PhotoLynx® Flow®
User's Manual

Flow® is a capture program that gives you the capability to match student images and data. It has a robust layout creator that allows you to build and print different items such as ID cards, proof sheets and order forms. Use the powerful green screen tools in Flow® to knockout and apply your own backgrounds. When all of your images and data are matched and packages are entered, you can send your order directly to your lab.

PhotoLynx® Mission Statement

PhotoLynx®, Inc. strives to keep abreast of the latest hardware and software technology while continuing to support existing standards. PhotoLynx® places the highest value on supporting and serving our clients. PhotoLynx® seeks to align itself with businesses providing hardware, software and services that will benefit our clients in the photographic industry.

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Getting Started

A quality internet connection is required to activate your software, submit orders to your lab and upload projects/online galleries. The following website will give your lab a good idea where you are and where you should be in respect to bandwidth. **Upload bandwidth is the most important**. Check your speed here: www.speedtest.net

Before installation, your computer must meet the following requirements:

Flow® Capture Station System Requirements

- **CPU** - Intel i7 or above
- **RAM** - 6GB +
- **System** - 250GB (SSD)
- **Storage** - 500GB Hard Drive
- **Ports** - USB 3.0+ ports (4 available)
- **Internet** - Fiber or Business Class Cable
- **Video** - Nvidia or ATI GPU with 512MB+ RAM
- **OS** - Windows 8.1 or 10 64bit

Flow® Master Station System Requirements

- **CPU** - Intel i7 or above (Desktop)
- **RAM** - 12GB +
- **System** - 512GB (SSD) System Drive
- **Storage** - 1TB 7200rpm Hard Drive
- **Network** - Gb+ Ethernet
- **Internet** - Fiber or Business Class Cable
- **Video** - Nvidia or ATI GPU with 1GB+ RAM
- **OS** - Windows 8.1+ 64bit

Instructions for Installing/Activating Flow® Software

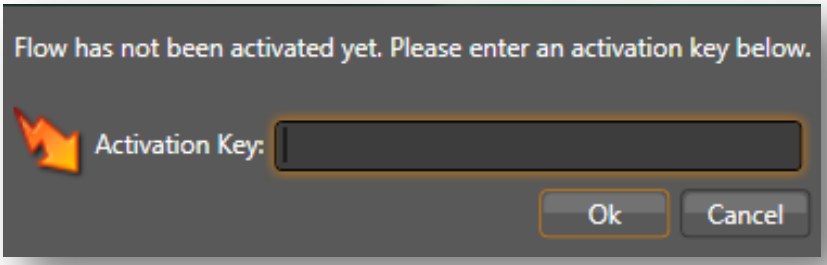
You should have received an email from either the PhotoLynx® Technical Support office or your lab with the installation link for Flow® as well as your activation key.

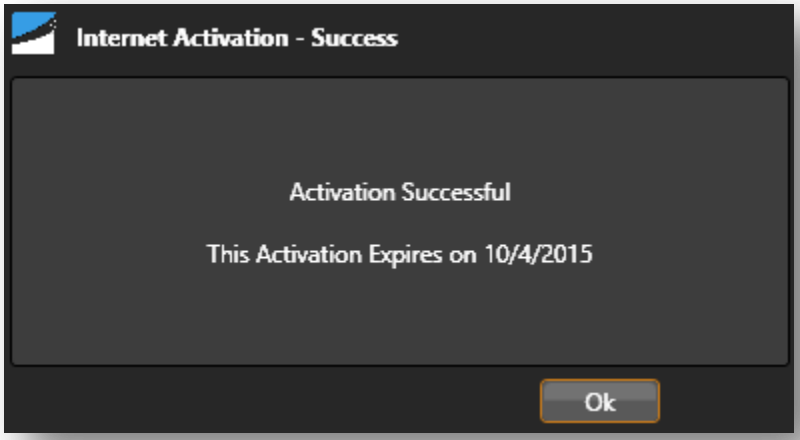
To Install:

1. Click on the link sent to you by your lab and download the installer from the website.
2. Right-click on the installer and select *Run as Administrator*
3. Follow the install prompts
4. Once finished installing, right-click on your Flow® icon on your desktop
5. Select *Properties*
6. Under your *Compatibility* tab, check off *Run this program as an administrator*
7. Click *Apply* then *OK*

To Activate:

1. Copy/Paste your Activation Key into the Activation window and press *OK*
2. You will receive a notification that the Activation was successful and your expiration date
3. Once activated, Flow® will download all files needed to work with your Lab





Create a Studio Catalog (Master Machine)

Only the Master Machine has the ability to create/edit catalogs and packages. If your *Studio Catalog* is all grayed out and you want this machine to be the Master Machine, please call the PhotoLynx® Tech Support team.

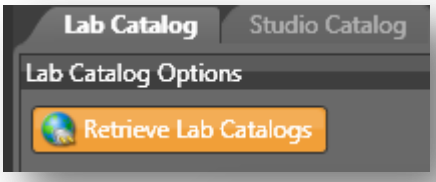
Note: *Only one machine per Activation Key can be the Master Machine.*

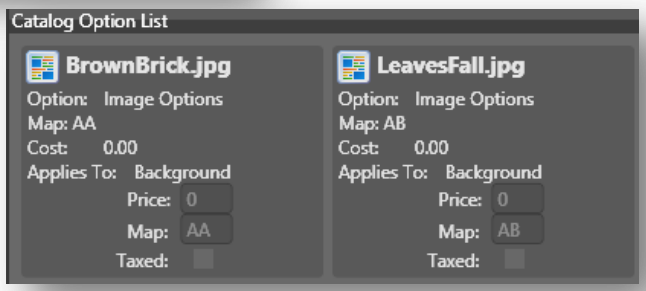
1. Go to the *Catalog* screen, and click on the *Lab Catalog* tab
2. If there is nothing already listed there, click on *Retrieve Lab Catalog* and allow your lab catalog to download
3. Click on the *Studio Catalog* tab
4. Click on the green plus sign to add your first catalog
5. Add your catalog *Description*
6. If you would like to add taxes to your packages, enter the *Tax Rate %* (optional)
7. Click the blue disk to *Save Changes* (or press your *Enter* key)
8. To *Edit* your Catalog information, select the catalog from the *Selected Studio Catalog* drop down menu, and click the pencil icon.
9. To *Delete* your Catalog information, select the catalog from the *Selected Studio Catalog* drop down menu, and click the red X icon
10. To *Duplicate* your Catalog information (and any packages within the catalog), click the *Duplicate* button on the correct Catalog you wish to duplicate

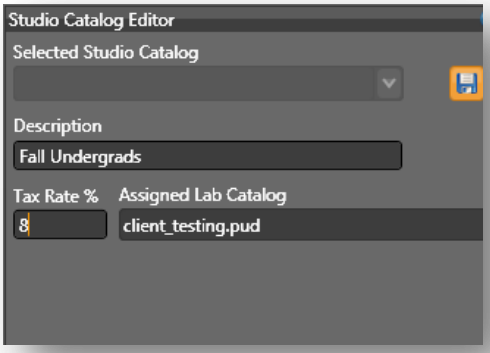
You will see your catalogs line up to the bottom left of the screen. You can select which catalog you are working on by either clicking on it, or selecting it from the *Selected Studio Catalog* drop down menu.

Your *Lab Catalog* lists the units that are available for you to build your packages with from your lab. If there are specific units you feel should be listed here, and you are not seeing them, you should contact your lab. Once the lab updates this information, you will then need to click *Retrieve Lab Catalog* for these changes to come through.

Your *Catalog Option List* at the top of your screen is options that are offered by your lab. You will see green screen backgrounds, retouching, vignette, black and white, etc. These are not units you can add to a package, rather an option you can apply to an entire package at the time of ordering. If you have specific options you wish to see here, you should contact your lab.







Create Packages

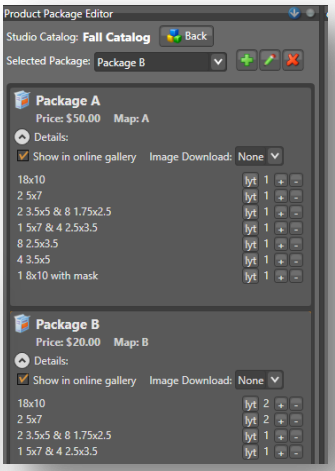
After you have created your catalog(s), you are now able to add/edit packages. To do so:

1. Select the catalog you wish to add packages to by either clicking on it, or selecting it from the *Selected Studio Catalog* drop down
2. Click *Add/Edit Packages*
3. Click the green plus sign to add your first package's information
    a. Add your package's *Description* (i.e.: Package A)
    b. Fill in your *Key Map* (i.e.: A)
    c. Fill in your *Price* of the package (optional)
    d. Check if this package is *Taxed* (optional)
4. Click the blue disk to *Save Changes* (or press your *Enter* key)

Add Products to your Packages

1. While still on the *Add/Edit Packages* screen, click on the package you wish to add products to, or select it from the *Selected Package* drop down menu
2. Hover over the list of products and click the green plus sign on each product you would like to add
3. To increase the *Quantity*, press the plus sign next to the product listed in your package
4. To decrease the *Quantity*, or to delete a product from your package, press the minus sign next to the product listed in your package
5. To have this package listed in your *Online Gallery**, check the box next to *Show in online gallery*
6. To offer a digital download of the selected image when this package is purchased in your *Online Gallery*, select the image size under the *Image Download* dropdown box
7. Once finished setting up all your packages, press the *Back* button to return to your *Catalog* screen
8. To offer a-la-carte sheets to your catalog, hover over this unit and click the a-la-carte button. You will have the option to change the map number, pricing and whether to show in online gallery if needed.

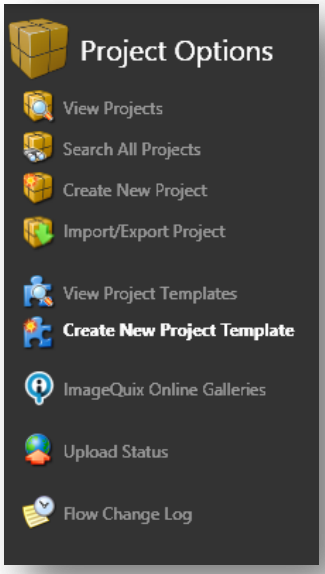
**Online Galleries are those galleries which are pushed up to either APE or ImageQuix. You will first need to set up an account with one of these vendors for this option to work for you.*

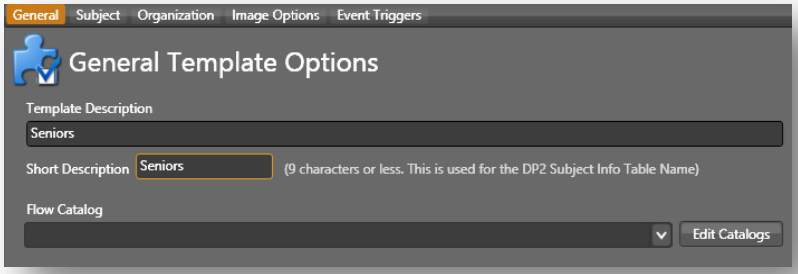


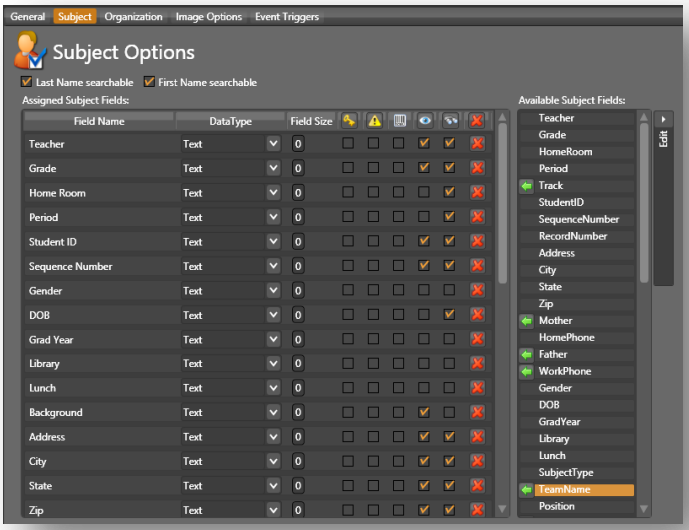
Creating a Project Template

Project Templates are defaults you can select with each corresponding project that will list specific data fields (Teacher, Grade, etc.) as well as any Event Triggers you wish to automatically apply. Your station of Flow® will come preloaded with different project templates you can use. If you wish to make your own, or edit your project template, it is recommended you contact your lab first to ensure it will not interfere with your workflow.

1. Go to the *Project* screen
2. On the left hand side, select *Create New Project Template*
3. Under the *General* tab you will need to enter in your *Template Description* or the job type (school, sports, dance, etc.). You will also need to enter in a *Short Description* (this allows DP2 to read the template type). Leave the *Flow® Catalog* blank.
4. Next, click the *Subject* tab. This is where you will be able to select all the data fields you would like in this template. Be as complete as possible (Flow® will allow you to edit your templates, but the changes are not retroactive and will only apply to new jobs)
5. At this point you will be able to mark your *Primary Key Fields, Required Field, Scan Key, View in Capture* and *Searchable Fields*
6. You will also be able to add any fields you do not see by clicking *Edit*
7. You can also set up *Image Options* and *Event Triggers* here
8. Once complete, press the *Save* button
9. Before you close/reopen Flow®, contact your PhotoLynx® Tech Support team to add this Project Template to your Activation Key





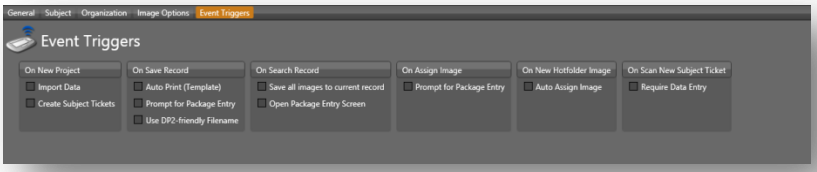


Setting up Event Triggers (Tethered Workflow)

You can set up any default automatic triggers by selecting them under the *Event Triggers* tab in your *Project Templates*. You can also set these up individually under your *Project Preferences*.

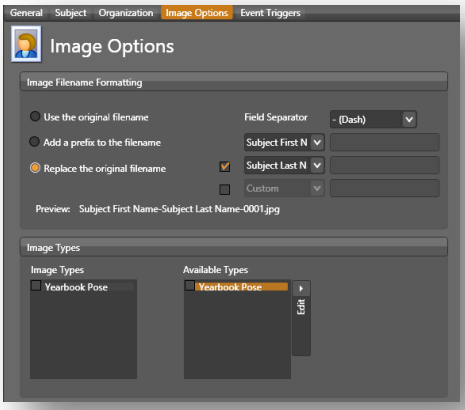
1. Under *On New Hotfolder Image* select *Auto Assign Image*
2. Under *On Assign Image* select *Prompt for Package Entry*
3. *Require Data Entry* listed under *On Scan New Subject Ticket* is highly recommended
4. Click *Save* to finish and save your selections

Note: *If you know that EVERY single job will be a tethered workflow, you can have Flow® automatically set to Auto Assign Images on New Hotfolder Image by going to Preferences>Capture. In the drop down next to "Auto Assign Hot Folder Images to Current Subject" select "Always" and press the Save button.*



Renaming Images

Similar to *Event Triggers,* you can set up Flow® to rename your images under the *Image Options* tab in your *Project Templates*, or individually under your *Project Preferences.*



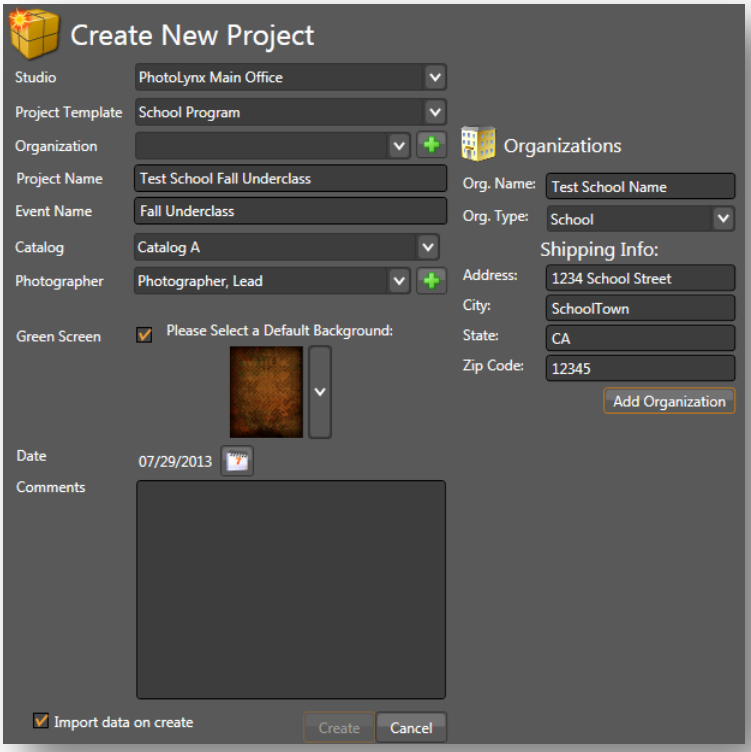
1. Select *Add Prefix to the filename* and select a field to use to add a prefix to the original filename.
2. Select *Replace the original filename* and select a field to use to completely replace the original filename.
3. To have more than one field selection, check the box on the second (and third if needed) drop down.
4. You can choose your *Field Separator* to be a dash or an underscore
5. Flow® will automatically add a sequence number to the end of each image name to prevent images from overwriting each other. By default, this sequence is the order of the images you take, not the sequence for the subject. To change this:
    a. Select *Preferences* in the top right of your screen
    b. Select *Capture*
    c. Check *Start Image number at 00001 for each subject*
    d. Press *Save* and go back to your *Project* screen
6. Press *Save*

    Note: *The rename process happens when the image moves from the Hotfolder to the subject's record. You cannot rename images already assigned to records*

Creating a Project

Adding Organization (School) Information and Creating the Project

1. Click *Create New Project* on the left hand side of the main screen
2. Select your *Project Template* from the drop down menu
3. Click the green plus sign next to *Organization* and add the organization's information (if you have previously added this organization, select it from the drop down list)
4. Fill in the organization name and choose the organization type, and fill in the shipping address
   Note: *You can update this information on the Preferences screen*
5. Click *Add Organization*
6. Fill in the project information
   Note: *Project Template, Organization, Project Name, Event Name and Catalog are required.*
7. If you are creating a green screen job, check the box next to *Green Screen* and select a default background* (leave unchecked if you are not doing green screen)
8. If your school has already sent you the student's data, click the *Import Data on Create* box then click *Create*. Otherwise, leave this box unchecked when clicking the *Create* button



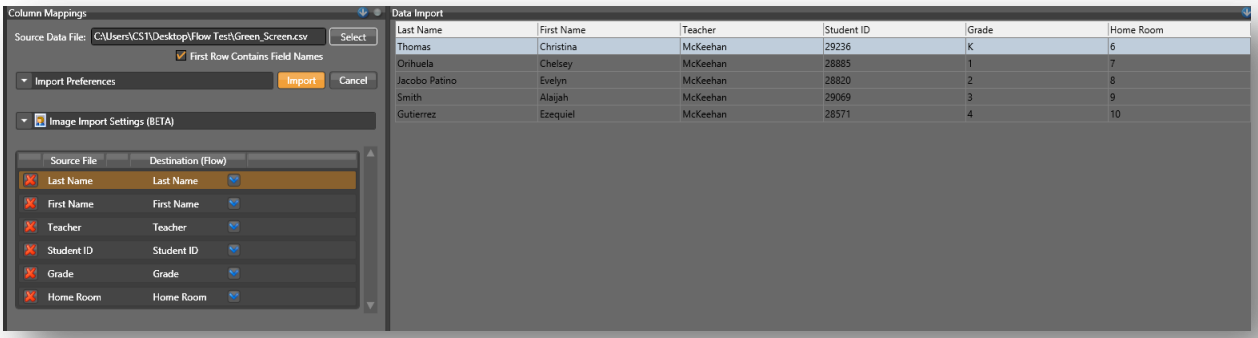
Your green screen backgrounds will pull down with your Flow® activation. If you do not see the backgrounds you wish to use, please contact your lab to set this up for you.

Importing Data

1. If you did not select *Import Data on Create*, you can access the *Data Import* screen by going to *Edit>Import Data*
2. Once on the *Data Import* screen, choose the *Select* button and browse out to the data file you wish to import

   Note: *Your data file can be either a .CSV file, a tab delimited text file or an Excel file. If using an Excel file, be sure there is no Excel formatting or blank sheets in your document before you import.*

   Note: *First Name and Last Name are <u>required</u> for each line of data you are importing. If you do not have this information complete for one subject, your data will not import. Please ensure your data is complete before starting this process.*
3. A preview of your data will be shown on the right preview list
4. If your data file does not have a header, uncheck *First Row Contains Field Names*
5. On the left side of the screen, map in your data to the correct *Destination* fields in Flow® by selecting the blue arrows next to each field and select the correct corresponding field
6. If there is a field you do not wish to map in, click the red X button to change the *Destination* field to *Omit*
7. Once finished, click *Import* to load your data into your project

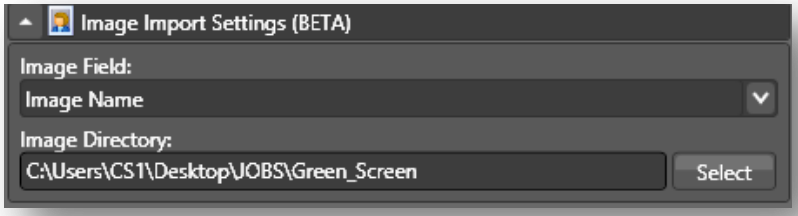


To Import in Already Matched Images and Data into Flow®

If you have a .csv file listing the image names for each subject as well as a folder of these images, you can bring this into Flow® with the images and data already matched together. To do this, follow the steps above. Before clicking *Import*, do the following:

1. Click on *Image Import Settings*
2. Select which field in your data contains the image name under the *Image Field* dropdown menu
3. Press the *Select* button to browse out to your folder of images

   Note: *Flow® will only read .jpg or .png images*
4. Press the *Import* button to load your already matched job into Flow®



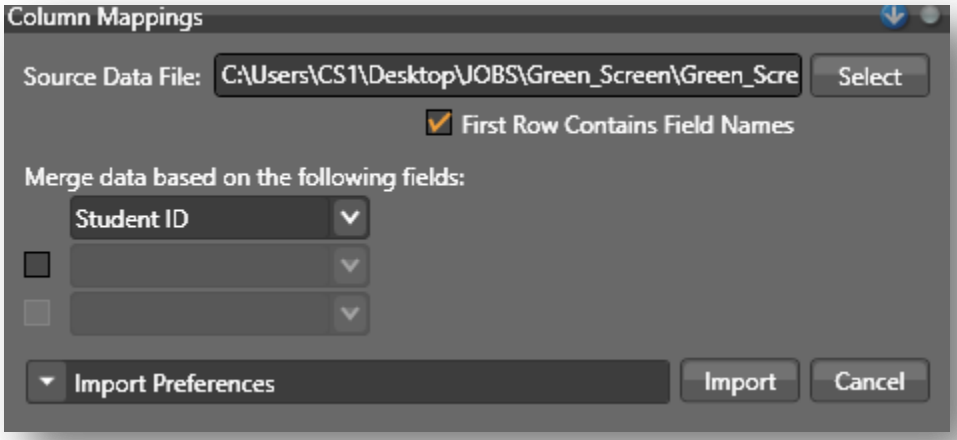
Merging Data into an Already Existing Job

To merge data into your already existing job (for example, your school sends you updated teacher information for your subjects), you first want to be sure there is something unique in your data to merge based off of, such as Student ID number. You can select more than one field, however if by going by first and last name only, keep in mind there may be more than one student with the same name (for example, John Smith). If that is the case, Flow® will not merge this information, and will add this information as a new record to the end of your job. To merge data:

1. Open your project you wish to merge data into
2. Go to *Edit>Import Data*
3. Once on the *Data Import* screen, choose the *Select* button and browse out to the data file you wish to import

   Note: *Your data file can be either a .CSV file, a tab delimited text file or an Excel file. If using an Excel file, be sure there is no Excel formatting or blank sheets in your document before you import.*

   Note: *First Name and Last Name are required for each line of data you are importing. If you do not have this information complete for one subject, your data will not import. Please ensure your data is complete before starting this process.*
4. A preview of your data will be shown on the right preview list
5. If your data file does not have a header, uncheck *First Row Contains Field Names*
6. On the left side of the screen, map in your data to the correct *Destination* fields in Flow® by selecting the blue arrows next to each field and select the correct corresponding field
7. If there is a field you do not wish to map in, click the red X button to change the *Destination* field to *Omit*
8. Under *Merge data based on the following fields:* select the fields that are unique for each subject that you wish to merge based off of (for example, Student ID)
9. Click *Import*
10. Any new information that Flow® finds, based on the unique fields selected, will be merged into the previous records. If Flow® is unable to locate a unique field, this information will be added as a new record at the end of your job

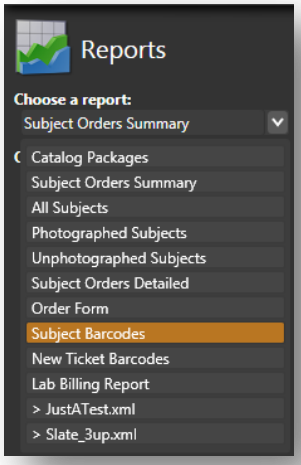


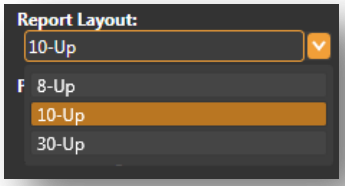
Camera Cards

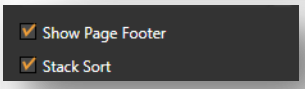
Creating Subject Barcodes

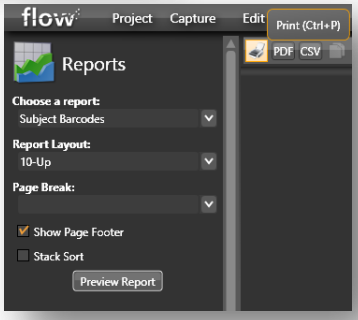
Creating camera cards inside of Flow® is a breeze. To set up your camera cards on the subjects you have loaded, we want to *Create Subject Barcodes*. To do this:

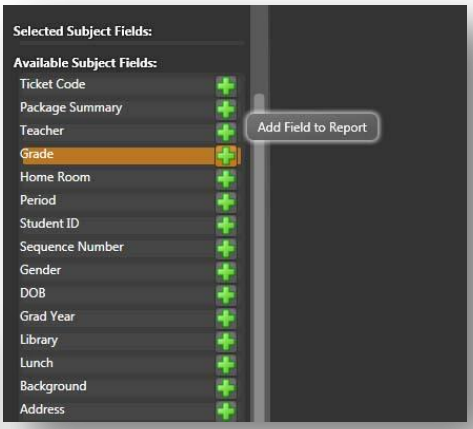
1. Load the project you need to create camera cards for
2. Click on the *Reports* menu
3. Under the *Choose a report:* dropdown, select *Subject Barcodes*
4. Under *Report Layout:* select how many cards you want per page. Your options are 8, 10 and 30
5. Check whether you wish to *Show Page Footer* or to have a *Stack Sort*
6. If you wish to have a page break, uncheck *Stack Sort* and select which field you wish to break on (for example, teacher)
7. By default, the only information that will show on your cards are the subject's name, their ticket code, the name of the organization and their barcode
8. To add more fields, press the green plus sign next to the fields you wish to have displayed on your card
   Note: *Only use "Grouping" if you are printing with a stack sort. Otherwise a Page Break is easiest.*
9. Click *Preview Report*
   Note: *Your preview will display as the paper size set in your default printer on the computer. If this does not look correct, be sure to change your default printer options and select Preview Report again*
10. To *Print* your cards, press the printer icon in the top left of the screen, or press *Ctrl+P*
11. To *Export* your cards as a PDF, press the *PDF* button in the top left of the screen. Choose your export location and click *Save*. Choose which settings you would like to apply to your PDF and click *OK*
    Note: *CSV is not available for this type of report*











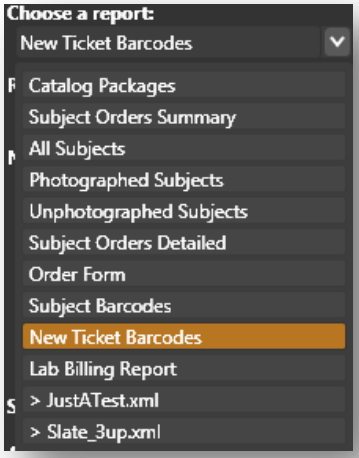
Creating New Ticket Barcodes

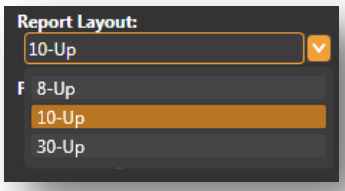
It is common practice, and recommended, to create about 10% blank camera cards for the subject's you have already loaded into Flow® for any people who show up on picture day who were not included on the school's roster you imported. To set up your blank camera cards:

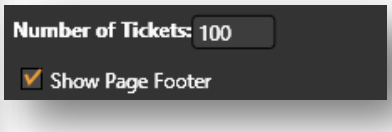
1. Load the project you need to create camera cards for
2. Click on the *Reports* menu
3. Under the *Choose a report:* dropdown, select *New Ticket Barcodes*
4. Under *Report Layout:* select how many cards you want per page. Your options are 8, 10 and 30
5. Type in the *Number of Tickets* you wish to print
6. Check whether you wish to *Show Page Footer*
7. By default, the only information that will show on your cards are blank lines for the subject's name, a unique ticket code, the name of the organization and their barcode
8. To add more fields for them to fill out, press the green plus sign next to the fields you wish to have displayed on your card
9. Click *Preview Report*

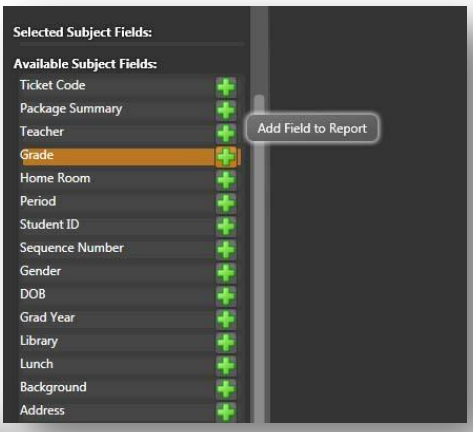
   Note: *Your preview will display as the paper size set in your default printer on the computer. If this does not look correct, be sure to change your default printer options and select Preview Report again*
10. To *Print* your cards, press the printer icon in the top left of the screen, or press *Ctrl+P*
11. To *Export* your cards as a PDF, press the *PDF* button in the top left of the screen. Choose your export location and click *Save*. Choose which settings you would like to apply to your PDF and click *OK*

    Note: *CSV is not available for this type of report*









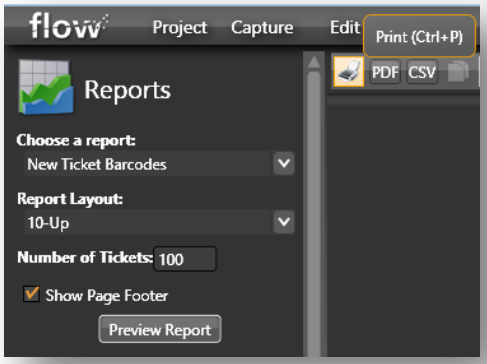


Image Capture Setup

Camera Setup

The Flow® image tray is loaded from images that are typically placed into the *C:\Hotfolder* folder on the root directory.

So, if photographing tethered, use the "Camera Capture Software" to point to that folder. Else, if photographing untethered, drop images into that directory after the session.

To Change Hotfolder or Setup Webcam Support

If you need to change the location of your *Hotfolder*, or to setup WebCam support, click on *Preferences*, then *Capture*

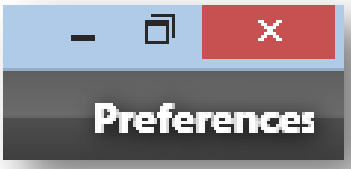
Hotfolder

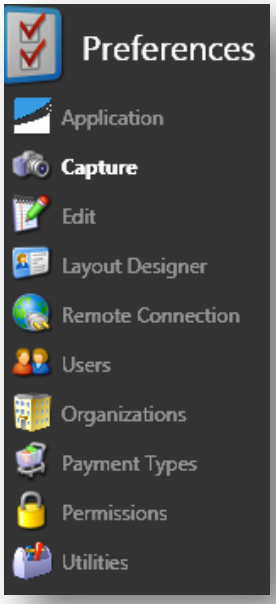
Uncheck *Use Default Directory* and browse out for your new *Hotfolder* location. If this option is grayed out and unavailable for you to change, contact your lab for permissions.

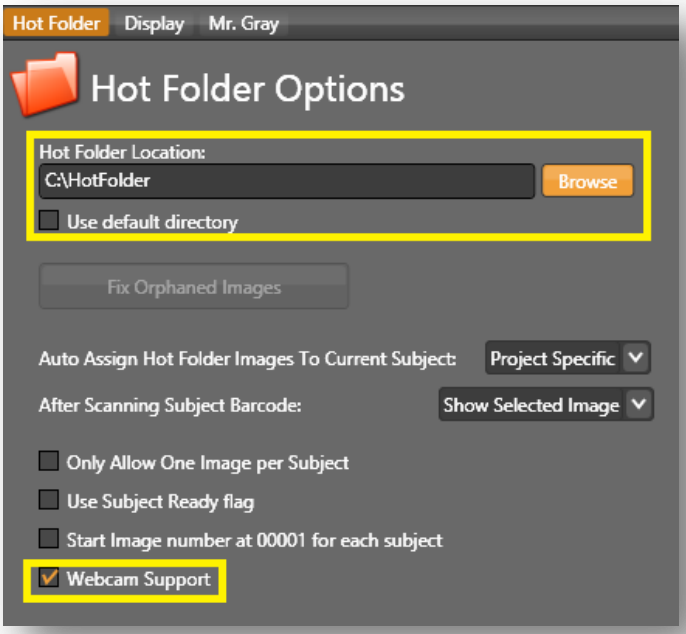
Webcam

Check *WebCam* support

Once you have your settings selected, press *Save* to continue.





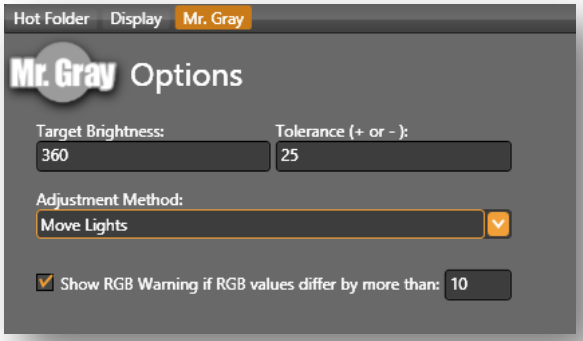


Mr. Gray Setup

Preferences

To utilize Mr. Gray, you will first want to set up your preferences:

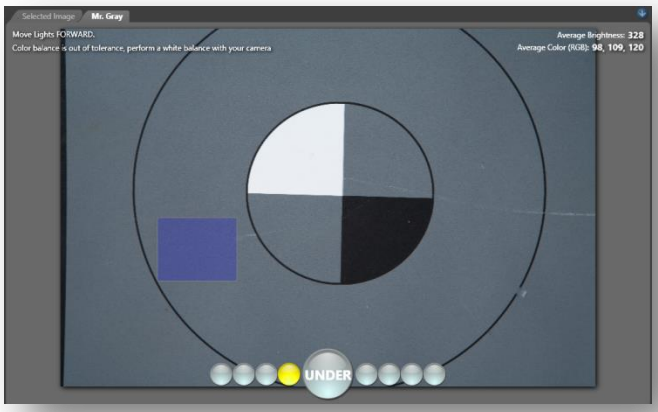
1. Go to *Preferences>Capture>Mr. Gray*
2. St your *Target Brightness* and *Tolerance* to your desired setting
3. Select your *Adjustment Method* by selecting either *Move Lights* or *Change Camera F-Stop*
4. If you want a RGB warning, check off the box next to *Show RGB Warning if Values Differ By More Than:* and select the desired value



Capture

Once you have all of your equipment set up on your session, take a test image of a gray card and place it into your *Hotfolder*.

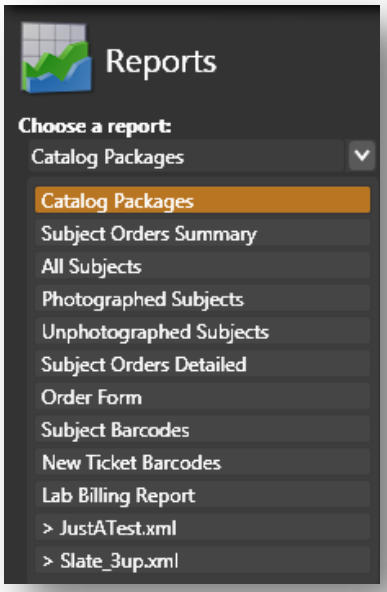
1. In your *Capture* screen, click the *Mr. Gray* tab
2. Using your mouse, left-click and drag to create a small box on your gray card
3. Mr. Gray will tell you, according to your preferences, how to adjust your setups

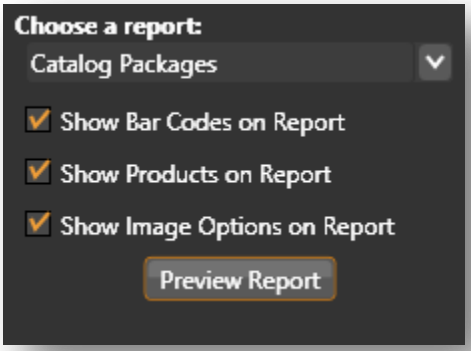


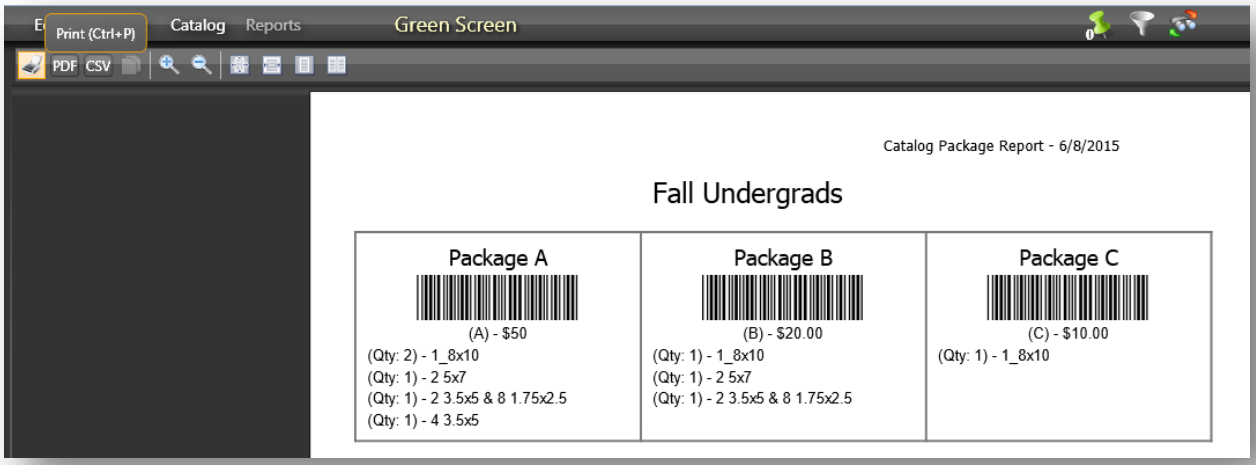
Creating Package Barcodes

To use barcodes to quickly assign packages, you will first need to set up a sheet of barcodes to scan. To do this:

1. Click on *Reports*
2. Select *Catalog Packages* from the drop down menu
3. To see your *Products* and *Image Options* on your report, check the corresponding boxes
4. Press *Preview Report*
5. From here you can either *Print* or save as a *PDF*







Associate Image to a Record

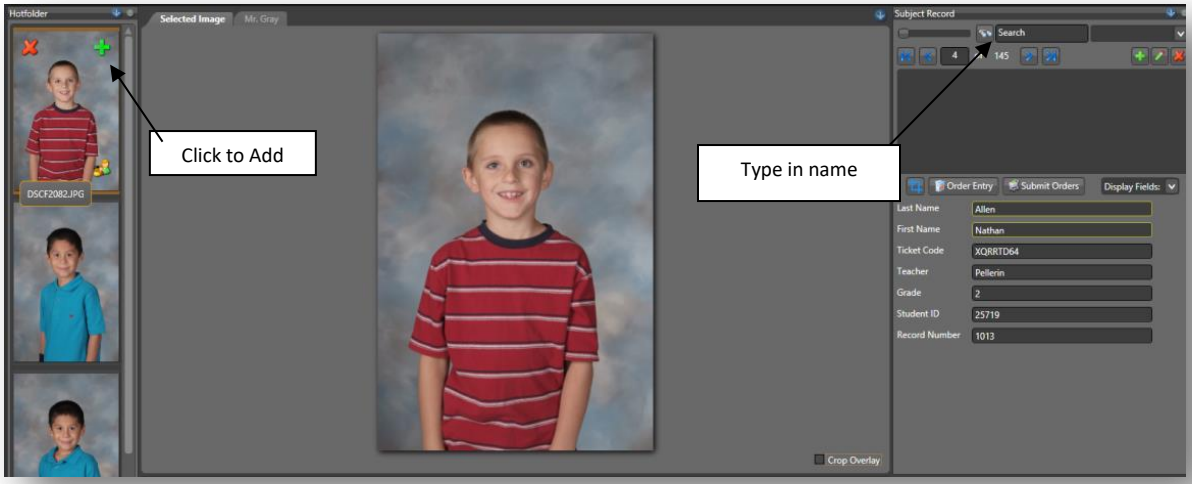
Before you can assign images to your records, you first need to be in your *Capture* screen and you will need to have your images directed to the *Hotfolder* (see Image Capture Setup).

Tethered Workflow

1. Set your tethering software to save your images to your *Hotfolder*
2. Scan the subject's barcode on the camera card to bring up their record
3. Photograph your subject
4. Your images will automatically assign to their record

Untethered Workflow

1. Copy your images into your *Hotfolder*
2. Click on the field next to the glasses to *Search* for your subject's record
3. Type in the subject's name or ticket code to bring up their record
4. Hover over their image in the *Hotfolder* click the green plus sign to assign it to their record



Note: *If an image has been incorrectly associated to a record, click the minus button to place it back into the Hotfolder*

Working with MetaData Images in Flow®

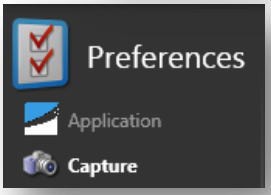
Flow® is set up so that you can assign images with specific Meta Data assigned to them automatically. To do this, you must have a specific camera that allows you to hook up a barcode scanner directly to the camera. Prior to your job, be certain that the camera and barcode scanner are correctly set up to record Meta Data to your images' *User Comment* field. See your camera's documentation to accurately set this up.

Flow® Setup Before Your Photo Session

1. Create a project in Flow®
2. Import your school's data in order to create your unique Ticket Codes for each subject
3. Create your camera cards to turn these unique Ticket Codes into barcodes
   Note: *Be sure to create New Ticket barcodes as well for any new students who may arrive to the photo session. It is recommended you scan in these barcodes and enter the new student's information into Flow® before importing your images.*

Set Up Flow® to Read Meta Data Images

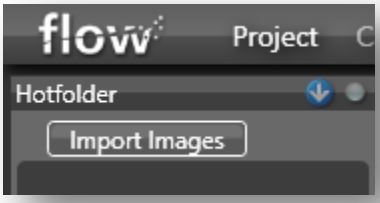
In order for Flow® to recognize the Meta Data inside your images, you must first do a one-time setup inside of Flow®:

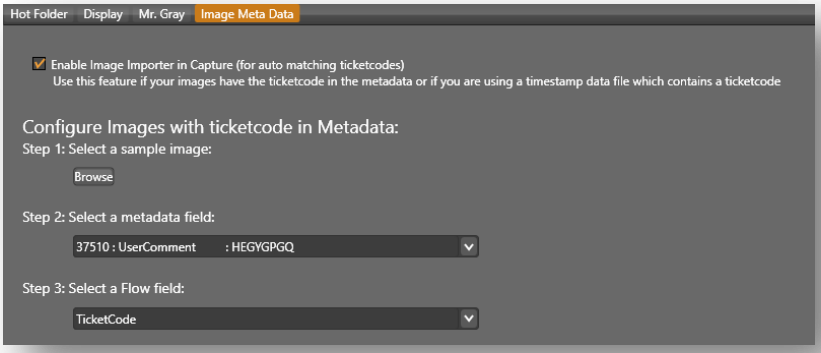


1. Press the *Preferences* icon in the top right hand corner of your menu bar
2. Select the *Capture* option
3. Select the *Image Meta Data* tab
4. Place a check mark next to *Enable Image Importer in Capture*
5. *Browse* out to select a saved image with Meta Data information saved to it on your computer
6. *Select a Meta Data Field* – this is typically line *37510: UserComment*
7. *Select a Flow Field* – this is typically the *TicketCode*
8. Press the *Save* button

Importing Meta Data Images into Flow®

After your photography session, matching images and data using the Meta Data workflow is as easy as opening the appropriate project inside of Flow® and selecting the *Import Images* button located on top of your hotfolder area. Browse out for your folder of images and press *OK*. If all the steps above were followed properly, you will see all of your images automatically assign to their records.





Working with an OptiCon Scanner in Flow®

Flow® is set up to read the data file exported out of an OptiCon scanner, along with your images, to assign them automatically to their data records inside of Flow®. To do this, you must have an OptiCon scanner which you can either purchase from OptiCon directly, or provided to you by your lab. Prior to your job, be certain that the camera and OptiCon scanner are correctly set up to sync the date and time of your images. See your scanner's documentation to accurately set this up, or contact the PhotoLynx® tech support team for assistance.

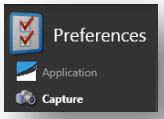
Note: *Not all labs will support the OptiCon workflow. Please contact your lab to ensure this is supported before you begin using these steps.*

Flow® Setup Before Your Photo Session

1. Create a project in Flow®
2. Import your school's data in order to create your unique Ticket Codes for each subject
3. Create your camera cards to turn these unique Ticket Codes into barcodes

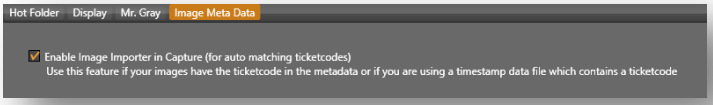
   Note: *Be sure to create New Ticket barcodes as well for any new students who may arrive to the photo session. It is recommended you scan in these barcodes and enter the new student's information into Flow® before importing your images.*

Set Up Flow® to Import Images

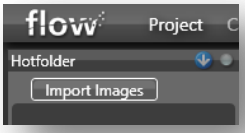


In order for Flow® to import your OptiCon data and images, you must first do a one-time setup inside of Flow®:

1. Press the *Preferences* icon in the top right hand corner of your menu bar
2. Select the *Capture* option
3. Select the *Image Meta Data* tab
4. Place a check mark next to *Enable Image Importer in Capture*



Importing Images into Flow®



After your photography session, be sure to save your images locally on your computer. You will then want to export out your data file from OptiCon. Be sure your scanner is set to format your data in the following format: TICKET CODE,HH:MM:SS,YYYY-MM-DD

```
.NST.V2DPDR6P,11:45:36,2016-02-08
.NST.RTJ3FMBY,11:45:57,2016-02-08
.NST.VV6J72DM,11:46:19,2016-02-08
.NST.SZYPGAKM,11:47:35,2016-02-08
```

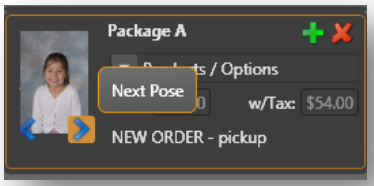
Once your data is saved in the same folder as your images, open your project in Flow®. Then, press the Import Images button and browse out for your folder of images and press *OK*. If all the steps above were followed properly, and your OptiCon scanner is correctly formatted, you will see all of your images automatically assign to their records.

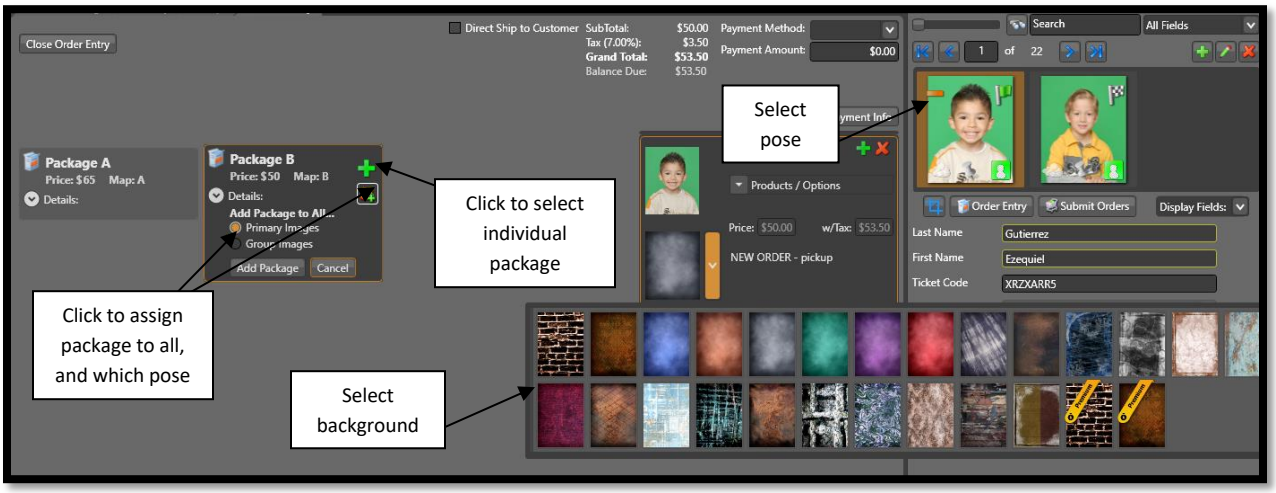
Add Packages to Your Images

You can set up your *Event Triggers* to automatically open your *Order Entry* screen after assigning an image. To add packages to your images:

1. Click on the desired image you wish to add a package to (this image will be highlighted in orange)
   Note: *To make it so that Flow® will automatically assign packages to the Primary Image, go to Preferences>Capture. Place a check mark next to "Always Assign Packages to Primary Image" and press "Save". If you change your primary image after a package has been assigned, the image assigned to this package will also change.*

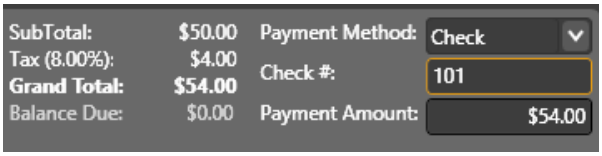
2. If using a tethered workflow, scan your barcode for the desired package
3. If using an un-tethered workflow, click the green plus sign for the desired package (or, you can type the *Key Map* and press *Enter*)
4. If this is a green screen job, select the desired background chosen with the package
5. If your lab offers package options, you can select these options at this time
6. To assign this package to every subject with an image assigned, click the icon depicted with two people and a green plus sign. Then select whether to assign this to the Primary image or the Group image, and press *Add Package*
   Note: *Flow® has the ability to assign packages to multiple images. If you have assigned the package to the wrong image, you can select the correct image by pressing the blue arrow on the package assigned.*





Package Payment Entry

You can choose to have Flow® keep track of your payment information of your packages. While in the *Order Entry* screen:

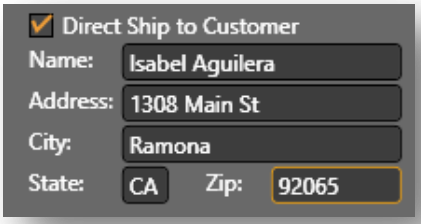


1. Select your *Payment Method* from the dropdown menu (cash, check or credit card)
2. Fill in the proper payment information
3. You will see the subject's *Balance Due* reflect the proper information
   Note: *This information will not get exported out, rather is just a quick way to look up payment information inside of Flow®.*

Direct Ship to Customer

You have the ability to tell your lab to ship directly to the studio, the school or the student. To ship directly to the student:

1. While in your *Order Entry* screen, check *Direct Ship to Customer*
2. Fill in the student's shipping address

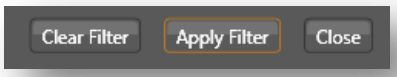


If using Direct Ship to Customer when submitting orders to your lab, you will be sending multiple separate orders to your lab. Doing so helps to ensure that these are packaged properly. It is recommended you discuss this workflow with your lab first before utilizing.

Holding an Image

Flow® has made coming back to specific subjects at a later time simple. We call this "holding images". To utilize this:

1. Hover over the subject's image and push the push pin changing it from gray to green
2. You will see the *Hold Counter* in the top display change in quantity
3. Once done "holding" all your images, you can then filter on them:
    a. Click on your *Filter* icon in the top right of your toolbar
    b. Click the bubble next to the option *Images Flagged* and select *is Hold Image*
    c. Click *Apply Filter*
4. The only subjects you will see in your *Capture* screen are those in your *Hold Image* filter. You can now print layouts, export, create reports, etc. on just these subjects

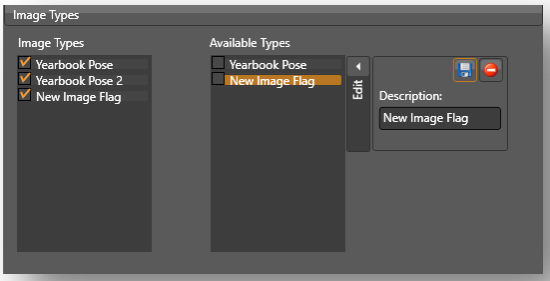


Flagging Images

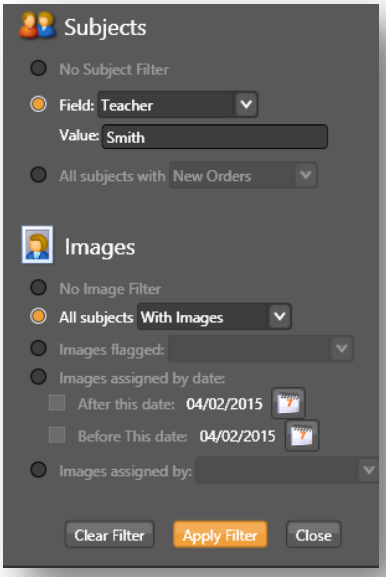
Flow® will assume that you are going to take pictures until you take "the keeper" and automatically flag the last image assigned as the *Primary Image*. To flag another image as either the *Primary Image* or a *Yearbook Pose*:

1. Hover over the image you wish to flag
2. Click on the flag in the top right hand corner of the image
3. Select which pose you would like to flag this image as

You can also set up Flow® to automatically flag the first image assigned as the Primary image, rather than the last image. To do this, go to *Preferences>Capture*. Select *First Image Assigned is Primary Pose* and press *Save*.



To set up your own custom image flags, you will want to set this up in either your *Project Template* or in your individual *Project Preferences*. Go to *Image Options*. At the bottom of the screen, press the arrow next to *Edit*. Press the green plus sign and type in a description. Press the blue save button to have this option appear under *Available Types*. Click and drag this option under *Image Types* and place a check mark next to it to make it available in your job. When finished, press *Save*.



Filtering in Flow®

Rather than search through your entire job, you can filter your job to specific image and/or data requirements. To do so:

1. Click the *Filter* icon in the top right of your toolbar
2. Your filter options will appear. You can filter on:
   a. Subject Data
   b. Images
   c. A combination of the two

3. Once you have entered the specific filter criteria, press the *Apply Filter* button to show your filtered job

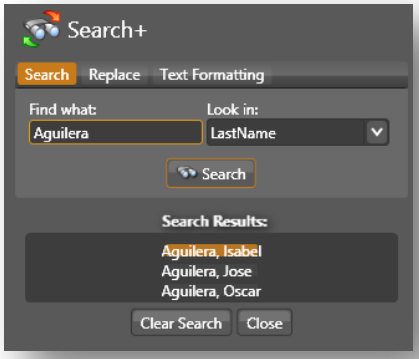
Note: *This comes in handy when printing layouts, reports or exporting specific jobs*

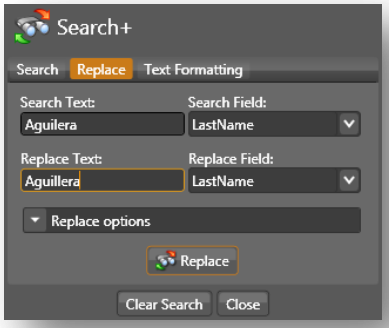
Search, Replace and Name Casing

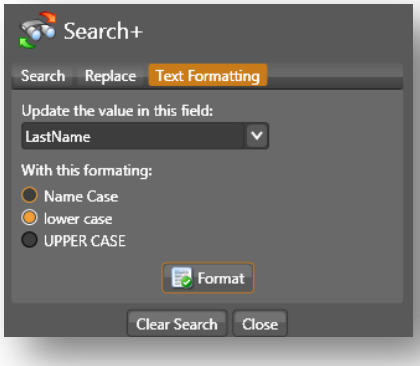
Flow® has data manipulation capabilities which allow you to search a subject, replace data and name case specific fields. To get started, click the *Search* icon in the top right of your screen:

1. To *Search,* click the *Search* tab. Enter the specific data in the *Find What* column and specify which field in the drop down. Press *Search* to begin your search. If more than one result is listed, select your choice in the list provided

   Note: *You can also search by clicking next to the eye glasses above the subject's record*
2. To *Replace* data, click the *Replace* tab. Type the specific data to search on and the field to search in from the drop down. Then type the replacement text and which field to place the replacement text in from the drop down. Press *Replace* to finalize your output
3. To *Name Case* a specific data field, click the *Text Formatting* tab. Select which field you would like to format in the drop down list, then select which style of formatting you would like to use. Press the *Format* button to finalize your output.







Display Fields

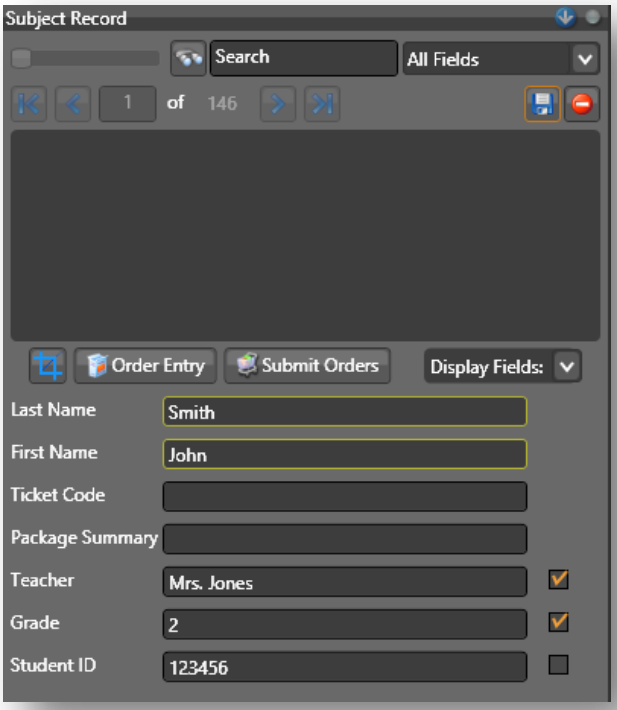
By default, the data fields that display on your subject's records in the *Capture* screen are the fields you imported when bringing in your data. To add additional fields to this display press the dropdown that says *Display Fields* and check off the fields you wish to see. To remove fields you don't wish to see, uncheck them. To quickly view/edit all data fields, go to *Edit>Subject Detail View*.

Remember Fields

When adding new records to Flow®, you have the ability to "remember" certain fields. For example – an entire group of kids from Mrs. Jones' 2nd grade class show up. Rather than key in "Mrs. Jones" in the Teacher field and "2" in the grade field for each student, you can set Flow® to remember these settings from the first subject, and apply it to each additional new record. To do this:

1. Press the green plus sign to *Add* a record, or press F5
2. Key in the information for the first subject
3. Place a check mark in the box next to the field(s) you wish to remember
4. Press the blue *Save* button, or press *Enter*
5. Press the green plus sign to *Add* a second record, or press F5
6. You will see your data remembered from your previous record in the fields you have checked off

Note: *This will only work when manually adding records, not scanning New Ticket barcodes.*

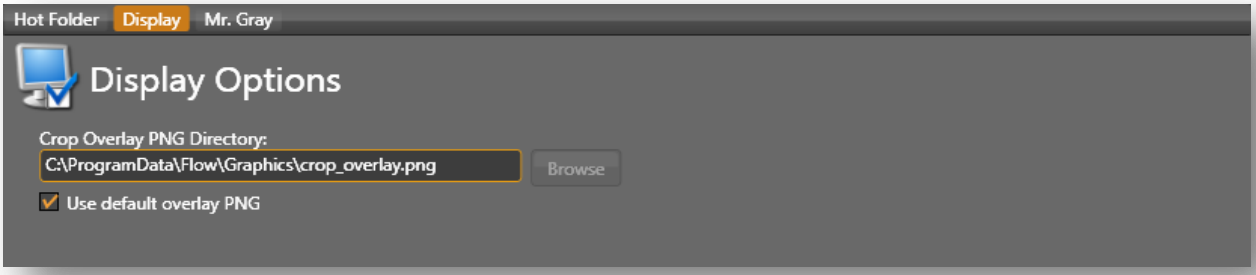


Crop Overlay

On your *Capture* screen, you will notice your display picture having a *Crop Overlay* on it. You can turn this off simply by un-checking the *Crop Overlay* box in the bottom right hand corner of the screen. To change which overlay you see on this image:

1. Click on *Preferences* in the top right hand area of your screen
2. Click on *Capture*
3. Go to the *Display* tab
4. Uncheck *Use Default Overlay PNG* and browse out for your overlay
   Note: *Your overlays used inside of your Flow® crop screen can be found in the following directory: C:\Program Data\Flow\Overlays*
5. Press *Save* to save your changes. You will now see your overlay in the *Capture* screen

You can add your own transparent PNG overlays to use simply by saving them to the following directory: *C:\Program Data\Flow\Overlays.* Not only will these overlays be available to use for your *Capture* screen, but you can also use them to help *Crop* your images.



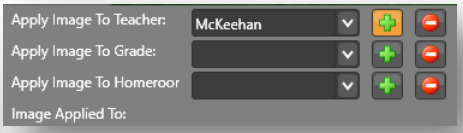
Group Pictures

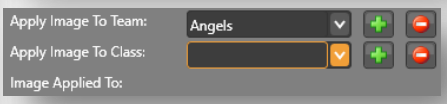
Traditional Assigning of Group Images

You have two options for assigning Group Images in Flow®. One way to assign them is our traditional way. You will first need to place your group images in your *Hotfolder*. Once you see your images displaying in the *Hotfolder* on your *Capture* screen:

1. Click on the icon in the bottom right hand corner with the 2 people to mark it as a group photo
2. You will then see the image move from the *Hotfolder* down to the *Group Photo Column* on the bottom of the screen
3. Once in the *Group Photo Column*, you can double click on the image and type in the group name of the image, so it is easier to identify. This is also how Flow® will name this image
4. Once you have clicked on this image, you will see a dialogue box appear in which you can assign your group image. Simply select the *Teacher* , *Grade* or *Homeroom* you wish to assign to and press the green plus sign. Or, if using a Sports project template, select the *Team* or *Coach* to assign to.

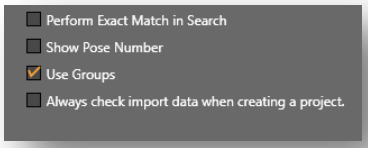
   Note: *To un-assign a group image, press the red minus sign next to the drop down box*
5. To assign a group image to something other than a Teacher, Grade, Homeroom, Team or Class you will first want to *Filter* your data based on the field name you are assigning to
6. Once your filter is set, you can hover over the appropriate group image and click the icon that is a green plus sign with two people in the bottom right hand corner of the image. This will assign the group photo to all subjects in the filter
7. A message will pop up telling you that it will only apply the group image to the current filter. Click and confirm if your filter is correct





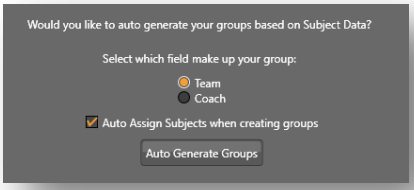
Assigning Group Images with the Group Images Tab

Another option to assign them is through the Group Images Tab. You will first need to set up Flow® to use the Group Tab function. To do this:

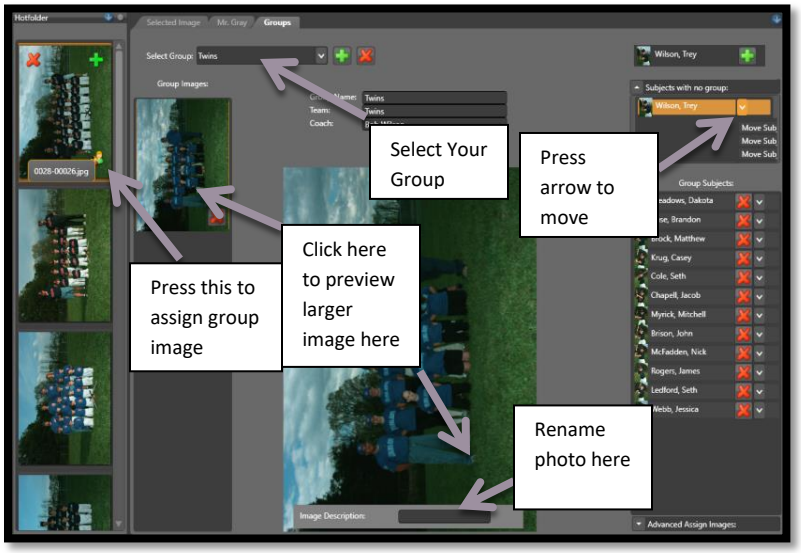


1. Go to *Preferences* in the top right hand corner of your screen
2. Click on *Application*
3. Check *Use Groups* and press *Save*

Once you have Flow® set up to use the Groups tab, you will then want to copy all of your group images into your *Hotfolder*. We are now ready to start setting up our groups and assigning group images. To do this:



1. Open your project and go to the *Capture* screen
2. Click on the *Groups* tab
3. You will be asked if you would like to auto generate your groups based on subject data. Choose whether to group by *Teacher*, *Grade* or *Homeroom*. Or, if using a Sports project template, choose to group by either *Team* or *Coach*.
4. Leave *Auto Assign Subjects when Creating Groups* checked
5. Once your grouping field is selected, press the *Auto Generate Groups* button and allow Flow® to process through all of your records to automatically generate your groups for you
6. Once Flow® has finished generating your groups; you will see them listed in the dropdown next to *Select Group*. Select the first group you wish to assign in this drop down list. You will see the associated subject images assigned to the group to the right of the page
7. Next, hover over the group image you wish to assign to these subjects in the *Hotfolder*, and press the *Assign as Group Image* button
8. This group image will then be assigned to every subject listed. Continue moving through your groups to assign all of your images. You can remove any subjects from a group by pressing the red X next to their name. Alternatively, you can move them to a different group by pressing the down arrow next to their name and choose the group to assign them to.
9. If there are subjects who are not assigned to a group, you will see them listed under the *Subjects with no group* drop down. To move them to a group, press the drop down next to their name and choose the group to assign them to.
10. To preview and/or rename the group image assigned, click on it under the *Group Images* section. Double click in the *Image Description* and type in a group image name.



Retouching Images

Export for Retouch

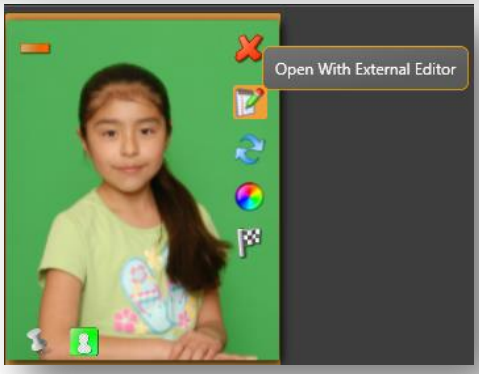
Flow makes retouching images very quick and easy. Once you have finished associating all of your images to your records, you can then do an export for retouch. To do this:

1. Click the *Export for Retouch* button in the top right hand corner of your menu bar
2. Browse out and find a location to save your exported images, and click *Export*
3. Open your folder of images in your retouching software of your choice, and make your retouching changes
   Note: *Be sure you do not change the image name when saving*
4. Once finished with all your retouching, open your correct job in Flow® and click the *Export for Retouch* button
5. Select the *Import* tab, browse out for your folder of retouched images and click *Import*
6. Your retouched images will now appear in your Flow® job

External Editor

To edit images one at a time from Flow®, you have the ability to open these individuals in an external editor directly from the program. To do this:

1. Go to your *Preferences* area in the top right hand corner of your menu bar
2. Click on *Edit*
3. Under *External Editor*, browse out and locate the .exe file of your program you wish to retouch your images in (***For Example:*** *Photoshop.exe*) and click *Save*
4. While in your Flow® job, go to your *Edit* screen and locate the subject you wish to retouch
5. Hover over their image and click the *Open with External Editor* button
6. Once finished with your retouching, save your image and close it out of the external editor. Your saved changes will appear in Flow®
   Note: *Be sure to save your image with the exact same image name*



Remote Imaging Service

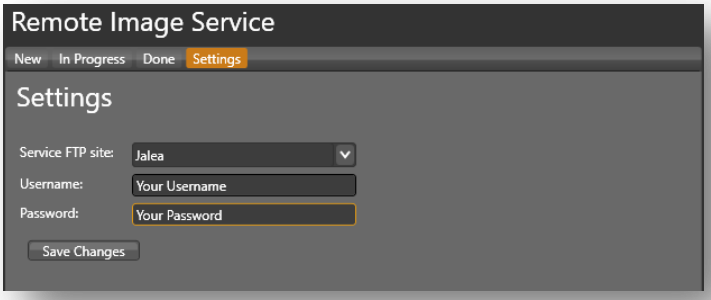
Flow® is equipped to send your images directly to different vendors for retouching. At this time, these vendors include36 Pix, Jalea and Photo Retouch Online.

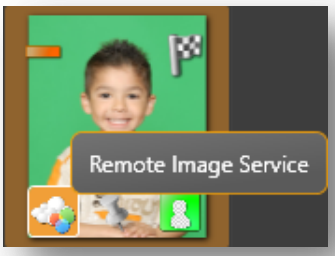
Note: *A quality internet connection is required to activate your software, submit orders to your lab and upload projects/online galleries. The following website will give your lab a good idea where you are and where you should be in respect to bandwidth.* ***Upload bandwidth is the most important****. Check your speed here: www.speedtest.net*

Inputting Your User Account Information

Before you can upload to either 36 Pix, Jalea or Photo Retouch Online, you must first enter your user name and password for your account into Flow®. To do this:

1. Click on your *Manage Images for Remote Image Service* icon in the top right hand corner of your toolbar
2. Click on the *Settings* tab
3. Under the *Service FTP site* drop down, select whether your account is with *36 Pix, Jalea* or *Photo Retouch Online*
4. Enter your *Username* and *Password* provided to you by either 36 Pix, Jalea or Photo Retouch Online
5. Press the *Save Changes* button





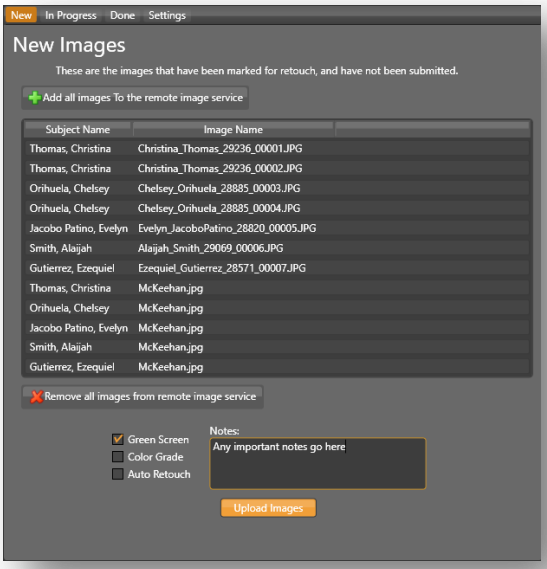
Selecting Individual Images

When browsing through your capture screen, you have the ability to quickly mark which images to upload. Simply hover over the image in the subject's record and click the *Remote Image Service* tag on the individual images. When you go to upload your images, only the images which have been tagged will be selected for upload.

Selecting Groups of Images

Rather than select an image individually, you have the ability to send up all of your images in your job, or all images in a specific filter.

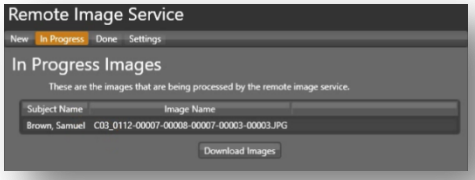
1. Press the *Manage Images for Remote Image Service* in the top right hand corner of your toolbar
2. Under your *New* tab, press the *Add all images to the remote image service* button. If you have a filter set, all images in your current filter will be added. If there is no filter set, all images in your project will be added
3. Likewise, you can remove all images for upload by pressing the *Remove all images from remote image service* button



Uploading Your Images

Once you have selected which images to upload, you are now ready to upload. To do this:

1. Press the *Manage Images for Remote Image Service* in the top right hand corner of your toolbar
2. Select the *New* tab
3. Select your service you wish to have done, either *Green Screen*, *Color Grade* or *Auto Retouch*
4. Type in any necessary notes to the *Notes* section
5. Once complete, press the *Upload Images* button



Downloading Retouched Images

Once your images have been sent back to you as complete from either 36 Pix, Jalea or Photo Retouch Online, you can then automatically import them back into Flow®. To do this:

1. Press the *Manage Images for Remote Image Service* in the top right hand corner of your toolbar
2. Under the *In Progress* tab, press the *Download Images* button
3. Your images will automatically download into Flow®, replacing your original image

Done Images

At any time you can see a list of all images that have been successfully completed inside of Flow®. To do this:

1. Press the *Manage Images for Remote Image Service* in the top right hand corner of your toolbar
2. Press the *Done* tab
3. Your will see a list of completed images that have been modified by the remote Image Service

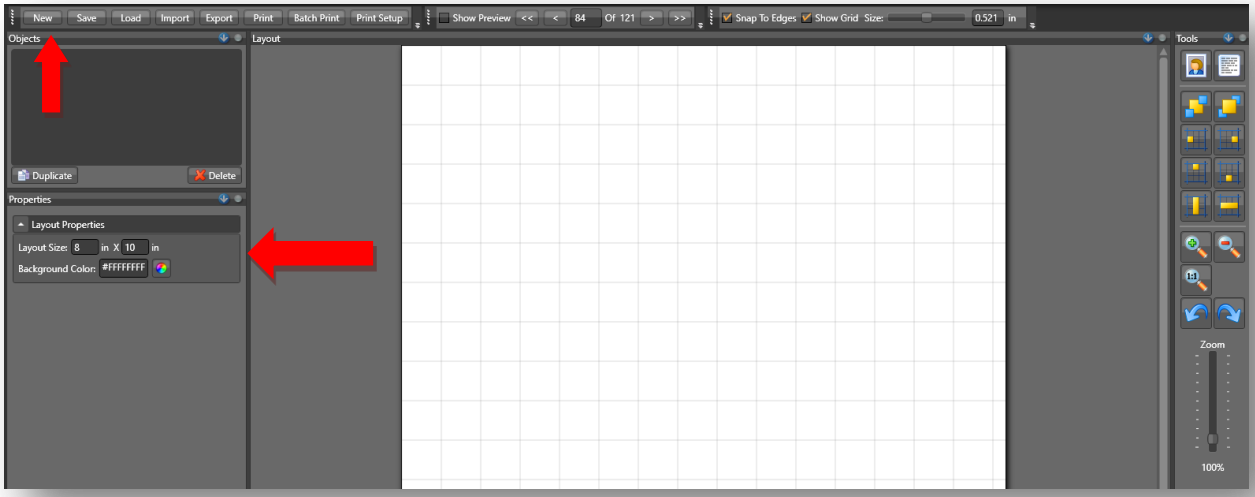
Layout Designer

Flow® has a robust layout creator which makes building templates for ID cards, proof sheets, memory mates, trader cards, etc. simple and fun. It comes pre-loaded with several layouts you can customize, or you can build your own. It has the ability to use dynamic text and images, and design features that make creating professional looking templates a breeze.

Creating a New Layout

To create your own layout from scratch:

1. Click *Layout* from your top menu bar
2. Underneath the Flow® icon, click the *New* button
3. You may change the size and color of your background underneath the *Properties* menu

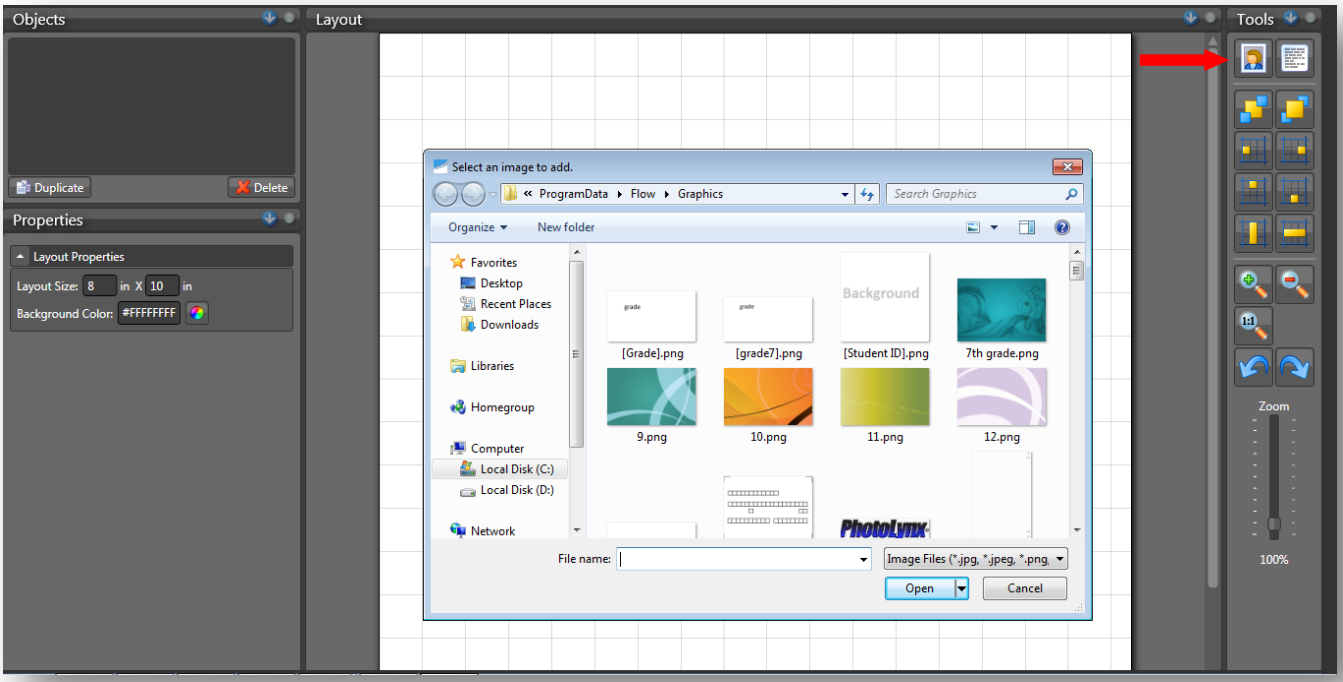


Import an Image/Graphic into Your Layout

After you have your layout size and background color selected, you are now able to start adding graphics and text to your layout. To add graphics:

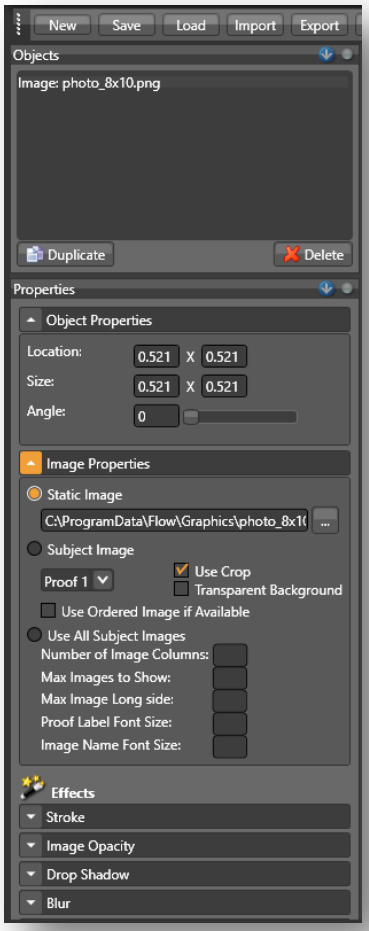
1. Click on the *Portrait* button on the top right hand side to insert a graphic or image
2. The browser will ask you which image you want to import
3. Select the image and click *Open*
4. Click on the image in the preview area (or select from the *Objects* List) and click the corner of the image to stretch it to a bigger size

   Note: *Image will not skew when stretching the image*



Editing Your Graphic

Flow® offers several options to help bring your graphics to life. To edit your graphic:



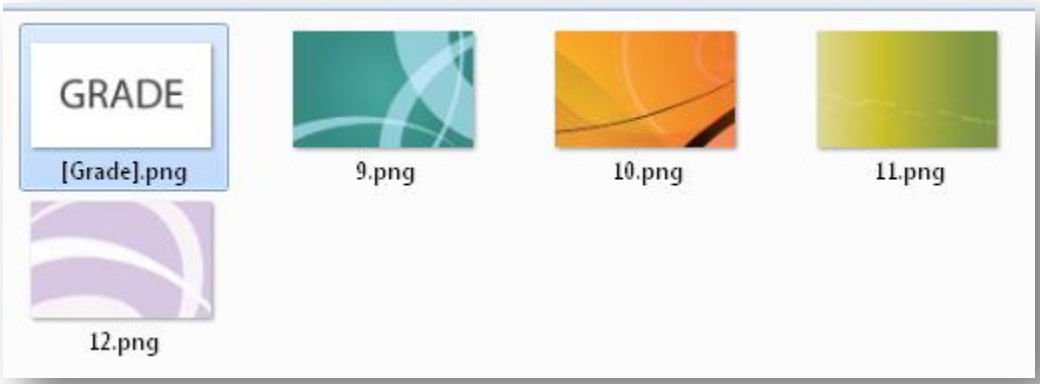
1. Click on your image object inside the *Objects* list on the top left hand corner
2. Your *Properties* box will give you various categories to edit your image
   a. *Object Proportions* will allow you to adjust the size and angle of your image
   b. *Image Properties* will tell you where your image came from
      - Select *Subject Image* and choose which pose if this is the subject's image
      - *Use Crop* if you want to use the crop set in Flow®
      - *Transparent Background* if you want to drop the green background out of the subject's image and make it a transparent background. ***Note:*** *If unselected and using a green screen job, the default background will be used.*
      - *Use Ordered Image if Available* will replace the static image with the image that was selected in package entry, including which background selected if this is a green screen job
      - *Use All Subject Images* is a quick and easy way to set up proof sheets. Just select how many images to show in the amount of columns and rows, and Flow® will auto populate
3. *Effects* offer several options:
   a. *Stroke* handles the outer line of the image and the color of the outer line. If you wish to change the color of the stroke, click on the color wheel and select the desired color
   b. *Opacity* changes how solid the image appears to be
   c. *Drop Shadow* has options for you to edit the *Depth, Opacity,* and *Direction* the shadow of the image will be displayed
   d. *Blur* controls how blurry you want to make the image appear
   e. *Color* can change your image to *Black and White, Sepia* or *Color*

Note: *For best results when working with multiple layers, always click the layer inside the Objects list when you intend to edit*

Creating Dynamic Graphics in Your Layout

There will be scenarios where you will need to have layouts created where the graphics will swap out depending on data inside your subject's record. A good example of this is a school that requires a different background for each grade on their ID cards. To set this up:

1. Save your dynamic graphics in a sub folder in graphics directory found here: *C:\Program Data\Flow\Graphics*
2. Create a placeholder image save it as "[Field Name].png"
   For Example: If you want your background to change out based on the grades in the grade field, you would name your placeholder background image as *[Grade].png*
3. Rename your selected graphics to match the data that will be entered into the corresponding field
   For Example: With the *[Grade].png* as the placeholder image, rename the other images to be the grade numbers – 9.png, 10.png, 11.png



Setup Your Layout with Your Dynamic Graphics

Once you have your graphics saved properly, you are now ready to set up your layout to dynamically change its graphics.

1. Load your layout in the *Layout* screen of Flow®
2. Add your placeholder graphic to your layout and reposition it to the correct size you wish it to display on your layout
3. Check *Show Preview* to see your results (arrow through several subjects to be sure all your graphics are changing accordingly)

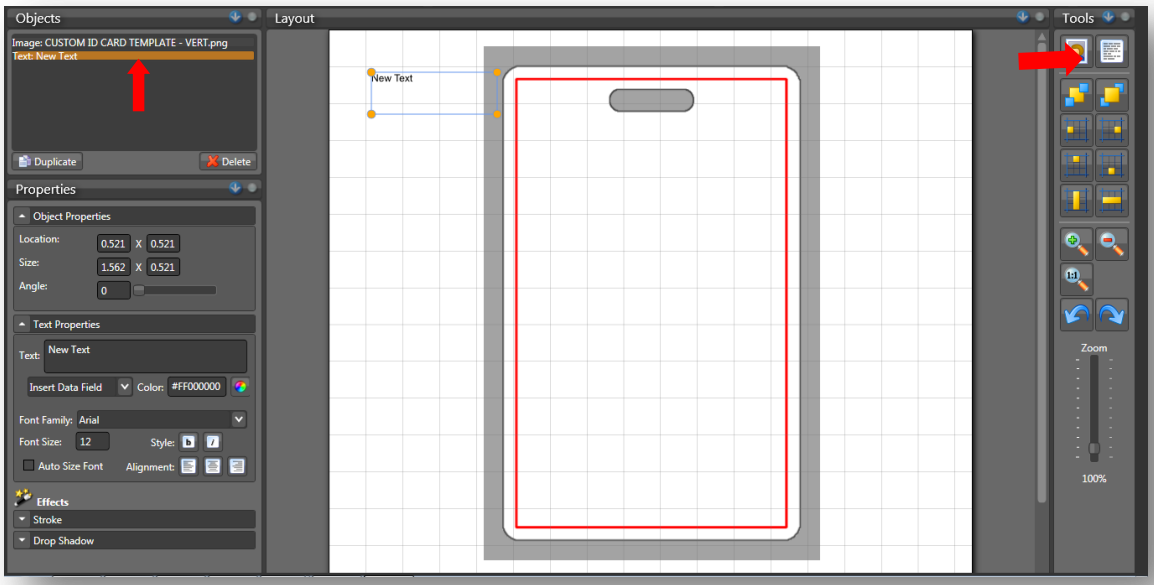
Helpful Hints: *Be sure you name your graphics in the correct subfolder of your graphics folder to be the exact same way you will enter the data inside of corresponding field in Flow®. If your graphic does not display in your preview then the data field you are trying to pull from either has nothing in it or does not match the name of the image you selected.*

Import/Edit a Text Object

After you have your layout size and background color selected, you are now able to start adding graphics and text to your layout. To add and edit text objects:

1. Click on the *Text* icon located right next to the *Portrait* icon to import a text box
2. To edit this text, click the text layer inside the *Objects* list
3. Your *Properties* box will give you various categories to edit your text
    a. *Object Properties* will allow you to change the location, size and angle of your text
    b. *Text Properties* offer several options:
        i. *Text* will be the actual text displayed. To import dynamic text from a field in Flow®, see *Setting up Dynamic Text*
    c. *Color* will allow you to change the color of your font. Just click the color wheel and select which color you wish to use
    d. *Font Family* will you allow you to change the font used for your text
    e. *Font Size* will allow you to change the size of your font.
    Note: *Auto Size Font will automatically fill the font to fit the text box you have created*
    f. *Style* will allow you to choose to have your font be bold or italics
    g. *Alignment* will allow you to left-justify, right-justify or center your text within the text box
4. *Effects* offer several options:
    a. *Stroke* handles the outer line of the image and the color of the outer line. If you wish to change the color of the stroke, click on the color wheel and select the desired color
    b. *Drop Shadow* has options for you to edit the *Depth, Opacity,* and *Direction* the shadow of the image will be displayed

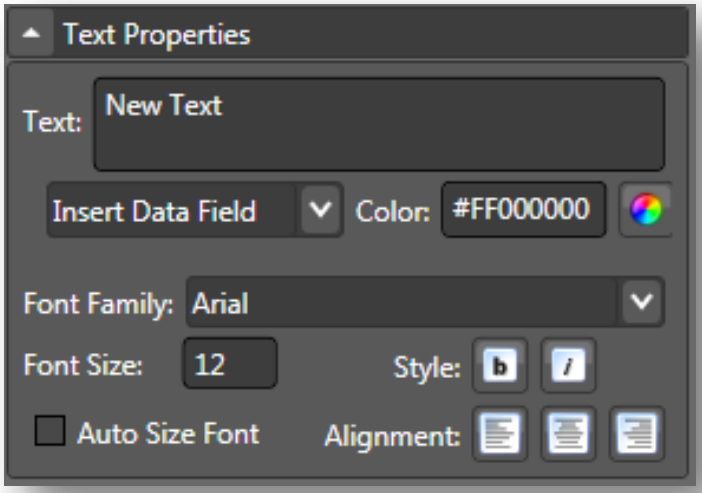
Note: *For best results when working with multiple layers, always click the layer inside the Objects list when you intend to edit*

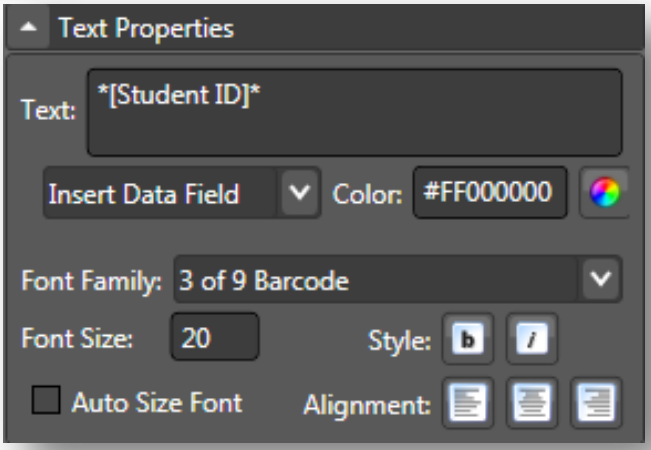


Setting Up Dynamic Text

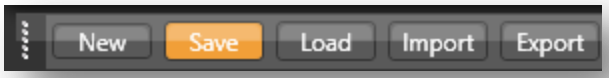
Flow® gives you the ability to have static text and dynamic text. Dynamic text is text that is in the subject's data that will automatically update on the layout depending on which subject is being printed. To set this up:

1. Under the *Insert Data Field* drop down box under *Text Properties* select which data field you would like to pull from to display on your template (for example – *First Name*)
   Note: *Be sure you delete the words "New Text" first*
2. Your field name will be displayed in the *Text* box surrounded by brackets (for example – *[First Name]*)
3. To insert a barcode object, you must select your barcode font in the *Font Family* drop down box after you choose which field to create the barcode with (for example – *Student ID*)
   Note: *For many barcode scanners to accurately scan the information, you must place asterisks around the brackets surrounding the field name (for example - *[Student ID]*). It is suggested you do a test scan with your barcode scanner to make sure it is reading your barcode fonts properly*





Saving and Loading your Layout



Once you have completed building your layout, you will want to save it. Do this by pressing the *Save* button on the top left hand side of your menu bar. Choose *Save As* to name your layout and save it for the first time. Choose *Save* to save any updates to your already saved layout.

To load a saved layout, click on the *Load* button on the top left hand side of your menu bar. From there you will see a dropdown list of all your saved layouts. Simply click on the name of the layout you wish to load.

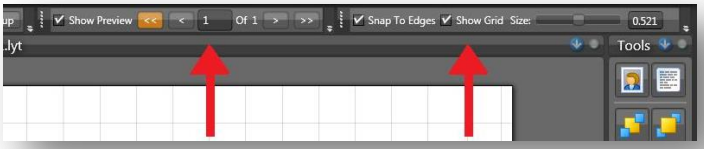
Exporting and Importing your Layout

An easy way to share layouts among other Flow® stations is to export them out of one station and import them into another. To export your layout, be sure to *load* the layout first and then press the *Export* button. Browse for an area to save your layout (desktop is best) and press the *OK* button. This will saved a zipped folder named after your layout.

To import a layout into Flow®, save this zipped file in a place that is easy to remember, such as your desktop. (***Note:*** *Do not unzip the file*) Open Flow® and go to your *Layout* screen. Press the *Import* button and browse out for your saved zipped file, and press *Open*. Your layout will then import into your new Flow® station.

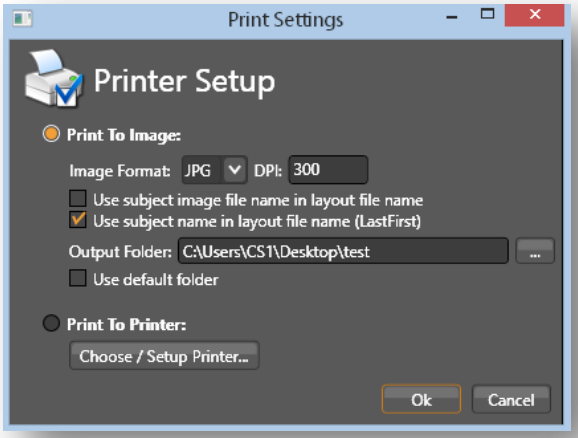
Preview Your Work

As you are building your layout, or before you send your layout to print, you may choose to preview your design. To do this check the *Show Preview* box in the middle of your menu bar. To use grid lines for careful spacing when building your layout, you can check the *Show Grid* box and adjust your grid sizing.



Batch Printing

To print a specific layout for multiple subjects, you can set up your filter and then do a *Batch Print* from inside your *Layout* screen. To do this:



1. Press the *Print Setup* button in the top left hand corner of your menu bar
2. If printing to image, select your *Image Format*, *DPI* and which folder you would like to save your images to
3. If sending directly to a printer, select your printer by pressing the *Choose Setup/Printer* button
4. Press *Batch Print* and your layouts will begin printing for your filtered subjects (or ever record if not filtered)
5. To print one individual at a time, press the *Print* button
   Note: *You may want to preview your work first to ensure you are on the correct subject record*

Auto Printing

One of the most popular features of Flow® is the ability to print onsite. Examples include ID cards, proof sheets, etc. To set this up:

1. You first need to have a *Layout* created
2. In the *Capture* screen, under the *Layout Preview* section:
   a. Select which *Layout* you would like to print by selecting the *Select lyt* button
   b. To preview your layout, check off the *Show Layout Preview* button
   c. From here you can push the *Printer* button to manually send to your printer - OR –
   d. To automatically print, check off the *Auto Print* button and select the *Pose Number* to start printing on
   e. The first time you send to print you will get a pop up asking if your layout looks correct. If so, press *Yes*. If not, press *No* to make your changes in the *Layout* screen and send to print again. Once you hit *Yes* the first time this pop up will no longer come up

Exporting and Importing Flow® Jobs from One Station to Another

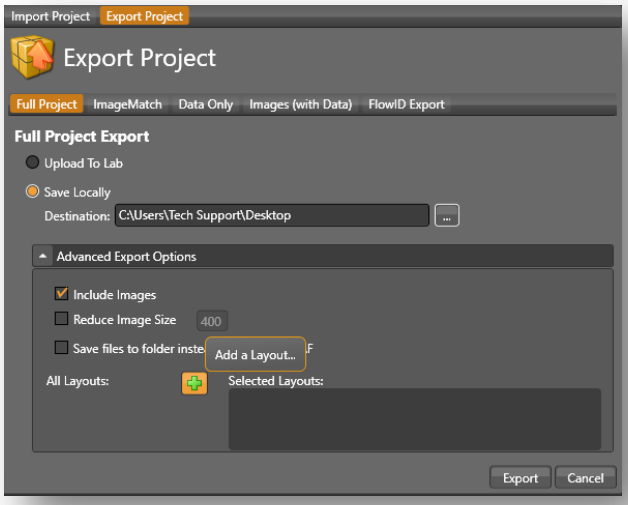
You have the capability to have all your stations of Flow® to be working on the same job, which you can then merge together at a later time. You do not want to create new projects on each machine, as each subject's Ticket Code are automatically generated, therefore their camera cards will not match. To avoid this, you will want to export/import/merge *Full Project Archive* files.

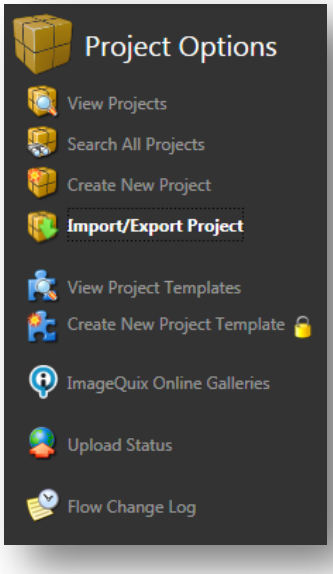
Exporting Full Project Archive Files

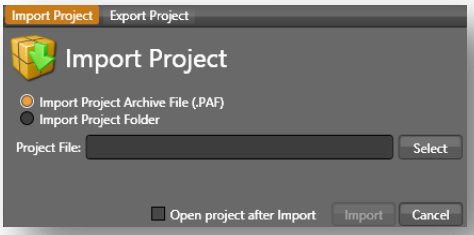
1. Under your *Project* screen, select *Import/Export Project*
2. Select the *Export Project* tab
3. Under *Full Project* select to *Save Locally*
4. Save to an easy to find location (for example, your desktop)
5. To include any layouts you have built in your version of Flow® with this project, such as ID cards to print on site, press the dropdown for *Advanced Options*. Press the green plus sign next to *All Layouts* and select any layouts to include
6. Click *Export* - This export will create a .paf file
7. Move this .paf file onto a CD/DVD/USB drive/Network to transfer to your other Flow® station(s)
   Note: *Exporting directly to your USB drive or Network is not recommended*

Importing Full Project Archive Files into Capture Stations

1. Copy your .paf file from your CD/DVD/USB Drive/Network to your desktop
2. Under your *Project* screen, select *Import/Export Project*
3. Browse out for your .paf file you saved on your desktop
4. Click *Import*
5. Repeat for each capture station going onsite







Merging Completed Projects onto the Master Machine

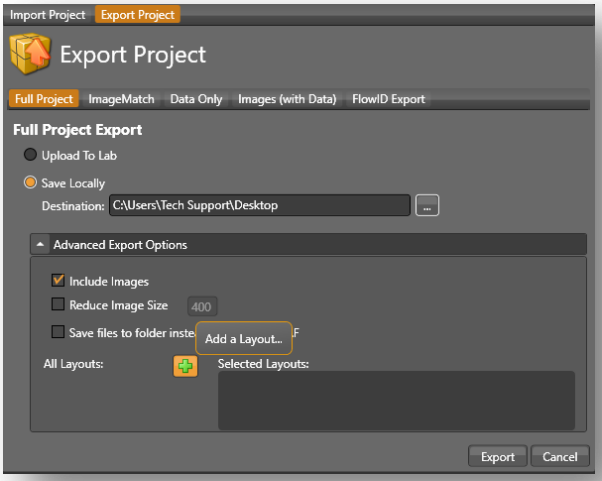
Once you are finished adding your images to the correct records on the capture machines, you are now ready to merge your complete jobs onto the master machine for finalizing before submitting to your lab. To do this:

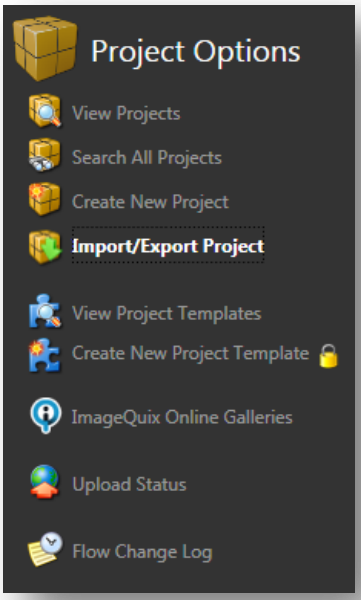
From the Capture Machines

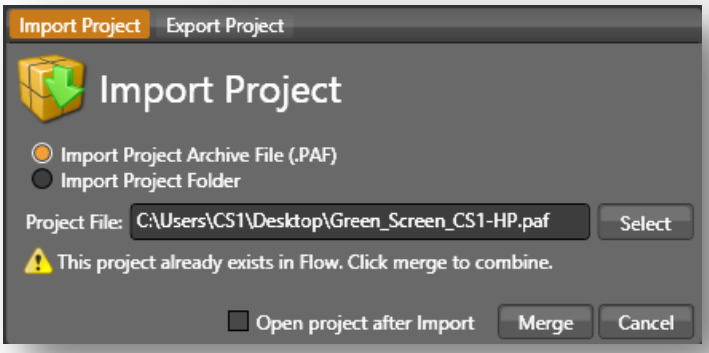
1. Under your *Project* screen, select *Import/Export Project*
2. Select the *Export Project* tab
3. Under *Full Project* select to *Save Locally*
4. Save to an easy to find location (for example, your desktop)
5. To include any layouts you have built in your version of Flow® with this project, such as ID cards to print on site, press the dropdown for *Advanced Options*. Press the green plus sign next to *All Layouts* and select any layouts to include
6. Click *Export* - This export will create a .paf file
7. Move this .paf file onto a CD/DVD/USB drive/Network to transfer to your master machine
   Note: *Exporting directly to your USB drive or Network is not recommended*

From the Master Machine

1. Copy your .paf file from your CD/DVD/USB Drive/Network to your desktop
2. Under your *Project* screen, select *Import/Export Project*
3. Browse out for your .paf file you saved on your desktop
4. You will see a warning saying "This project already exists in Flow®. Click merge to combine"
5. Click *Merge*
6. Repeat for each capture station that sent a .paf file





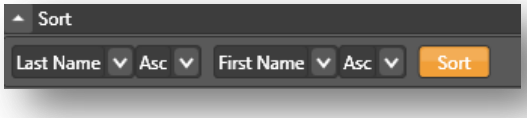


Edit Screen

The *Edit* screen in Flow® will allow you to do quick data and image manipulations to your job. The following list briefly describes each section on this screen.

Subject List View

Here you can view your subject's data and information in a spreadsheet type layout. You can *Sort* your data on this screen by selecting the options you wish to sort by on the dropdown at the bottom of the page.



Subject Detail View

Here you can see all the available data fields available for your data manipulation a breeze.

Note: *Both the List View and Detail View have the option of going to Order Entry. You can move different subjects by the arrow buttons at the bottom of the screen and search for specific subjects from the search field at the bottom right*

Import Data

Use this feature to import new data or merge data into your already existing data.

Show Original Image

Use this feature to toggle back and forth between your *Original* image and your *Cropped* image.

Find Missing Images

If you've encountered any errors merging jobs, or any images got deleted from your project folder, use *Find Missing Images* to help refresh your job.

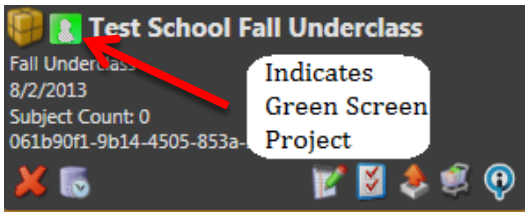
Adjust Images

Use this feature to access your *Cropping* options in Flow®.

Green Screen

Use this feature to access your *Green Screen* options in Flow®.

Green Screen



Before you start working in green screen, you first want to create a green screen project. See *Creating a Project* for step by step instructions. Once the project has been created as a green screen project, a green icon will appear next to the project name. When assigning your packages, you can select which background the subject chooses on this screen. You can also select their background from the green screen area in the *Edit* screen. ***Note:*** *choosing the background in the green screen area on the Edit screen will change the default background as well. Do not use this option if you wish to have a universal background for things like yearbook pictures, ID cards, etc.*

If you do not see your backgrounds available for you to use inside of Flow®, you need to contact your lab to get this set up. **Do not just copy your backgrounds into your background folder** as this will not automatically ensure that your lab will be able to print your backgrounds. Once your backgrounds are applied to your Activation Key, you will see them automatically download into your backgrounds folder for you.

The RGB values Flow® will automatically drop out are:

Red: 77
Green: 193
Blue: 119

To get to the green screen functions:

1. Click the *Edit* button
2. From the *Subject List View* select the record you wish to work with
3. Click the *Green Screen* tab to get to the green screen functions
4. Flow® will automatically drop out your background if shot at specific RGB values, leaving a checkered backdrop
5. If you need to drop green out further, press the *Background Definition Tool* and click on the green area
6. Click *Apply To Entire Project* to apply this green drop out to every subject
7. To select a background, move your cursor over the desired background and it will appear in place of the checkered backdrop
8. Bring in any green shirts, etc. that may have been dropped out as well by using the tools to bring green in
9. Click *Save GS Settings* to save any green screen work you have done on an individual
10. Select the next record by hitting the arrows at the bottom of the screen

Green Screen Tools: Dropping Out Green

Background Definition Tool

By clicking on this tool the user can further define the background for the program, just click this button and then click the color you would like to remove from the background.

Background Color Picker Tool

By clicking on this tool the user can further identify the background color of the image. Just click the tool and then a color on the background that has not been removed and it will then disappear.

Background Lasso Tool

By clicking on this tool the user can further identify an area of the background that needs to be retouched through the use of our lasso tool. Just click the tool and then on the image in an area you wish to define a background. Click and hold the mouse button following the outline of the area you wish to remove, ending in a circular ring back to where you started. ***Note:*** *For more control, right click on this icon and select "Polygonal Hand". This will give you more of a "connect the dots" type control.*

Background Brush Tool

By clicking this tool the user can further identify an area of the background that needs to be retouched through the use of a round brush tool. Just click the tool and then on the image in an area you wish to define a background. Click and hold the mouse button following the outline of an area you wish to remove.

Green Screen Tools: Bringing Green In

Foreground Color Picker

By clicking on this tool the user can further identify the color that had been removed and bring it back. Just click the tool and then a color that has been dropped out of the image and it will reappear.

Foreground Lasso Tool

By clicking on this tool the user can further identify an area of the foreground that needs to be retouched through the use of our lasso tool. Just click the tool then on the image in an area you wish to define a foreground. Click and hold the mouse button following the outline of an area you wish to bring back in, ending in a circular ring back where you started. ***Note:*** *For more control, right click on this icon and select "Polygonal Hand". This will give you more of a "connect the dots" type control.*

Foreground Brush Tool

By clicking this tool the user can further identify an area of the foreground that needs to be retouched through the use of a round brush tool. Just click the tool and then on the image in an area you wish to define a foreground. Click and hold the mouse button following the outline of the area you wish to bring back in.

Green Screen Tools: Other Useful Tools

Image Move Tool

By clicking on this tool the user can move the image around so that they can move an image to a specific area for review. For best results, use the *Zoom* tool to enlarge the area and then select this tool to focus on a specific area.

Image Zoom Tool

By clicking on this tool the user can enlarge the image so the user can further identify an area they are looking to focus on. Just click the tool and then on the image in an area that you wish to define an enlargement.

Green Screen Tools: Settings Tools

By clicking on this button the user saves any changes made to the image

By clicking on this button the user elects to revert the image back to its original form

By clicking on this button the user chooses to make the changes made to all images for this subject record

By clicking on this button the user chooses to apply the changes made to all images in the job

This button is a toggle between the current image and the original image. Press the *Show Original Image* button to see the image as it was originally shot. If the user had made any changes by using any of the tools listed above, they would not appear. Press the *Show GS Dropout* button to see the image with the green screen work applied.

By clicking this button you will apply your green screen changes to everyone in the current *Filter* set.

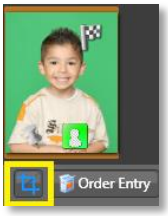
Cropping Images

There are several different options when it comes to cropping your images inside of Flow®. You can crop the entire job, you can crop individuals, and you can bring in your crop data from our Auto Head Sizing software.

Cropping the Entire Job

1. Go to your *Edit* screen
2. Click *Adjust Images* to open your cropping area
3. Select your desired *Overlay*
4. Select your desired *Crop* ratio
5. Go to your selected image and either use your mouse ball to scroll the highlighted crop box bigger or smaller, or click and drag the surrounding boxes on the corners. ***Note:*** *Everything inside the highlighted box will be inside the crop. Everything outside the highlighted box will be cropped out*
6. Click *Apply to All*
7. Click on individual images to make adjustments

Cropping an Individual



1. Under your *Capture* screen, search for the specific subject you wish to crop
2. Click the *Crop* button under their image in their *Subject Record*
3. Select your desired *Overlay*
4. Select your desired *Crop* ratio
5. Go to your selected image and either use your mouse ball to scroll the highlighted crop box bigger or smaller, or click and drag the surrounding boxes on the corners.

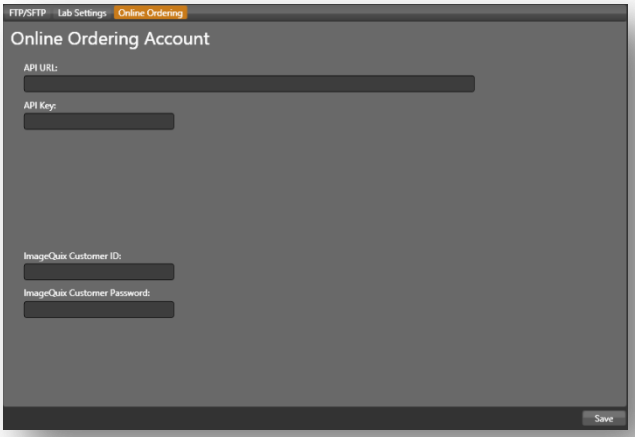
Importing Auto Head Sizing Crop Data

1. Set your desired crop using Auto Head Sizing software and export your crop data file
   Note: *Auto Head Sizing should be looking at the same folder of images that Flow® is looking at. You can find your project folder in the following directory C:\Program Data\Flow\Projects*
2. Inside of Flow®, go to your *Edit* screen
3. Click *Adjust Images* to open your cropping area
4. Click *Import Crop Data*
5. Browse out and select the correct crop data file from your folder of images
6. You will see your soft cropping automatically update in Flow®
   Note: *Because this is not a hard cropped image, you still have the ability to make any cropping adjustments necessary in Flow®, or apply a different crop data file at a later time*

Uploading for Online Ordering

Flow® will upload your image galleries and price lists directly to your selected online gallery vendor. Before you begin, you will need to have the following information:

- Strong internet connection
- Active Flow® license
- Account with either APE or ImageQuix, including your account ID and password
- A *Studio Catalog* set up with price information



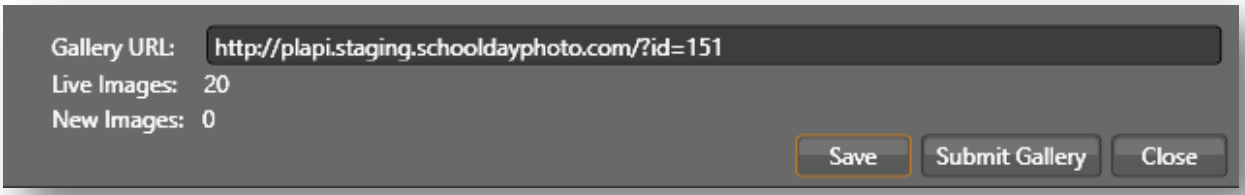
Once you have your account information, you will want to set this up in Flow®. To do this:

1. Click on your *Online Galleries* button in the top right hand corner of your menu bar
2. Fill in your account information for your either APE or ImageQuix and press *Save*
   Note: *This is a one-time set up and you will not have to re-enter again*

Once all this is in place, you will then be able to upload to the selected vendor easily. To do this:

1. Open the correct vendor gallery by clicking on *Online Galleries* in the top right hand section of your toolbar and fill out the settings screen completely
2. Once filled out, click *Submit Gallery*. Your images will then upload and a unique *Gallery URL* will be created
   Note: *Your Subject's Ticket Code will be the unique individual password for your client to view and order with*
3. You can then send a proof sheet listing the unique URL and *Ticket Code* to your client, or set up your account with your online hosting program to send out an email listing this information

Note: *A quality internet connection is required to activate your software, submit orders to your lab and upload projects/online galleries. The following website will give your lab a good idea where you are and where you should be in respect to bandwidth.* ***Upload bandwidth is the most important****. Check your speed here: www.speedtest.net*

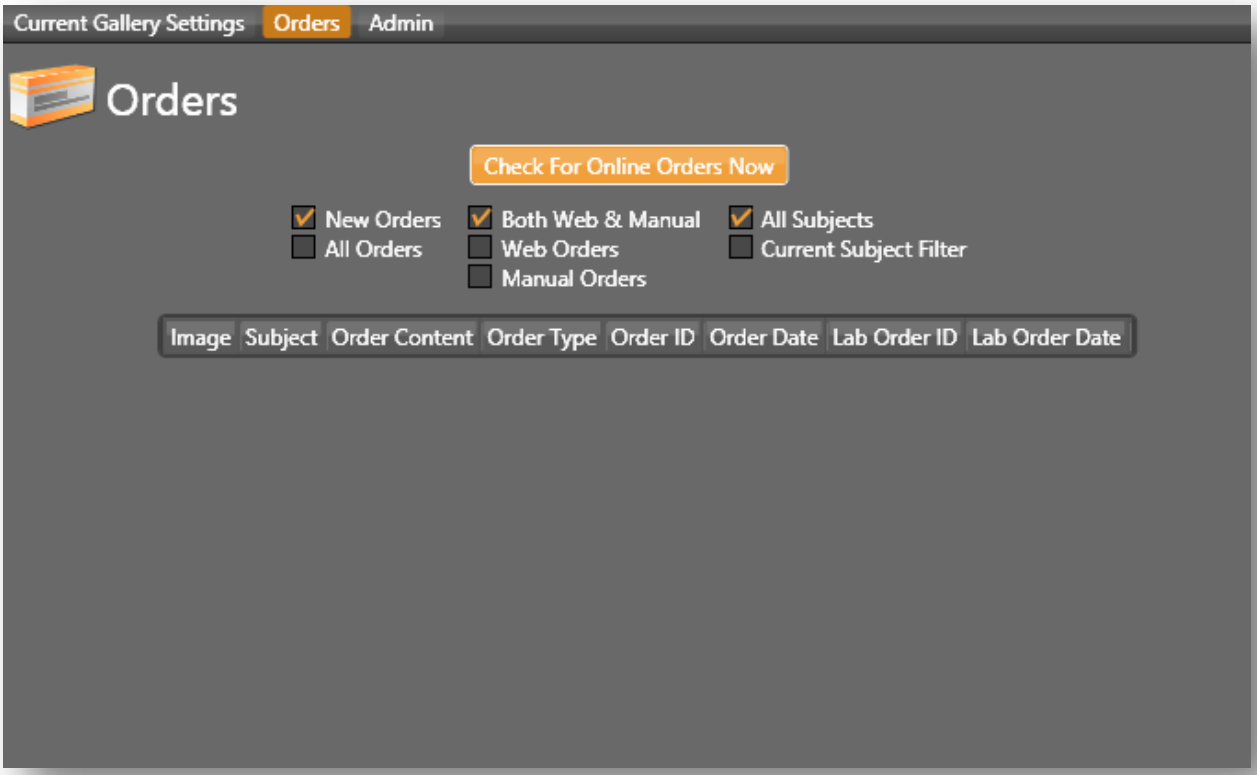


Retrieving and Submitting Online Orders to Your Lab

Once a client has ordered and paid for their packages via your online hosting vendor, you are then able to pull that packaging information back into Flow® to submit to your lab for processing. To do this:

1. Open the correct vendor gallery by clicking on the *Online Galleries* button on the top right hand section of your toolbar
2. Go to *Orders*
3. Click *Check For Online Orders Now*
4. You can then go to *Submit Orders* to submit your online orders to your lab

Note: *A quality internet connection is required to activate your software, submit orders to your lab and upload projects/online galleries. The following website will give your lab a good idea where you are and where you should be in respect to bandwidth.* ***Upload bandwidth is the most important****. Check your speed here: www.speedtest.net*

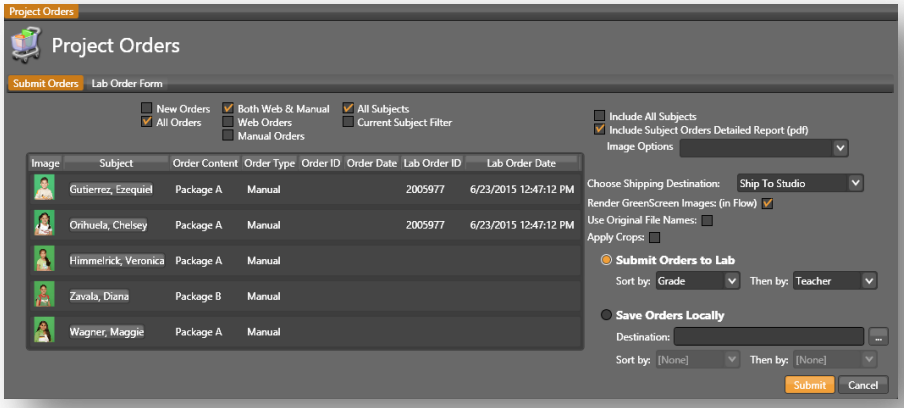


Submitting Orders to Lab

After fully completing a job in Flow®, including package entry, green screen, cropping, pulling down online orders, etc., you are now ready to submit your orders to your lab for processing. To do this:

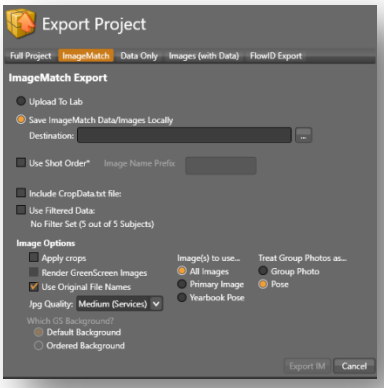
1. Press the shopping cart icon in either your project details, capture screen or on the top right hand side of your toolbar
2. Select which orders you would like to submit – *New Orders*, *All Orders, Previous Order, Web or Manual orders, All Subjects* or *Current Subject Filter*
3. Select whether to *Include All Subjects* or leave unchecked to only submit those subjects who ordered packages ***Note:*** *You will want to have this checked if you want your lab to create Yearbook CD's, composites, mugbooks, etc.*
4. Choose your shipping method – either *Ship to Studio* or *Ship to School*
   Note: *The school's shipping information will be the address you set up in your organization.*
5. If you would like to send your rendered green screen images, check *Render GreenScreen Images*. To send your original images with no green screen work done, leave unchecked.
6. If you set up Flow® to rename your images, and you wish to keep this filename format when you send to your lab, select *Use Original Filenames*
7. To send hard cropped images to your lab, select *Apply Crops*. Otherwise, select *Send Crop Data* so your lab can see your crops and adjust if needed
8. Choose to *Submit Orders to Lab* and choose how to sort your job
   Note: *To keep a copy of your submission on your computer, you can select Save Orders Locally. Otherwise, you can pull order information later from your Reports screen*
9. Click *Submit*
10. Complete your *Lab Order Form* and click *Save*
11. After you receive a dialog box saying *Done*, you can check on your upload status by clicking *Upload Status* from your *Project Screen*

Note: *A quality internet connection is required to activate your software, submit orders to your lab and upload projects/online galleries. The following website will give your lab a good idea where you are and where you should be in respect to bandwidth.* ***Upload bandwidth is the most important****. Check your speed here: www.speedtest.net*



Exporting from Flow®

Flow offers multiple exports that you can save locally or submit directly to your lab as well. These exports include a *Full Project Export*, an *ImageMatch© Export*, a *Data Only* export, an *Images with Data* export and a *FlowID* export



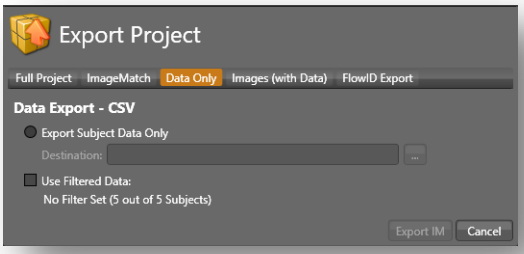
ImageMatch© Export

This export will include all of your images, a .CSV file of all your data inside of Flow®, a folder of green screen backgrounds used and a Flow.prm file. The Flow.prm file is used inside of our ImageMatch© software to read package information. To utilize this export:

1. Press the icon depicting a red arrow pointing up in either your project details or on the top right hand side of your toolbar
2. Select the *ImageMatch©* tab
3. Select whether to upload your export directly to your lab or to save locally. If saving locally, press the three dots to browse out for a location to save your export
4. To export your images and data in shot order, select *Use Shot Order*. This will rename your images to a sequence number before the image name, so if you would like to add a prefix add this information to the *Image Name Prefix* box
5. To export out a cropped data file, rather than hard cropped images, select *Include CropData.txt file*
6. If you have a *Filter* set and you wish to export only those subjects within the filter, check *Use Filtered Data*
7. Select your *Image Options*
    a. *Apply Crops* will hard crop your image.
    b. *Render GreenScreen Images* will export all of your green screen images. You can then select whether to export the *Default Background* or the *Ordered Background*
    c. *Use Original File Names* will export your images using *Rename Images* option you set up in Flow®
    d. *Jpq Quality* will allow you select whether you need to export *Medium* resolution images for Service items or *High* resolution images for production
8. Select which *Image(s) to use*
    a. *All Images* will export all images in your current job
    b. *Primary Image* will export only images flagged as the Primary Image
    c. *Yearbook Pose* will export only images flagged as the Yearbook Pose
9. Select how to *Treat Group Photos*
    a. *Group Photo* will export one copy of the group image, and have the corresponding record(s) refer to this image as the group image in their data file
    b. *Pose* will export one copy of the group image. In the subject's data you will see one line of data for their main pose, and one line of data for their group image, making multiple records for this subject when imported into other programs such as ImageMatch©

Data Only Export

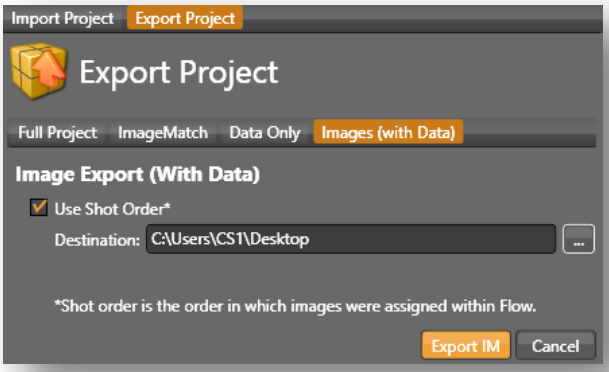
This export will give you a .csv file of all your data in your current job. To utilize this:



1. Press the icon depicting a red arrow pointing up in either your project details or on the top right hand side of your toolbar
2. Select the *Data Only* tab
3. Choose to *Export Subject Data Only*
4. Press the three dots to browse out for a location to save your data file
5. If you have *Filtered* your data and would like to export out only your filtered data, check *Use Filtered Data*
6. Press the *Export* button to begin your export

Images (with Data) Export

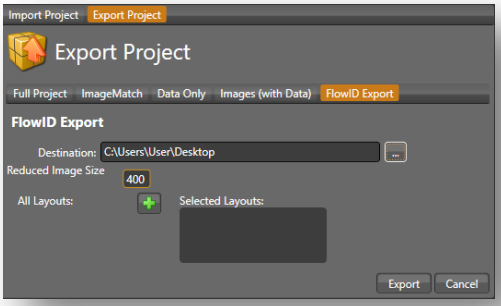
This export will give you a .csv file of all your data in your current job as well as a copy of all of your original, untouched images. To utilize this:



1. Press the icon depicting a red arrow pointing up in either your project details or on the top right hand side of your toolbar
2. Select the *Images (with data)* tab
3. Press the three dots to browse out for a location to save your export
4. Press the *Export IM* button

FlowID Export

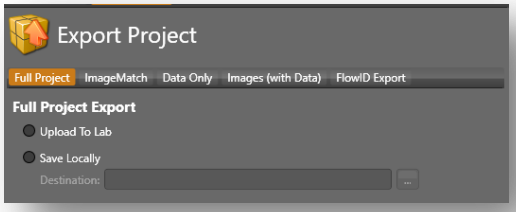
This export will give you a .paf file of your job, with the ability to reduce your image sizes as well as choose your ID cards you wish to include with your project. This export works in conjunction with FlowID, where schools can reprint ID cards.



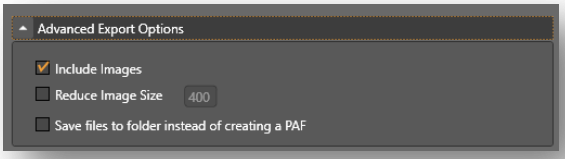
1. Press the icon depicting a red arrow pointing up in either your project details, capture screen on the top right hand side of your toolbar
2. Select *FlowID Export*
3. Press the [...] button to browse out for a location to save your export
   Note: *We recommend saving to your desktop, rather than directly to a jump drive or server*
4. Select your *Reduced Image Size*
5. To include any layouts you have created for this school with the export, press the green plus sign next to *Selected Layouts*. From the drop down list of layouts provided, press the green plus sign next to all the layouts you wish to include with your export
6. Press *Export* to begin the export process – you will receive a PAF file named after your Flow® job
7. Move your exported PAF file to a jump drive, CD, dropbox, etc. to bring to the school

Full Project Export

This export will export your entire project from FLOW to then transfer to another FLOW station, or to save as a backup on an external drive. This .paf file that is created will include all data, images, packages and any project preferences set for the current job.



1. Press the icon depicting a red arrow pointing up in either your project details, capture screen on the top right hand side of your toolbar
2. Select the *Full Project* tab
3. Choose whether to *Upload to Lab* or to *Save Locally*
4. If saving locally, press the three dots to browse out for a save location on your machine
5. Save to an easy to find location (for example, your desktop)
6. To include any layouts you have created for this school with the export, press the green plus sign next to *Selected Layouts*. From the drop down list of layouts provided, press the green plus sign next to all the layouts you wish to include with your export
7. Click *Export* - This export will create a .paf file
8. Move this .paf file onto a CD/DVD/USB drive/Network to transfer to your other Flow® station(s)
   Note: *Exporting directly to your USB drive or Network is not recommended*
   Note: *There are advanced options as well which are typically used as backups only. These options are the ability to not export images, reduce the image sizes and to save the export to a folder rather than a .paf file*



Flow® Reports

Flow® offers several different reports you can use at different stages in your job. These reports are:

- ***Catalog Packages*** – Use this report to print out barcodes of your packages, or to get a listing of all packages listed in your catalog.
- ***Subject Orders Summary*** – Use this report to get a listing of all orders placed. You can choose *New Orders*, *All Orders*, orders placed in a *Current Filter* and orders you submitted to your lab
- ***All Subject s*** – Use this report to get a listing of all your subjects in your job. You can also use a *Data Only Export* to get this information
- ***Photographed Subjects*** – Use this report to get a listing of all subjects who have an image assigned to their record, along with their image name that was assigned
- ***Unphotographed Subjects*** – Use this report to get a listing of all subjects in your job who do not have an image assigned to their record
- ***Subject Orders Detailed*** – Use this report to get a detailed listing of all packages ordered for each subject. You can choose *New Orders*, *All Orders*, orders placed in a *Current Filter* and orders you submitted to your lab
- ***Order Form*** – Use this report to get a copy of your order form that is submitted to your lab
- ***Subject Barcodes*** – Use this report to create camera cards for all your subjects loaded into your job
- ***New Ticket Barcodes*** – Use this report to create blank camera cards
- ***Lab Billing Report*** – Use this report to get a billing report from your lab. You can choose *New Orders*, *All Orders*, orders placed in a *Current Filter* and orders you submitted to your lab
- ***Slate*** – Use this report to create slates for all your subjects loaded into your job

Once your report is selected and set up properly, you have the option to send directly to your printer, create a PDF or create a CSV file. You can use the magnifying glasses to zoom in or out of your display screen. You can use the 4 other boxes to choose how to have your pages displayed in the preview pane – *100%, Page Width, Whole Page* or *Two Pages*.