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Introduction

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About PrintSmith Vision

PrintSmith™ Vision is a browser-based print management system for commercial printers, trade printers, copy shops, and quick printers. To help you run your business efficiently and profitably, PrintSmith Vision combines estimating, invoicing, billing, point of sale, and accounts receivable in a single product.

How to Use This Guide

If you are new to PrintSmith Vision (never used PrintSmith Classic 8.1)

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------------------------------------------  -------------------
• Make sure you meet technical requirements Page 10
• Install PrintSmith Vision, including i-net Designer (required if you want to add your logo to invoices or customize reports) Page 13
• Understand how to start PrintSmith Vision Page 36
• Activate your license Page 36
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• Understand how to stop and start the PrintSmith Vision server Page 42
• Set up and start using PrintSmith Vision Page 42

PrintSmith Vision – Setup and User Guide

If you are upgrading from PrintSmith Classic 8.1 to PrintSmith Vision

For the procedure for upgrading to PrintSmith Vision from PrintSmith Classic 8.1, including exporting/importing your data, see the instructions that begin on page 45.

Important After you complete the procedures in this manual, see the PrintSmith Vision – Setup and User Guide for information about setting up and using the system.

If you are upgrading PrintSmith Vision to a more recent version

For information about upgrading PrintSmith Vision if you were using an earlier version of it, see the current version of the PrintSmith Vision – Release Notes. This guide is for those who are installing PrintSmith Vision for the first time.

If you upgrade your server hardware

If you were already using PrintSmith Vision and then decide to upgrade your server hardware, see the instructions on page 61.

PrintSmith Vision Support and Services

When you purchase PrintSmith Vision, EFI provides several types of support and assistance.

• Customer Support
• Documentation
• Training
• Maintenance agreements and e-mail forums
Customer Support

**EFI Support**

<table>
<thead>
<tr>
<th>Web Site:</th>
<th><a href="https://customer.ifi.com/support">https://customer.ifi.com/support</a></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>US Phone:</strong></td>
<td>1.855.EFI.4HLP 480.538.5800</td>
</tr>
<tr>
<td><strong>UK Phone:</strong></td>
<td>+44 (0) 800.783.2737</td>
</tr>
<tr>
<td><strong>EU Phone:</strong></td>
<td>+49 (0) 2102.745.4500</td>
</tr>
<tr>
<td><strong>E-Mail:</strong></td>
<td><a href="mailto:printsmith.support@efi.com">printsmith.support@efi.com</a></td>
</tr>
</tbody>
</table>

Regular US Service Desk hours are 7 A.M. to 5 P.M. Mountain Standard Time, Monday – Friday
Regular UK Service Desk hours are 8 A.M. to 5 P.M. Greenwich Mean Time, Monday – Friday
Regular EU Service Desk hours are 9 A.M to 6 P.M. Central European Time, Monday – Friday

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

**EFI Professional Services**

| **US Phone:** | 651.365.5321 |
| **US Fax:** | 651.365.5334 |
| **US E-Mail:** | ProfessionalServicesOperations@efi.com |
| **Outside US E-Mail:** | EMEAProfessionalServicesOperations@efi.com |

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

**Documentation**

You can download documentation (in the form of PDF files) from the PrintSmith Web site.

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<th>For information about</th>
<th>See</th>
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<td>PrintSmith Vision - Setup and User Guide</td>
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<tr>
<td>Configuring receipt printers</td>
<td>PrintSmith Vision - Configuring Receipt Printers</td>
</tr>
<tr>
<td>Fiery® integration</td>
<td>PrintSmith Vision - Fiery Integration Guide</td>
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<td>Integrated credit card processing in PrintSmith Vision</td>
<td>PrintSmith Vision - Secure Credit Card Processing</td>
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<td>Using Tracker for shop floor data collection</td>
<td>PrintSmith Vision - Tracker User Guide</td>
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<tr>
<td>Using Scheduler</td>
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</tr>
<tr>
<td>Using Digital StoreFront with PrintSmith Vision</td>
<td>PrintSmith Vision - Digital StoreFront Integration Guide</td>
</tr>
<tr>
<td>Using Four51 OrderCloud™ with PrintSmith Vision</td>
<td>PrintSmith Vision - Four51 Integration Guide</td>
</tr>
<tr>
<td>Using SugarCRM® with PrintSmith Vision</td>
<td>PrintSmith Vision - SugarCRM Integration Guide</td>
</tr>
</tbody>
</table>

**Training**

Onsite and remote training sessions of varying durations are available to meet your needs.

For information about training, in the US, call 480.538.5800; in the UK, call 44.0.1.753.622606.
E-mail forums
With your maintenance agreement, you can join the PrintSmith e-mail forum to be automatically notified when an update is available or to exchange questions and ideas with other users. Access to this site requires a user name and password.
System Requirements

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Overview

The computer where PrintSmith Vision and its database are installed is known as the server. PrintSmith Vision is then accessed by users through a browser on Windows® or Macintosh® computers. These computers are also known as clients.

This section describes the technical requirements you must meet for the PrintSmith Vision server (see below) and for the client computers (see page 11). In addition, to run PrintSmith Vision, you must meet some miscellaneous requirements such as browser version and monitor size and resolution.

Starting with PrintSmith Vision 3.0, mobile views of parts of the PrintSmith system are available from smartphones and tablets. Requirements for taking advantage of mobile views are on page 12.

Important Below are the system requirements for running PrintSmith Vision based on what was certified by EFI. If your environment is not listed below, then it has not been certified, and EFI cannot guarantee or support the results.

PrintSmith Vision Server Requirements

You can install PrintSmith Vision on a Windows or Macintosh computer as long as it meets the requirements listed below.

Important Although you can run PrintSmith Vision on a shared server, EFI strongly recommends a dedicated server. Not only does performance degrade when several applications run on the server, but issues resulting from conflicting applications can be very difficult to diagnose. This type of diagnosis is therefore not supported by EFI.

PrintSmith Vision can run on a virtual machine (VM). While EFI supports PrintSmith Vision running in a virtual environment, EFI is not responsible for your virtual environment or its setup. EFI will use commercially reasonable efforts to investigate potential issues with PrintSmith Vision running on a virtual machine, but as part of that investigation, EFI may require the issue to be reproduced independently of the virtual machine environment. When issues are confirmed to be unrelated to the virtual environment, EFI will support PrintSmith Vision in a way that is consistent with the support provided when PrintSmith Vision is running in a non-virtual environment.

Windows 64-bit

Operating system: Windows 8
Windows 10
Windows Server 2012 R2 Standard or Essentials

Processor: Intel Quad Core i7 2.3 GHz
Memory: 16 GB (more memory will improve performance) Hard drive: 50 GB free space

Macintosh

Operating system: OS X 10.11, 10.11 Server, 10.12**, or 10.12 Server**, 10.13, or 10.13 Server**

Processor: Intel Quad Core i7 2.3 GHz
Memory: 16 GB (more memory will improve performance)
Hard drive: 50 GB free space

Important Macs (starting with version 10.9) do not have Java installed, which is required to install PrintSmith Vision. Download and install Java (version 7) before starting the PrintSmith Vision installer.

Important notes about the server

- If PrintSmith Vision is going to be run from other computers (clients), the server computer should have a static IP address. This IP address is part of the URL users enter to run PrintSmith Vision; if the IP address keeps changing (because it is not static), the URL will also keep changing.
In addition, the server computer must be configured not to go to sleep. If the server goes to sleep, users who are running PrintSmith Vision from other computers will get a “server down” message, and will be unable to use PrintSmith while the server is in sleep mode. On a Windows computer, turn off sleep mode in the Power Options settings in the Control Panel; on a Macintosh, turn off sleep mode in the Energy Saver settings.

About operating system updates
EFI strongly recommends that you do not have automatic operating system updates turned on. Instead do the updates manually at the same time as you update PrintSmith Vision.

If you want to update the operating system at other times, do it manually and then make sure PrintSmith Vision works as expected. If necessary, revert the updates.

PrintSmith Vision Client Requirements
The requirements for running PrintSmith Vision on a client computer (one on which PrintSmith Vision is not installed) are:

Operating System: Windows 7, 8, or 10
Macintosh OS X 10.10 or higher

Memory: 8 GB minimum (more memory will improve performance)

Browser: See “Browser Requirements” below.

Monitor: See “Monitor and Resolution Requirements” below.

Browser Requirements

<table>
<thead>
<tr>
<th>OS</th>
<th>Browser</th>
<th>Browser Version</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Windows 10</td>
<td>Google chrome</td>
<td>Version 65.0.3325.181 (64 bit)</td>
<td>Certified</td>
</tr>
<tr>
<td>Professional</td>
<td>Mozilla</td>
<td>59.0.2 (64-bit)</td>
<td>Certified</td>
</tr>
<tr>
<td>Windows2008 R2</td>
<td>Microsoft Edge</td>
<td>40</td>
<td>Certified</td>
</tr>
<tr>
<td>Standard</td>
<td>Safari</td>
<td>11.0 (13604.5.6)</td>
<td>Certified</td>
</tr>
<tr>
<td>Mac OS 10.13</td>
<td>Chrome</td>
<td>Version 65.0.3325.181 (64 bit)</td>
<td>Certified</td>
</tr>
<tr>
<td>(High Sierra)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>iOS 11.0.3</td>
<td>Safari</td>
<td>11.0 (13604.1)</td>
<td>Certified</td>
</tr>
<tr>
<td>(15a432) iPad</td>
<td>Chrome</td>
<td>62.0.3202.60</td>
<td>Certified</td>
</tr>
</tbody>
</table>

Monitor and Resolution Requirements
PrintSmith Vision is designed to be viewed and used on a large monitor with high resolution:

- 19-inch monitor
- Minimum resolution of 1280 x 1024

Important: If you are using a laptop, to see estimates and invoices in full, the height (second number) must be at least 1024 pixels.

Network Requirements
- 100 base T Ethernet
Internet Requirements
In addition to being required to run PrintSmith Vision, Internet connectivity is required as follows:

- For initial licenses of software
- For upgrades and upgrade licenses
- For Payment Plan users during defined periods of plan
- For interaction with EFI Support team

Custom Document and Report Requirements
PrintSmith Vision reports and other documents (such as estimates or invoices) are written in i-net Clear Reports. If you want to customize your estimates or invoices (for example, include your logo) or if you plan to create custom reports, you must install i-net Designer, which is part of Clear Reports. You will be given the option to install i-net Designer during the PrintSmith Vision server installation.

Receipt Printer Requirements
A receipt printer is optional in PrintSmith Vision, but if you want to use one, you must purchase the Star TSP 700i1 printer from EFI.

For important information about configuring the receipt printer, see the PrintSmith Vision - Configuring Receipt Printers.

Fiery Integrations
If you are using PrintSmith Vision with a Fiery®, Fiery JDF version 1.5.0.36 is required.

Digital StoreFront Integrations
To use the eFlow-based integration of PrintSmith Vision with Digital StoreFront®, Digital StoreFront 9.6 or higher is required.

Mobile View Requirements
As of PrintSmith Vision 3.0, mobile views of parts of the PrintSmith system are available from smartphones and tablets. Mobile views are based on HTML5 technology. This section describes devices, operating systems, and browsers that are fully compatible with HTML5 and can therefore support PrintSmith Vision mobile views.

Mobile devices
The following mobile devices are supported:

- iPad® 4th and 5th generation
- iPhone® 5 and 6
- Android™ tablets
- Android smartphones

Mobile operating systems
- iOS 8.3
- Android 4.1, 5.1

Browser requirements for mobile views
The following browsers are supported:

- Chrome 21 or higher
- Safari 5 or higher

Note: Mozilla Firefox is not supported.
Installing the PrintSmith Vision Server

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Installing and Configuring an SSL Certificate 32
Uninstalling PrintSmith Vision 33
Before You Begin

1. Make sure the computer on which you plan to install the PrintSmith Vision server meets the system requirements described in “PrintSmith Vision Server Requirements” on page 10.

2. Make sure you have your license activation code (LAC). You will be unable to complete installation or run PrintSmith Vision until you provide your license information. To purchase a license, contact PrintSmith.Sales@efi.com.
   
   Note: Your LAC is in the activation e-mail you received from EFI. If you have problems locating your LAC, please contact EFI Support.

3. Obtain instructions from your EFI representative about downloading the installer (PrintSmith Vision Server Installer).

4. Decide whether you need to use an SSL (https://) connection because that requires the purchase and installation of an SSL certificate. See “Using an SSL Connection” below.

5. Make sure you are logged in as an administrator on the server computer, or you will be unable to install the software.

6. Close any applications that are running on the computer and be prepared for a re-start after installation is complete.

7. While installing the PrintSmith Vision Server, you will have the option of installing i-net Designer. If you want to customize your estimates or invoices (for example, include your logo), or if you plan to create custom reports, be sure to install i-net Designer, which is part of Clear Reports. PrintSmith reports and other documents (such as estimates and invoices) were created in Clear Reports.

The sections that follow describe the installation process on a Windows and Macintosh computer. (The process is very similar.)

Important: If you are upgrading from PrintSmith 8.1 to PrintSmith Vision, the installation of PrintSmith Vision is just one part of the upgrade process. See “Upgrade Checklist” on page 45.

If you already have PrintSmith Vision installed and are upgrading to a more recent version, see the current version of the PrintSmith Vision – Release Notes. The instructions in this guide are for new installations.

Using an SSL Connection

As of version 2.3, PrintSmith Vision includes support for SSL (Secure Sockets Layer). SSL creates an encrypted connection between the PrintSmith Vision server and your users’ browser, preventing eavesdropping and data tampering. When you use SSL, the URL to your server is prefaced by https:// instead of http://.

Note: To use SSL, you must purchase an SSL certificate from a certificate authority (CA) and then install and configure it (with the help of EFI Support). The certificate must be compatible with Apache Tomcat version 7.

A non-SSL connection (which is the default connection between PrintSmith Vision and users’ browsers) is not encrypted. This means data transmitted to and from the server could in theory be seen by others.

Important: Even if you use non-SSL, credit card information is never at risk. This information is never stored in PrintSmith Vision, and USA ePay ensures the security of the transmission of credit card information.

If you are unfamiliar with SSL and SSL certificates, EFI strongly recommends you use the default non-SSL connection.

Some organizations may have policies requiring SSL for all data exchange over the Internet, in which case they can take advantage of this new SSL functionality in PrintSmith Vision.

During the installation process, you will be given the choice of using a non-SSL or SSL connection. Non-SSL is the default.

If Installing the PrintSmith Vision Server on a Windows Computer

Notes: EFI recommends that you close all applications on your computer before starting the installation. To complete installation, you will need to re-start the computer.

1. After you obtain the installer, double-click PSV Installer.exe.
2. The installer defaults to the language of your operating system, but you can change it if necessary. Either leave the selected language or select a different language and click **OK**.

3. Review the reminders and instructions in the Introduction window and click **Next** to continue.

4. Read the license agreement, click **I accept...**, and then click **Next** to continue.
5. Enter your **LICENSE ACTIVATION CODE** (LAC) and click **Next** so that the Installer can verify you have a maintenance contract for PrintSmith Vision.

**Notes** Your LAC is in the activation e-mail you received from EFI. If you have problems locating your LAC, please contact EFI Support.

If you are not connected to the Internet while running the Installer, select the **Currently do not have Internet connection** check box, obtain an offline activation code from EFI Support, and enter this code (as well as your license activation code) to proceed with installation. (The offline activation code is valid for 24 hours.)

You only have to enter your license activation code once. After your license is validated, the next time you run the Installer the **LICENSE ACTIVATION CODE** field will automatically include your code so that the Installer can verify your maintenance contract.

6. Decide if you want to use a **Non SSL** or **SSL** connection (**Non SSL** is the default) and click **Next**. For information about using SSL (which requires the purchase and installation of an SSL certificate), see page 14.
7. Accept the proposed location (C:\Program Files (x86)\EFI\PrintSmith) or click Choose and select a folder. (If you select a different folder but change your mind, you can click Restore Default Folder.) Then click Next.

8. Select one of the following in the Select a starting point window and then click Next:
   - If you are upgrading from PrintSmith to PrintSmith Vision (and therefore importing your data), select **UPGRADE**. In an upgrade, an empty database is created so you can import your data into the database.
   - **Note** After the PrintSmith Vision server is installed, follow the instructions for exporting and importing your data in “Upgrading from PrintSmith Classic to PrintSmith Vision” on page 45.
• If you are new to PrintSmith Vision (and have no data to import), select **NEW USER**. In a new installation, the database includes sample pricing information to help you get started using PrintSmith Vision.

![Select a starting point](image_url)

9. By default, PrintSmith Vision uses port 9191 for non-SSL communication and port 8443 for SSL communication. Depending on whether you selected **Non SSL** or **SSL** in step 5, the Installer checks whether the appropriate port is available.

   - If port 9191 (for non-SSL) or port 8443 (for SSL) is available, installation proceeds. Go to step 9.

   - If port 9191 (for non-SSL) or port 8443 (for SSL) is being used by another application, another port number is suggested. Either accept the suggested port number or enter a different unused port number. (If you enter an invalid port number or a number that is being used, you will be asked again for a port number.)

**Note** The port number is part of the URL used to start PrintSmith Vision so if you are not using a default port number (9191 for non-SSL or 8443 for SSL) you will need to specify your port number as part of the URL. For more information about the URL used to start PrintSmith Vision, see “PrintSmith Vision URL” on page 36.

The installer now checks your system and installs any components that are required by PrintSmith Vision but that are not installed on your computer (for example, Java Run Time).

10. If you get the following security warning, click **Allow access**.
11. If the Default Language Selection window opens, select your language.

**Important**  The language you select here affects locale settings such as the thousands and decimal separators and the currency used in PrintSmith Vision.

12. Review what is being installed. If you want to change anything (like the install folder), click **Previous** and make your corrections. Otherwise, click **Install**.
13. When a cmd window like the following opens, ignore it. No action is required on your part.

![Cmd window image]

14. When asked if you want to install i-net Designer, click Yes if you plan to add your logo to documents, customize the job ticket, or create custom reports. (You need i-net Designer to customize documents and reports.)

   **Note**  
   EFI recommends that you install i-net Designer now, but you can always do so later by running Setup.jar in the \Program Files (x86)\EFI\PrintSmith\Crystal_Clear_Installer folder.

![Designer installer image]

15. If you clicked Yes in the previous step, complete the installation steps for i-net Designer:
   a. Click Designer.
b. Read and accept the license agreement and then click Next.

c. Accept the proposed installation folder (or specify a different folder) and click Next.
d. By default, shortcuts are created for you. Click **Next** to continue.

e. Review what is being installed. If you want to change anything (like the install folder), click **Previous** and make your corrections. Otherwise, click **Install**.
f. After the installation is complete, click **Done**. An i-net Designer shortcut is now available on your desktop.

16. The installation of the PrintSmith Vision server now continues. When asked if you want PrintSmith Vision to start automatically when you start the computer, click **Yes** or **No**.

**Note**  
EFI recommends that you click **Yes** (the default). Otherwise, each time you shut down the server computer, you must start the server manually.
17. When the Install Complete window opens, click **Done** to exit the installer and re-start the computer. Then click **OK** to confirm the re-start.

**Note**  
If you clicked **Yes** (as recommended) in step 16, the PrintSmith Server will now be running as a service in the background. If you clicked **No** in step 16, start the server as explained in “Starting and Stopping the PrintSmith Vision Server” on page 44.

---

**If Installing the PrintSmith Vision Server on a Macintosh Computer**

Starting with OS X 10.9, Apple does not install Java on Macs. Java is required to run the PrintSmith Vision Installer, so you must download and install Java before starting the installation process. (The Installer will warn you if Java is not installed.)

**Notes**  
EFI recommends that you close all the applications on your computer before starting the installation process.  
To complete installation, you will need to re-start the computer.

1. After you obtain the installer, double-click **PSV Installer**.

2. In the Authentication window, click the lock to make changes (you need to provide an administrator password.)
3. The default language is English. If necessary select a different language and click **OK**.

4. In the Introduction window, review the reminders and instructions and click **Next** to continue.

5. Read the license agreement, click **I accept...**, and then click **Next** to continue.
6. Enter your **LICENSE ACTIVATION CODE** (LAC) and click **Next** so that the Installer can verify you have a maintenance contract for PrintSmith Vision.

**Notes**
Your LAC is in the activation e-mail you received from EFI. If you have problems locating your LAC, please contact EFI Support.

If you are not connected to the Internet while running the Installer, select the **Currently do not have Internet connection** check box, obtain an offline activation code from EFI Support, and enter this code (as well as your license activation code) to proceed with installation. (The offline activation code is valid for 24 hours.)

You only have to enter your license activation code once. After your license is validated, the next time you run the Installer the **LICENSE ACTIVATION CODE** field will automatically include your code so that the Installer can verify your maintenance contract.

7. Decide if you want to use a **Non SSL** or **SSL** connection (Non SSL is the default) and click **Next**. For information about using SSL (which requires the purchase and installation of an SSL certificate), see page 14.
Note  If you select SSL, you must install and configure your SSL certificate after PrintSmith Vision is installed. For details, see page 32.

8. In the Choose Install Folder window, accept the proposed location (/Applications/EFI/PrintSmith) and click Next.

Important  A custom installation folder is currently not supported; use the default folder instead.

9. In the Select a starting point window, choose one of the following and then click Next:
   - If you are upgrading from PrintSmith to PrintSmith Vision (and therefore importing your data), select UPGRADE. In an upgrade, an empty database is created so you can import your data into the database.
     Note  After the PrintSmith Vision server is installed, follow the instructions for exporting and importing your data in “Upgrading from PrintSmith Classic to PrintSmith Vision” on page 47.
• If you are new to PrintSmith Vision (and have no data to import), select NEW USER. In a new installation, the database includes sample pricing information to help you get started using PrintSmith Vision.

10. By default, PrintSmith Vision uses port 9191 for non-SSL communication and port 8443 for SSL communication. Depending on whether you selected Non SSL or SSL in step 6, the Installer checks whether the appropriate port is available.
   • If port 9191 (for non-SSL) or port 8443 (for SSL) is available, installation proceeds. Go to step 10.
   • If port 9191 (for non-SSL) or port 8443 (for SSL) is being used by another application, another port number is suggested. Either accept the suggested port number or enter a different unused port number. (If you enter an invalid port number or a number that is being used, you will be asked again for a port number.)

Note: The port number is part of the URL used to start PrintSmith Vision so if you are not using a default port number (9191 for non-SSL or 8443 for SSL) you will need to specify your port number as part of the URL. For more information about the URL used to start PrintSmith Vision, see “PrintSmith Vision URL” on page 36.

11. If the Default Language Selection window opens, select your language.
   Important: The language you select here affects locale settings such as the thousands and decimal separators and the currency used in PrintSmith Vision.

12. In the Pre-Installation Summary window, review what is being installed. If you want to change anything (like the install folder), click Previous and make your corrections. Otherwise, click Install.
The installer now checks your system and installs any components that are required by PrintSmith Vision but that are not installed on your computer.

13. When asked if you want to install i-net Designer, click Yes if you plan to add your logo to documents, customize the job ticket, or create custom reports. (You need i-net Designer to customize documents and reports.)

   **Note** EFI recommends that you install i-net Designer now, but you can always do so later by running Setup in the Applications/EFI/PrintSmith/Crystal_Clear_Installer folder.

14. If you clicked Yes in the previous step, complete the installation steps for i-net Designer:
   a. Click Designer.
b. Read and accept the license agreement and then click **Next**.

c. Accept the proposed installation folder (or specify a different folder) and click **Next**.
d. Review what is being installed. If you want to change anything (like the install folder), click Previous and make your corrections. Otherwise, click Install.

e. After the installation is complete, click Done. (i-net Designer is now available in the dock.)
15. The installation of the PrintSmith Vision server now continues. When asked if you want PrintSmith Vision to start automatically when you start the computer, click Yes or No.

16. In the Install Complete window, click Done to re-start the computer and then click OK to confirm the restart.

Note If you clicked Yes in step 15 above, the PrintSmith Vision Server will now be running as a service in the background. If you clicked No in step 15, start the server as explained “Starting and Stopping the PrintSmith Vision Server” on page 44.

Installing and Configuring an SSL Certificate

If you selected SSL during the installation process, you must purchase, install, and configure an SSL certificate to make your communications secure. EFI Support will help you with the installation and configuration process.

Note PrintSmith Vision comes with a test certificate. This certificate, however, is not valid, and will result in warnings when you try to start PrintSmith Vision. You must buy a valid certificate to secure your server.

1. If you did not already do so, purchase an SSL certificate from a Certificate Authority (CA).

   Important The certificate must be compatible with Apache Tomcat v. 7.

2. Contact EFI Support for help in installing and configuring the signed certificate that you purchased.
Uninstalling PrintSmith Vision

**Important** If you need to uninstall PrintSmith Vision, and already activated your license, you must deactivate the license *before* you uninstall PrintSmith. If you fail to do this, you will be unable to activate the license on a different computer – the license will be considered “in use.”

1. Deactivate your license as described in “Deactivating a license” on page 40.
2. Uninstall PrintSmith by running the Uninstall PrintSmith Vision Server application.
   - On a Windows computer, the application is in the `\Program Files (x86)\EFI\PrintSmith\Uninstall PrintSmith Vision Server` folder.
   - On a Macintosh computer, the application is in the `/Applications/EFI/PrintSmith/Uninstall PrintSmith Vision Server` folder.
3. Follow the prompts to uninstall PrintSmith.
4. When you uninstall PrintSmith Vision on a Macintosh computer, you are warned that some shortcuts are not removed from the dock automatically. Remove them manually by dragging them from the dock into the trash.

5. If you installed i-net Designer, and used a custom path, enter that path when prompted.

**Note** When you uninstall PrintSmith Vision, the EFI folder is not removed. Delete this manually.
Running PrintSmith Vision

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- PrintSmith Vision URL 34
- Obtaining the IP Address of the Server Computer 35
- Licensing 36
- Logging Into PrintSmith Vision 42
- Starting and Stopping the PrintSmith Vision Server 42

Important Notes About the PrintSmith Vision Server
- Before anyone can run PrintSmith, the PrintSmith Vision server must be running. If the server is configured to start automatically whenever the server computer starts, no action is necessary. If, however, during installation you chose not to start the server automatically, you must start it manually (as described in “Starting and Stopping the PrintSmith Vision Server” on page 42) each time the server computer is re-started.
- If PrintSmith Vision is going to be accessed from other computers (clients), the server computer must be configured not to go to sleep. If the server goes to sleep, users who are running PrintSmith Vision from other computers will get a “server down” message, and will be unable to use PrintSmith while the server is in sleep mode. (On a Windows computer, turn off sleep mode in the Power Options settings in the Control Panel; on a Macintosh, turn off sleep mode in the Energy Saver settings.)

PrintSmith Vision URL
You start PrintSmith Vision by entering a URL in the address bar of your browser. (For supported browsers, see page 11.) The format of the URL depends on whether you are running on the server computer or a client computer and whether you are using a non-SSL or SSL connection.
- If you are on the server computer
  The URL for non-SSL connections is:
  http://localhost:9191/PrintSmith/PrintSmith.html
  9191 is the default port used by PrintSmith Vision for non-SSL connections. If you were asked to select a different port during installation, replace 9191 with the port number you specified. The URL for SSL connections is:
  https://localhost:8443/PrintSmith/PrintSmith.html
  8443 is the default port used by PrintSmith Vision for SSL connections. If you were asked to select a different port during installation, replace 8443 with the port number you specified.
  **Tip** On the server, you can also start PrintSmith Vision from PrintSmith Vision Monitor. When you installed the PrintSmith Vision Server, PrintSmith Vision Monitor was also installed. Open PrintSmith Vision Monitor using a shortcut on the desktop (Windows) or directly from the dock (Macintosh). Then click the Client Access URL to start PrintSmith Vision.
- If you are on a client computer
  The URL for non-SSL connections is:
  http://hostname:9191/PrintSmith/PrintSmith.html
where *hostname* is the name or IP address of the server computer (for example, 10.40.58.12). 9191 is the default port used by PrintSmith Vision for non-SSL connections. If you were asked to select a different port during installation, replace 9191 with the port number you specified. The URL for SSL connections is:

```
https://hostname:8443/PrintSmith/PrintSmith.html
```

where *hostname* is the name or IP address of the server computer (for example, 10.40.58.12). 8443 is the default port used by PrintSmith Vision for SSL connections. If you were asked to select a different port during installation, replace 8443 with the port number you specified.

**Tips**

- For information about obtaining the IP address of the server computer, see page 35.
- After you provide users with the URL for running PrintSmith Vision, encourage them to bookmark it.

### Obtaining the IP Address of the Server Computer

To run PrintSmith Vision from a client computer, the URL must include the IP address of the computer where the PrintSmith Vision server is installed. On both a Windows and Macintosh computer, you can run PrintSmith Vision Monitor to get the entire URL that users on client computers must provide.

**Tip**

When you install the PrintSmith Vision Server, PrintSmith Vision Monitor is also installed. You can open it using a shortcut on the desktop (Windows) or directly from the dock (Macintosh).

1. On the server computer, start PrintSmith Vision Monitor.
2. Note (or copy) the URL for client access so you can distribute it to your users.

![PrintSmith Vision Monitor](image)

**Tip**

You can click the Client Access link to start PrintSmith Vision on the server.
Licensing

The first time you use the PrintSmith Vision URL, you must activate your license before you can log in and start using the application. If you did not yet obtain your license, contact PrintSmith.Sales@efi.com.

Note: In some restricted environments (as determined by your organization), you must establish proxy settings to connect to the Internet. You will have the opportunity to establish proxy settings while activating your license.

If you later purchase additional features, you will need to update your license as described on page 40. If you decide to move the PrintSmith Vision server to another computer, you must deactivate the license before you uninstall PrintSmith Vision. See “Deactivating a license” on page 40.

Activating your license

1. Enter the PrintSmith Vision URL in the address bar of your browser as explained in “PrintSmith Vision URL” on page 34.

2. If you get a message that Adobe Flash Player needs to be installed, click the link to download the player and then install it.

3. After you install the player, restart the browser and enter the PrintSmith Vision URL again.

4. Click Activate License.
5. The Manage PrintSmith Options page opens and summarizes the terms of the license activation. Click Continue.

6. In some restricted environments (as determined by your organization), you must establish proxy settings to connect to the Internet. If this is the case, do the following (otherwise, proceed to step 7).
   a. Click Setup Proxy.
b. If necessary, contact your IT staff to obtain the information you need to configure proxy settings (address and port).

c. Enter the **Address** and **Port** (and **Username** and **Password** if necessary), and then click **Apply**.

7. Enter your license activation code and click **Continue**.
8. After you get the confirmation of your license activate, click **Finish**.

9. **Refresh the PrintSmith Vision page** (in your browser) so you can log into the application.

**If you experience problems with licensing**

If, after your license is successfully activated, you experience any problems, use PrintSmith Vision Monitor on the PrintSmith Vision server to re-start the license server.

1. Start PrintSmith Vision Monitor:
   - On a Windows computer, start PrintSmith Vision Monitor using the shortcut on the desktop.
   - On a Macintosh computer, start PrintSmith Vision Monitor from the dock.
2. Click **Restart License Server**.

   **Note** On a Macintosh, if re-starting the license server does not solve the problem, **re-start the computer.**
**Updating your license after you purchase additional features**

If you initially purchase the base PrintSmith Vision system, but then decide to purchase additional features (for example, integrated credit card processing or Tracker), contact PrintSmith.Sales@efi.com and request the additional features you want. You will then need to update your license before you can use the features you purchased.

1. After you receive a confirmation e-mail from PrintSmith Sales, log into PrintSmith Vision.
2. Select **Help > About PrintSmith**.
3. Click **Update License**.
4. Click **Update** to activate the additional features you purchased.
5. Log out of PrintSmith Vision and log in again to see the newly activated features.

**Deactivating a license**

If for any reason you need to uninstall PrintSmith Vision, perhaps to move it to another computer, you must deactivate the license before uninstalling PrintSmith Vision. Likewise, if you stop using an individually licensed feature, you must deactivate it.

**Important** If you do not deactivate your license before you uninstall PrintSmith Vision, you will not be able to activate the license on a different computer – the license will be considered “in use.”

1. **Before** you uninstall PrintSmith Vision, log into the system.
2. Select **Help > About PrintSmith**.
3. Click **Update License**.
3. Click **Deactivate All**. (If you are deactivating individual features, click **Deactivate** next to the feature.)

4. After the deactivation is confirmed, click **Finish**.

5. To uninstall PrintSmith Vision, follow the instructions in “Uninstalling PrintSmith Vision” on page 33.
Logging Into PrintSmith Vision

After your license is entered and validated, you can run PrintSmith Vision.

1. Enter the PrintSmith Vision URL in your browser.
2. In the login window, use admin/admin to log in as the administrator.

Notes
For security reasons, EFI strongly recommends you change the admin password.

If you are upgrading to PrintSmith Vision from PrintSmith 8.1, the system user name and password that you used with PrintSmith 8.1 will not work with PrintSmith Vision.

Starting and Stopping the PrintSmith Vision Server

The PrintSmith Vision server runs as a service in the background (so is not visible). When you run PrintSmith Vision, you access the server from a browser. If the server is not running, you cannot run PrintSmith Vision.

If (during the installation process) you did not configure the server to start running automatically whenever the server computer is restarted, you must start the PrintSmith server manually.

If you need to make PrintSmith Vision unavailable to your users, you can stop the server and then re-start it. You use PrintSmith Vision Monitor to stop and start the server. (As described earlier, when you install the PrintSmith Vision Server, PrintSmith Vision Monitor is also installed.)

If (during the installation process) you did not configure the server to start running automatically whenever the server computer is started, you can use PrintSmith Vision Monitor to configure the server to start automatically.

Start or stop the server

1. Start PrintSmith Vision Monitor:
   • On a Windows computer, start PrintSmith Vision Monitor using the shortcut on the desktop.
   • On a Macintosh computer, start PrintSmith Vision Monitor from the dock.
2. If the server is not running, click Start Server. (In the figure below the server is running.)
3. To stop the server, click **Stop Server**.

![Stop Server button in PrintSmith Vision Monitor](image)


*Ensure the server runs automatically*

If (during the installation process) you did not configure the server to start running automatically whenever the server computer is started, you can use PrintSmith Vision Monitor to configure the server to start automatically.

1. Start PrintSmith Vision Monitor:
   - On a Windows computer, start PrintSmith Vision Monitor using the shortcut on the desktop.
   - On a Macintosh computer, start PrintSmith Vision Monitor from the dock.

2. Click the **Preferences** tab.

3. Select the **Start PrintSmith Vision Server when computer starts** check box.

4. *Unless* advised to change these by EFI Customer Support, *ignore* the remaining fields. For example, you may be advised to change the Postgres port as described in “Appendix B: Changing the Postgres Port” on page 55.

**Tip** For more information about using PrintSmith Vision Monitor, see the *PrintSmith Vision - Setup and User Guide*. 

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![PrintSmith Vision Monitor](image-url)
Upgrading from PrintSmith Classic to PrintSmith Vision

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- Import Your Data to PrintSmith Vision 49
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**Upgrade Checklist**

If you were using PrintSmith Classic 8.1, you can upgrade to PrintSmith Vision and import your data (pricing, preferences, accounts, invoices and estimates, and so on) from PrintSmith 8.1.

**Important** The instructions in this upgrade chapter apply to all PrintSmith users, but PrintSmith Site and Digital StoreFront users have some additional requirements to complete the upgrade and integration. Please contact PrintSmith Support (see page 7) before you start the upgrade process. If you do a test export/import, be sure to follow the instructions on page 51 before re-exporting and re-importing data before going live.

To ensure a successful upgrade, as you go through the procedures, use this checklist to make sure you complete all the steps.

- Are you using line item taxation? If you are, do not upgrade at this time. Line item taxation will be supported in PrintSmith Vision in a later release.
- Do you meet the PrintSmith Vision system requirements? (See page 10.)
- Did you obtain your PrintSmith Vision license?
- Did you install PrintSmith Vision and select the **UPGRADE** option? (See “Installing the PrintSmith Vision Server” starting on page 13).
- Have you activated your license? (See page 36.)
- Is PrintSmith 8.1.28 installed?
- Did you post all POS charges (select AR > Post POS Charges and click **OK**)?
- Did you perform daily and monthly closeouts?
- Do you use PrintSmith Site?
  - Did you contact EFI Support to coordinate your upgrade?
  - Did you zip up your Images folder?
- Do you use Tracker?
  - Did you pause or complete active items?
  - Are all employees clocked out?
- Did you obtain and enter your export activation key?
Did you export your data from PrintSmith 8.1.28? (See page 46.)

If you use PrintSmith Site, did you copy your Images.zip file to the Preferences folder (in the PrintSmith folder) so it is with all your exported data?

Did you review the import exceptions? (See page 49.)

Did you use PrintSmith Vision to import your data? (See page 49.)

Did you re-start the server after the import?

Did you check the imported data? (See page 50.)

Are you planning to customize documents or reports (e.g., add a logo to invoices)? If so, did you install i-net Designer when you installed PrintSmith Vision? (See steps 13-14 of the Windows server installation process or steps 12-13 of the Mac server installation process.)

Did you do a test export/import? If so, follow the instructions on page 51 before re-exporting and reimporting data before going live.

Export Your Data from PrintSmith 8.1

Before you export data

Before you export data from PrintSmith **8.1.28**, certain conditions must be met. In particular, your system must be in a stable and “clean” accounting state.

**Important** Be sure to export data from PrintSmith 8.1.28, *not* an earlier version.

1. Post all POS transactions: select **AR > Post POS Charges** and click **OK**.
2. Perform both a daily closeout (**AR > Closeout**) and monthly closeout (**AR > Monthly Closeout**). (The register tape should be blank.)
   
   **Tip** You do not have to wait until the end of a month to do a monthly closeout as long as you have done a daily closeout.

3. Templates cannot be imported into PrintSmith Vision. If you have document templates that you want to use in PrintSmith Vision, copy them to estimates/invoices. In PrintSmith Vision you can then turn them back into templates.

If you are using the unsupported size table (ID 5)

You will be prevented from exporting data from PrintSmith Classic if you are using the unsupported size table (ID 5) and specifying it in **Admin > Preferences > Estimator > Stock and Sizes**. You should (a) re-enter your sizes in the appropriate size table (as explained below) and then (b) select this size table in **Admin > Preferences > Estimator > Stock and Sizes** before trying to export again.

For PrintSmith Vision to import the sizes correctly, the data must be entered in the right table in Classic:

- If the unsupported size table is in US inches, use Table Editor to enter the data in the size table with table ID 1. Sizes in table ID 1 in Classic are imported as US Imperial IN in PrintSmith Vision.
- If the unsupported size table is in millimeters, use Table Editor to enter the data in the size table with table ID 2. Sizes in the table ID 2 in Classic are imported as Metric MM in PrintSmith Vision.
- If the unsupported size table is in centimeters, use Table Editor to enter the data in the size table with table ID 3. Sizes in the table ID 3 in Classic are imported as Metric CM in PrintSmith Vision.
- If the unsupported size table is in metric inches, use Table Editor to enter the data in the size table with table ID 4. The sizes in table ID 4 in Classic are imported as Metric M-IN in PrintSmith Vision.

**Notes** To figure out the ID of a size table in PrintSmith Classic, use Table Editor to open the table and click **Properties**. The ID will be displayed. (The table ID controls how Vision imports the sizes.)

Make sure the size table in which you are re-entering the data *does not include any duplicate size names*. You may want to delete all the sizes in the table before re-entering the ones from the unsupported table.
After entering your sizes in the correct table, be sure to specify this table with Admin > Preferences > Estimator > Stock and Sizes before starting the export from PrintSmith Classic. If you use PrintSmith Site

Important The instructions in this upgrade chapter apply to all PrintSmith users, but PrintSmith Site users have some additional requirements. Review the upgrade section of the PrintSmith Vision - PrintSmith Site Integration Guide before you start the upgrade process. The timing of your upgrade is important. Please contact PrintSmith Support before starting the upgrade.

If you were using PrintSmith Site with PrintSmith 8.1, do the following:

1. Contact EFI PrintSmith Support about coordinating the upgrade process. (Support must change a setting for your site just before you export your data.) This is a critical step.

2. To ensure that your graphics (images) are imported into PrintSmith Vision:
   a. Zip up the contents of the entire PrintSmith Images folder (PrintSmith\E-Commerce\Images).
   b. After you export your data from PrintSmith (see page 50), copy the Images.zip file to the Preferences folder (where your data was exported).

Note If you fail to perform step 2, you will need to re-import your data.

If you use Tracker

If you were using Tracker in PrintSmith 8.1, before you export data, make sure:

• There are no active items in the Tracker Console. Active items will not be imported into PrintSmith Vision. Make sure all items are completed, or pause any active items if you do not want to wait for them to complete. (You will be prevented from exporting data if there are active items.)

• All employees are clocked out (not just on break).

Note If your employees use a PIN to log into the Tracker Console, you will need to re-create the PINs in PrintSmith Vision. PINs are not imported.

For information about using Tracker in PrintSmith Vision, see the PrintSmith Vision - Tracker User Guide. If you use Scheduler

If you were using Scheduler in PrintSmith 8.1, keep in mind that scheduled jobs are not imported. Try to time the upgrade when you have as few jobs on the schedule as possible, because you will have to re-schedule them in PrintSmith Vision Scheduler.

For information about setting up and using Scheduler in PrintSmith Vision, see the PrintSmith Vision - Scheduler User Guide.

If you use Digital StoreFront

If you were using Digital StoreFront in PrintSmith 8.1, be sure to review and follow the upgrade steps in the PrintSmith Vision - Digital StoreFront Integration Guide. In particular:

• If Digital StoreFront is self-hosted, make sure you have version 8.4 (or higher) installed.

• Complete all the upgrade and integration steps in a timely fashion to minimize the time web orders are waiting in a queue.

Important If you use Digital StoreFront, please contact PrintSmith Support before starting the upgrade.

Export procedure

If you are licensed to upgrade to PrintSmith Vision, you are given an activation key so you can export your data from PrintSmith 8.1. Again, be sure you have version 8.1.28 installed.

Notes A typical export takes 1-2 hours.

If you are a PrintSmith Site user, do not begin the export if you did not yet contact EFI PrintSmith Support about switching over to PrintSmith Vision.

To export data

1. Obtain an export activation key from EFI.

2. Enter your activation key:
   a. Start PrintSmith 8.1.
   b. Select Admin > Preferences > System > Product Activation.
c. Enter your key in the **Activate Full Export Capabilities** field and click **OK**.

d. **Close** the Preferences window.

3. Export your data:

   a. Select **Admin > Preferences** again.

   b. Click **Migrate Data** under **System**. (**Migrate Data** is available only if you entered a valid export activation key in step 2c.)

   c. (Required) One at a time, click **Export Preferences**, **Export Table Files**, **Auto Cost All Pending Invoices**, and **Export ALL Data Files**. (You will be informed that the data is being exported to the Preferences folder in your PrintSmith folder.)

4. If you use PrintSmith Site, copy your Images.zip file to the Preferences folder (in the PrintSmith folder) so it is with all your exported data.

**Install PrintSmith Vision**

1. Install PrintSmith Vision as explained in “Installing the PrintSmith Vision Server” starting on page 13. Be sure to select the **UPGRADE** option since you will be importing your own data.

2. Review the information about the PrintSmith Vision server and the URL used to start PrintSmith Vision. See “Running PrintSmith Vision” starting on page 34.

3. Activate your license as described on page 36.
Import Your Data to PrintSmith Vision

Once your data is exported from PrintSmith 8.1, you can import it to PrintSmith Vision. When you import data, you can control how many months of estimates/invoices you want to import.

**Warning** If you indicated during the installation process that you are importing data, you cannot start to enter new data (like customer accounts) until after you import your data.

**Import exceptions**

Your data will be imported with these known exceptions:

- If you limit the number of months of data you want to import, but have items with negative balances that were charged to post payments and that precede the time period you specified, those items will not be imported.
- If you have large format digital definitions, the values in the **Maximum Width** and **Minimum Width** fields are not imported. You will need to re-enter those values.
- PrintSmith Vision does not include a default waste chart. If any of your press definitions used the default waste chart, you must create a new waste chart and assign it to those definitions.
- If an account was deleted in PrintSmith, any invoices associated with that account are imported without an account specified for them.
- Templates are not imported. If you copied the templates to documents (as recommended in step 5 under “Before you export data” on page 46), you can re-create the templates from these documents.
- Cost Plus is not a supported pricing method for digital (copier) definitions in PrintSmith Vision. You must edit any digital definitions that used Cost Plus: select a different method and set an appropriate rate. If this new rate results in different pricing, and an old document is opened, a price update warning message will be displayed.
- Sometimes bad data will cause a tax element to be duplicated in the sales tax table, resulting in an incorrect effective tax rate. If you notice this when going through the post-import checklist, select **Pricing > Sales Tax**, select your default tax table, correct it, and click **Save**.
- If you use Tracker, employee PINs are not imported. You must use Employee Manager in PrintSmith Vision to set up new PINs.
- If you use Scheduler:
  - Jobs currently on the schedule are not imported; you will need to re-schedule them in PrintSmith Vision Scheduler.
  - If you use PrintSmith Site, and any catalog names included double quotes ("), these were changed to single quotes (’), to ensure a successful import.

**Import procedure**

**Warning** An import can take up to 48 hours. EFI recommends that you start the process at EOB on a Friday.

1. If necessary, move your exported data to a folder that you can access when running PrintSmith Vision, for example, the desktop on the PrintSmith Vision server.
2. Start PrintSmith Vision:
   a. Open your browser on the server computer.
   b. Start PrintSmith Vision by entering this URL in the address bar: **For non-SSL connections**
      
      http://localhost:9191/PrintSmith/PrintSmith.html
      
      **Note** If you specified a different port during installation because port 9191 was already in use, replace **9191** in the URL with your port number.

      **For SSL connections**
      
      https://localhost:8443/PrintSmith/PrintSmith.html
Notes  If you specified a different port during installation because port 8443 was already in use, replace **8443** in the URL with your port number.

If this is the first time you are running PrintSmith Vision, you will need to activate your license (as described on page 36) before you can log in.

c.  Log in as admin/admin. (Be sure to change the password as soon as possible – using **Admin > Change Password** – to prevent unauthorized users from using the admin password and gaining full access to PrintSmith.)

3.  In PrintSmith Vision, select **Admin > System Monitor**.

4.  Click **Import**.

5.  To limit the invoices and estimates that are imported to those created in the last x months, enter this number in the **months** field. (If the field is blank, all invoices and estimates are imported.)

6.  Click **Import Data**, navigate to the folder that has all your exported data, and select **all** the files in the folder. (Click the first file in the list, press and hold Shift, and click the last file in the list.)

7.  After the import is done, click **Import Statistics** to see if any errors were reported.

8.  Re-start the server (see below) and check the data that was imported into PrintSmith Vision as described below.

**Important**  Once your data is imported into PrintSmith Vision, make sure your PrintSmith 8.1 system is no longer being used for business purposes, for example, to create estimates or invoices.

EFI recommends that you keep the data you exported from PrintSmith Classic just in case you need to re-import it.

**Re-start the PrintSmith Vision server**

After you import your data, re-start the PrintSmith Vision server. For information about doing this, see “Starting and Stopping the PrintSmith Vision Server” on page 42.

**Check the Imported Data**

Before you start using PrintSmith Vision to run your business, you should check the data that was imported using the checklist below. Occasionally, some bad data in your PrintSmith 8.1 system may cause problems in PrintSmith Vision. There are also a few exceptions to what is imported as described on page 50. Be sure to review those exceptions.

If you find a minor issue, for example, one incorrect record or some missing data in a field, make the corrections yourself. If you find a more pervasive problem – an issue that affects multiple records – contact PrintSmith Support.
Note: Sometimes if a piece of data is wrong or missing, Vision corrects it during the import, for example, adds a generic color to a stock definition. In this case, when you open the definition for the first time in Vision and then try to close it (or try to view another definition), you will be prompted to save the definition even if you did not make any changes. Save the definition to avoid further prompts in the future.

Post-import checklist
Below is a checklist of areas to examine after your data is imported.

- **Preferences** Check them all to make sure your settings are the way you want.
- **Tables** Use Table Editor to check the contents of tables that you use.
  
  **Notes** The size tables in PrintSmith were replaced by the Dimension table in PrintSmith Vision. For important information about the Basic Sizes table, see below.

- **Charge definitions** Check a few for each pricing method (e.g., job aware, markup, flat rate, always ask, etc.).
- **Press definitions** Check a few sheet-fed definitions and a few roll-fed (if you have web presses) and review target pricing (if any).
- **Digital definitions** Check a few color, B&W, and large format definitions.
- **Stock definitions** Check a few definitions for different types of stock (e.g., sheet, envelope, roll, etc.).
- **Accounts** Check a few customer and prospect accounts (all tabs).
- **Contacts** Check a few contact accounts (all tabs).
- **Sales tax** Check your tax tables, including tax elements and effective tax rate.
- **Security** Check your security setup and verify a few user definitions.
- **List price schedules** If using, open and review.
- **Stamp schedule** If using, open and review.
- **Documents** Open a few invoices and estimates and review their contents (including different types of jobs).
- **Payments** Verify cash drawer status; verify AR balances; and verify account status payments, and balance in the Post Payments window.
- **Delivery tickets** Use Delivery Ticket Manager to review your delivery ticket.

**Basic Sizes table**
To preserve data integrity, the standard basic sizes (in the Basics Sizes table) in PrintSmith Vision are fixed and cannot be changed. If you made any changes to the Basic Sizes table in PrintSmith Classic, note the following:

- If you edited the basic sizes with ID 1 – 11, your changes will not be imported to PrintSmith Vision; stocks using the edited basic sizes will use the standard sizes instead. Review your stock definitions to make sure they are still correct.
- If you added basic sizes in Classic (beyond those with ID 1 – 11), these basic sizes will not be imported. Any stocks that use a basic size you added will have a blank basic size after the import. Again, you must review your stock definitions.
- If either of the above cases applies to you, the stock weight calculation on jobs will be affected until you correct the stock definitions.

**If You Did a Test Export/Import**
If you did a test export from PrintSmith Classic and imported the data into PrintSmith Vision, you must complete the following steps when you are ready to re-export and re-import data before going live.
Important  If PrintSmith Classic is integrated with either Digital StoreFront or PrintSmith Site, call PrintSmith Support before doing the "live" import/export.

Before re-exporting from PrintSmith Classic

1. As you did before the test export, in PrintSmith Classic be sure to:
   a. Post all POS transactions: select AR > Post POS Charges and click OK.
   b. Perform both a daily closeout (AR > Closeout) and monthly closeout (AR > Monthly Closeout). (The register tape should be blank.)

2. In PrintSmith Classic, delete any items in the Preferences folder. The Preferences folder must be empty.
   Note  The Preferences folder is in your PrintSmith folder.

3. In the pending list, correct any issues based on the test import. In particular:
   • Make sure the pending list (POS > Pending Documents Window) has fewer than 2,000 items.
   • If you have more than 2,000 items, use Admin > Clear Estimates and remove estimates over 60 days old.

4. In your stock definitions, check the following:
   • If any stock definitions are corrupt (have #######??!!! err in the Name field), delete these stock definitions.
   • If any stocks are expired (grayed out), delete them or reset the Price Expires date.

Re-exporting from PrintSmith Classic

1. Make sure you completed all the steps listed in “Before re-exporting from PrintSmith Classic” above.

2. Make sure your export activation key is in the Activate Full Export Capabilities field in the Product Activation preferences (Admin > Preferences > Product Activation).

3. Select Admin > Preferences > Migrate Data and click each of the four buttons, one at a time.
   Note  After the export is complete, the Preferences folder will include approximately 90 items (more if you were using PrintSmith Site).

Before re-importing data into PrintSmith Vision

Before you re-import your PrintSmith Classic data into PrintSmith Vision, you must delete the current PrintSmith Vision database and create a new empty database. You will then be able to re-import your data.

• Follow the instructions in this video to delete/drop the PrintSmith Vision database and create a new database:
  https://www.dropbox.com/s/m1i1x4a8af4vy1/Vision-%20Delete%20Drop%20Database.mp4?dl=0

Re-importing the data

• After you have deleted the PrintSmith Vision database and created a new database, import the data into PrintSmith Vision following the instructions under “Import procedure” on page 52.
Appendix A: Accessing the Database

The PrintSmith Vision database is a Postgres SQL database, and resides on the computer where you installed the PrintSmith Vision server.

**Note** For information about performing and restoring backups, see the *PrintSmith Vision - Setup and User Guide*.

If you want to examine the structure of the database, for example, because you are writing custom reports, you must use the Postgres pgAdmin III utility.

- On a Windows computer, a Postgres shortcut was added to the desktop when you installed the PrintSmith Vision server.
- On a Macintosh computer, Postgres was added to the dock when you installed the PrintSmith Vision server.

**Caution** Never edit information in the database directly and never change the structure of the database tables. Either action would compromise the integrity of the database severely.

If no server is listed in pgAdmin III

If you run pgAdmin III on the PrintSmith Vision server computer, and no database server is listed, you must add the server as described below. The server exists; it is just not “visible” in pgAdmin III. Adding the server is a onetime procedure.

1. On the computer where the PrintSmith Vision server is installed, double-click the Postgres shortcut on the desktop (Windows) or click Postgres in the dock (Macintosh). The pgAdmin III window opens.
3. In the Name field, enter a name for the server (it can be anything you want).
4. In the Host field, enter localhost.
5. In the Port field, enter 5432.
6. Unless you changed the port, leave Port set to 5432.
7. Leave the following set as they are:
   - **Service** = blank
   - **Maintenance DB** = postgres
   - **Username** = postgres

8. In the **Password** field, enter **PrintSmith^2012**.

9. Ignore the remaining fields and click **OK**.

The server is now listed.

**Displaying the contents of the database in pgAdmin III**

When you start pgAdmin III, the PrintSmith server may have a red X next to it. (This not a sign of any problem.)

1. Double-click **PrintSmith (localhost:xxxx)**.

2. Expand **Databases**.

3. If **printsmit_db** database has a red X next to it, double-click it. (As long as the red X is displayed, you cannot look at the structure of the database.)
Appendix B: Changing the Postgres Port

Communication between PrintSmith Vision and the Postgres database takes place through a port. When you install PrintSmith Vision, a default port number is used. In some cases that port may already be in use, which will prevent PrintSmith Vision from running. In this situation you must change the Postgres port number as described below. Only do this if advised by EFI Customer Support.

1. Make sure the Postgres pgAdmin III utility is not running.
2. On the server computer, start PrintSmith Vision Monitor. You can open it using a shortcut on the desktop (Windows) or directly from the dock (Macintosh).
3. Click the Preferences tab.
4. Enter an unused port number in the Postgres Port field.
5. Click Stop Server and Apply.

6. Click the Server tab in PrintSmith Vision Monitor and click Start Server.
7. Add the same port number in pgAdmin III:
   a. Double-click the Postgres shortcut on the desktop (Windows) or click Postgres in the dock (Macintosh). The pgAdmin III window opens.
   c. In the Name field, enter a name of your choice.
   d. In the Host field, enter losthost.
   e. In the Port field, enter the same port number you entered in PrintSmith Vision Monitor (step 4 above).
   f. In the Password field, enter PrintSmith^2012.
   g. Leave the remaining fields as they are and click OK.
Appendix C: If You Upgrade Your Server Hardware

If you were using PrintSmith Vision, and at some point decide to upgrade your server, for example, you get a more powerful Windows or Macintosh computer, you will need to do the following:

1. Back up your entire system as described in the “Backup Manager preferences” section of the PrintSmith Vision - Setup and User Guide.
2. De-activate your license on the current PrintSmith Vision server. (See page 40.)
   
   **Note**  If you fail to de-activate your license it will still be considered “in use,” and you will be unable to activate it on the new computer.
3. Uninstall PrintSmith Vision from the old server. (See page 33.)
   
   **Note**  On newer Macs (starting with OS X 10.9), Java is no longer installed. The PrintSmith Vision Installer requires Java so you will need to download and install Java version 7. (The Installer will warn you if Java is not installed.)
4. Install PrintSmith Vision on the new computer with the UPGRADE (not NEW USER) option and reactivate your license.
5. Restore your PrintSmith Vision data on the new computer as described in the “Restoring the entire PrintSmith Vision system” section of the PrintSmith Vision - Setup and User Guide.