

PrintSmith™ Vision Release Notes

Version 3.4.1  
August / 2016

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EFI Productivity Suite | *PrintSmith Vision Release Notes*

August 2016 PrintSmith Vision 3.4.1

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## About This Document

This document describes the enhancements and corrections that were made in PrintSmith™ Vision 3.4.1.

## Contact Information

### EFI Support

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

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

<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>

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.

## Important Information – Read This!

### Do You Meet System Requirements?

Be sure you meet the system requirements listed on page 8.

**Important** Mac OS X 10.8 is no longer a supported operating systems for PrintSmith Vision servers, but Mac OS X 10.11 is now supported.

Windows 7 and Windows Server 2008 are no longer supported for PrintSmith Vision servers.

### Macintosh OS X Installation Folder

When you install PrintSmith Vision on a Mac, be sure to install it in the default **Applications** folder. Custom folders are not currently supported, and will prevent PrintSmith Vision from running.

### If You Are Upgrading from PrintSmith Classic 8.1 to PrintSmith Vision

If you are upgrading from PrintSmith 8.1, make sure you have PrintSmith Classic 8.1.28 installed before you export your data. For complete details of upgrading, see the *PrintSmith Vision - Installation and Upgrade Guide*.

## If You Are Upgrading PrintSmith Vision

If you have PrintSmith Vision installed, and are updating it, see “Upgrading PrintSmith Vision” on page 17.

## Known Issues

### Mac OS X: PrintSmith server may be slow to start after upgrade to 3.4.1

On some Macs, after you upgrade PrintSmith Vision to version 3.4.1, the server may take a few minutes to start automatically the first time after the upgrade.

### Overriding/uploading reports

On some browsers an error occurs if you try to override a report from Report Manager or upload your own version of a report (for example, a customized statement, estimate, or delivery ticket).

Workaround: Make sure the report you are trying to upload is *not* in one of the PrintSmith Vision report repository folders. Move the report to another folder (or the desktop) and then try overriding or uploading.

### Internet Explorer 10 or 11 and closeout and sales reports

If you use Internet Explorer 10 or 11 as your browser, the following reports will not be generated and printed:

- All reports during a closeout
- Daily sales reports (**Reports > Daily Sales**)
- Monthly sales reports (**Reports > Monthly Sales**)

Please use a different supported browser for performing closeouts and for printing sales reports.

### Dates when using Mac OS X 10.10 (Yosemite)

When you access PrintSmith Vision from a Mac running 10.10, dates selected in the Account Info window, Generate Statements window, and so on, may change to a different date. As a workaround, select the YY (e.g., 15) format for the **Short** date in System Preferences (**Date & Time > Open Language & Region > Advanced > Dates**).



## Digital StoreFront integration and account-level invoice charges

If an order is placed for an account with an invoice-level charge, the price of the charge is not included in the price that PrintSmith Vision sends back to Digital StoreFront so there will be a price mismatch.

# System Requirements

## 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*.

**Note** If EFI is hosting PrintSmith Vision for you, the server requirements do not apply to you, but the client and other requirements do.

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

<i>Operating system:</i>	Windows 8 Windows 10 ** Windows Server 2012 R2 Standard or Essentials
<i>Processor:</i>	Intel Quad Core i7 2.3 GHz
<i>Memory:</i>	16 GB (more memory will improve performance)
<i>Hard drive:</i>	50 GB free space

\*\* For Windows 10, be sure to read "Windows 10 and existing PrintSmith Vision installations" on page 9.



## Windows 10 and existing PrintSmith Vision installations

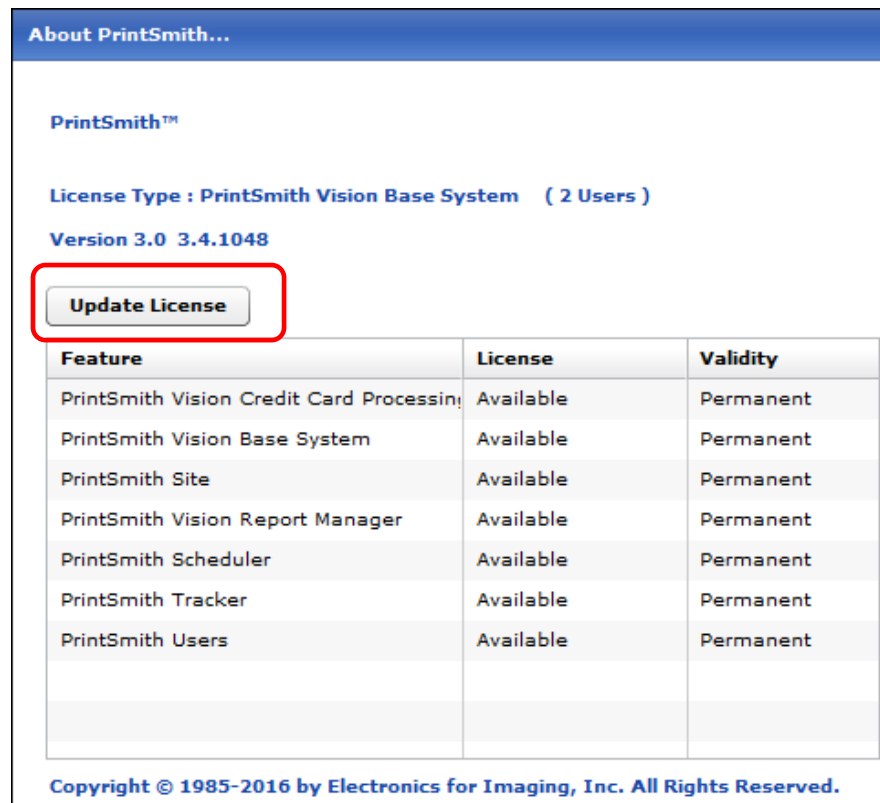
Windows 10 is supported for both the PrintSmith Vision server computer and client computers. If you want to upgrade your server to Windows 10, be sure to follow the instructions below for existing PrintSmith Vision installations.

*During an upgrade to Windows 10, PrintSmith Vision is currently removed so you will lose your PrintSmith system unless you follow these steps:*

1. Back up your entire PrintSmith Vision system using the Backup Manager preferences as described in the “Backup Manager preferences” section of the *PrintSmith Vision - Setup and User Guide*.

**Important** Store the backup on an external device or in the cloud to make sure your backed-up data stays safe during the upgrade.

2. *Deactivate your PrintSmith Vision license:*
  - a. Before you uninstall PrintSmith Vision, log into the system.
  - b. Select **Help > About PrintSmith**.
  - c. Click **Update License**.



**About PrintSmith...**

**PrintSmith™**

**License Type : PrintSmith Vision Base System ( 2 Users )**

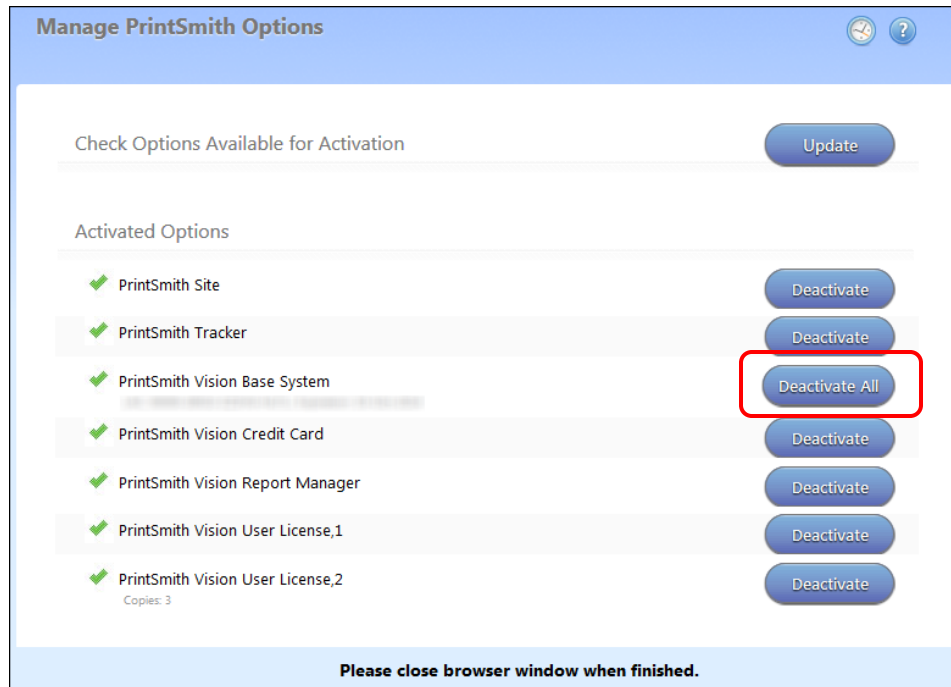
**Version 3.0 3.4.1048**

**Update License**

Feature	License	Validity
PrintSmith Vision Credit Card Processing	Available	Permanent
PrintSmith Vision Base System	Available	Permanent
PrintSmith Site	Available	Permanent
PrintSmith Vision Report Manager	Available	Permanent
PrintSmith Scheduler	Available	Permanent
PrintSmith Tracker	Available	Permanent
PrintSmith Users	Available	Permanent

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- d. In the Manage PrintSmith Options window, click **Deactivate All**.



- e. After the deactivation is confirmed, click **Finish**.
3. Uninstall PrintSmith Vision.
  4. Upgrade your operating system to Windows 10.
  5. After the operating system is upgraded, install PrintSmith Vision and activate your license. (For installation instructions, see the *PrintSmith Vision - Installation and Upgrade Guide*.)
  6. Restore your database, custom documents/reports, and digital assets (content files) as described in the "Restoring the entire PrintSmith Vision system" section of the *PrintSmith Vision - Setup and User Guide*.

### Windows 10 and new installations of PrintSmith Vision

If you are new to PrintSmith Vision, just install it on your Windows 10 computer as described in the *PrintSmith Vision - Installation and Upgrade Guide*.

### Macintosh

<i>Operating system:</i>	OS X 10.10, 10.10 Server, 10.11, or 10.11 Server
<i>Processor:</i>	Intel Quad Core i7 2.3 GHz
<i>Memory:</i>	16 GB (more memory will improve performance)
<i>Hard drive:</i>	50 GB free space

### OS X and new PrintSmith Vision installations

Macs running OS X 10.10 and higher do not have Java installed, which is required to install PrintSmith Vision. Download and install Java *before* starting the PrintSmith Vision Installer.

### Existing PrintSmith installations and upgrades to OS X 10.11

If you currently have a pre-3.4 version of PrintSmith Vision installed on a Mac, and want to upgrade your Mac to **OS X 10.11** (El Capitan), you must upgrade PrintSmith Vision to 3.4.1 *before* you upgrade the operating system.

After you upgrade the operating system, do the following:

- When Apple upgrades the operating system, it removes Java, which is required to uninstall PrintSmith Vision and to install future versions of PrintSmith Vision. Download and re-install Java (version 7).
- When Apple upgrades the operating system, it removes your printer settings both in the operating system and PrintSmith Vision.
  - a. On the Mac, open **System Preferences > Sharing**, make sure **Printer Sharing** is selected for the printer, and make sure **Everyone Can Print** is selected under **Users**.
  - b. In PrintSmith Vision, select **Admin > Preferences > POS > Cash Drawer** and select your printer in the **Printer** field.

## 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.
- 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 Client Requirements

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

<i>Operating system:</i>	Windows 7, 8, or 10 Macintosh OS X 10.8 or higher
<i>Memory:</i>	4 GB minimum (more memory will improve performance)
<i>Browser:</i>	See “Browser Requirements” below.
<i>Monitor:</i>	See “Monitor and Resolution Requirements” below.

## Browser Requirements

The following browsers are supported for running PrintSmith Vision on a desktop:

- Internet Explorer 10 or 11

**Note** When using Internet 11 with Windows Server 2012 R2 Standard or Essentials, some additional configuration may be required. See the section on “Windows Server 2012 and Internet Explorer 11” in the *PrintSmith Vision - Installation and Upgrade Guide*.

- Mozilla Firefox® 40.x or later
- Safari® 7.x or later
- Chrome® 51 or later

## 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 the 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 are given the option of installing 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 700II printer *from EFI*.

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

## Fiery Integrations

If you are using PrintSmith Vision with a Fiery<sup>®</sup>, Fiery JDF version 1.5.0.25 is required.

## Digital StoreFront Integrations

If you use PrintSmith Vision with Digital StoreFront<sup>®</sup>, Digital StoreFront 9.2 is required to take advantage of the new eFlow-based integration introduced in PrintSmith Vision 3.4 and Digital StoreFront 9.2.

**Note** If you are currently integrated with Digital StoreFront, *your integration will continue to work as is* after you upgrade to PrintSmith Vision 3.4. Once you upgrade to Digital StoreFront 9.2, you have the option of upgrading to the eFlow-based integration as described in the “Upgrading” chapter of the *PrintSmith Vision – Digital StoreFront Integration Guide*.

## 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<sup>®</sup> 4<sup>th</sup> and 5<sup>th</sup> generation
  - iPhone<sup>®</sup> 5 and 6
  - Android<sup>™</sup> 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.

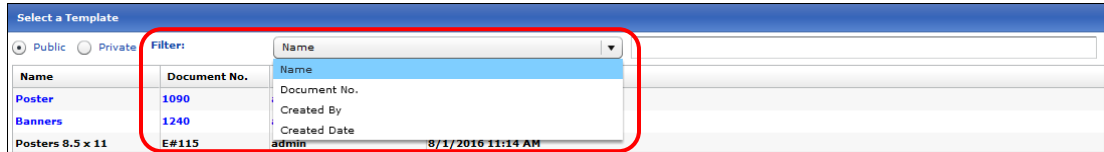
---

## New Features and Enhancements

PrintSmith Vision 3.4.1 includes the following enhancement.

### Improvements to User Interface for Templates

- The Select a Template window was enlarged so more templates can now be listed. The window can also be positioned and re-sized. (Issue Reference: 13398)
- You can now filter a long list of templates by **Name**, **Document No**, **Created By**, or **Created Date**. (Issue Reference: 16301)



## Corrections

The sections that follow describe the corrections that were made in PrintSmith Vision version 3.4.1. For your convenience they are categorized.

### Estimating

#### Invoices and estimates

- Sorting now works correctly in the Select a Template window for job templates. (Issue Reference: 15023)

#### Jobs

- A multi-quantity job can now be dragged and dropped within a document or to another document without problems occurring. (Issue Reference: 17044)
- The job price is now correctly recalculated after you click the **Multi-Quantity** command in the Job window and then close the Bid Quantities window. Job passes are calculated before the waste is calculated, and then the job price is updated. (Issue Reference: 17071)
- A problem that was causing some charges to be duplicated in the Work Order reports was fixed. (Issue Reference: 17066)

### Reports

#### Sales

- If you run a sales report that is sorted by Sales Rep, invoices that were voided on the tape are no longer included in the sales figures. (Issue Reference: 17078)

#### Work in Progress

- The time it takes for the Integration Schedule report to load was decreased. (Issue Reference: 16997)

### Administration

#### Preferences

- The **Banking Info** fields in the Company preferences can now include special characters like &. Previously, special characters prevented banking information from being saved. (Issue Reference: 17059)

### E-Commerce API

- The **Products** tab in the Web Administration window is now available when you are licensed for the e-commerce API. (Issue Reference: 17067)

### Digital StoreFront Integration

- For the eFlow-based integration, the registration of multiple accounts at a time from the Account Picker window now works correctly. (Issue Reference: 17100)
  - For the eFlow-based integration, the eFlow URL that is entered in the Integration preferences can be either HTTP or HTTPS. Note, however, that currently Digital StoreFront does *not* support HTTPS for eFlow. This will be addressed in a future release of Digital StoreFront. (Issue Reference: 17124)
-

## PrintSmith Site Integration

- The time it takes to load data in the Web Administration window when many products exist was decreased. (Issue Reference: 17052)
- To make it easier to find products, a **Filter by product name** field was added to the **Categories** tab in the Web Administration window. (Issue Reference: 17082)
- Double-clicking a product on the **Categories** tab to add it to a category no longer selects all the products. (Issue Reference: 17084)
- Several corrections were made on the **Categories** tab in the Web Administration window:
  - The response of the system to user activities like clicking was improved.
  - You can now reposition a category at the same level as another category. Previously, when you dragged a category, it always became a subcategory of the category where you dropped it. Now you are given a choice.
  - Products are now deleted from categories in a consistent way.
  - The check boxes in the product list are now correctly selected for products that are associated with a category.

In addition, on the **Products** tab, questions are now deleted from products in a consistent way.

(Issue Reference: 17053)

---



# Upgrading PrintSmith Vision

## About Upgrading

If you were already using an earlier version of PrintSmith Vision, but want to upgrade to version 3.4.1, you update your existing installation by running the 3.4.1 installer. *You must, however, be upgrading from PrintSmith Vision 3.2.1 or higher, not a pre-3.2.1 version.*

An upgrade requires a re-start of the server computer.

## Important: Before You Begin the Upgrade

### If you also plan to upgrade the operating system

If you plan to upgrade your operating system *as well as* PrintSmith Vision, be sure to follow these instructions:

- For upgrades to Windows 10, see “Windows 10 and existing PrintSmith Vision installations” on page 9
- For upgrades to Mac OS X 10.11 (El Capitan), *upgrade PrintSmith Vision first* and then follow the instructions in “Existing PrintSmith installations and upgrades to OS X 10.11” on page 10.

### If you want to use an SSL connection

Support for SSL (Secure Sockets Layer) connections was introduced in PrintSmith Vision 2.3. 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.

If you did not previously configure SSL, during the upgrade process, you will be given the choice of using a non-SSL (the default) or SSL connection. Keep in mind that an SSL connection:

- Requires the purchase and installation of an SSL certificate. The certificate must be purchased from a Certificate Authority (CA) and be compatible with Apache Tomcat v. 7.
- Requires the help of PrintSmith Support to install and configure the signed certificate you purchased.
- Changes the PrintSmith Vision URL: the URL begins with `https://` and uses port 8443 by default.

## Upgrade Your System

**Warning** You must have PrintSmith Vision 3.2.1 or higher installed before you can upgrade to 3.4.

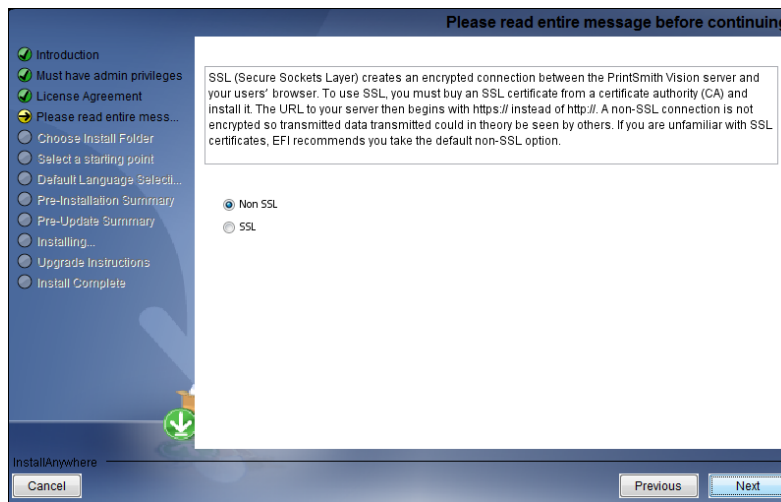
1. Back up your entire system as described in the section on “Backup Manager preferences” in the *PrintSmith Vision - Setup and User Guide*.
2. Obtain the PrintSmith Vision Server 3.4 installer.

**Caution** Before you start the installer, close PrintSmith Vision Monitor, pgAdmin, and any PrintSmith Vision installation folders that are open.

3. Start the installer.
4. After you accept the license agreement and read some warnings about performing backups and closing all PrintSmith applications, if you are given this option, select **Non SSL** (the default) or **SSL**. For more information about this choice, see “If you want to use an SSL connection” on page 17.

**Notes** If you selected **SSL** in a previous release of PrintSmith Vision, you will not be given the choice to select **Non SSL** or **SSL**.

If you select **SSL**, you must install and configure your SSL certificate after you upgrade PrintSmith Vision. Contact PrintSmith Support for help with this.



5. Follow the remaining instructions to complete the upgrade. A re-start of the computer is required at the end of the upgrade.

## After the Upgrade

To ensure you are seeing all the latest changes to the user interface, clear your browser cache after upgrading PrintSmith Vision. You only need to do this for any browser that you used to run PrintSmith Vision in the past. For instructions on clearing the browser cache:

Chrome	<a href="https://support.google.com/chrome/answer/95582?hl=en">https://support.google.com/chrome/answer/95582?hl=en</a>
Firefox	<a href="https://support.mozilla.org/en-US/kb/how-clear-firefox-cache">https://support.mozilla.org/en-US/kb/how-clear-firefox-cache</a>
Internet Explorer	<a href="http://windows.microsoft.com/en-in/windows7/how-to-delete-your-browsing-history-in-internet-explorer-9">http://windows.microsoft.com/en-in/windows7/how-to-delete-your-browsing-history-in-internet-explorer-9</a>
Safari	<a href="https://answers.syr.edu/display/software/Clear+Cache+in+Safari+version+7+on+Mac+OSX">https://answers.syr.edu/display/software/Clear+Cache+in+Safari+version+7+on+Mac+OSX</a>

**Important** Make sure all your users clear their browser cache, too.