1-up proof, layout proof and final plates.

## Apogee Hot Ticket Configuration



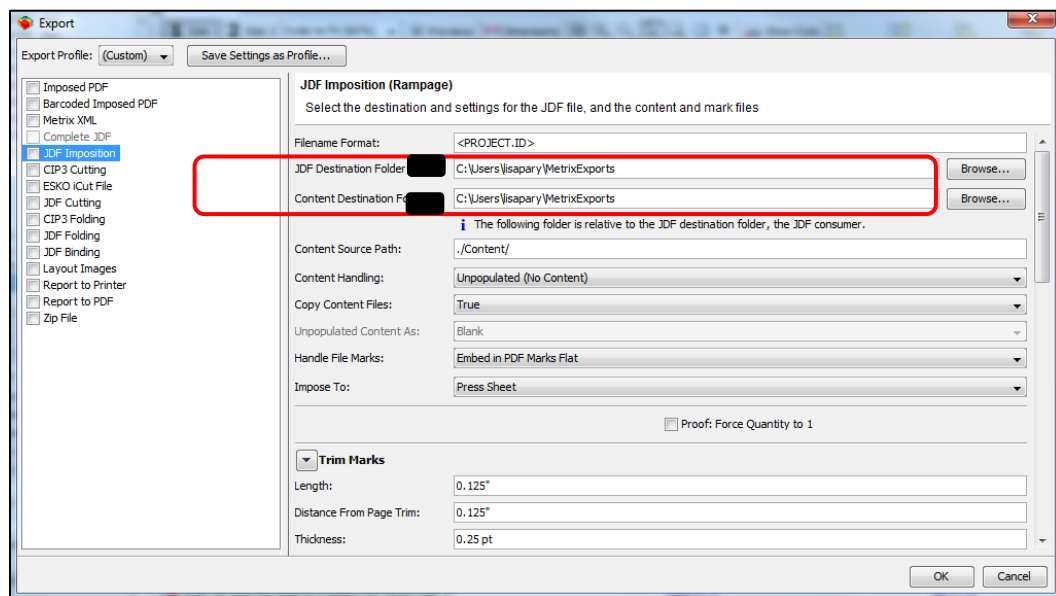
Set “Imposition Selection” to “From JDF Input.”



## Metrix configuration

The following steps will help you set up the Metrix/Apogee configuration.

1. In Metrix, with any sample job open, click **Export** in the menu bar.
2. Then select JDF Imposition and define the JDF and Content Destinations, along with the Content Source Folder Location: “./”:



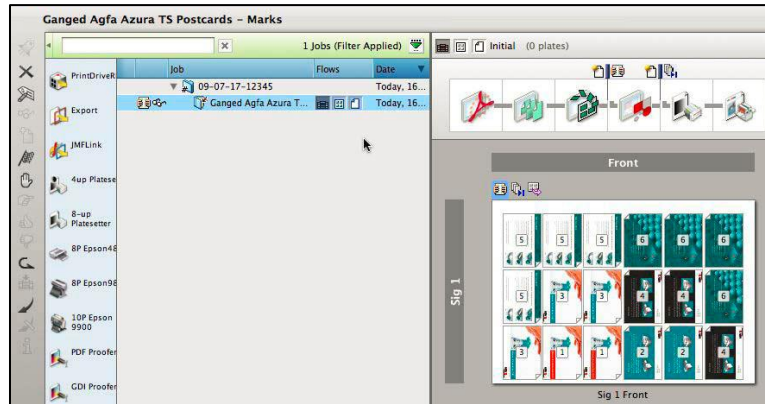
## Notes about Hot Ticket shared directory on Mac

You cannot browse to a network directory from Metrix on the Mac, so keep an alias of the JDF Input Directory (see above) in your local Metrix directory. It is a good idea to keep this handy, since Metrix will default to a local directory if this hot folder is not mounted.

Once you use this alias to find the JDF Input directory, you will need to back up on directory level, highlight the input folder and click **Select**.

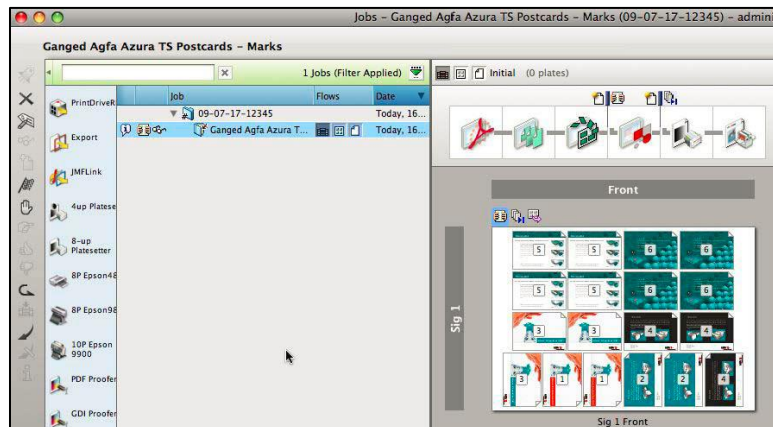
## Exporting from Metrix to Apogee

1. Select a layout in Metrix.
2. Click **Export** in the Menu bar.
3. In the Export window, select **JDF Imposition**.
4. Click **OK** to send the job to Apogee.



The JDF Subscription (or “handshake”) between Metrix and Apogee allows changes to the Metrix job to dynamically update the Apogee Prepress job.

Here is the result in Apogee when a different layout was selected in Metrix:



# Appendix B: Rampage Workflow

## Metrix-Rampage Workflow Integration

Metrix can attach Rampage-specific processing instructions to a Metrix JDF exported to Rampage.

This chapter explains how to set up and use Metrix to embed Rampage

Workflows and Rampage Job Templates. For further information on the Rampage system, Rampage Workflow and Job Template options, and operation within the Rampage system, contact Rampage Inc.

See also the documentation that is included with your Rampage installation.

### Setting up Metrix for your Rampage workflow

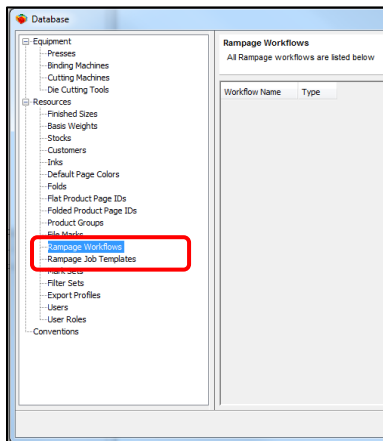
Follow these steps to prepare your Metrix system to integrate with your Rampage workflow.

1. Select **Settings> User Preferences**.
2. Select **General** in the User Preferences window.
3. Choose **Rampage** as your **Prepress Workflow**, and then click **OK**.
4. Close and restart Metrix.

### Rampage workflows and job templates

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

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



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

A Rampage Job Template applies to an entire Metrix project.

### Assigning Rampage workflows in Metrix

When you select the whole project in Metrix, you can then select any job template listed in the Database using the Rampage Job Template property.

When you select **Products**, you can then select any Page Rampage Workflow listed in the Database using the Page Rampage Workflow property.

In the Assembly View, you can also view the page workflow applied to any specific page in the Pages window in the Rampage Workflow column.

When you select a layout, you can then select any Side-Specific Rampage Workflow listed in the Database using the Side-1 or Side-2 Rampage Workflow property in the Properties Editor.

If you want, you can also select a component, and then a specific page, and then a Specific Rampage Page Workflow from the Database using the Rampage Workflow Property.

## Using Rampage color aliases

### What is a Rampage color alias?

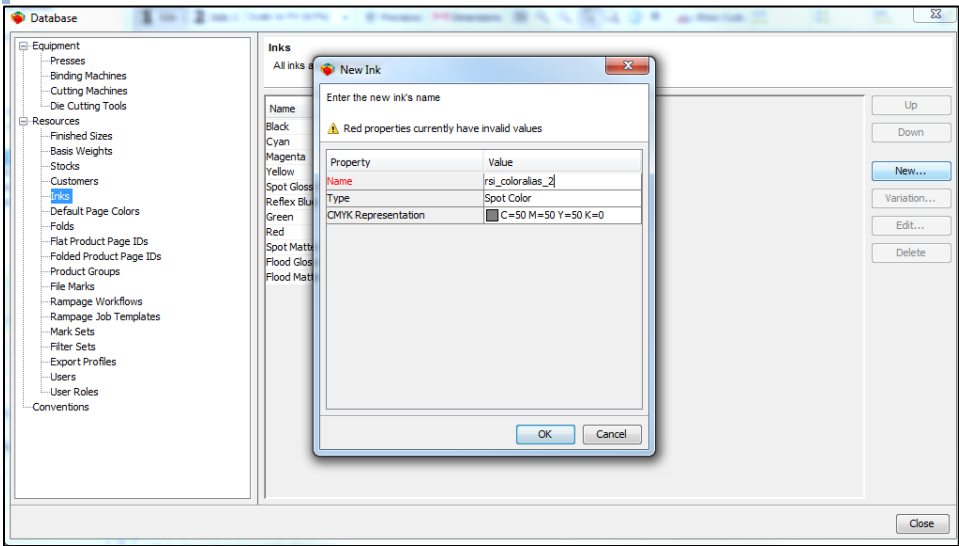
A special color name that is used as a spot color alias. This special color name is then automatically swapped for the actual job spot colors on the Rampage system.

### How to create spot color marks

In order to create spot color marks (such as take-off bars) using an alias that will later be remapped automatically, the aliases must first be added to the Inks node of the Metrix database. Follow these steps.

1. Add the spot color aliases by accessing the Metrix Database.
2. Choose the Inks node and then click **New**.

**Note** You must have the appropriate permissions.



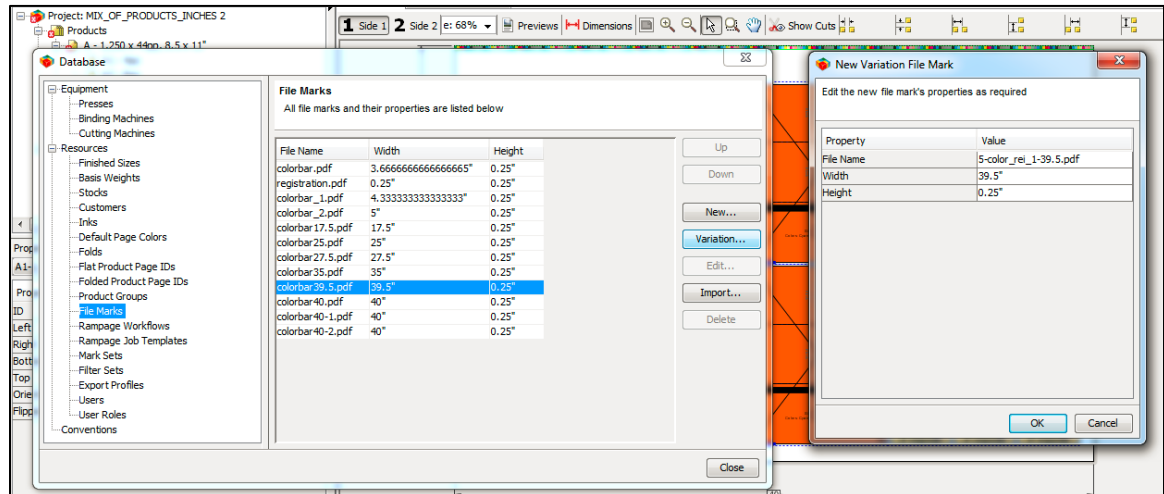
Valid names are:

rsi\_coloralias\_1 through rsi\_coloralias\_28, and they must be lower case. Aliases cannot be mapped to spot colors that contain the process names: cyan, magenta, yellow, or black.

### Spot Color colorbars

Your colorbars must also have the proper Rampage rsi coloralias names to trigger automatic remapping in Rampage. A five-color bar, for example, would have patches of cyan, magenta, yellow, black, and a spot color named rsi\_coloralias\_1, for example. To add these special colorbars to Metrix, follow the normal procedure:

1. Import the PDF mark into the Metrix Database (**Database > File Marks > Import**). You must have the appropriate permissions.



**Note** From Rampage documentation: "if you are using the Rampage rsi\_coloralias feature in Illustrator, and you save the Illustrator file to an older version, Illustrator may add a number 1 to the end of the color name. Rampage will no longer recognize this color as a color alias. If you do re-save your Illustrator document, remember to check your spot color names."

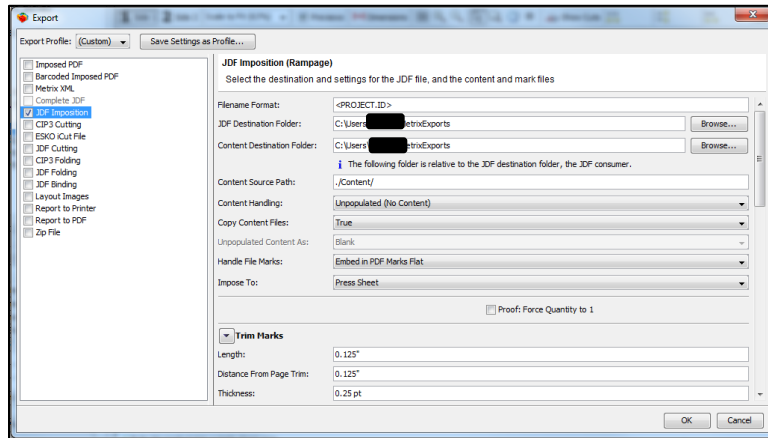
## Appendix C: Screen TrueFlow Workflow

## Setting up Metrix for Screen TrueFlow

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

1. Select **Settings> User Preferences**.
2. In the User Preferences window, select **General**.
3. Choose **Screen Trueflow** as your **Prepress Workflow**, and then click **OK**.
4. Close and restart Metrix.

## Exporting JDF Imposition for Screen Trueflow



### JDF Imposition Settings for Trueflow

Setting	Explanation
JDF Destination Folder	<p>The destination for the JDF file exported by Metrix. This is a location on the Trueflow server, either \\Trueflow host name\\HFRoot or \\Trueflow host name\\HFRoot_ Adv. Metrix will write the JDF to the location selected.</p> <p><i>The JDF is named with the Project ID followed by a JDF extension. All “illegal” characters ( \\ / : , ; * ? ” &lt; &gt;   # = + % &amp; ( ) ~ ) are automatically replaced by dash characters (-), and any preceding period (.) is also replaced with a dash. For example, if the project name is “Project #90943” Metrix will replace the “#” with a dash and determine the filename to be “Project -90943.jdf”.</i></p>
Content Destination Folder	<p>The destination for the PDF Marks Flat, generated by Metrix for all JDF Imposition files, and for PDF content files when exporting populated JDF. This path should be \\Trueflow host name\\docpool. When you click <b>OK</b> to export a JDF file, a new subfolder is created in this folder with the exact same name as the JDF file (including the “.jdf” extension). All PDF content and the PDF Marks Flat will then be copied into this new subfolder.</p> <p><i>If a subfolder already exists with the name of the JDF file, an underscore (_) and number (beginning at “2”) will be added to the root part of the file name, and the number will be incremented until a folder name is found that does not already exist. For example, if the JDF file is named “Project -90943.jdf” and a subfolder already exists with this name,</i></p>

	<i>Metrix will try "Project -90943_2.jdf". If this subfolder already exists too, Metrix will try "Project -90943_3.jdf", and so on until Metrix finds a new unique folder name.</i>
Content Source Path	JDF folder
Content Handling	<b>Unpopulated (No Content) / Populated (Include Content)</b>
Copy Content Files	<b>True / False</b>
Handle File Marks	<b>Embed in PDF Marks Flat / Reference in JDF File</b>
Impose To	<b>Press Sheet / Plate</b> The area to impose to.
PDF Sheet Bleed	Value that specifies the PDF Sheet Bleed margin (default is <b>0"</b> ) You can specify a PDF Sheet Bleed margin when exporting Imposed PDF, Barcoded Imposed PDF, and JDF. This bleed margin setting is in the Export window; it adds the specified margin to the mediabox all around the sheet and sets the trimbox to the exact sheet size. This ensures that marks can bleed off the edge of the sheet.
<b>Trim Marks</b>	
Length	The trim mark length. <b>0</b> (zero) length turns off trim marks.
Distance from Page Trim	The distance from the page trim to the beginning of the trim mark.
Thickness	The trim mark thickness or weight.
Over Page Content	<b>True / False</b> When <b>True</b> , trim marks will overprint page content.
Color	<b>All Separations / Select an Ink (from the Metrix database)</b> The color for trim marks.
White Knockout Thickness	The thickness of the white knockout around the trim marks. Can be 2x, 3x, or 5x the thickness of the trim marks.
<b>External Fold Marks (outside the page trim bounding rectangle)</b>	
Length	The fold mark length. <b>0</b> (zero) length turns off external fold marks.
Distance from Page Trim	The distance from the page trim to the beginning of the fold mark.
Thickness	The fold mark thickness or weight.
Over Page Content	<b>True / False</b> When <b>True</b> , fold marks will overprint page content.
Color	<b>All Separations / Select an Ink (from the Metrix database)</b> The color for trim marks.
Line Type	<b>Solid / Dashed / Dotted</b> The fold mark line type.
White Knockout Thickness	The thickness of the white knockout around the external fold marks. Can be 2x, 3x, or 5x the thickness of the external fold marks.
<b>Internal Fold Marks (inside the page trim bounding rectangle)</b>	

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Maximum Length	The maximum length for the fold mark. 0 (zero) length turns off internal fold marks.
Crop Distance from Page Trim	The distance from the page trim to the beginning of the fold mark.
Minimum Length	The minimum length for the fold mark.
Thickness	The fold mark thickness or weight.
Over Page Content	<b>True / False</b> When <b>True</b> , fold marks will overprint page content.
Color	<b>All Separations / Select an Ink (from the Metrix database)</b> The color for trim marks.
Line Type	<b>Solid / Dashed / Dotted</b>
White Knockout Thickness	The thickness of the white knockout around the internal fold marks. Can be 2x, 3x, or 5x the thickness of the internal fold marks.
Export Negative Bleeds	<b>True / False</b> When <b>True</b> , any Negative Bleed area specified in Metrix will be cropped.

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# Appendix D: Fujifilm XMF Workflow

## Setting up Metrix for Fujifilm XMF

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

1. Select **Settings> User Preferences**.
2. On the left side of the User Preferences window, select **General**.
3. Choose **Fujifilm XMF 3.1** or **Fujifilm XMF 3.0 and Earlier** as your **Prepress Workflow**, then click **OK**.
4. Close and restart Metrix.

## Exporting and Importing

### Exporting XMF job templates as CSV

You can export your XMF Job Templates as CSV so they can be imported into the Metrix Database. If you are not sure how to export your XMF Templates, contact Fujifilm for assistance.

### Importing CSV XMF job templates

Follow these steps to import XMF Job Templates.

1. Select **Settings > Database**.
2. On the left side of the screen, choose XMF Job Templates.
3. Click **Import**.
4. Select XMF Template.csv.
5. Click **Import**.

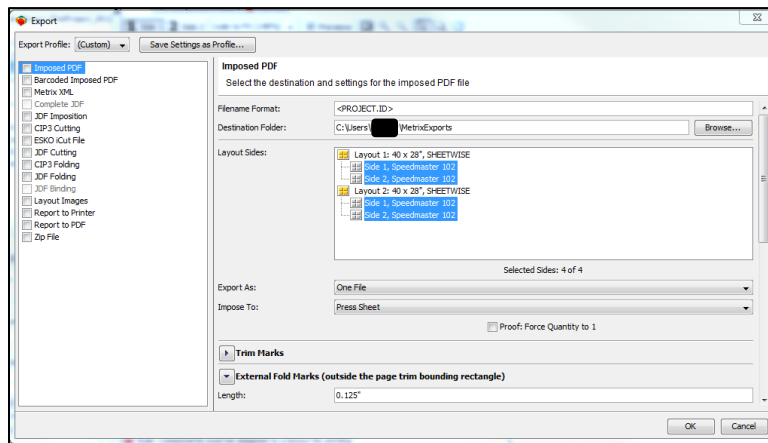
### JDF Imposition Settings for Fujifilm XMF

Setting	Explanation
JDF Destination Folder	The destination for the JDF file exported by Metrix, which must be a location accessible to Fujifilm XMF. If you are unsure of the exact syntax and path, contact Fujifilm for assistance.
Content Destination Folder	This is the destination for the PDF Marks Flat as well as the destination for PDF Content files when Copy Content Files= <b>True</b> , for populated JDF Imposition. This must be a location accessible to Fujifilm XMF. If you are unsure of the exact syntax and path, contact Fujifilm for assistance.
Content Source Path	Be sure to enter this folder name using the proper syntax. If you are unsure of the exact syntax and path, contact Fujifilm for assistance.
Content Handling	<b>Unpopulated (No Content) / Populated (Include Content)</b>
Copy Content Files	<b>True / False</b> When <b>True</b> , Metrix will copy any assigned content files to the Content Destination folder. When <b>False</b> , no assigned content will be copied.
Handle File Marks	<b>Embed in PDF Marks Flat / Reference in JDF File</b> The generally accepted JDF procedure is to <b>Embed in PDF Marks Flat</b> . This means that any file marks used in the job are part of the data stream processed by XMF. When <b>Reference in JDF File</b> is selected, file marks must be copied to the <b>Content Destination Folder</b> so XMF has access to them for processing.

XMF Job Template	The XMF Job Template to use. Select from the list in the Metrix database.
Impose To	<b>Press Sheet / Plate</b> The area to impose to.
<b>Trim Marks</b>	
Length	The trim mark length. <b>0</b> (zero) length turns off trim marks.
Distance from Page Trim	The distance from the page trim to the beginning of the trim mark.
Thickness	The trim mark thickness or weight.
Over Page Content	<b>True / False</b> When <b>True</b> , trim marks will overprint page content.
Color	<b>All Separations / Select an Ink (from the Metrix database)</b> The color for trim marks.
White Knockout Thickness	The thickness of the white knockout around the trim marks. Can be 2x, 3x, or 5x the thickness of the trim marks.
<b>External Fold Marks (outside the page trim bounding rectangle)</b>	
Length	The fold mark length. 0 (zero) length turns off external fold marks.
Distance from Page Trim	The distance from the page trim to the beginning of the fold mark.
Thickness	The fold mark thickness or weight.
Over Page Content	<b>True / False</b> When <b>True</b> , fold marks will overprint page content.
Color	<b>All Separations / Select an Ink (from the Metrix database)</b> The color for trim marks.
Line Type	<b>Solid / Dashed / Dotted</b> The fold mark line type.
White Knockout Thickness	The thickness of the white knockout around the external fold marks. Can be 2x, 3x, or 5x the thickness of the external fold marks.
<b>Internal Fold Marks (inside the page trim bounding rectangle)</b>	
Maximum Length	The maximum length for the fold mark. 0 (zero) length turns off internal fold marks.
Crop Distance from Page Trim	The distance from the page trim to the beginning of the fold mark.
Minimum Length	The minimum length for the fold mark.
Thickness	The fold mark thickness or weight.
Page Content	<b>True / False</b> When <b>True</b> , fold marks will overprint page content.
Color	<b>All Separations / Select an Ink (from the Metrix database)</b> The color for trim marks.
Line Type	<b>Solid / Dashed / Dotted</b>

White Knockout Thickness	The thickness of the white knockout around the internal fold marks. Can be 2x, 3x, or 5x the thickness of the internal fold marks.
<b>Proofing Lines</b>	
Thickness	The thickness of all proofing lines.
Trim Line Color	<b>(None) / Select an Ink (from the Metrix database)</b> Insert a trim line of the selected color around the bleed of each page.
Trim Line Type	<b>Solid / Long Dashed / Short Dashed</b> Insert a trim line of the selected type around the trim of each page.
Bleed Line Color	<b>(None) / Select an Ink (from the Metrix database)</b> Insert a bleed line of the selected color around the bleed of each page.
Bleed Line Type	<b>Solid / Long Dashed / Short Dashed</b> Insert a bleed line of the selected type around the bleed of each page.
Export Negative Bleeds	<b>True / False</b> When <b>True</b> , any Negative Bleed area specified in Metrix will be cropped.

## Exporting JDF Imposition for Fujifilm XMF 3.0 and Earlier



## JDF Imposition for Fujifilm XMF 3.0 and Earlier

Setting	Explanation
JDF Destination Folder	The destination for the JDF file exported by Metrix, which must be a location accessible to Fujifilm XMF. If you are unsure of the exact syntax and path, contact Fujifilm for assistance.
Content Destination Folder	This is the destination for the PDF Marks Flat as well as the destination for PDF content files when Copy Content Files= <b>True</b> , for populated JDF Imposition. This must be a location accessible to Fujifilm XMF. If you are unsure of the exact syntax and path, contact Fujifilm for assistance.

Content Source Path	Be sure to enter this folder name using the proper syntax. If you are unsure of the exact syntax and path, contact Fujifilm for assistance.
Content Handling	<b>Unpopulated (No Content) / Populated (Include Content)</b>
Copy Content Files	<b>True / False</b> When <b>True</b> , Metrix will copy any assigned content files to the Content Destination folder. When <b>False</b> , no assigned content will be copied.
Handle File Marks	<b>Embed in PDF Marks Flat / Reference in JDF File</b> The generally accepted JDF procedure is to <b>Embed in PDF Marks Flat</b> . This means that any file marks used in the job are part of the data stream processed by XMF. When <b>Reference in JDF File</b> is selected, file marks must be copied to the <b>Content Destination Folder</b> so XMF has access to them for processing.
XMF Job Template	The XMF Job Template to use. Select from the list in the Metrix database.
Layout Sides	<b>All Sides / Plate or Sheet Sizes</b> Use this drop-down list to automatically select plate or sheet sizes in the project for export.
Export As	<b>One File / Separate File for Each Layout / Separate File for Each Layout Side / Separate File for Each Plate and Sheet Size</b> The JDF file(s) to generate and send to XMF.
Impose To	<b>Press Sheet / Plate</b> The area to impose to.
<b>Trim Marks</b>	
Length	The trim mark length. <b>0</b> (zero) length turns off trim marks.
Distance from Page Trim	The distance from the page trim to the beginning of the trim mark.
Thickness	The trim mark thickness or weight.
Over Page Content	<b>True / False</b> When <b>True</b> , trim marks will overprint page content.
Color	<b>All Separations / Select an Ink (from the Metrix database)</b> The color for trim marks.
White Knockout Thickness	The thickness of the white knockout around the trim marks. Can be 2x, 3x, or 5x the thickness of the trim marks.
<b>External Fold Marks (outside the page trim bounding rectangle)</b>	
Length	The fold mark length. <b>0</b> (zero) length turns off external fold marks.
Distance from Page Trim	The distance from the page trim to the beginning of the fold mark.
Thickness	The fold mark thickness or weight.
Over Page Content	<b>True / False</b> When <b>True</b> , fold marks will overprint page content.
Color	<b>All Separations / Select an Ink (from the Metrix database)</b> The color for trim marks.
Line Type	<b>Solid / Dashed / Dotted</b>

	The fold mark line type.
White Knockout Thickness	The thickness of the white knockout around the external fold marks. Can be 2x, 3x, or 5x the thickness of the external fold marks.
<b>Internal Fold Marks (inside the page trim bounding rectangle)</b>	
Length	The fold mark length. <b>0</b> (zero) length turns off internal fold marks.
Distance from Page Trim	The distance from the page trim to the beginning of the fold mark.
Thickness	The fold mark thickness or weight.
Over Page Content	<b>True / False</b> When <b>True</b> , fold marks will overprint page content.
Color	<b>All Separations / Select an Ink (from the Metrix database)</b> The color for trim marks.
White Knockout Thickness	The thickness of the white knockout around the internal fold marks. Can be 2x, 3x, or 5x the thickness of the internal fold marks.
<b>Proofing Lines</b>	
Thickness	The thickness of all proofing lines.
Trim Line Color	<b>(None) / Select an Ink (from the Metrix database)</b> Inserts a trim line of the selected color around the bleed of each page.
Trim Line Type	<b>Solid / Long Dashed / Short Dashed</b> Inserts a trim line of the selected type around the trim of each page.
Bleed Line Color	<b>(None) / Select an Ink (from the Metrix database)</b> Inserts a bleed line of the selected color around the bleed of each page.
Bleed Line Type	<b>Solid / Long Dashed / Short Dashed</b> Inserts a bleed line of the selected type around the bleed of each page.
Export Negative Bleeds	<b>True / False</b> When <b>True</b> , any Negative Bleed area specified in Metrix will be cropped.

# Appendix E: Keyboard Shortcuts

## Keyboard Shortcuts

Action	Windows	Mac
Zoom In on the Layout	CTRL + +	CMD + +
Zoom Out on the Layout	CTRL + -	CMD + -
Redo	CTRL + Y	CMD + Y
Delete	Press Delete	Press Delete
Delete Instance and Product	Press Delete	Press Delete
Delete Layout and Products	Press Delete	Press Delete
Select All	CTRL+A	CMD+ A
Undo	CTRL+Z	CMD+ Z
Automate...	SHIFT+CTRL+T	CMD + T
Open Project	CTRL + O	CMD + O
New Project	CTRL + N	CMD + N
Close Project	CTRL + W	CMD + W
Save Project	CTRL + S	CMD + S
Save Project As...	SHIFT + CTRL + S	SHIFT + CMD + S
Apply Standard	SHIFT + CTRL + A	SHIFT + CMD + A
Exit Standards Manager	CTRL + W	CMD + W
Automatic Layout	CTRL + L	CMD + L
Rotate 90 degrees CW	CTRL + R	CMD + R
Rotate 90 degrees CCW	SHIFT + ALT +R	SHIFT + OPT + R
Step and Repeat Layouts	ALT + drag (snap to bleed edge) or CTRL + ALT + drag (snap to trim edge)	OPT + drag (snap to bleed edge) or CMD + OPT + drag (snap to trim edge)
Add Mark Set	CTRL + M	CMD + M
Copy Selected Marks	SHIFT + ALT + C	SHIFT + OPT + C
Paste On Selected Layout(s)	SHIFT + ALT + V	SHIFT + OPT + V
Select All Marks	SHIFT + ALT + A	SHIFT + OPT +A
Add New Product	CRTL + D	CMD + D
Add New Layout	CTRL + T	CMD + T
Clone	SHIFT + CTRL + C	SHIFT + CMD + C
Clone Multiple...	SHIFT + CTRL + M	SHIFT + CMD + M
Select All	CTRL + A	CMD + A
Undo	CTRL + Z	CMD + Z
Close Project	CTRL + W	CMD + W
Database	CTRL + B	CMD + B
Stale Locks	CTRL + K	CMD + K
User Preferences	CTRL + U or CTRL	CMD + U
Refresh	F5	Not applicable
Full View	SHIFT + CTRL + F	SHIFT + CMD + F
Previews	SHIFT + CTRL + P	SHIFT + CMD + P
Print Project Report	CTRL + P	CMD + P
Preview Project Report	CTRL + R	CMD + R

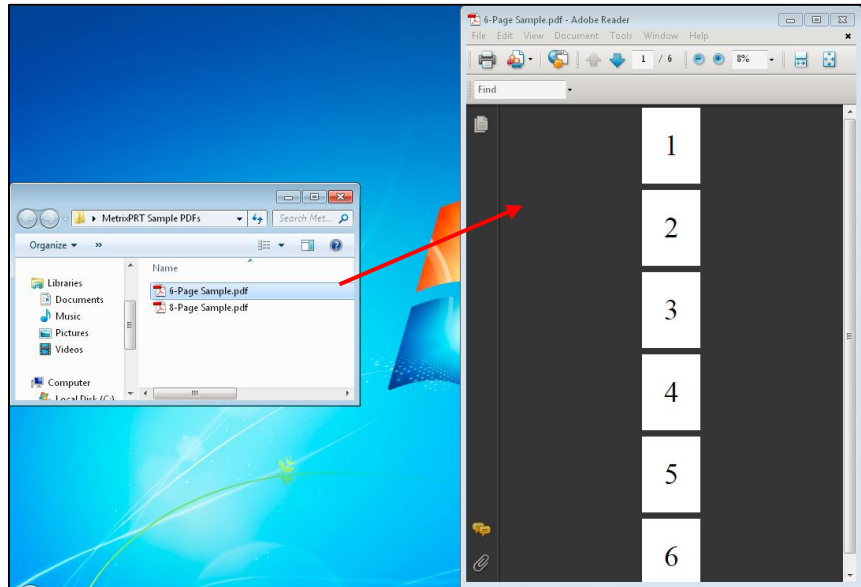
Hide Metrix	CTRL + H	CMD +H
Hide Others	CTRL + ALT + H	CMD + OPT + H
Quit Metrix	CTRL + Q	CTRL + Q
Scale to Fit	CTRL + 0	CMD + 0
Pan across on the Layout – hold down these keys	CTRL + spacebar	OPT + spacebar
Turn cursor into Marquee Zoom Tool- hold down these keys	CTRL + ALT + spacebar	CTRL + OPT + spacebar
Step-and-Repeat product instances, snap to bleed edge. For more information, see <a href="#">Step and Repeat using Drag and Drop</a> .	ALT + drag	OPT + drag
Step-and-Repeat product instances, snap to trim edge. For more information, see <a href="#">Step and Repeat using Drag and Drop</a> .	CTRL + ALT + drag	CMD + OPT + drag
Nudge product instance (moves 1mm or 1/16"). For more information, see <a href="#">Nudging product instances</a> .	CTRL + ←↑→↓	CMD + ←↑→↓
Step and repeat marks. For more information, see <a href="#">Creating Step and Repeat Marks</a> .	ALT + drag	OPT + drag
Select multiple product instances.	SHIFT + click or drag + select	SHIFT + click or drag + select
Drag and snap to bleed edge. For more information, see <a href="#">Drag and drop product instances</a> .	Drag to blue outline	Drag to blue outline
Drag and snap to trim edge. For more information, see <a href="#">Drag and drop product instances</a> .	CTRL + drag to blue outline	CMD + drag to blue outline
Open "Assign Component(s) to Layout"	CTRL + SHIFT + L	CMD + SHIFT + L
Automatic Production Plan	CTRL + ALT + A	CMD + OPT + A
Export File	CTRL + E	CMD + E
Side 1 of layout	CTRL + 1	CMD +1
Side 2 of layout	CTRL + 2	CMD+ 2

# Appendix F: The Metrix Page Reordering Tool (PRT)

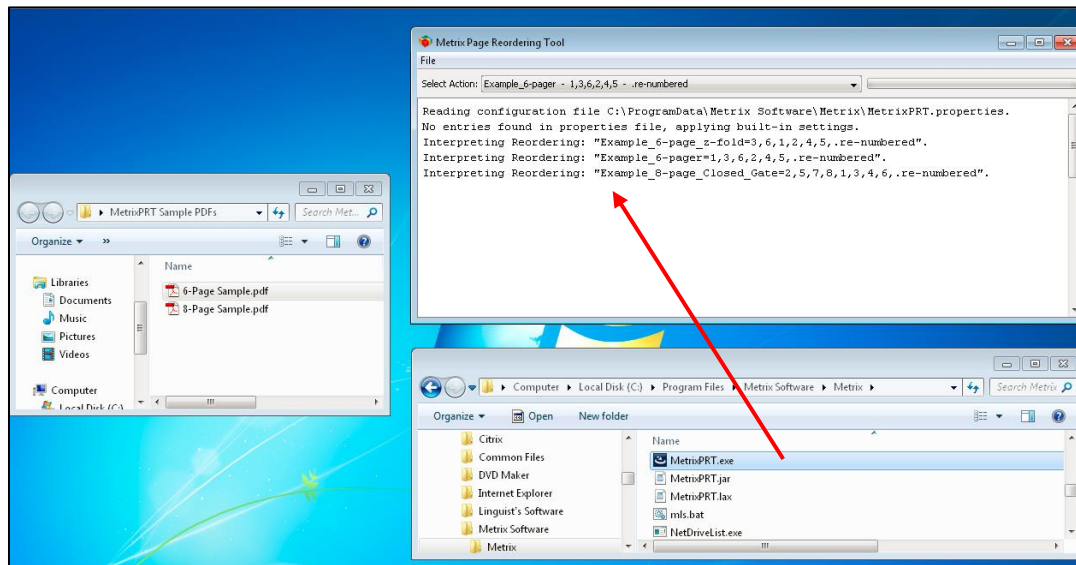
## Using the Metrix Page Reordering Tool (PRT)

Since the pages in a PDF are not always in the proper order to work with the way Metrix performs folding, Metrix ships with a stand-alone application that can quickly and easily reorder the pages in a PDF document. You can follow these steps to use or create reordering actions for your PDF documents.

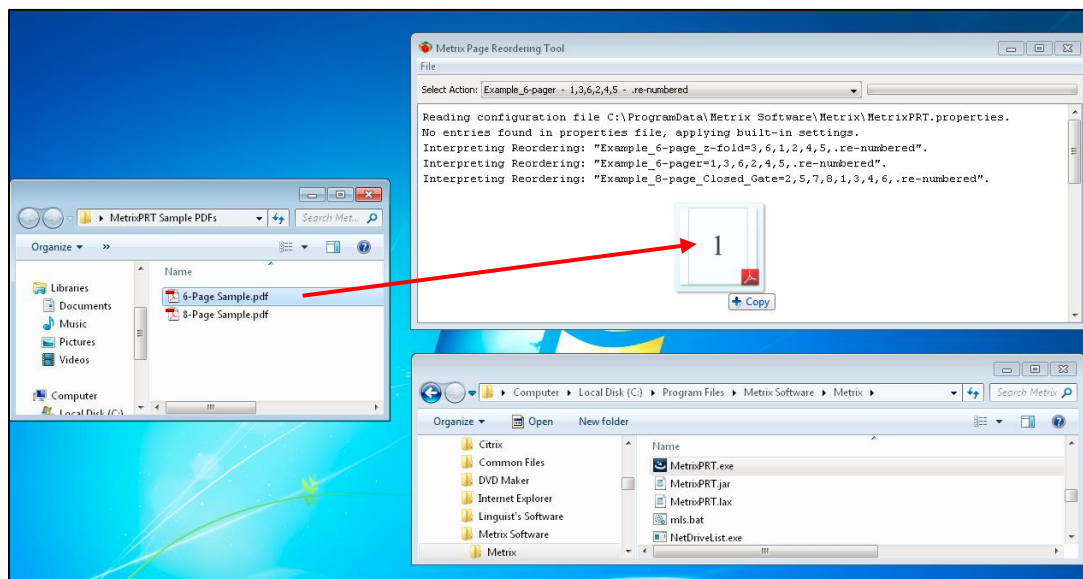
1. On your desktop, open the folder containing the PDF files you would like to reorder. Here is an example of a 6-page sample file, and how the pages look when opened in Acrobat (or some other PDF reader).



2. Now go to: **C: > Program Files > Metrix Software > Metrix** (on Windows)  
**Hard Drive > Applications > Metrix Software > Metrix** (on Mac)
3. Double-click the MetrixPRT.exe (MetrixPRT.app) file to open the Metrix Page Reordering Tool (PRT). A window will open on the desktop showing the sample reordering actions that are already included in the MetrixPRT. As you can see from the menu called Select Action above the list of actions, the selected action is "Example\_6-pager-1, 3, 6, 2, 4, 5-.re-numbered."



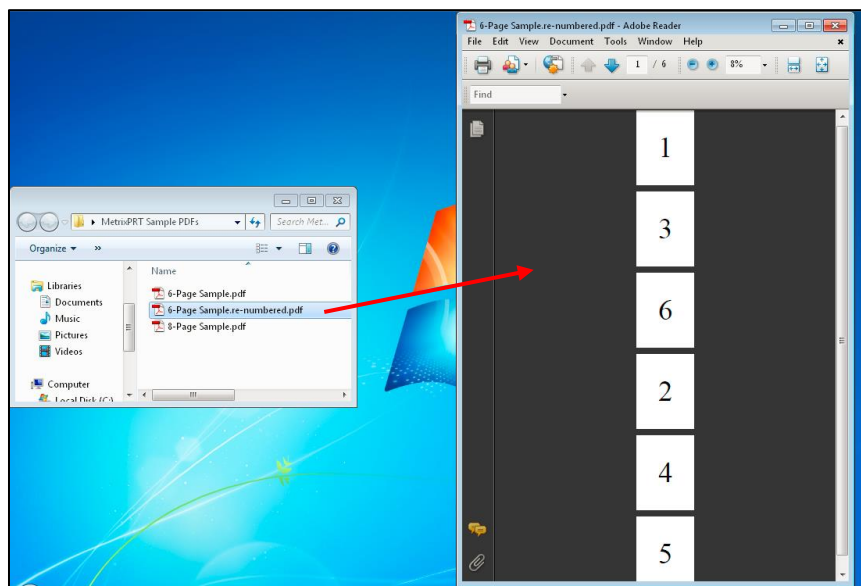
4. Drag the PDF file you wish to reorder anywhere on the open window of the Page Reordering Tool



5. When the PDF file is processed, Metrix displays a message in the **MetrixPRT** window, and places the processed file in the same folder as the original file.

**Note** The name of the new file has the extra text designated by the action used to process the PDF file. The reordering process is very fast, even with very large documents.

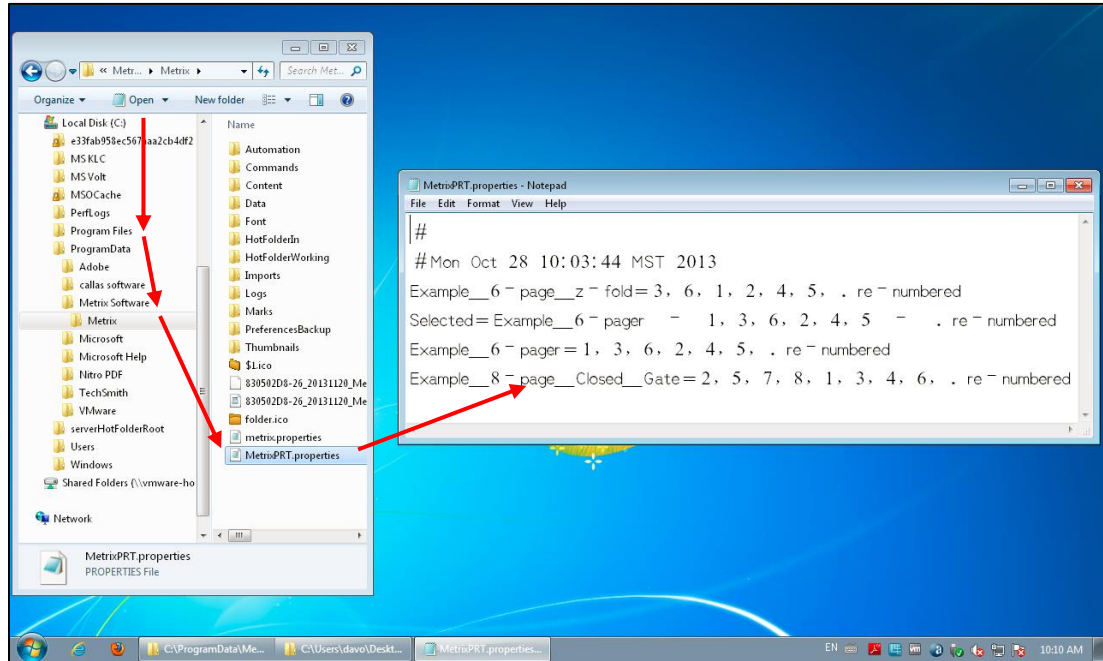
6. Open the reordered PDF file in Acrobat. You will see that the pages are now in the order designated by the action selected in the Metrix Page Reordering Tool.



Of course, the Page Reordering Tool becomes useful when you make your own reordering actions.

7. When you close the MetrixPRT for the first time, a file called "MetrixPRT.properties" will be generated in the Metrix folder in the ProgramData folder on your hard drive. So, if you have not closed the MetrixPRT yet, do so now.
8. Now, navigate to the **MetrixPRT.properties** file at:

**C: > ProgramData > Metrix Software > Metrix** (on Windows) **Hard Drive > Applications > Metrix Software > Metrix** (on Mac) and double-click to open it in text-editing mode.



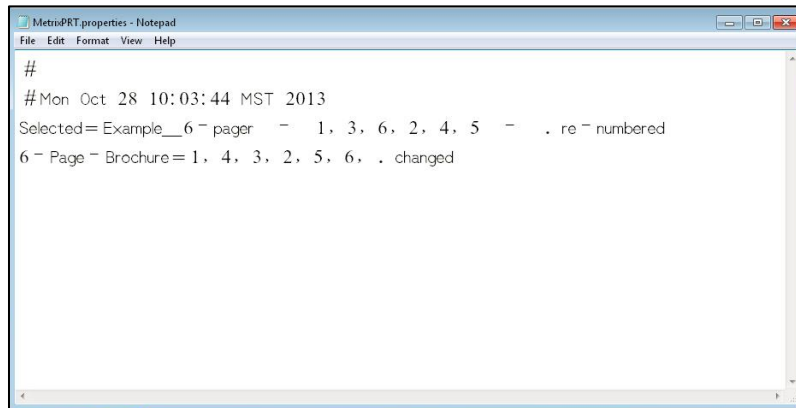
9. You will probably want to remove all of the example actions that ship with the MetrixPRT. When you have done that, place your cursor after the last line, and type your new action following this order:

[Action Name]=[Page numbers followed by commas][Separator (such as . or -)]

[Extra text to designate the new file (such as "reordered," "re-numbered," or "changed")]

**Note** There should be no spaces in the entire string of text.

In the example below, the Action Name is "6-Page-Brochure," then the "=" sign, then the numbers (followed by commas), a separator character, and the extra text, resulting in: 6-Page-Brochure-1,4,3,2,5,6, changed.

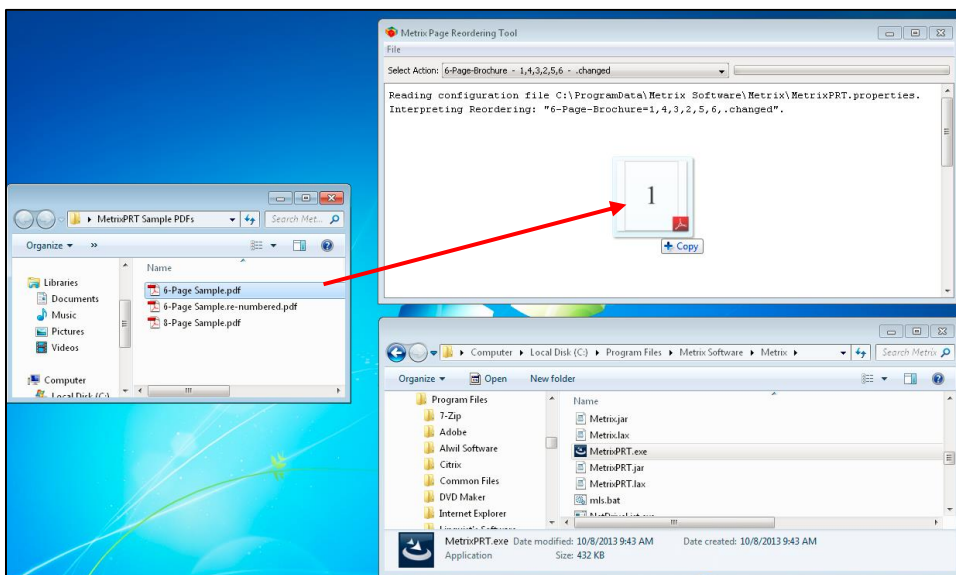


**Note** Because this order is related to Metrix folding, the content of the pages is irrelevant. Only the order of the pages is considered by the MetrixPRT. For example, the "2" in this sample action means that the second page of the original PDF should become the 4th page in the new PDF. The content on that page does not matter to the PRT.

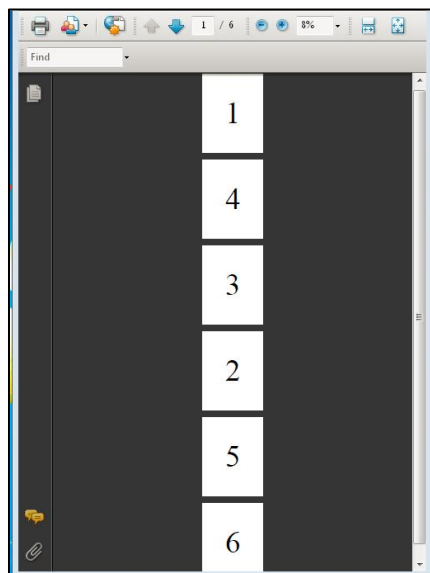
10. Once you have completed the new action, close the **MetrixPRT.properties** file, allowing the text-editing program to save the changes to the file. You can only save changes to the **MetrixPRT.properties** file while the PRT is not running.

Now go back and open the MetrixPRT.exe file. Your new action should be listed in the Select Action menu. If it is not, then use the menu to select your new action.

Now drag the PDF file called "6-Page Sample" onto the window of the PRT.



11. When you drop the file onto the PRT window, the PRT will process the file, give you a message in the PRT window, and tell you that a new file has been saved in the same folder as the original file.  
The new file will have the same name as the original sample file, but with the extra text you designated when you created the action.
12. Open the new PDF file in Acrobat (or some other PDF reader). You should see the pages reordered according to the sequence you designated in the action you created.



**Tip** If you have different PDF files that need to be reordered on a regular basis, you can create multiple actions in the **MetrixPRT.properties** file, and then save the properties file. (Remember: You can only save changes to the **MetrixPRT.properties** file while the PRT is not running.) Then open multiple copies of the **MetrixPRT.exe** file by double-clicking the file multiple times.

13. Now select a different action for each copy of the PRT you have open. You can then drag PDF files into different windows to reorder them in different ways.

**Notes** If you are working on the Mac, you will need to make multiple copies of the MetrixPRT program, and open one copy for each action you wish to run.

Remember that the number of pages in the PDF file must always match the number of pages in the MetrixPRT action.