

CtrlPrint

Admin Guide

support.ctrlprint.net | support@ctrlprint.net

Tel. SWE: +46 8 743 72 60 | UK: +44 203 630 0134 | FIN: +358 9 4245 4425

SET UP CTRLPRINT IN 10 MINUTES

Administrating a project in CtrlPrint is easy. This cheat sheet lays out everything you need and the steps to get your users and projects set up correctly first time. If you have any problems, please contact support@ctrlprint.net.

1 WHAT WILL I NEED?

- Access to a computer with a stable Internet connection
- Your login credentials (or your CtrlPrint email invitation)
- A list of users' full names and email addresses (for both client and agency users)
- A plan for the chapter structure of your project
- InDesign templates for each chapter of your project
- [The correct version of InDesign, downloaded and installed](#) – external link to CtrlPrint
- [The most recent version of CtrlPrint Transfer Manager, downloaded and installed](#) – external link to CtrlPrint
- [Any fonts your project requires, correctly licensed and installed](#) – external link to CtrlPrint

2 WHAT DO I NEED TO DO?

We recommend following the instructions in this book in this order:

- [1. Login to CtrlPrint as a user \(page 6\)](#)
- [2. Login to CtrlPrint as an administrator \(page 7\)](#)
- [3. Create any new users for your agency and the client \(page 10\)](#)
- [4. Select which users will be administrators \(page 21\)](#)
- [5. Create a new project \(page 14\)](#)
- [6. Add chapters to the project \(page 15\)](#)
- [7. Add your users \(from steps 3 and 4\) to the project \(page 17\)](#)
- [8. Set access permissions for users \(page 18\)](#)
- [9. Upload your InDesign documents to chapters \(page 19\)](#)
- [10. Activate TrackChanges and set permissions \(page 22\)](#)

3 I NEED MORE HELP

You can contact our support team 7AM – 6PM (GMT):

Email: support@ctrlprint.net

Phone: SWE: +46 (0) 8 743 72 60
UK: +44 (0) 203 630 0134
FIN: +358 (0) 9 4245 4425

CtrlPrint

Admin Guide

updated: Nov 2020

Contents

1

LOGIN AND PASSWORDS

Login to CtrlPrint	6
Login as an administrator	7
Change your password	8

2

ADMINISTRATING USERS

Create new users	10
Edit user information	11
Delete a user account	12

3

CREATING PROJECTS

Create a new project	14
Add chapters to a project	15

4

SETTING PERMISSIONS

Add users to a project	17
Set user document permissions	18
Add InDesign documents to empty chapter	19
Add custom PDF profiles to project	20
Make other users administrators	21
Activate TrackChanges and permissions	22

5

ADVANCED ADMIN TASKS

Unlock a document for a user	24
Delete chapter versions	25
Delete chapters	26
Delete comments	27

CTRLPRINT EXPLAINED

1 WHAT DO I NEED TO DO?

To successfully administrate a project in CtrlPrint you will need to do the following:

- Create users to work on the project
- Create a project for users to work on
- Add the users you created to the project you created
- Give the users permissions to access and edit the project

This guide will walk you through the process. We strongly recommend completing every step in order.

If you have any problems, please contact support@ctrlprint.net.

2 WHAT ARE USERS?

Users refers to the individual people who need to access your project. They may be project managers in a creative agency, members of the client's project team, a freelancer, someone responsible for XBRL tagging etc.

As an administrator you can create user accounts for anyone who needs to work on your project.

For security reasons it is highly recommended that you keep the list of users who have access to projects in CtrlPrint up-to-date. For example, you should delete a user's account if they no longer work for a company that is using CtrlPrint.

WARNING: users will not have access to documents until they have been added to the project and given the correct permissions by the administrator.

3 WHAT IS A PROJECT?

A project is the collection of chapters that make up your report. It will most likely have a name like **Annual Report 2019**. When you create an empty project, you also need to add empty chapters where you can add your InDesign documents.

From the project page, you can download chapters for editing, change project settings such as user permissions, and send messages to other users in your project.

WARNING: users will not have access to documents until they have been added to the project and given the correct permissions by the administrator.

4 WHAT ARE PERMISSIONS?

Every user must have one of the following access permissions set for every chapter in a project:

- None: for users who are part of the project but do not have access to the chapter
- Read and comment - for users who need to see PDFs of the document but not edit it
- Edit text (InCopy) - for users who will only be editing the document's text
- Edit layout (InDesign) - for users who will be editing the document's layout and typesetting

WARNING: users will not have access to documents until they have been added to the project and given the correct permissions by the administrator.

1

Login and passwords

Login to CtrlPrint	6
Login as an administrator	7
Change your password	8

LOGIN TO CTRLPRINT

URL ADDRESS

The URL address to CtrlPrint is secure.ctrlprint.net.

Add this as a bookmark in your web browser so you can find it easily in the future.

Enter your username and click **Next**.

Enter your password and click **Login**.

USER CREDENTIALS

To log in to CtrlPrint you will need a username and password.

If you haven't received these, or don't know where they are, please contact support@ctrlprint.net.

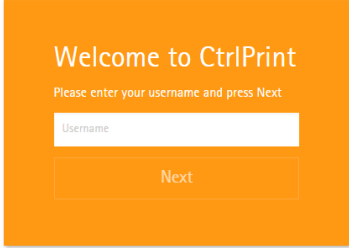
PASSWORD

The first time you log in to CtrlPrint you will need to request a password from the system.

Go to secure.ctrlprint.net and click: [Click here to create a new password](#).

Enter your username and the email address associated with your account to be sent a password.

The Walkthrough



Welcome to CtrlPrint
Please enter your username and press Next

Username

Next

Do you need a new password?
If you need a new password for any reason, please [click here to create a new password](#).

Contact CtrlPrint
If you require assistance, please don't hesitate to contact our friendly support team. You can find all the contact details you need on our [support site](#).

Contact CtrlPrint

If you require assistance, please don't hesitate to contact our friendly support team. You can find all the contact details you need on our [support site](#).

Do you need a new password?

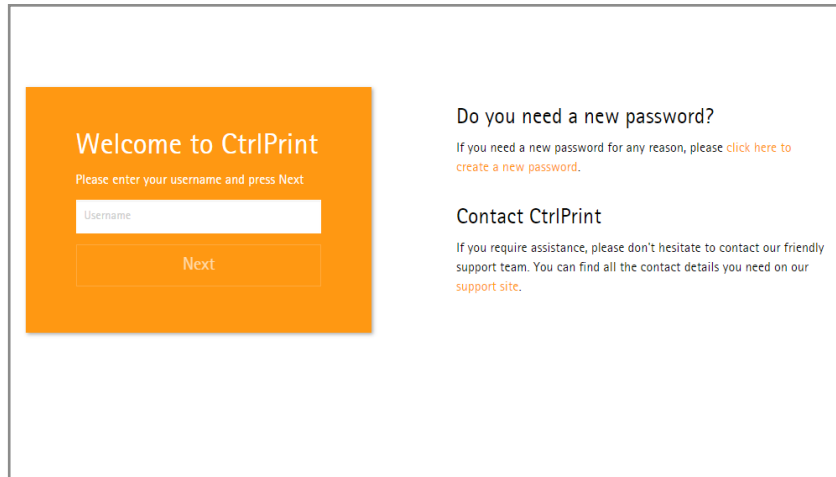
If you need a new password for any reason, please [click here to create a new password](#).

LOGIN AS AN ADMINISTRATOR

The Walkthrough

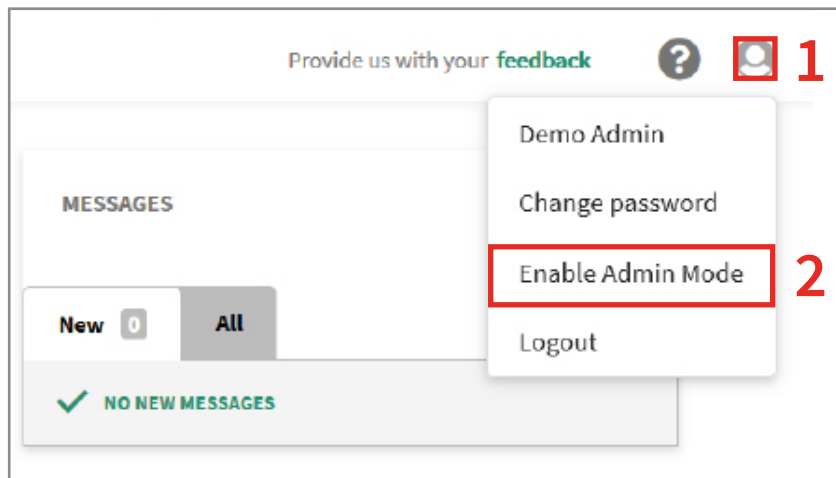
LOGIN AS A USER

Go to secure.ctrlprint.net and use the instructions from page 6 to log in as a user.



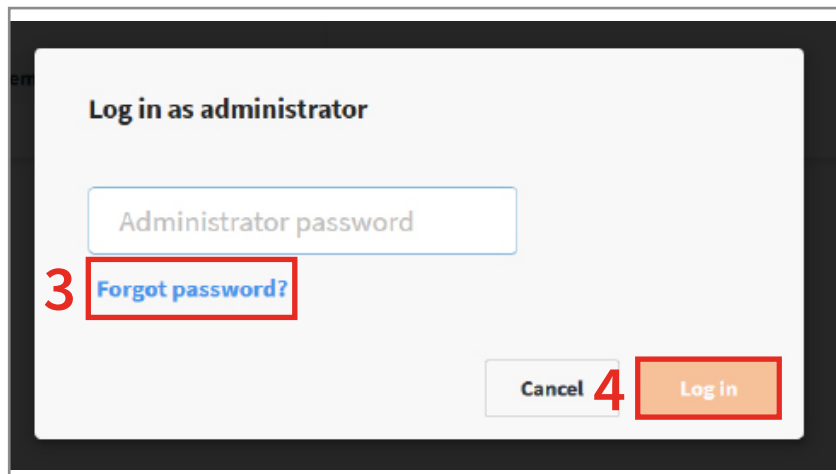
LOGIN AS AN ADMIN

1. Click the person icon in the top right hand corner.
2. Click: **Enable Admin Mode**.



REQUEST PASSWORD

3. If this is the first time you are logging in as an admin, click: **Forgot password** and a new one will be sent to you.
4. Enter your administrator's password and click: **Log in**.

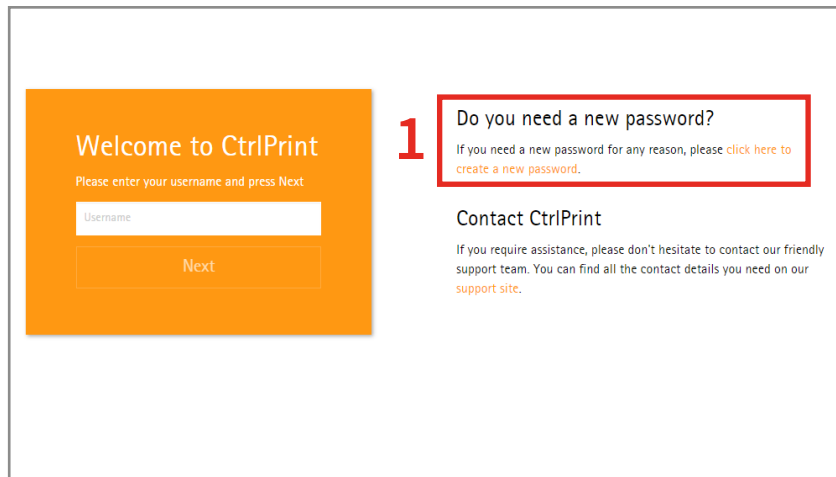


CHANGE YOUR PASSWORD

The Walkthrough

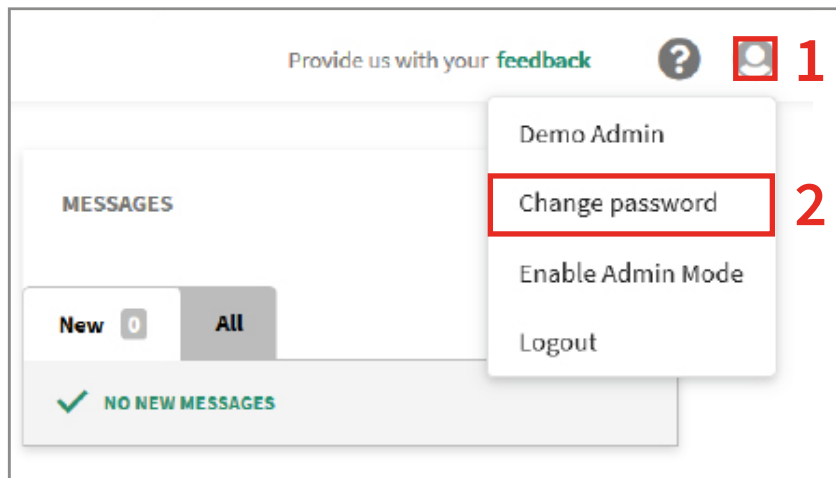
FORGOT YOUR PASSWORD?

1. Go to secure.ctrlprint.net.
Click: **Click here to create a new password.**
2. Fill in your username and the email address associated with your CtrlPrint account.
3. Click: **Send me a new password.**
A new password will be sent to your email account.



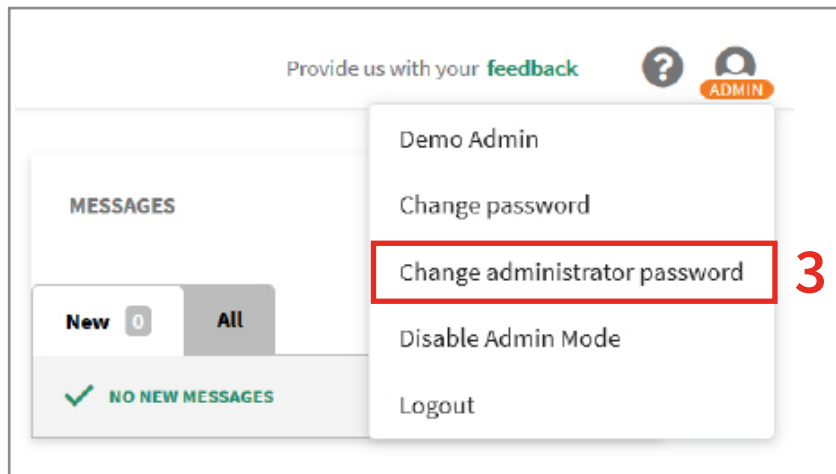
CHANGE YOUR USER PASSWORD

1. Log in to CtrlPrint and click on the person icon in the top right.
2. Click: **Change password.**



CHANGE YOUR ADMIN PASSWORD

1. Log in to CtrlPrint and click on the person icon in the top right.
2. Log in as an admin (see page 6).
3. Click:
Change administrator password.



2

Administering users

Create new users	10
Edit user information	11
Delete a user account	12

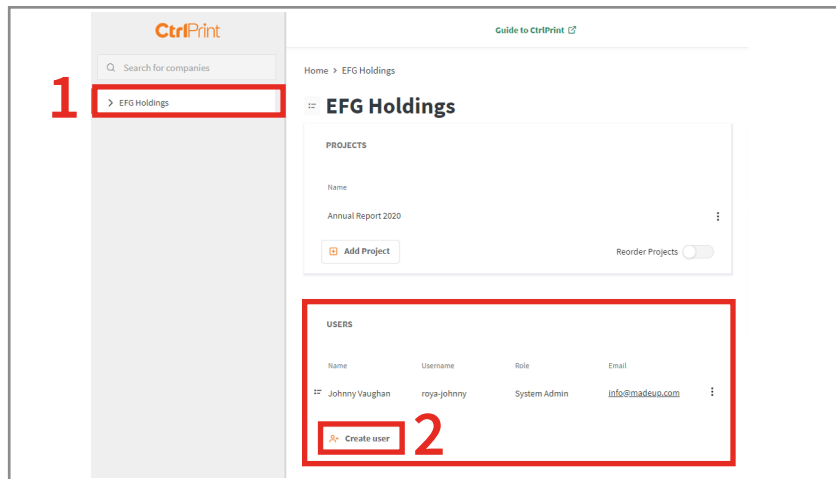
CREATE NEW USERS

The Walkthrough

NAVIGATE TO USER'S COMPANY

Login as an administrator (see page 7).

1. Click on the user's company on the left side of the window.
2. Scroll down to the **USERS** section and click: **Create user**.



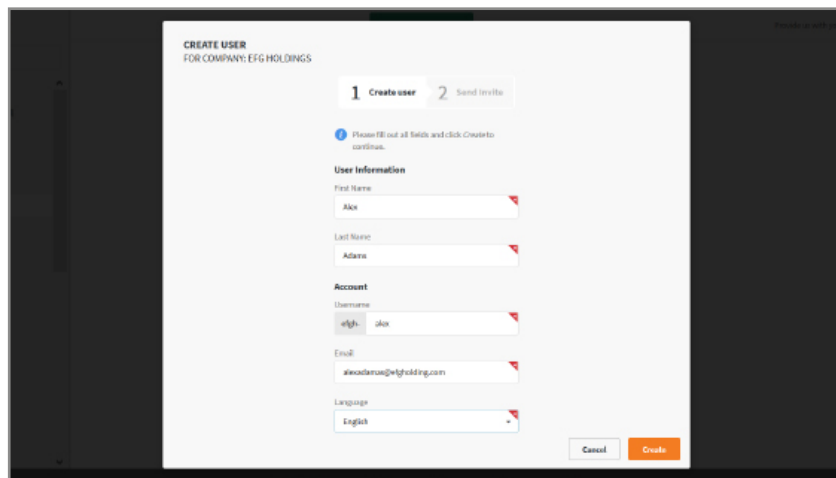
FILL IN THE NEW USER FORM

3. Fill in the form with the user's details including a username and their level of access:

- user – anyone who is not an admin
- project manager – DO NOT USE
- system manager – for other admins

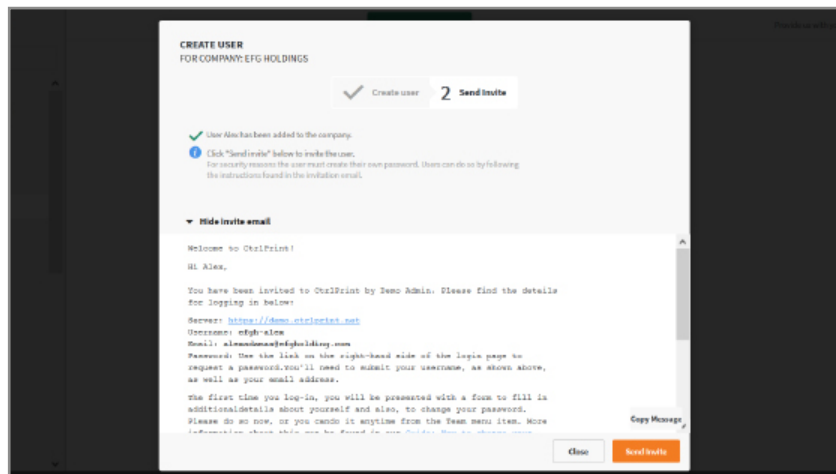
If you are not sure which role is right for a new user, select user. You can always change this later (see page 21).

4. Complete the form and click: **Create**.



SEND AN INVITE NOW OR LATER

5. You can send a secure invitation to the user now or later (see page 11).



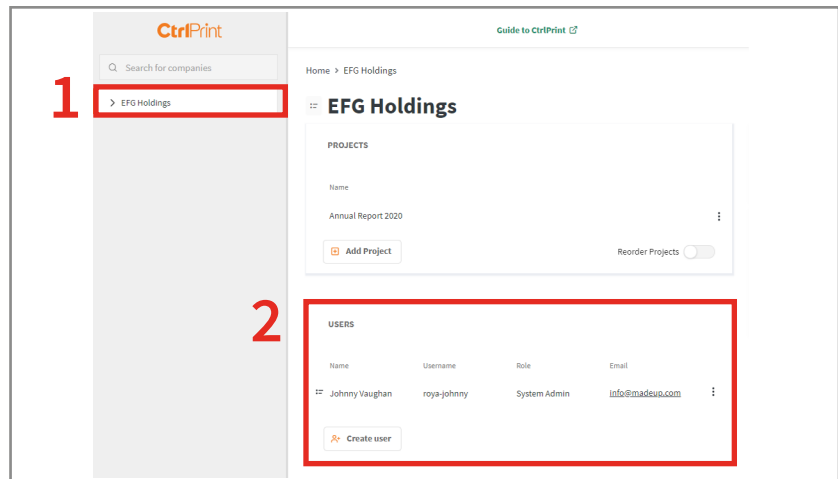
EDIT USER INFORMATION

The Walkthrough

NAVIGATE TO USER'S COMPANY

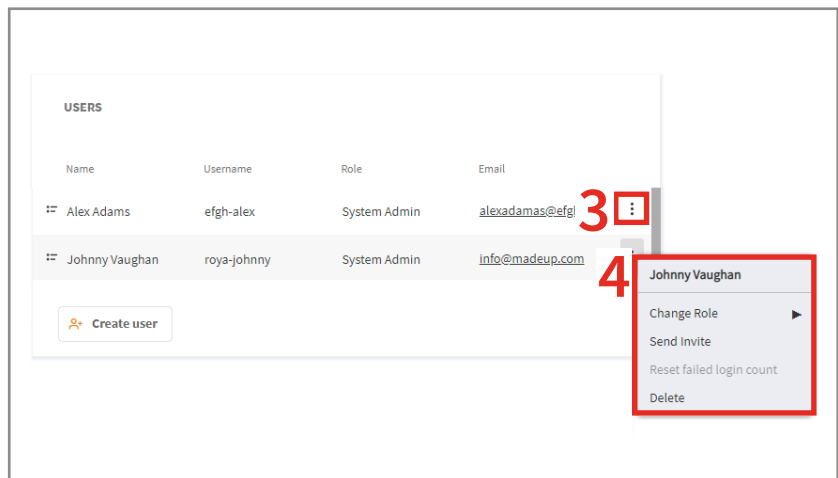
Login as an administrator (see page 7).

1. Click on the user's company on the left side of the window.
2. Scroll down to the **USERS** section



VIEW USER CONTEXT MENU

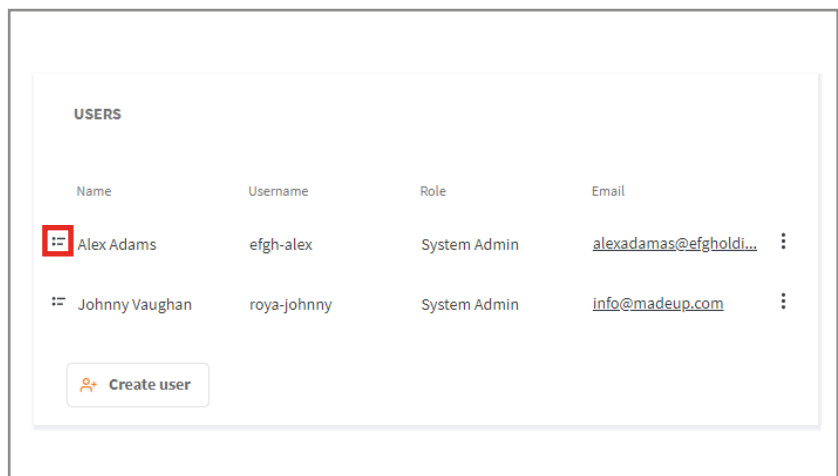
3. Click on the context menu for the user – **the three dots icon** to the right of their email address.
4. From here you can change the user's role between user and administrator (see page 21), send or resend the login invitation to the user, and delete the user (see page 12).



EDIT USER ACCOUNT DETAILS

Click the symbol to the left-hand side of the username.

From here you can edit the user's contact details, email address, language and TrackChanges colour (see page 22).



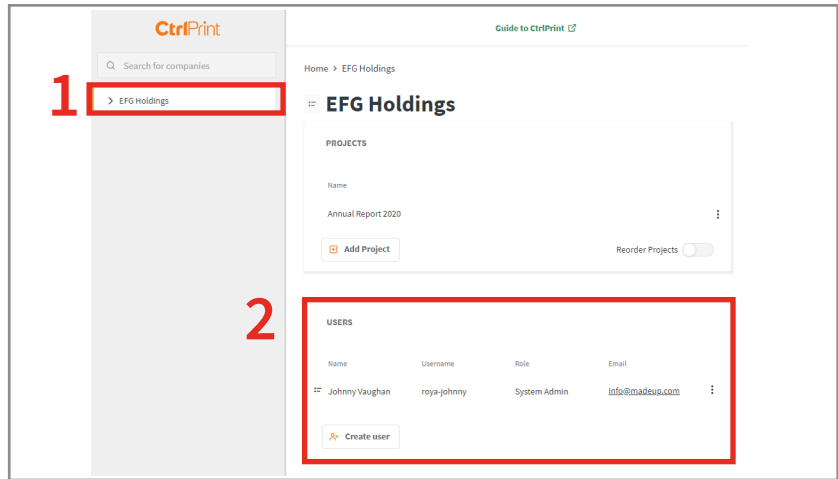
DELETE A USER ACCOUNT

The Walkthrough

NAVIGATE TO USER'S COMPANY

Login as an administrator (see page 7).

1. Click on the user's company on the left side of the window.
2. Scroll down to the **USERS** section



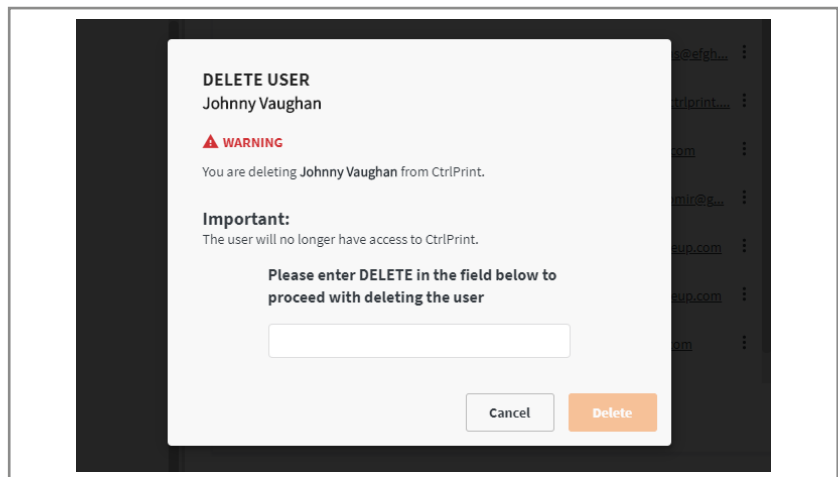
VIEW USER CONTEXT MENU

3. Click on the context menu for the user – **the three dots icon** to the right of their email address.
4. Click: **Delete**.



DELETE USER ACCOUNT

Type **DELETE** into the text box.



3

Creating projects

Create a new project	14
Add chapters to a project	15

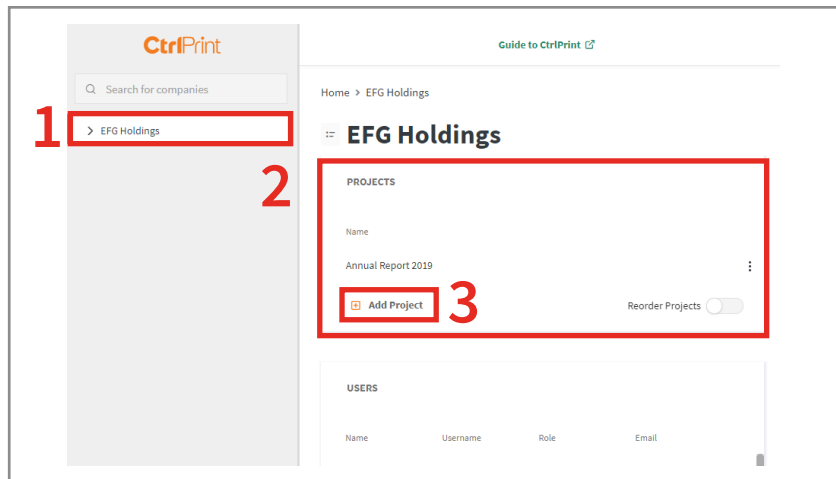
CREATE A NEW PROJECT

The Walkthrough

NAVIGATE TO USER'S COMPANY

Login as an administrator (see page 7).

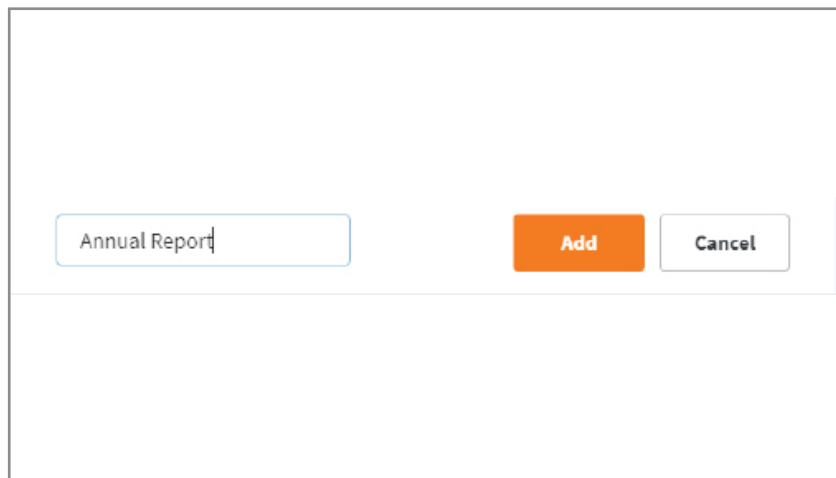
1. Click on the user's company on the left side of the window.
2. Scroll down to the **PROJECTS** section.
3. Click: **Add Project**.



NAME YOUR PROJECT

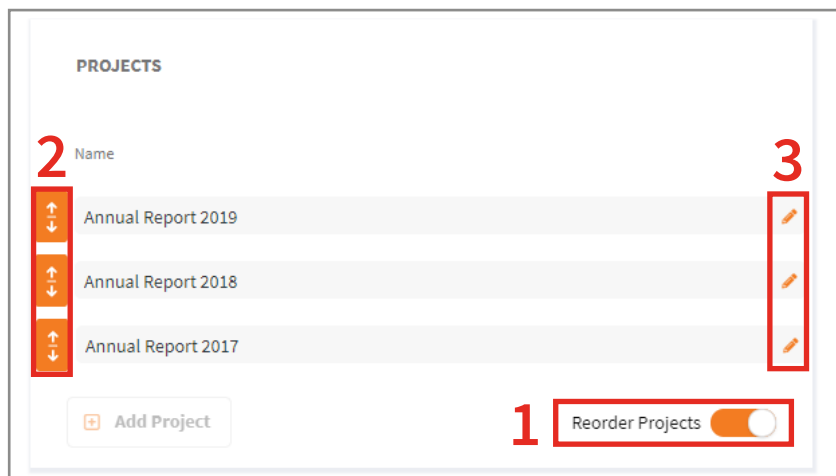
Type a project name into the text box that appears.

NOTE: Each project must have a unique name.



REORDER & RENAME PROJECTS

1. Toggle **Reorder Project** in the bottom right-hand corner of the **PROJECTS** section.
2. You can change the display order of the projects by clicking the arrows on the left-hand side and then dragging them up or down.
3. You can rename the project by clicking the pencil icon on the right-hand side.



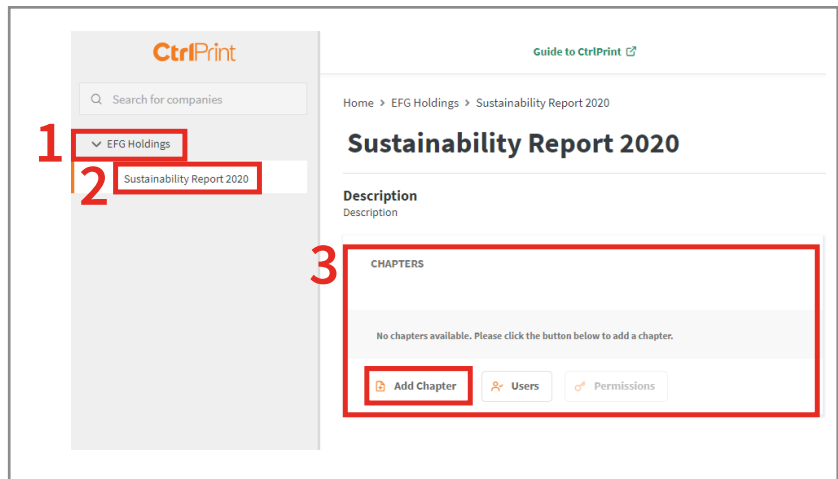
ADD CHAPTERS TO A PROJECT

The Walkthrough

NAVIGATE TO PROJECT

Login as an administrator (see page 7).

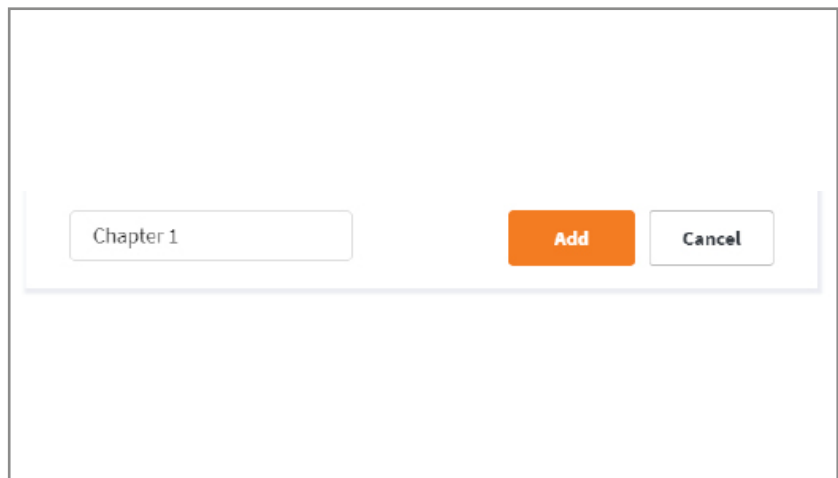
1. Click on the user's company on the left side of the window.
2. Select the project from the **PROJECTS** section.
3. Click: **Add chapter** in the bottom left-hand corner of the **CHAPTERS** section.



NAME YOUR CHAPTER

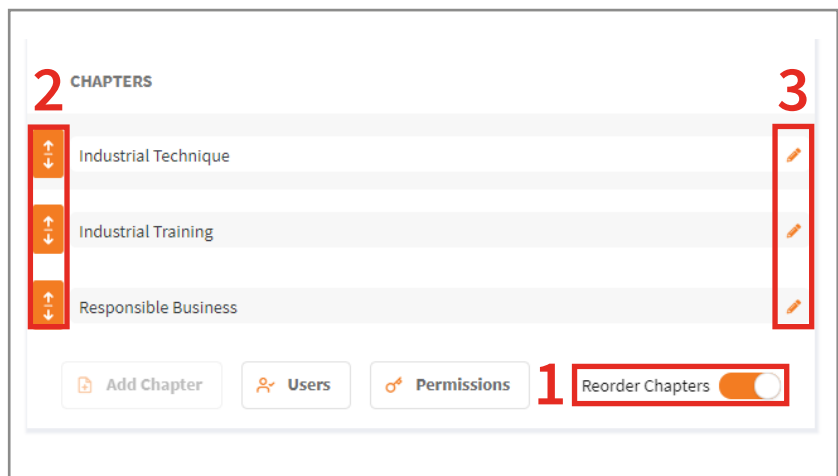
Type a chapter name into the text box that appears.

NOTE: Each chapter must have a unique name.



REORDER & RENAME CHAPTERS

1. Toggle **Reorder chapters** in the bottom right-hand corner of the **CHAPTERS** section.
2. You can change the display order of the chapters by clicking the arrows on the left-hand side and then dragging them up or down.
3. You can rename a chapter by clicking the pencil icon on the right-hand side.



4

Setting permissions

Add users to a project	17
Set user document permissions	18
Add InDesign documents to empty chapter	19
Add custom PDF profiles	20
Make other users administrators	21
Set TrackChanges permissions	22

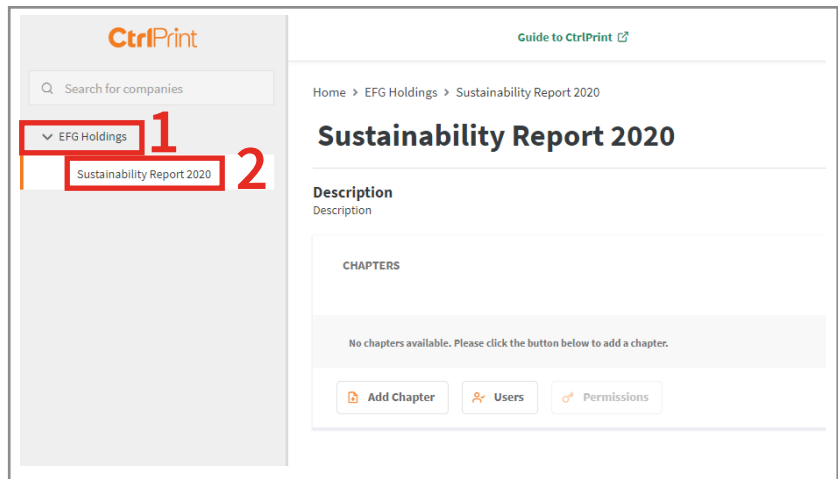
ADD USERS TO A PROJECT

The Walkthrough

NAVIGATE TO PROJECT

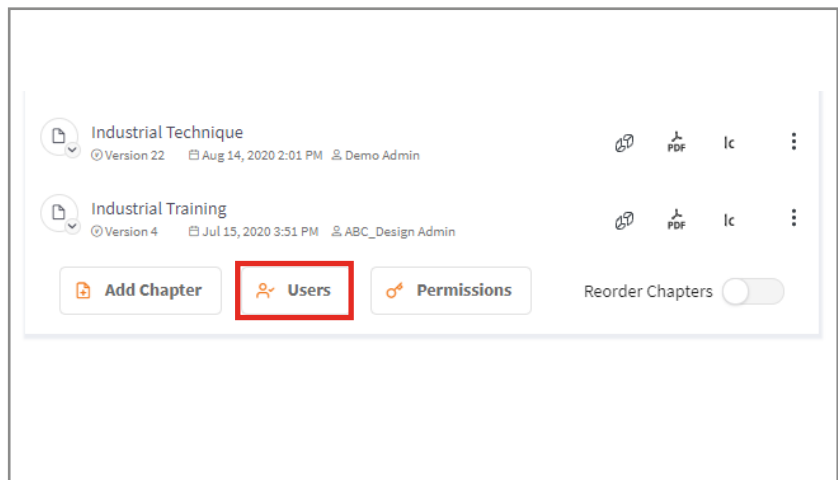
Login as an administrator (see page 7).

1. Click on the user's company on the left side of the window.
2. Select the project from the PROJECTS section.



OPEN PROJECT-USER MENU

3. Click: **Users** at the bottom of the CHAPTERS section.

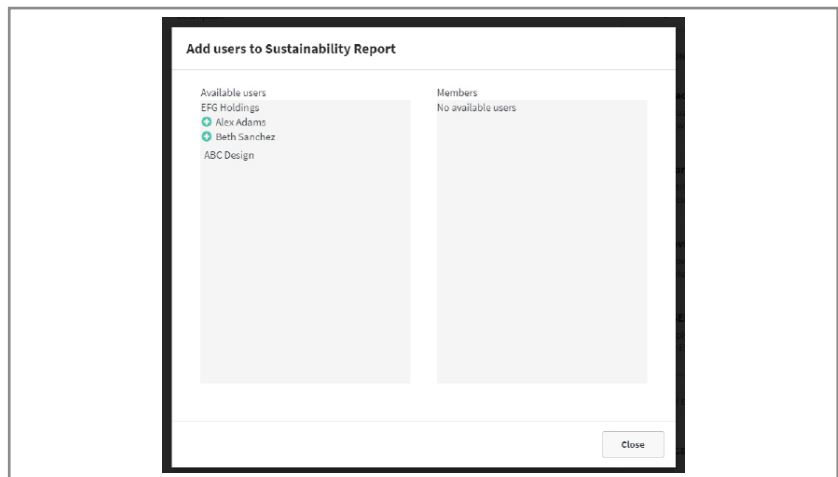


ADD USERS TO PROJECT

4. In the left-hand column, click the **green plus icon** on the left-hand side of the user's name, or drag and drop the user name from the left column to the right.

If adding users from multiple companies, make sure to click the company name to expand it and see the users inside.

Click: **Close**.



SET USER DOCUMENT PERMISSIONS

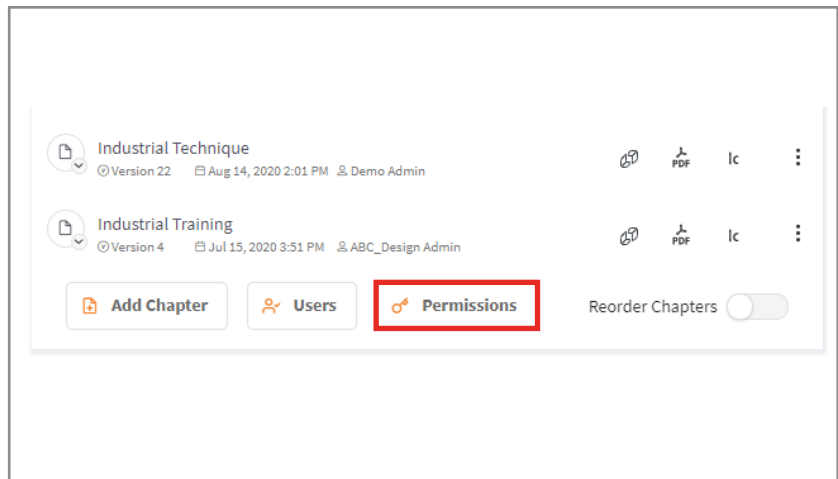
The Walkthrough

NAVIGATE TO PROJECT

Login as an administrator (see page 7).

1. Click on the user's company on the left side of the window.
2. Select the project from the **PROJECTS** section.
3. Click: **Permissions** at the bottom of the **CHAPTERS** section.

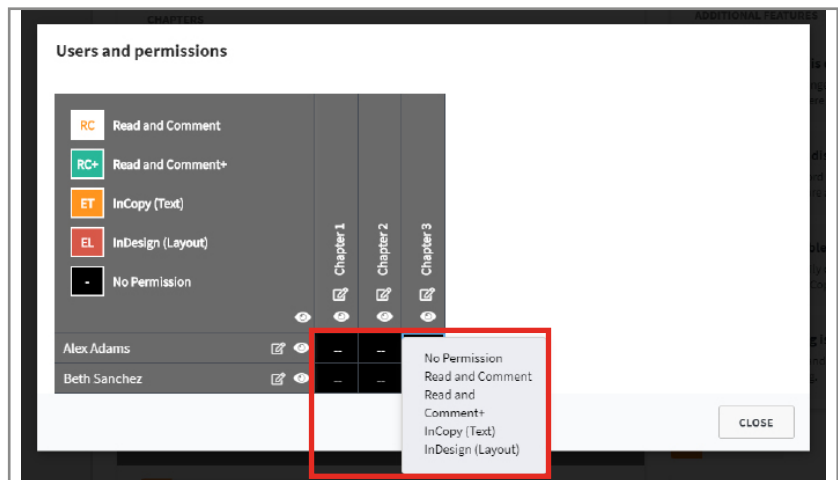
Note: the Chapter section clearly shows which chapters have no permissions set.



THE PERMISSIONS GRID

4. Click on a square to set permissions:

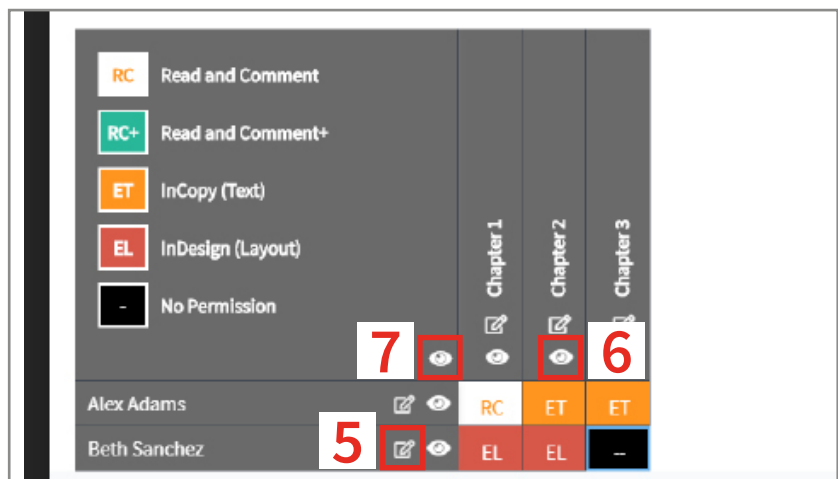
- None – for users who are part of the project but do not have access to the chapter.
- Read and comment – for users who need to see PDFs of the document but not edit it
- Edit text (InCopy) – for users who will only be editing the document's text
- Edit layout (InDesign) – for users who will be editing the document's layout and typesetting



5. You can change permissions for a whole row (a user) or column (a chapter) by clicking on the paper and pencil icon.

6. You can hide a chapter or user (if you are working with a large table) by clicking the eye icon. **Note that this does not delete users or chapters.**

7. Click on the eye icon in the top left hand corner of the grid to display all chapters and users which are hidden.

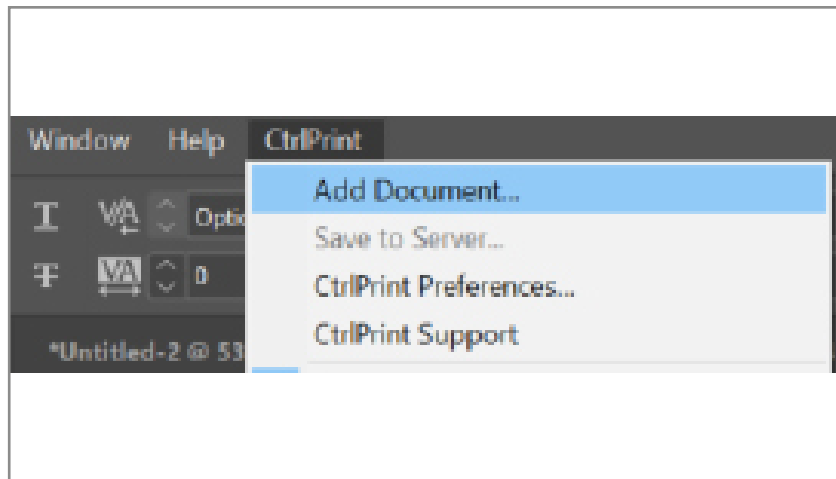


ADD INDESIGN DOCUMENT TO CHAPTER

The Walkthrough

CREATE INDESIGN DOCUMENT

1. Open InDesign and create a layout for your project. **You must include at least one text frame with some text in it.**
2. Click on the CtrlPrint menu and click: **Add Document**. If you can't see this menu, please check that your [plugins and Transfer Manager](#) are up-to-date.



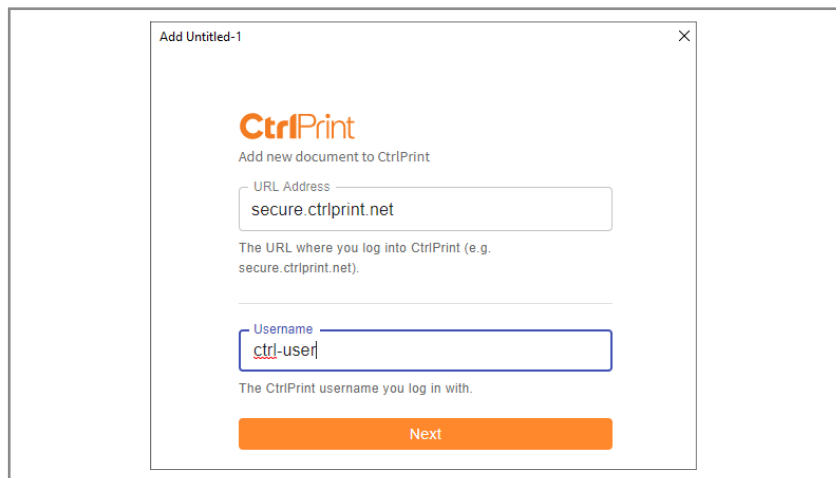
ENTER SERVER INFORMATION

3. Fill in your details:

- URL Address: secure.ctrlprint.net
- Your CtrlPrint username

Click **Next**.

- Password: your CtrlPrint password
Note: this is your user password, not your admin password

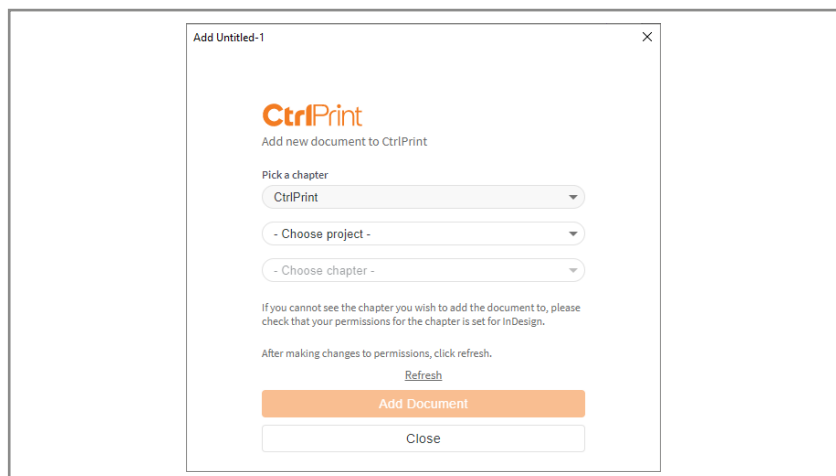


ADD DOCUMENT TO CHAPTER

4. Select which company, project and chapter you want to upload your InDesign file to and click: **Add Document**.

This step will not work if you have not added chapters to the project (see page 15) or have not given yourself Edit Layout permissions.

The document will now be uploaded and **Version 1** will be available when the upload is completed. The chapter can now be downloaded by other users for editing.



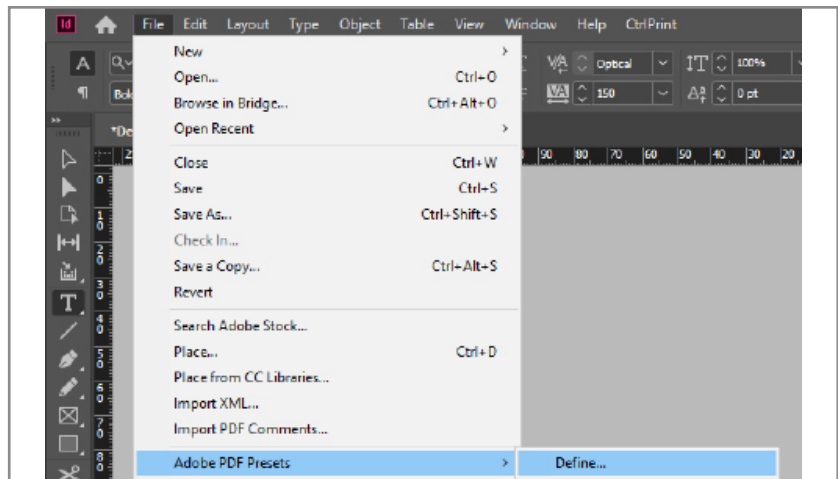
ADD CUSTOM PDF PROFILES

The Walkthrough

OPEN PDF OPTIONS WINDOW

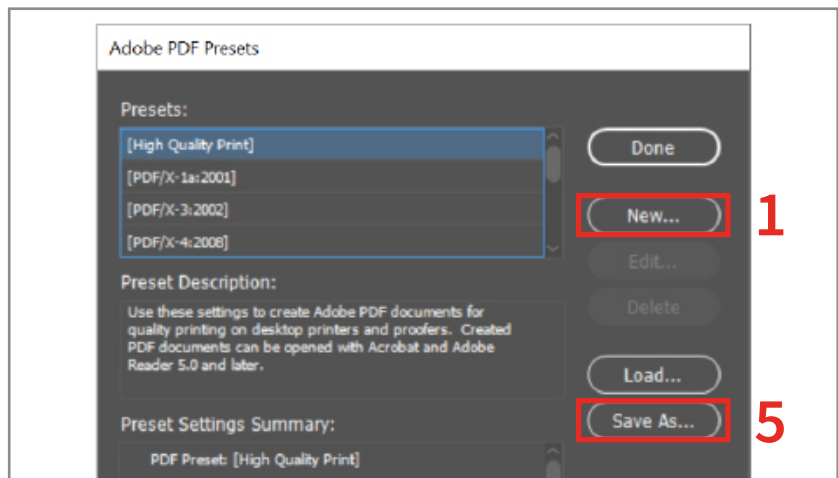
Open InDesign.

1. Click: **File**.
2. Hover over **Adobe PDF presets**.
3. Click: **Define**.



CREATE A NEW PDF PROFILE

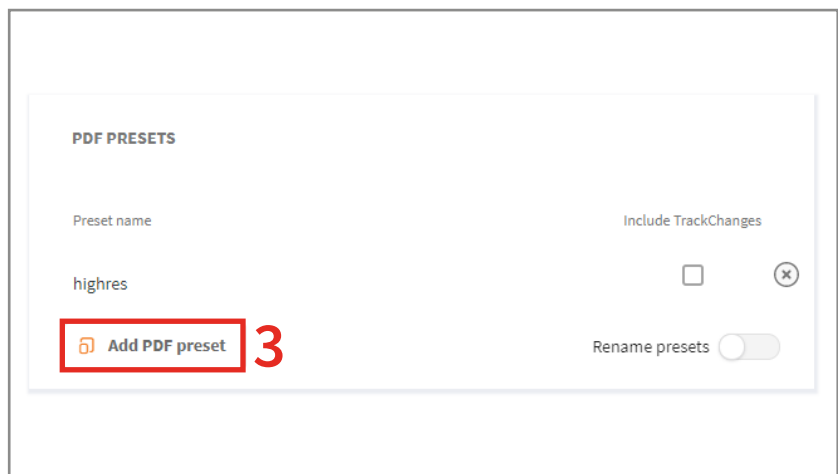
1. Click: **New**.
2. Name your PDF profile.
3. Select your PDF preferences.
4. Click: **OK**.
5. Click: **Save As** and choose a file name and save location.



UPLOAD TO CTRLPRINT

Login as an administrator (see page 7).

1. Click on the user's company on the left side of the window.
2. Select the project from the **PROJECTS** section.
3. Click: **Add PDF Preset** from the **PDF Presets** sections.
4. Click: **Choose File** and select the file you created above
5. Click: **Add**



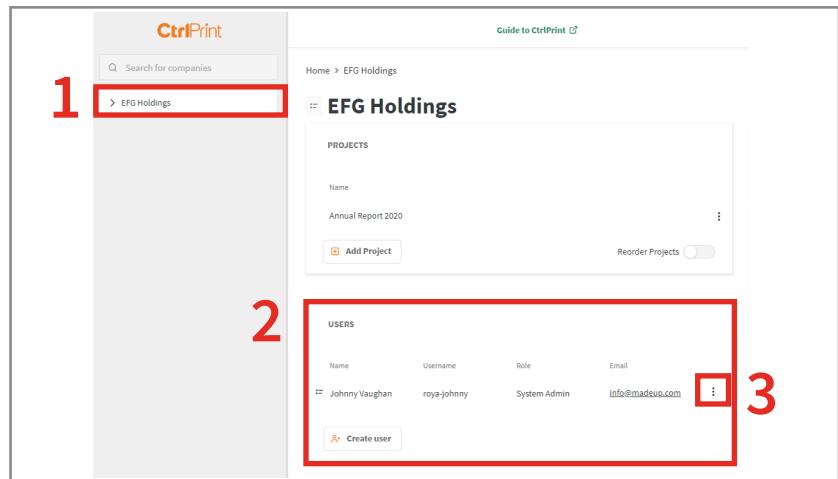
MAKE OTHER USERS ADMINISTRATORS

The Walkthrough

NAVIGATE TO USER'S COMPANY

Login as an administrator (see page 7).

1. Click on the user's company on the left side of the window.
2. Scroll down to the **USERS** section.
3. Click on the context menu for the user – **the three dots icon** to the right of their email address.



VIEW USER CONTEXT MENU

4. Click: **Change Role** and select **System Admin**.

In most cases, you will want to use System Admin.

The Project Admin role can only add users, chapters and permissions to projects they are administrators for.

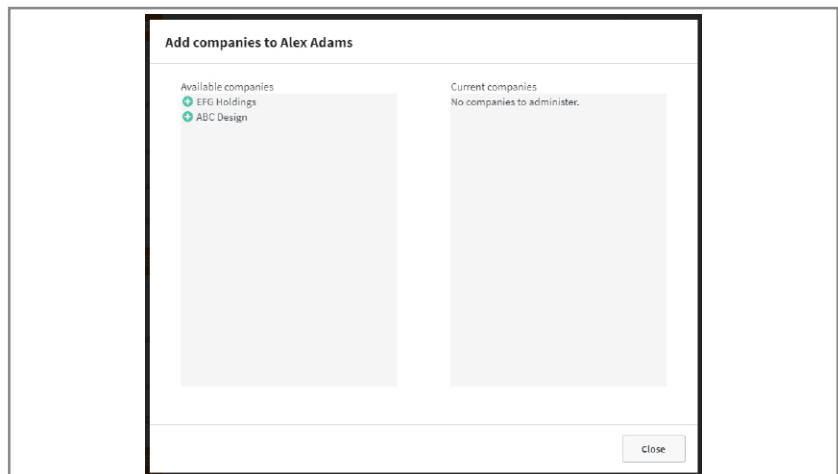
If you are unsure, please contact support@ctrlprint.net



FIND COMPANY IN LIST

In the left-hand column, click the **green plus icon** on the left-hand side of the company name, or drag and drop the company from the left column to the right.

Click: **Close**.



ACTIVATE TRACKCHANGES

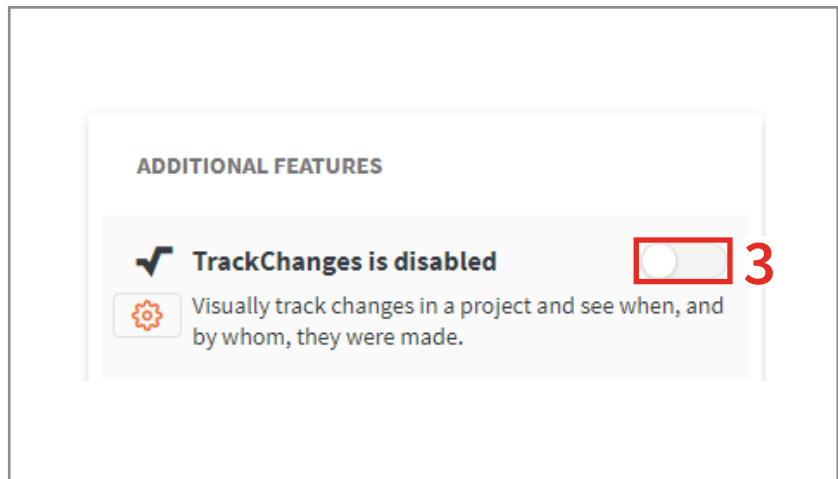
The Walkthrough

TRACKCHANGES TOGGLE

TrackChanges can only be activated once [a chapter has been created](#) (page 15).

Login as an administrator (see page 7).

1. Click on the user's company on the left side of the window.
2. Select the project from the **PROJECTS** section.
3. Click the toggle next to TrackChanges on the right side of the page.

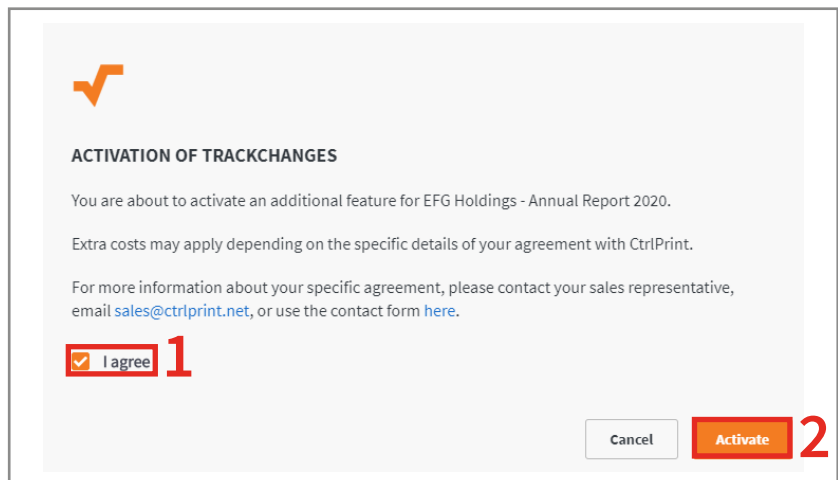


ACTIVATE TRACKCHANGES

Extra costs may apply depending on the specific details of your agreement with CtrlPrint.

For more information about your specific agreement, please contact your sales representative, email sales@ctrlprint.net.

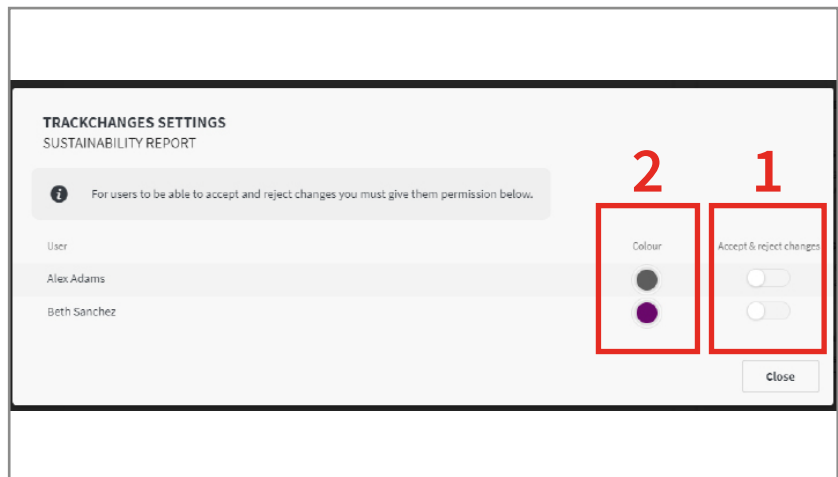
1. Click the **I agree** checkbox.
2. Click: **Activate**.



TRACKCHANGES PERMISSIONS

An administrator must set a user's permissions for them to be able to accept/reject changes in the project.

1. Use the toggles to set a user's permissions for reject/accept changes as **Enabled** or **Disabled**.
2. You can also choose which colour each user's changes will be underlined/highlighted with from this menu.



5

Advanced admin tasks

Unlock a document for a user	24
Delete chapter versions	25
Delete chapters	26
Delete comments	27

UNLOCK A DOCUMENT FOR A USER

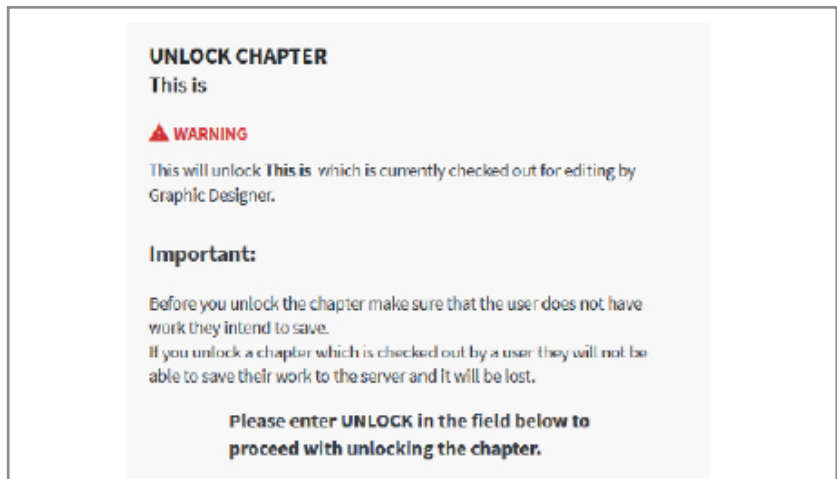
The Walkthrough

BEST PRACTICE

Only administrators have the ability to unlock documents which are locked by **other users**. This should be done sparingly and only in cases where the user who has the file locked has agreed to it.

Once a document is unlocked the user will no longer be able to save any work they've done to the server.

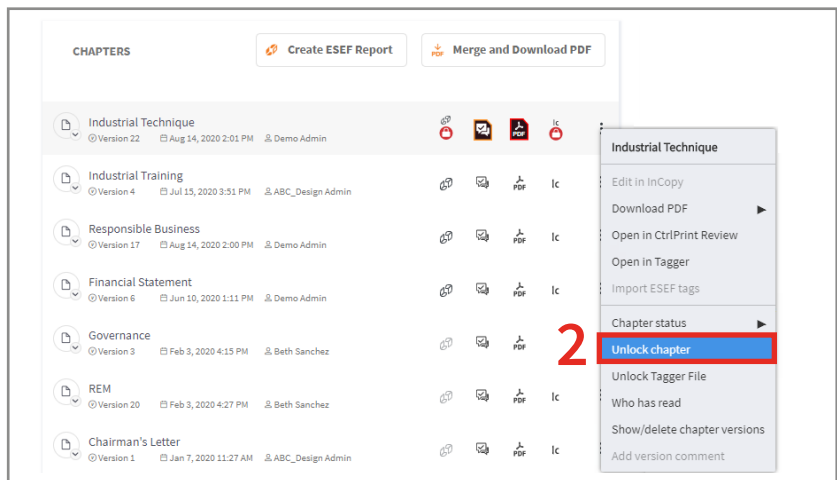
Note: all users have the ability to unlock documents which they themselves have checked out.



METHOD 1: PROJECT SECTION

Login as an administrator (see page 7).

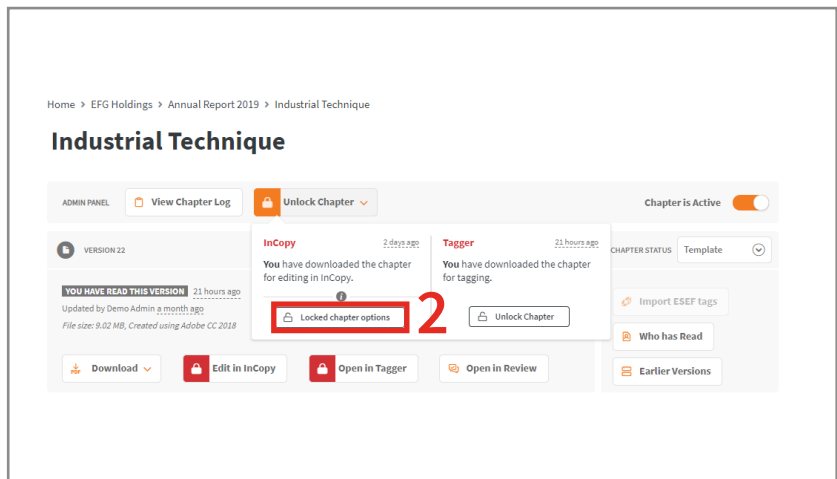
1. Click on the user's company and project from the left-hand side navigation menu.
2. Click the **three dots icon** on the right-hand side of the chapter name and click: **Unlock Chapter**.
3. Type **UNLOCK** in the window and click **OK**.



METHOD 2: CHAPTER SECTION

Login as an administrator (see page 7).

1. Click on the user's company, project and chapter from the left-hand side navigation menu.
2. Click the **Unlock Chapter button** and then click: **Locked Chapter Options**.
3. There are instructions for how to save and locate user's work. To unlock the document, type **CANCEL** in the right-hand column.



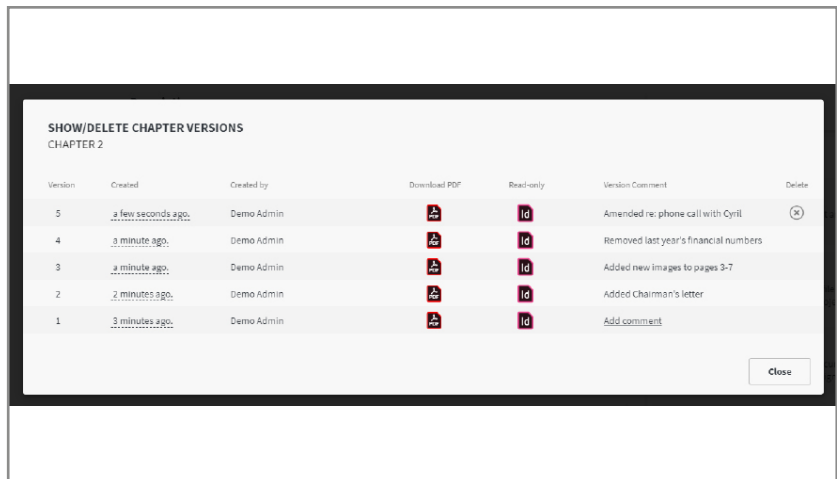
DELETE CHAPTER VERSIONS

The Walkthrough

BEST PRACTICE

On occasion you may need to delete one or more versions of a chapter. As an administrator you can delete the latest version of a chapter.

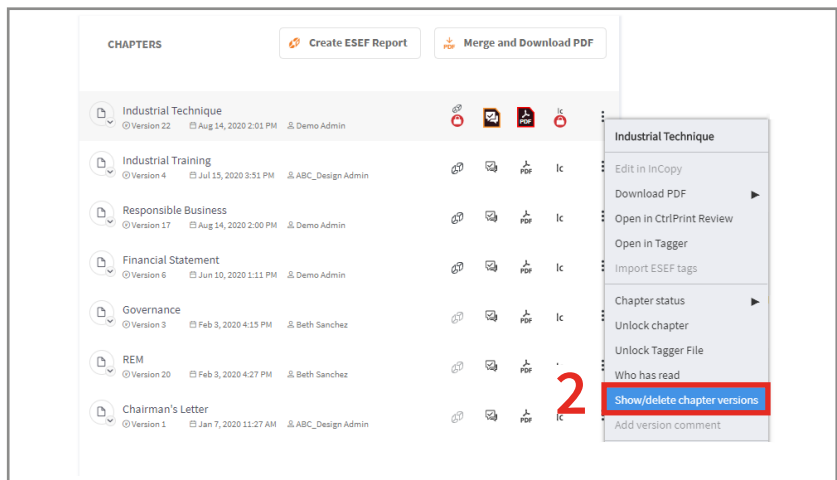
You can only remove one version at a time but, by repeating this process, you can remove unnecessary chapter versions until the correct version the latest one.



NAVIGATE TO CHAPTER MENU

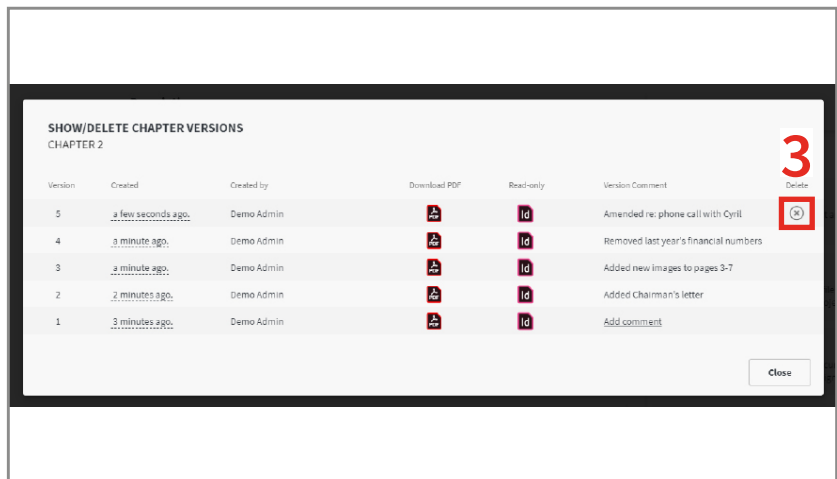
Login as an administrator (see page 7).

1. Click on the user's company and project from the left-hand side navigation menu.
2. Click the **three dots icon** on the right-hand side of the chapter name and click: **Show/delete chapter versions**



DELETE CHAPTER VERSIONS

3. Click the **X icon** on the right-hand side of the most recent chapter version.
4. Type **DELETE** in the window and click **OK**.



DELETE CHAPTERS

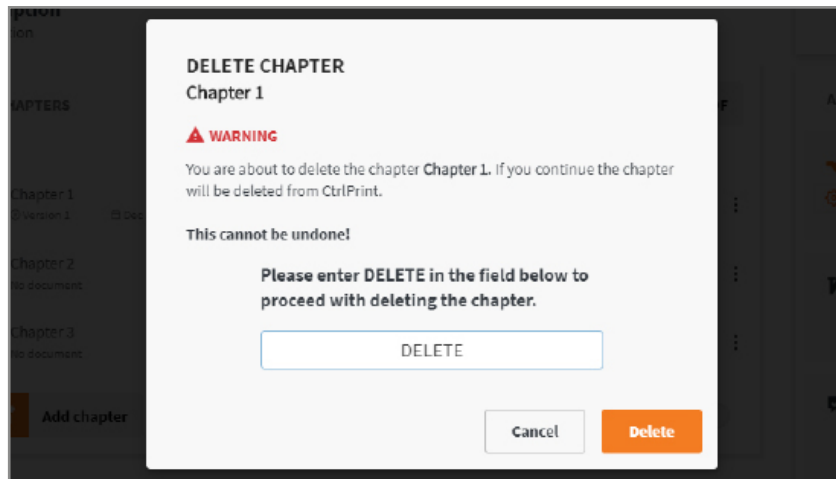
The Walkthrough

BEST PRACTICE

Deleting an entire chapter will delete all versions and remove all files associated with it.

If you want to delete the latest chapter version, please see page 24.

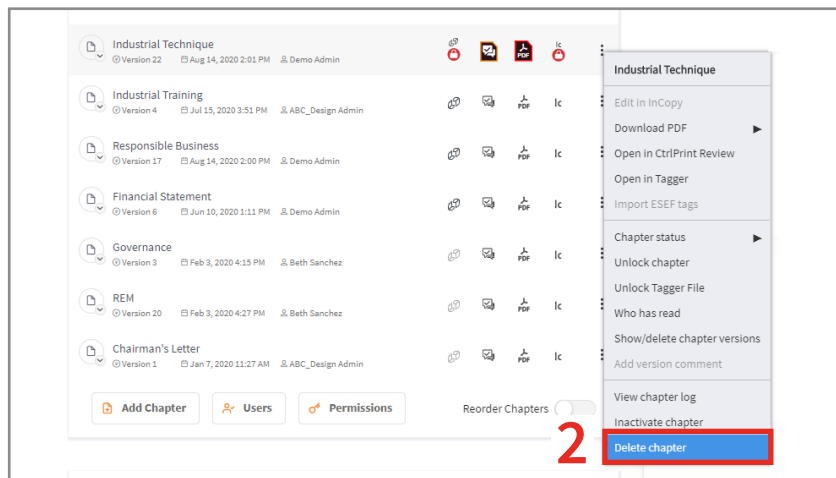
Note: only chapters which have all comments marked as Done can be deleted. For more information, see page 26.



NAVIGATE TO CHAPTER MENU

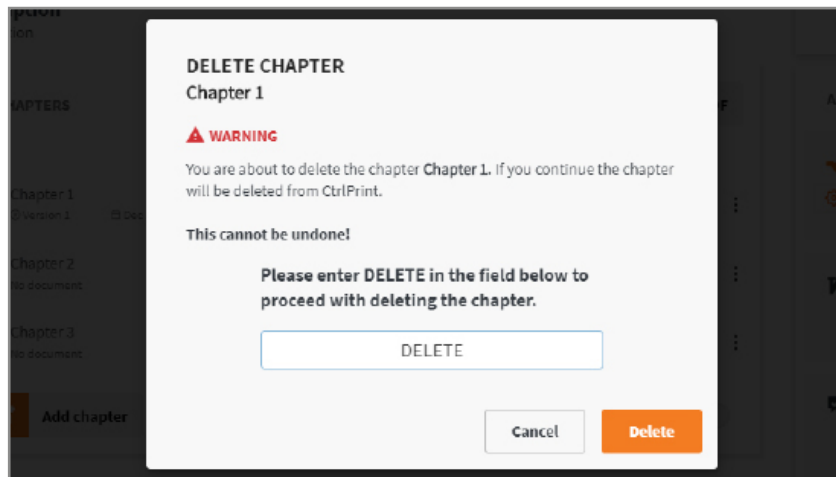
Login as an administrator (see page 7).

1. Click on the user's company and project from the left-hand side navigation menu.
2. Click the three dots icon on the right-hand side of the chapter name and click: **Delete Chapter**.



DELETE CHAPTERS

3. Type **DELETE** in the window and click **OK**.



DELETE COMMENTS

The Walkthrough

FILTERING CHAPTER COMMENTS

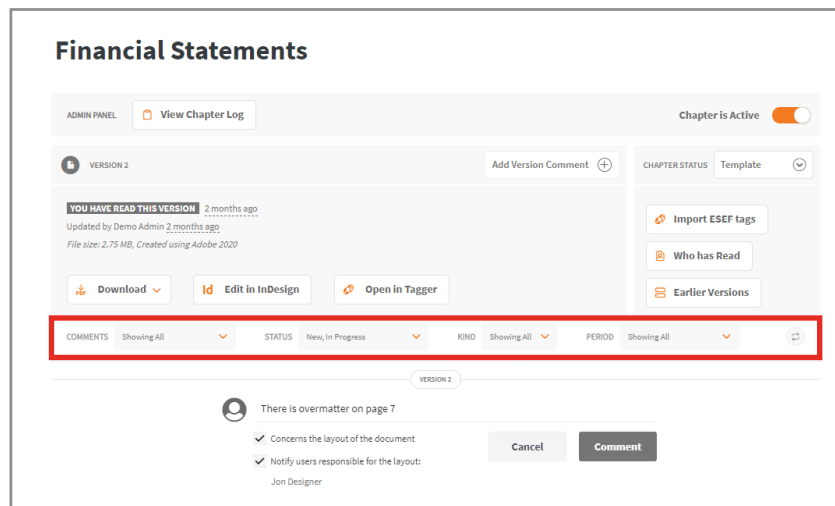
You can filter comments in four ways:

Type: Filter chapter version comments and chapter comments. Version comments are created when you save to server; chapter comments are created by typing in the comment box on any chapter page.

Status: Filter by New, In Progress, Done or Rejected.

Kind: Filter layout comments.

Period: Filter by date range.



NAVIGATE TO CHAPTER MENU

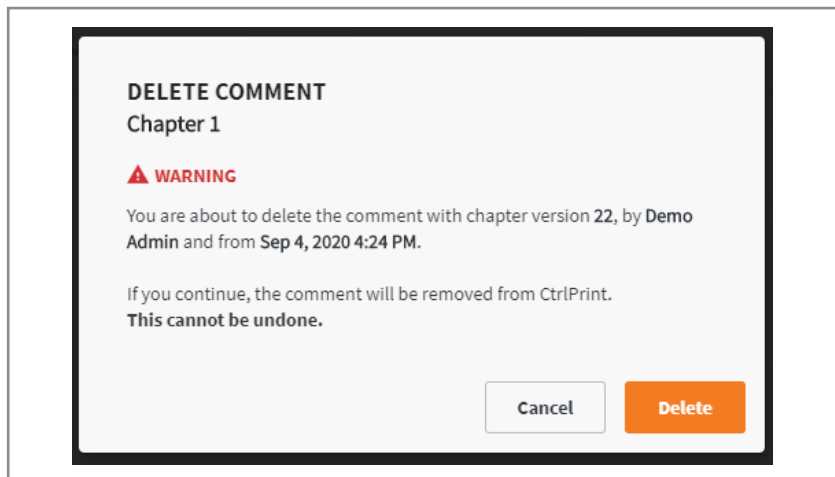
Login as an administrator (see page 7).

1. Click on the user's company, project, and chapter from the left-hand side navigation menu.
2. Click on **the X icon** in the bottom right-hand corner of any chapter comment. Please be aware that you cannot delete chapter version comments.



DELETE COMMENT

3. Click: **DELETE** in the window.



CtrlPrint

Admin Guide

support.ctrlprint.net | support@ctrlprint.net

Tel. SWE: +46 8 743 72 60 | UK: +44 203 630 0134 | FIN: +358 9 4245 4425