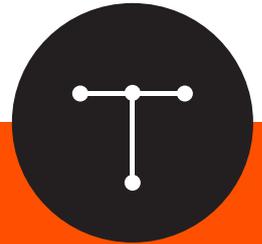


**DO MORE .**



TYPEFI™

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GETTING STARTED:

# Typefi Server

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*Automation for print, online and mobile*



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Because Typefi periodically releases new versions and updates to its software, images shown in this book may be different from what you see on your screen.

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Release: 1.0.1

# Getting Started with Typefi Server

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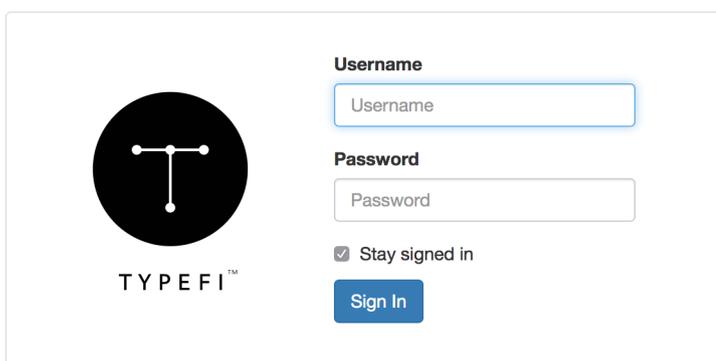
## Finding your way around

Typefi Server provides access to all your templates, documents, workflows, and projects through your web browser. The Typefi home screen is your starting point for organizing **Files**, creating **Workflows**, viewing the result of **Jobs**, and setting defaults for workflow **Actions**.

## Sign in to Typefi

To access the Typefi Server you first need to sign in:

- 1 Open a new browser window and enter the URL of your Typefi Server. For example, `http://cloud.typefi.net` (where 'cloud.typefi.net' is the name of your Typefi Server).
- 2 When the login screen appears, sign in using your account credentials (typically your email address). To avoid signing in the next time select *Stay signed in*. You will not be asked to sign in again for 30 days, even if you refresh your browser window or close your web browser.

The image shows the Typefi login interface. On the left is the Typefi logo, a black circle with a white 'T' shape inside, and the text 'TYPEFI™' below it. To the right of the logo are two input fields: 'Username' and 'Password'. Below these fields is a checkbox labeled 'Stay signed in' which is checked. At the bottom right of the form is a blue button labeled 'Sign In'.

- 3 To sign out, click on your name shown at the top right side of the browser window, then choose **Sign out**. If you did not select *Stay signed in* when logging in, you can also sign out simply by closing your web browser.

## Overview

Use the tabs at the top of the browser window to switch between different areas of your Typefi Server.



## Files

Clicking the Typefi logo or **Files** tab takes you to the top level of the Files area, where you can browse and organize files the way you prefer to work, as well as create workflows and projects.

Selected view

Signed in as Administrator

Files / Hello World

<input type="checkbox"/>	Name	Checked Out By	Size	Modified
<input type="checkbox"/>	Folder Hello World	--	--	Sep 17
<input type="checkbox"/>	File Hello World	--	15.6 KB	Nov 17
<input type="checkbox"/>	Folder Images	--	--	Jun 23
<input type="checkbox"/>	File template.indd	--	968 KB	May 1
<input type="checkbox"/>	File template.xml	--	12.2 KB	May 1

New Folder New Project New Workflow Add Files

Location breadcrumbs System tools

## Jobs

Click the **Jobs** tab to see a history of all the output created by Typefi workflows. When you are in the Jobs area, the hierarchical folder view shown in the Files area is replaced by a historical sequencing of all workflow job folders. Jobs are shown in reverse chronological order so that the most recent one always appears at the top; whereas the files and folders located in the Files area are sorted alphabetically.

Search

Jobs tab

Search operators

Job counter

Files Jobs Actions

1-3 of 121

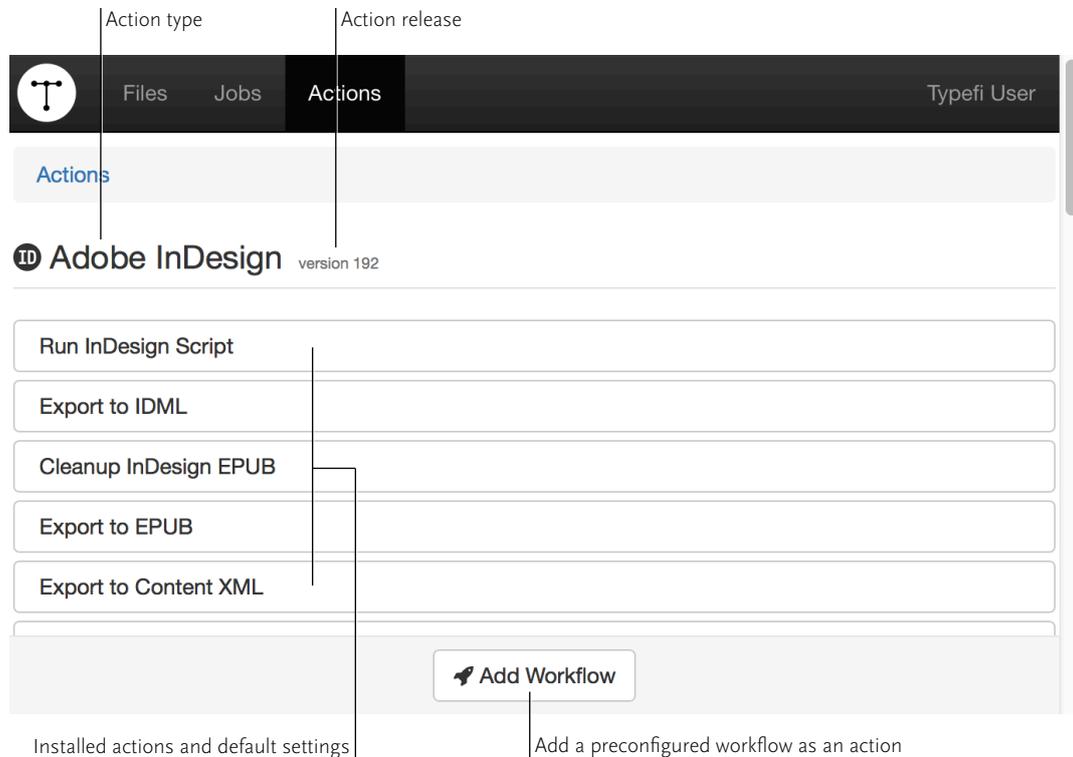
	/Hello World/2015-06-12 22.13.05	Typefi User	Started at 6:13 pm
	/Hello World/2015-06-12 19.34.03 Final	Typefi User	Completed at 3:34 pm
	/Hello World/2015-06-11 16.44.16	Typefi User	Failed on Jun 11

Quick view Job Username

Job status

## Actions

Click the **Actions** tab to set system-wide preferences for how each action should behave when added to a new workflow. Here you can adjust settings such as Microsoft Word import options, PDF Presets, EPUB export options, and more. For more information on setting up workflows, see [Getting Started with Typefi Workflows](#).



## Admin

Typefi Server supports small organizations, mid-sized workgroups, and large enterprise deployments. Log in with an administrator account to change service settings and perform other administrative tasks via the **Admin** tab. For more information on administering your Typefi Server, see the [Typefi Server Administration](#) guide.

**Note:** The Admin tab is only visible for specific user roles.

## Working with files

Everything on your Typefi Server is organized in a folder structure. You can create folders to organize your documents and projects in the Files area. While navigating through folders, Typefi displays location breadcrumbs at the top of the window so you always know where you are.

The screenshot shows the Typefi Files interface. At the top, there is a navigation bar with a logo, tabs for 'Files', 'Jobs', 'Actions', and 'Admin', and a 'Signed in as Administrator' indicator. Below the navigation bar, the breadcrumb 'Files / Hello World' is displayed. The main area contains a table with columns for 'Name', 'Checked Out By', 'Size', and 'Modified'. The table lists several items: a folder named 'Hello World' (modified Sep 17), a file named 'Hello World' (15.6 KB, modified Nov 17), a folder named 'Images' (modified Jun 23), a file named 'template.indd' (968 KB, modified May 1), and a file named 'template.xml' (12.2 KB, modified May 1). Below the table, there is a 'System tools' bar with buttons for 'New Folder', 'New Project', 'New Workflow', and 'Add Files'. Labels 'Selected view' and 'Signed in as' point to the navigation bar, 'Location breadcrumbs' points to the breadcrumb text, and 'System tools' points to the buttons.

	Name	Checked Out By	Size	Modified
<input type="checkbox"/>	Folder Hello World	--	--	Sep 17
<input type="checkbox"/>	File Hello World	--	15.6 KB	Nov 17
<input type="checkbox"/>	Folder Images	--	--	Jun 23
<input type="checkbox"/>	File template.indd	--	968 KB	May 1
<input type="checkbox"/>	File template.xml	--	12.2 KB	May 1

### Creating a folder

To create a folder, click **New Folder** (📁), then enter a name for the folder.

### Uploading files

You can upload templates, artwork, other kinds of files, and even entire folders to your Typefi Server so you can access these documents from anywhere at any time.

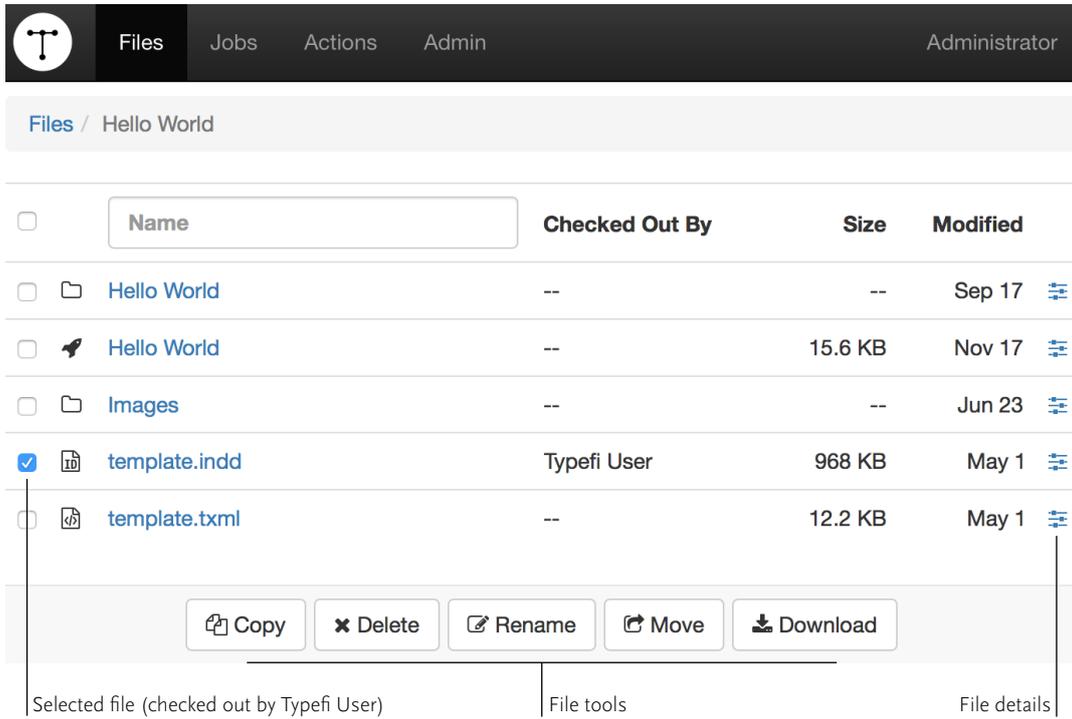
Click **Add Files** (+) to open a browser file upload dialog, and then select the files you want to upload. To select multiple files, press **Ctrl** (Windows) or **Command** (OS X) and click all the files you want to upload.

To upload a folder, first compress the folder as a ZIP archive, then click **Add Files** to upload the archive. To create an archive:

- **Windows:** Right-click the folder, then choose **Send to ▶ Compressed (zipped) folder** from the shortcut menu.
- **OS X:** Control-click or tap the folder using two fingers, then choose **Compress** from the shortcut menu.

## Downloading files

To download a file or folder, click the checkbox next to the item, and then click **Download** (↓). To download all the items currently visible on the page, click the checkbox in the heading above to select all the checkboxes, then click **Download**.



The screenshot shows the Typefi Server interface. At the top, there is a navigation bar with a logo, 'Files', 'Jobs', 'Actions', 'Admin', and 'Administrator'. Below this is a breadcrumb 'Files / Hello World'. A table lists files and folders:

<input type="checkbox"/>	Name	Checked Out By	Size	Modified
<input type="checkbox"/>	Folder: Hello World	--	--	Sep 17
<input type="checkbox"/>	File: Hello World	--	15.6 KB	Nov 17
<input type="checkbox"/>	Folder: Images	--	--	Jun 23
<input checked="" type="checkbox"/>	File: template.indd	Typefi User	968 KB	May 1
<input type="checkbox"/>	File: template.xml	--	12.2 KB	May 1

Below the table is a toolbar with buttons: Copy, Delete, Rename, Move, and Download. The 'Download' button is highlighted. A vertical line on the left indicates the selected file, and a vertical line on the right indicates file details.

When downloading multiple items or a folder, Typefi Server automatically compresses the items into a ZIP archive before downloading them.

Downloaded files are saved in a download folder set by your web browser. Check your browser's settings to see where to find your downloads.

## Checking out files

Checking out a document locks the file for all other users while you make your changes. Other users can still view or download the original version of the document while you have it checked out, but they cannot make changes to it.

To check out a file:

- 1 Click on the name, or the **File Details** (≡) link, of the file you'd like to check out.
- 2 Click **Check Out**.

**Note:** You can also check out files using *Typefi Designer for Adobe InDesign* or *Typefi Writer for Microsoft Word*.

### Check in a file

When you finish making your changes, you must check it back into the Typefi Server to update the original document. This removes the lock and makes the updated file available to other users.

To check in a file:

- 1 Click on the name, or the **File Details** (≡) link, of the checked out file.
- 2 Click **Check In** to open a browser file upload dialog.
- 3 Select the updated file and click **OK**.

**Note:** You can only check in a file with the same name as the file you checked out.

### Undo a check out

If you decide not to keep the changes you've made to a checked out document, you'll need to undo (cancel) the checkout to make the original version available to other users.

To undo a check out:

- 1 Click on the name, or the **File Details** (≡) link, of the checked out file.
- 2 Click **Undo Check Out**.

**Note:** Only administrators can undo a check out for files that are checked out by other users.

### Deleting files

If you want to delete a file, click the checkbox next to the files you want to delete, and then click **Delete** (✕). To delete all the items currently visible on the page, click the checkbox in the column heading to select all items in the current folder, and then click **Delete**.

### Restoring a deleted file

Deleted files are usually not recoverable unless Typefi Server has been configured to use a content management system as its Filestore. To restore deleted files, see the documentation provided with your content management system.

### Renaming files

You can change the name of most files and folders in Typefi 8 by clicking the checkbox next to an item, then clicking **Rename** (✎) and entering a new name.

Follow these conventions when naming a workflow:

- You can use numbers and most symbols.
- The name cannot be longer than 255 characters.
- Avoid using [control characters](#) or any of the following: \* < > : " / | \ ? ; ! ^
- Do not start or end a name with a period (.).
- Avoid starting or ending a name with a space.

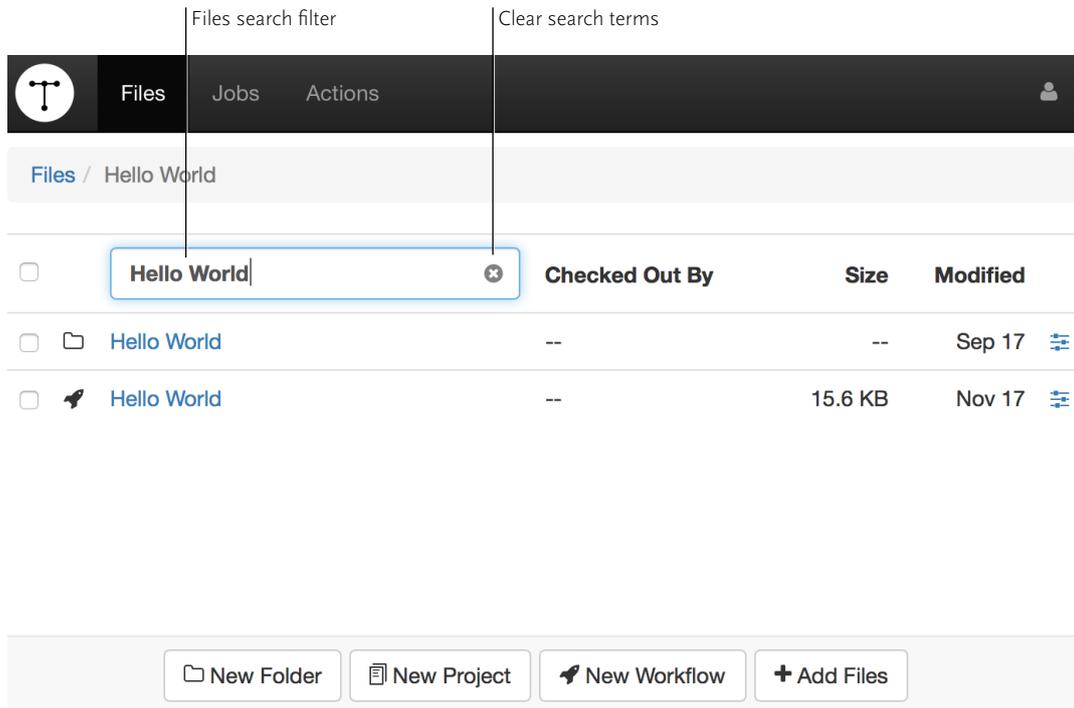
### Moving or copying a file

To move, copy, or duplicate a file or folder, click the checkbox next to the item, then click the respective button.

- 1 Click **Move** (↔) to copy a file to a new folder and then remove the original.
- 2 Click **Copy** (📄) to duplicate a file without changing the original.

## Filtering your files

If a folder contains many files, you can use the search filter to help you quickly find a file. Click within the **Search** box located above the list of files, then enter your search. Your search results will appear as you type.



To undo the files filtering, clear the contents of the search box by clicking the clear icon (⊗) or by selecting and deleting it.

## Creating workflows and projects

**Workflows** () connect applications and actions to automate tasks without needing to know complicated programming or scripting languages. For more information about creating and using workflows, see [Getting Started with Typefi Workflows](#).

**Projects** () group complementary workflows into a collection and are used by Typefi Writer to validate documents against multiple workflows simultaneously. For more information about projects and Typefi Writer, see the [Typefi Writer](#) documentation.

## APPENDIX A: Troubleshooting

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### Browser issues

Some issues that you encounter with the Typefi Server can be solved by changing your browser settings, refreshing the page, or clearing the browser cache or cookies.

### Supported Browsers

Some browser issues may be caused by the browser itself. For optimal viewing and security, we recommend that you keep your browser up-to-date. We recommend that you use [Mozilla Firefox](#), [Google Chrome](#), [Safari](#), or [Internet Explorer 10](#) or later.

### Force refresh

A force refresh or reload will cause the browser to make sure that it has the latest copy of the web page you are viewing. Use these keyboard shortcuts to force refresh your browser:

- Windows: Ctrl + F5
- OS X: Command + R

### Clearing your browser cache

Each time you access a web page, your browser stores or caches copies of the files needed to display the page. If your browser cache is not updating properly, your browser may be using out-of-date files needed to run Typefi 8. Clearing the cache will cause the browser to fetch all the support files again:

- [Mozilla Firefox](#)
- [Google Chrome](#)
- [Safari](#)
- [Internet Explorer](#)

### Clearing cookies

Cookies are small data files sent to your browser by Typefi 8 to log you in, remember your preferences and settings, and keep your account secure, among other things. Typefi does not use cookies in order to promote our services on third-party sites.

If you have trouble accessing parts of the Typefi Server, you may need to clear your Typefi-specific cookies. We do *not* recommend that you clear all browser cookies, as that will affect your experience using other websites:

- [Mozilla Firefox](#)
- [Google Chrome](#)
- [Safari](#)
- [Internet Explorer](#)