BarTender™

Getting Started with BarTender Cloud

USER GUIDE

SUPPORTS: BARTENDER® CLOUD

Contents

# Getting Started with BarTender Cloud

BarTender® enables organizations around the world to improve safety, security, efficiency, and compliance by creating and automating the printing and control of labels, barcodes, RFID tags, plastic cards, and more. BarTender gives you the tools to easily and efficiently design labels and templates; to configure and connect to data sources and business systems; and to launch print commands from any system, operating system (OS), or device.

BarTender Cloud is a software as a service (SaaS) product that offers click-and-print functionality in a cloud-based setting that makes it easy to manage, select, and print BarTender documents. By using BarTender Cloud, anyone can print BarTender documents remotely, no matter what kind of device, operating system, or internet browser is being used.

After you sign in to BarTender Cloud, you are taken directly to the Home page. This page contains links to take you directly to some of BarTender Cloud's most utilized features. It also gives you a Print Activity dashboard and external links to Seagull resources and support. You can click 🕜 on theBarTender Cloud menu at any time to access the help documentation for more information. You can also click the Profile menu (displayed as either your profile image or initials on right-hand side of the header bar on any BarTender Cloud page) to display a drop-down menu where you can access your My Profile page.
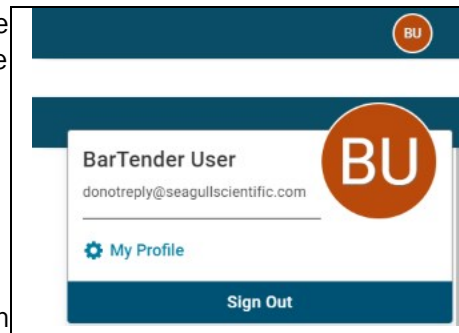
All the BarTender Cloud pages include the header bar and the BarTender Cloud menu. The options that appear in the BarTender Cloud menu vary depending on your access to these views, which in turn depends on your user role.

By default, the BarTender Cloud menu displays icons only.

To open the BarTender Cloud menu, click ☰. You can also click an icon directly on the menu, which will either load the new page (if the icon represents a direct link), or expand the BarTender Cloud menu to display additional information and options (if the icon represents a group of links).
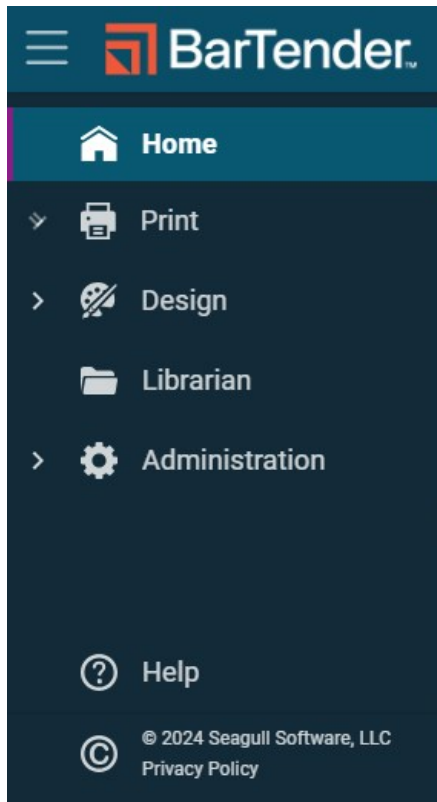
Locating and Printing Your BarTender Documents

Use the Print Console to quickly locate and print your BarTender documents.

To open Print Console

1. On the header bar, click ▤.

2. Click **Print**.

3. Click **Print Console**.

Locating Documents

The left navigation pane in the Print Console displays your documents in a folder hierarchy. You can browse these folders and spaces to locate the document that you want, or you can use the search bar to filter the documents that are displayed for the selected folder. You can also group and sort documents and folders by name, keyword, or other attributes to make them easier to find.
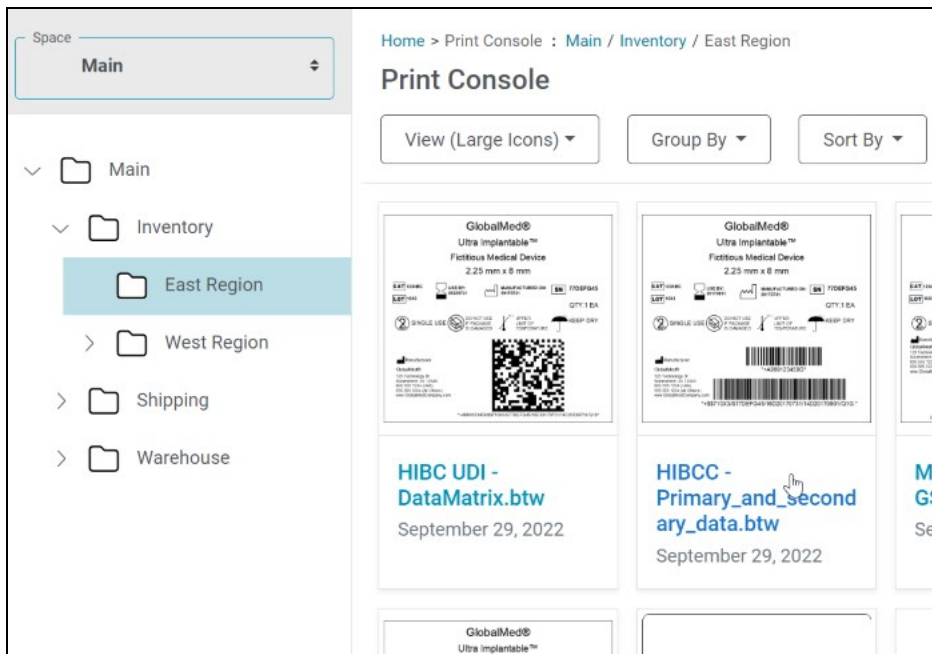
If your subscription includes Spaces, you can create and curate spaces (i.e., repositories) to organize files, apply published workflows, and create additional storage options.
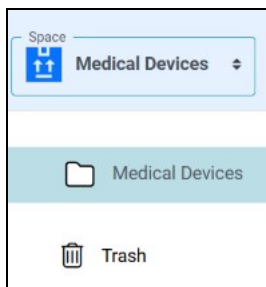
Use breadcrumbs to navigate back to the Print Console or to any previous folders in the current chain. The blue words in the breadcrumbs are links and you can navigate to that location simply by clicking the link in the breadcrumbs.

Breadcrumbs are structured into two parts, separated by a colon character.

- **Feature access breadcrumb**. Hierarchical levels on the left side of the colon that are separated by a greater than ">" symbol. Matches the structure presented within the BarTender Cloud menu.

- **Content hierarchy breadcrumb**. User-defined content such as **Librarian** folders and files, and printer locations that display on the right side of the colon. Content breadcrumb hierarchy is separated by a slash "/" character.
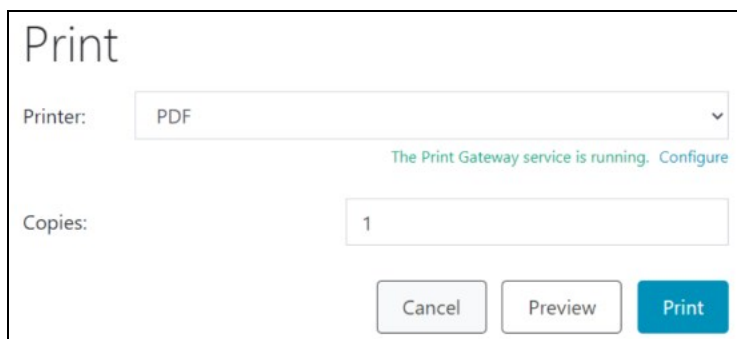
Home > Print Console : Main / Inventory / East Region

Printing Documents

The first time you use BarTender Cloud to print a document, you are prompted to install the Print Gateway service. BarTender Cloud uses this service to automatically detect connected printers, and it takes advantage of the nearly 10,000 printer drivers that are available with Drivers by Seagull™, which are already installed in BarTender Cloud. You can print to any of these printers without needing to install individual printer drivers. Printing to PDF is also supported.

To print a document

1. In the document selection pane, click a document to display the **Print** page.

2. In the **Printer** list, select the printer that you want.

3. In the **Copies** field, enter the number of copies that you want to print. If your document contains serialized data, enter the number of serial numbers and the number of copies per serial number that you want to print.

4. To preview the document before you print it, click **Preview**. Otherwise, click **Print.**

Managing Your BarTender Documents

Use the Librarian to manage and organize your files and folders. The Librarian page displays your folder hierarchy and items in a selected folder; it provides features you can use to upload new items; and it enables you to sort, move, rename, search, delete, and so on.

You can also create a new BarTender document by using a preconfigured template or the BarTender Cloud Designer. Your new document is ready to print right away and is saved in BarTender Cloud in the space and folder that you specify.

- To display the **Librarian** page, click ☰ on the toolbar, and then click **Librarian**.
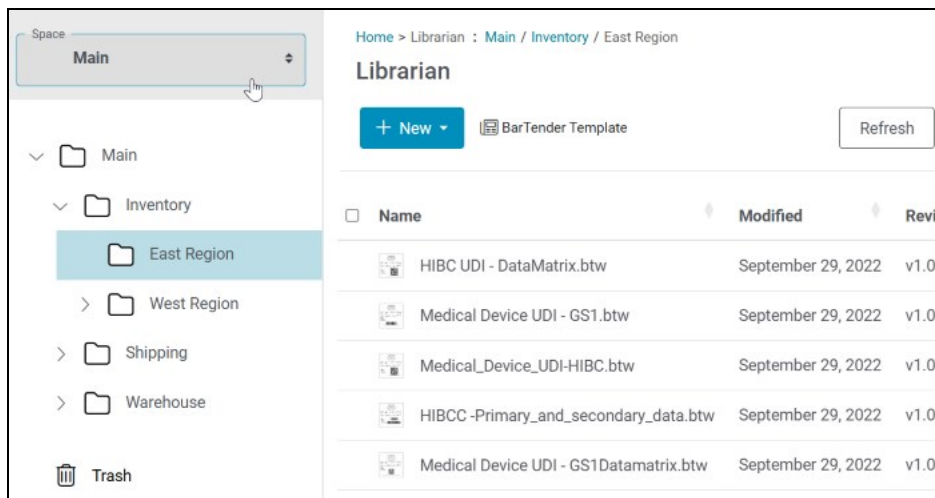
Creating a New BarTender Document from a Template

BarTender Cloud provides a variety of preconfigured templates that you can use to print labels quickly and efficiently without using BarTender Designer. When you create a new BarTender document by using a template, the document is saved in BarTender Cloud in the space and folder that you specify.

To create a new BarTender document by using a preconfigured template

1. Click ☰ on the toolbar, then click Design and select Design Templates.

2. In the Design Templates dialog, select the space and folder where you want to store the new document.

3. Click **Launch Template Wizard**.

4. Scroll to find the template that you want. Alternatively, click **Add Filter** or use the search bar to filter the available templates.
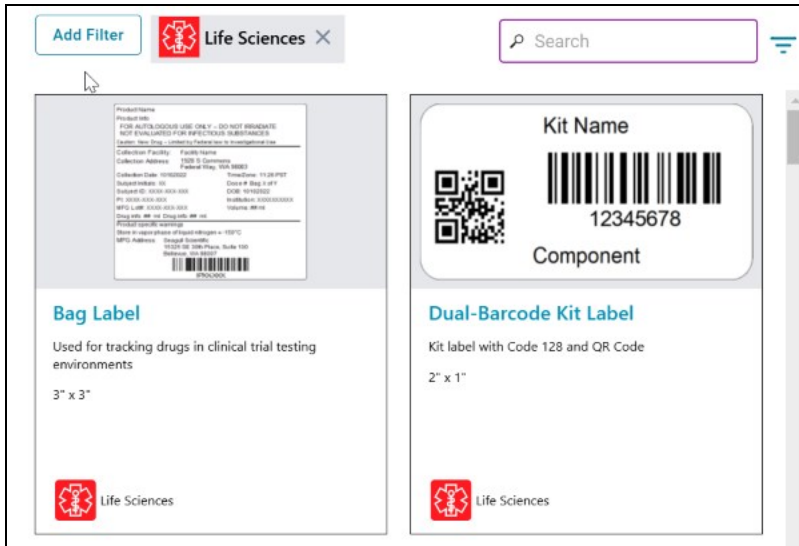
5. Point to the template that you want, and then click **Create**. Alternatively, click the template.

6. Follow the steps in the Template Assistant to name your document, specify and import data sources, and assign data sources to the fields in the template.

Alternatively, you can run the template wizard from Librarian.

1. In Librarian's folder navigation pane, select the space and folder in which you want to create and save the new document.

2. Open the Template Assistant by using one of the following methods:

   - On the toolbar, click **New**, and then click **Document From BarTender Template**.
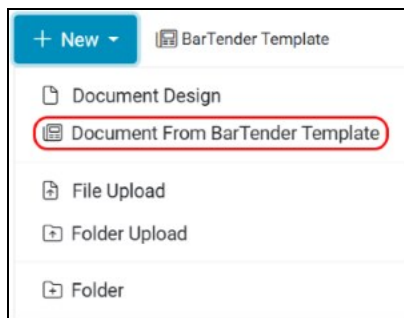
- On the toolbar, click **BarTender Template**.

Creating a New BarTender Document by Using BarTender Cloud Designer

BarTender Cloud includes a cloud-based version of BarTender Designer, called BarTender Cloud Designer, which you can use to create and edit BarTender documents. When you create a new BarTender document by using BarTender Cloud Designer, the document is saved in BarTender Cloud in the folder that you specify.
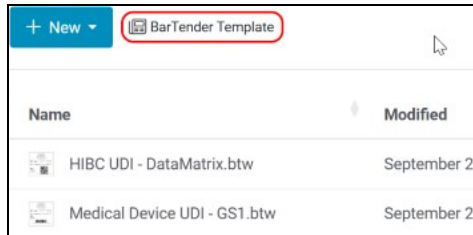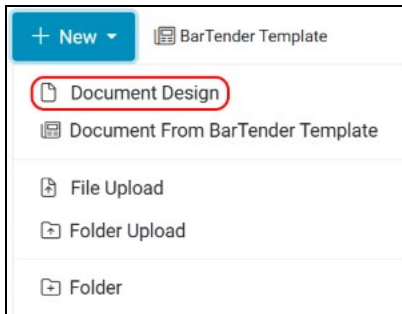
To create a new document by using BarTender Cloud Designer

1. In Librarian's folder navigation pane, select the folder in which you want to create and save the new document.

2. On the toolbar, click **New**, and then click **Document Design**.

3. In the **New Document Design** dialog, enter a name for the document, and then click **Design**. BarTender Cloud opens the BarTender Cloud Designer page.

4. On the BarTender Cloud Designer page, design your new document. You can open the BarTender Cloud Designer help system for assistance by pressing F1 or clicking **Help** in any dialog or page on which a **Help** button appears.

5. Click **Print** to print your document, and/or click **Save** to save it to BarTender Cloud in the folder that you specified.

Uploading Documents and Folders

To get started with BarTender Cloud, upload documents, files, images, and folders on the Librarian page.

To upload items

1. In Librarian's folder navigation pane, select the folder that you want to add your items to.

2. Click **New**, and then click **File Upload** or **Folder Upload** to browse for the items that you want. Alternatively, drag and drop items into the item list pane to upload them.

BarTender documents that use data entry forms, cloud database connections, and embedded database tables are supported for uploading.

> For security purposes, BarTender documents that contain certain actions are not supported for uploading.

Creating New Folders

To help you organize your documents, you can create any number of folders and subfolders.

To create a new folder

1. In Librarian's folder navigation pane, select the space (if applicable) and folder in which you want to create the new folder.

2. On the toolbar, click **New**, and then click **Folder**.

Managing Documents and Folders

When you select a document or folder in Librarian's item list pane, you can use the options on the toolbar above the pane to perform various operations, such as printing, downloading, and copying. You can also add revision comments to a document, view the revision history, and assign permissions to access the selected item to specific users and groups.

The options that appear on the toolbar vary depending on your permissions to access a particular item, on whether an item is selected, and on what type of item is selected. For more information, refer to the "Librarian" topic in the BarTender Cloud help system.
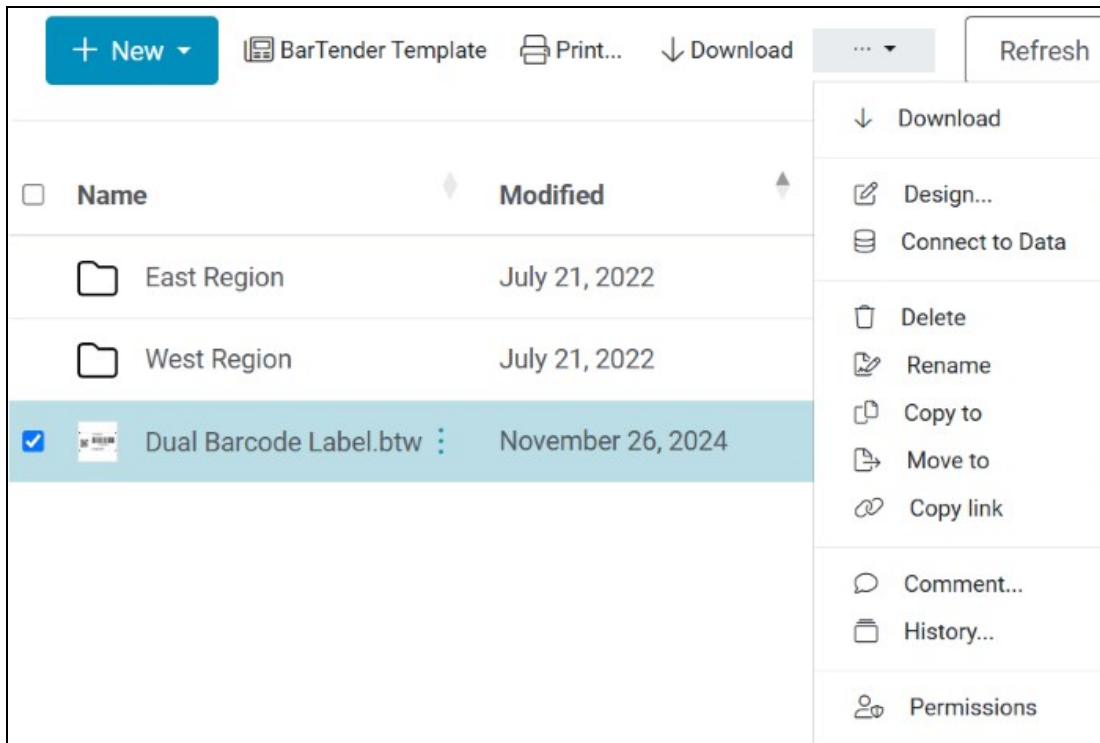
Depending on the size of your browser window, some of these options might not be visible. In this case, click ··· ▾ to view these options in a menu, as shown.

Using Workflows

A workflow is a series of steps that define the life cycle of a BarTender Cloud document or other file. A customizable workflow defines the states and transitions of the process and helps you manage the life cycles of your files and documents. If your subscription includes workflows, BarTender Cloud provides customizable workflows that enable you to define and control these business processes.

Workflows are created and managed in the **Workflow** section of the **Design** group.

Use the **Librarian** to move a document through a workflow.

Color-coding Folders

To make your documents easier to find, you can change the color of the folder icons. To do this, select the folder that you want, click **Folder Color** on the toolbar, click **Change color**, and then use the color selector to select the color that you want.
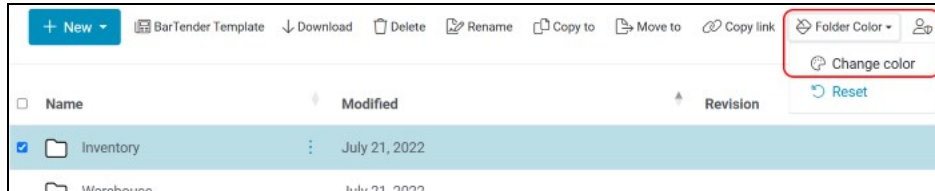
Managing Your BarTender Cloud Account

Use the Administration menu to access the account management features that are available for your role, as follows:

- Administrators can perform the following functions:

    - Configure global account information

    - View usage statistics and event log data

    - Manage user accounts, groups, and roles

    - Set up and manage spaces

    - Upload and manage fonts

    - Register a web application that can be used to access the BarTender Cloud REST API to automate printing processes

- Both administrators and non-administrators (depending on their role and on the permissions that they are granted) can perform the following functions:

    - View subscription information

    - Manage printers

    - View and export print history data

    - Reprint whole print jobs or individual items

    - Use the **My Profile** page to update their profile information and upload a profile image for themselves *Accessed from the Profile menu in the header bar of any BarTender Cloud page.*

    - Use the **BarTender Cloud API** page to manage a private access token *Accessed from the API Keys menu item*

- To access the Administration menu, click ☰,then click **Administration**.

> ℹ️ Access to the BarTender Cloud REST API is included with the Automation subscription plan.
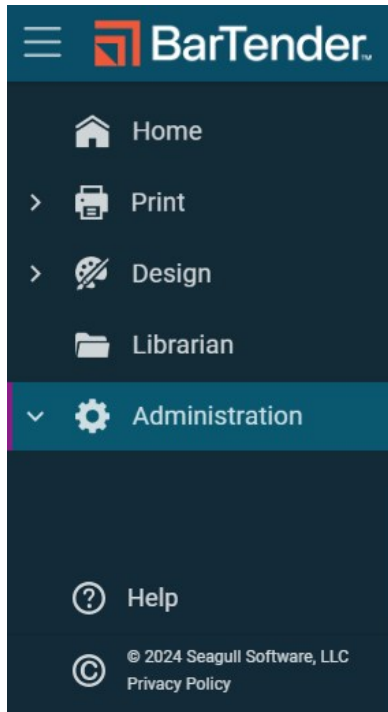
Configuring Global Information

Open the **Administration** menu and click **Settings**, **Global Settings** to display the **Global Settings** page, where you can configure the following information:

- In the **Company Information** area, you can enter and edit your company's name and address and your organization domain ID and upload a logo.

- In the **Points of Contact** area, you can add, change, or remove the email addresses of the users in your company who are points of contact for BarTender Cloud account notifications, billing notifications, and technical administration.

- In the **Security** area, you can configure two-factor authentication, and specify a third-party authentication service.

Customizing Your Organization's Information

You can replace the default BarTender Cloud logo with your company logo as well as customizing your company's name, ID, and address on the **Global Settings** page.

To set or modify branding information, click **Change** beside the information you want to work with. If you click **Reset** for the Brand Logo field, BarTender Cloud returns to its default logo.

> ⚠️ You cannot undo resetting the logo. If you reset the logo and want to revert back to your logo, you will need to re-upload your company's logo.

Configure Print Settings

Open the **Administration** menu and click **Settings**, **Print Settings** to display the **Print Settings** page, where you can specify how BarTender Cloud appears to the print operator and how it behaves before, during, and after a print job is run. The **Print Settings** page is divided into three sections: Print Settings, Print History Retention Policy, and Reprint. Each section contains controls for defining how BarTender Cloud prints and retains its print history.

Viewing Print History Data and Reprinting Items

Open the **Print** menu and click Print HIstory/Reprint to display the **Print History** page, which you can use to view, sort, and filter your print history data; to export data to an external file; and to reprint whole print jobs or individual printed items.

Creating and Modifying a User Account

Open the **Administration** menu and click **Security**, **Users** in the left navigation pane to display the **Users** page, where you can view, create, search, edit, and manage all your user accounts. This page displays user names, each user's roles, and their account status: Active, Deactivated, or Invited.

To create a new user account

1. On the **Users** page, click **Create User**.

2. In the **Create User** dialog, enter the new users first and last names.

3. Enter the new user's email address in the **Email** field.

4. If the user is an administrator, select the **Set as administrator** checkbox.

5. If the user has API access, select the **Allow password-based API access** checkbox.

6. If the user can use two-factor authentication, select the **Enable two-factor authentication** checkbox.

7. Assign one or more roles to the user in the **Role** list.

8. Click **Invite**. An invitation to register with BarTender Cloud is emailed to the user.

To modify a user account

- On the **Users** page, in the row of the user you want to work with, click the ⋮ icon, then click the option that you want.

  The options that are available depend on the user account's status and include the following:

  - **Resend invitation:** Sends another email invitation to register with BarTender Cloud to a user who has not yet responded to the first invitation.

  - **Edit:** Opens the user profile so that you can edit the user's first name, last name, and user roles. You can also allow password-based API access or enable two-factor authentication for a user (but not both).

  - **Change profile image:** Opens the **Choose and crop an image for user** dialog so that you can add a new profile image for the user.

  - **Remove profile image:** Deletes the current profile image.

  - **Reset password:** Sends a "reset password" email message to the user.

  - **Deactivate/Activate user:** Deactivates an active user account or activates a deactivated one.

  - **Delete user:** Deletes the user account.

Creating and Modifying User Groups

Open the **Administration** menu and click **Security, Groups** to display the **Groups** page, which you can use to create, edit, and delete user groups.

Creating and Modifying User Roles

Open the **Administration** menu and click **Security, Roles** to display the **Roles** page, where you can view, create, search, edit, and manage all your user roles. You can create any number of roles to assign to your user accounts. These roles define the permissions that each user has to access BarTender Cloud features.

To create a new user role

1. On the **Roles** page, click **Create Role**.

2. In the **Create Role** dialog, enter a name for the new role.

3. For each of the listed permissions, turn the permission on or off for the role.

To modify an existing user role

1. On the **Roles** page, in the row of the role you want to work with, click ⋮, then select **Edit**.

2. In the **Edit Role** dialog, make the changes that you want to the role's name and access permissions.

Managing Printers

Open the **Administration** menu and click **Printers** to display the **Printers** page, which you can use to view your printers as organized by their location or by the groups they are assigned to. You can also create and modify printer groups. Click a location or group name, and then click a printer to open its **Printer Details** page, where you can view and manage the printer's print queue, permissions, settings, and so on.

Managing Spaces

If your subscription includes Spaces, Open the **Administration** menu and click **Spaces** to display the **Spaces** page, where you can organize files, apply published workflows, and create additional storage options.

> Access to the BarTender Cloud REST API is included with the Automation subscription plan.

Managing Fonts

Open the **Administration** menu and click **Fonts** to open the **BarTender Cloud Fonts** page, where you can upload and manage custom TrueType and OpenType fonts.

Accessing the BarTender Cloud REST API

Open the **Administration** menu and click **API Keys** to display the **BarTender Cloud API** page, which you can use to view, copy, and refresh a private access token and/or to register a web application with BarTender Cloud.

> Access to the BarTender Cloud REST API is included with the Automation subscription plan.

Viewing Usage Data

Open the **Administration** menu and click **Usage** to display the **Usage** page, on which you view your account usage information.

Configuring Your User Profile Settings

Expand the Profile menu (⬤) and select **My Profile** to display the **My Profile** page, where you can view and edit your user profile, including general information and contact information. You can also use this page to send a password reset email message and to opt in or out of receiving email newsletters from Seagull Scientific about BarTender Cloud.

The following options are available:

- **User Information**: In this area, you can upload an image to use as a profile image and enter basic information such as name, address, job title, and company name.

- **Contact Information**: In this area, you can enter or edit your email address and phone number.

- **Security**: In this area, you can view information about the last time your account password was reset, and you can click **Reset Password** to send a password reset email message.

- **Terms/Email Preference**: In this area, you can click to view the BarTender Cloud Terms of Service and subscribe or unsubscribe from receiving email newsletters about BarTender Cloud.

Related Documentation

Technical Documents

To view and download technical documents, visit:

https://www.seagullscientific.com/resources/white-papers/

User Guides

- *Getting Started with BarTender*
  https://support.seagullscientific.com/hc/categories/200267887

BarTender Cloud Help System

- [BarTender Cloud](#)
- [Librarian](#)
- [Printing Documents](#)

Other Resources

- Please visit the *Getting Started with BarTender Cloud* page on the BarTender Support Portal website.

- Please visit the BarTender website at *https://www.seagullscientific.com*.