BarTender Cloud™
BY SEAGULL SCIENTIFIC

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 can click ⑦ on the toolbar to access the help documentation for more information. You can also click your profile image on the toolbar to display the main menu, where you can access your My Profile page and resources on the Seagull Scientific website.
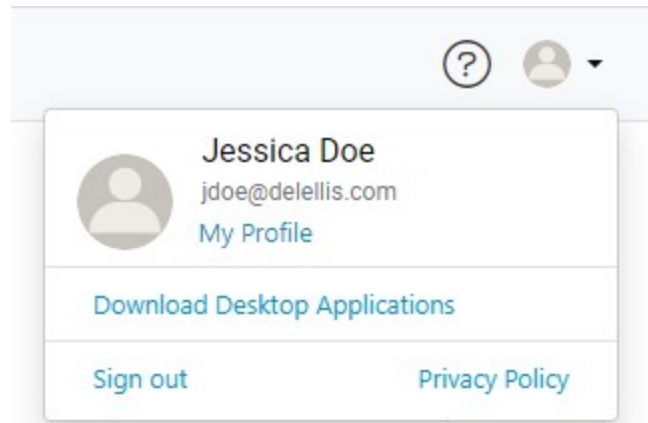
BarTender Cloud provides several views that organize the various features. The options and panes that appear in the main BarTender Cloud window vary depending on the view that is displayed, and your access to these views depends on your user role.

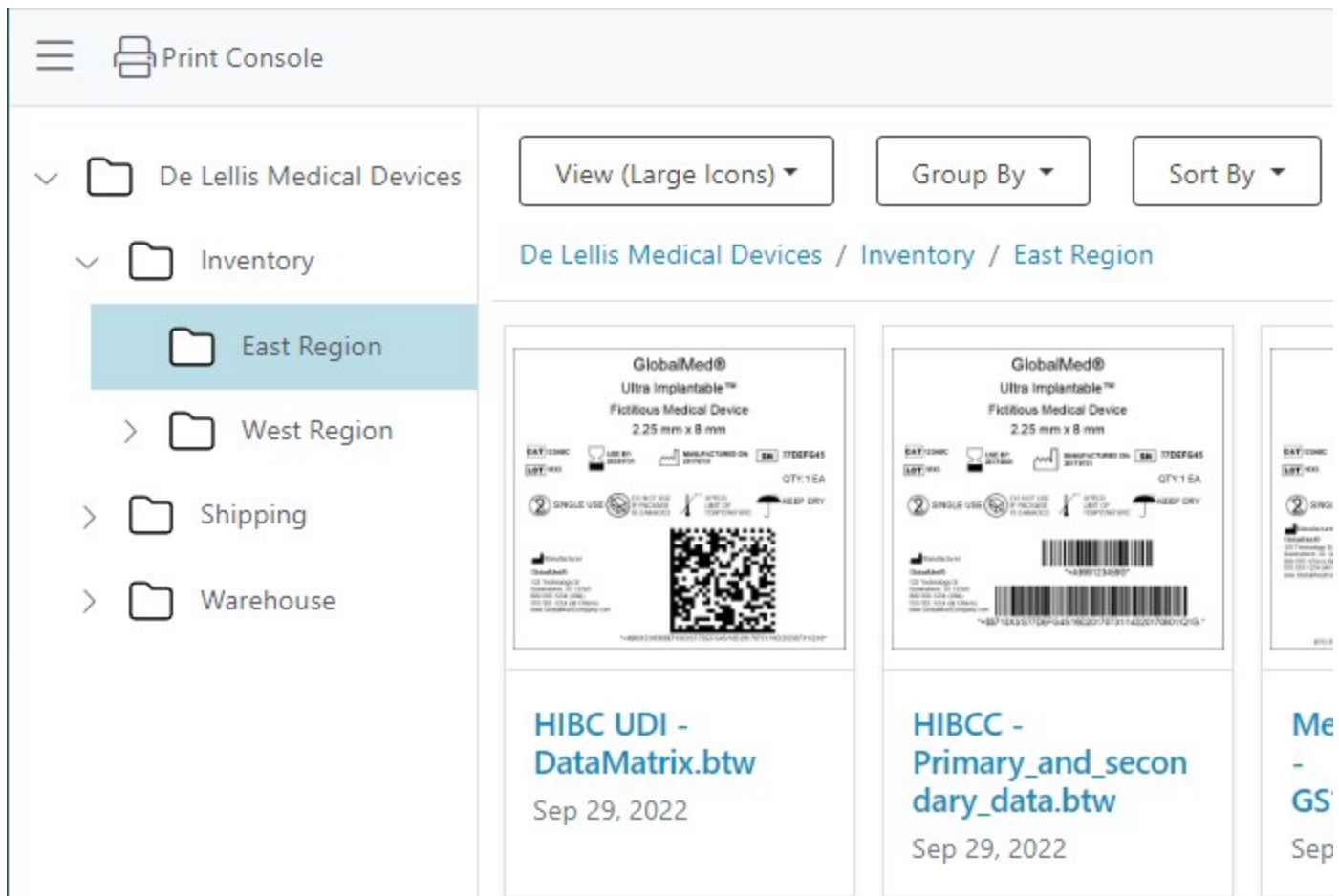To display the view navigation menu, click ≡ on the toolbar.
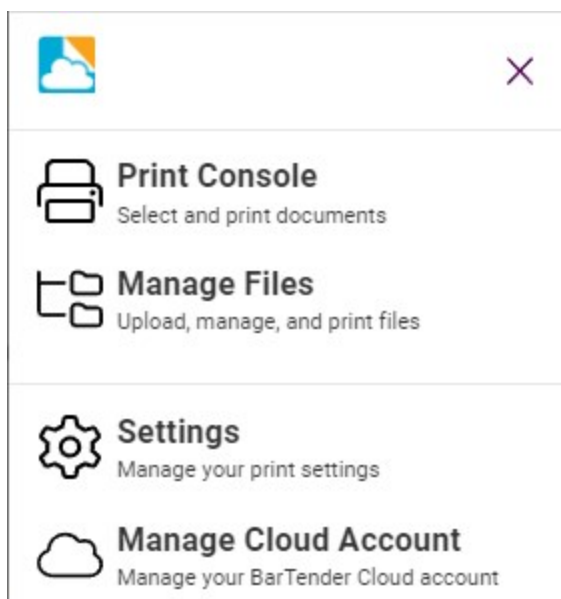
Locating and Printing Your BarTender Documents

Use the Print Console view to quickly locate and then print your BarTender documents. To display this view, click ☰ on the toolbar, and then click **Print Console**.

Locating Documents

The left navigation pane in the Print Console view displays your documents in a folder hierarchy. You can browse these folders 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.

Printing Documents

The first time that 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 8,000 printer drivers that are available with Drivers by Seagull™, which are already installed in BarTender Cloud, so 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 open 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**.

Print

Printer:

Avery 64-04 RFID ⌄

The Print Gateway service is running. Configure

Copies:

1

Cancel   Preview   Print

Managing Your BarTender Documents

Use the Manage Files view to manage and organize your documents and folders. This view displays your folder hierarchy, displays items in a selected folder, and provides features that you can use to upload new items and sort, move, rename, search, delete items, and so on.

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

To display the Manage Files view, click ≡ on the toolbar, and then click **Manage Files**.
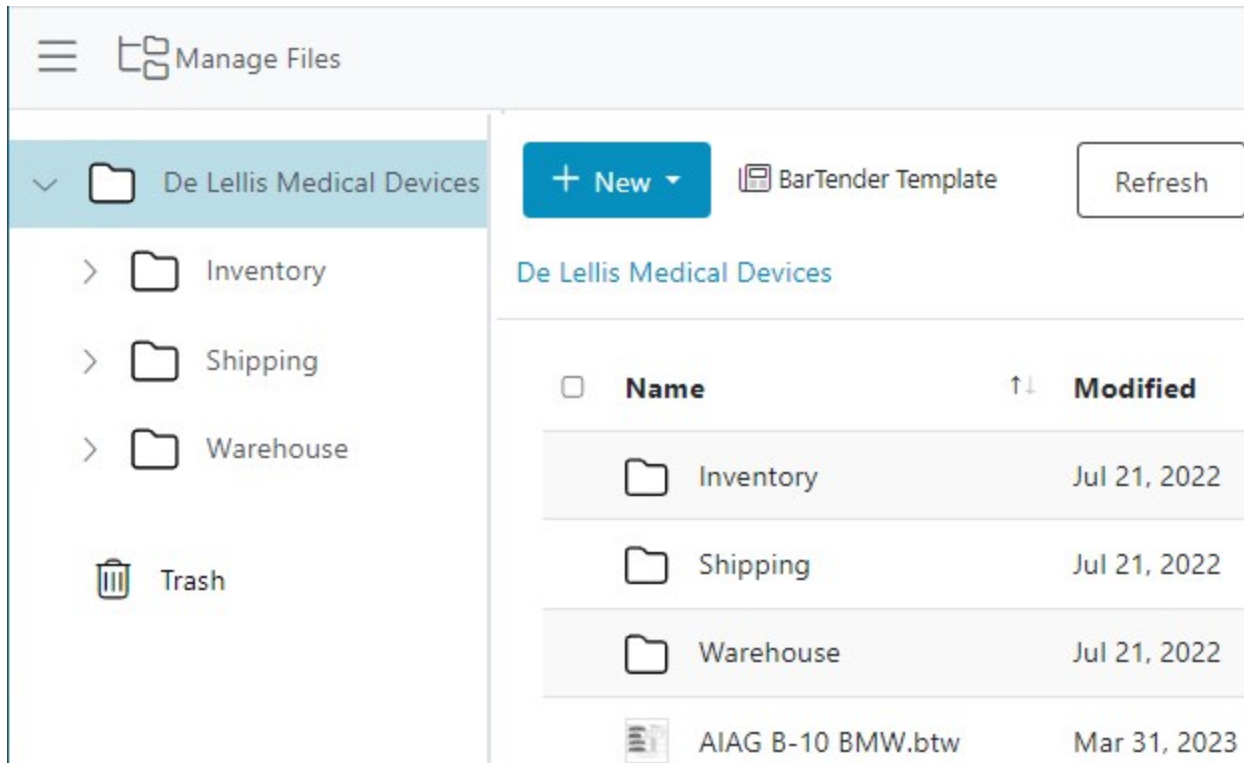

Creating a New BarTender Document from a Template

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 folder that you specify.

To create a new BarTender document by using a preconfigured template

1. In the folder navigation pane, select the 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**.
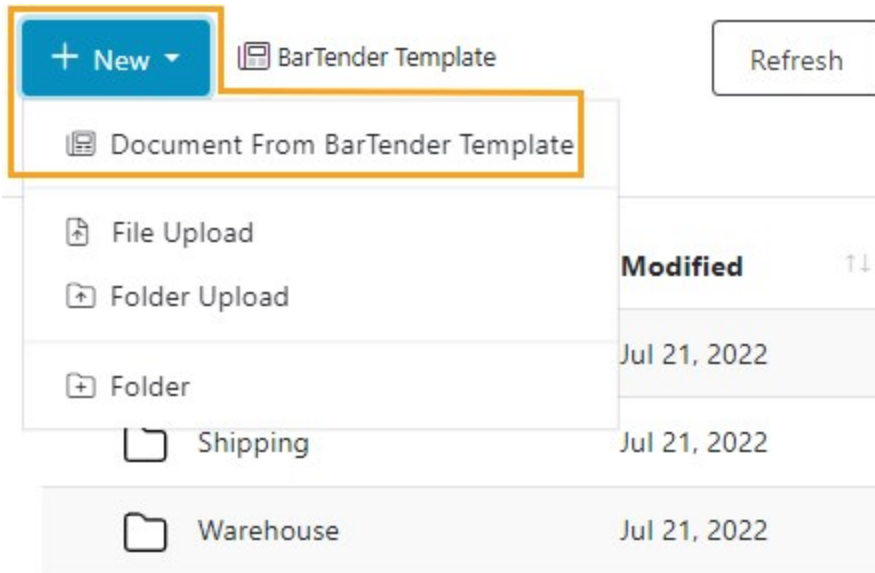
- On the toolbar, click **BarTender Template**.
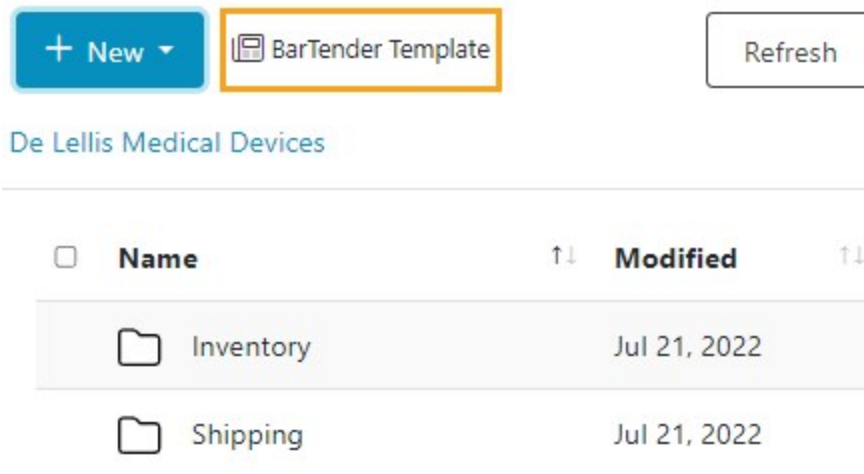
3. Scroll to find the template that you want. Alternatively, click **Add Filter** or use the search bar to filter the available templates.
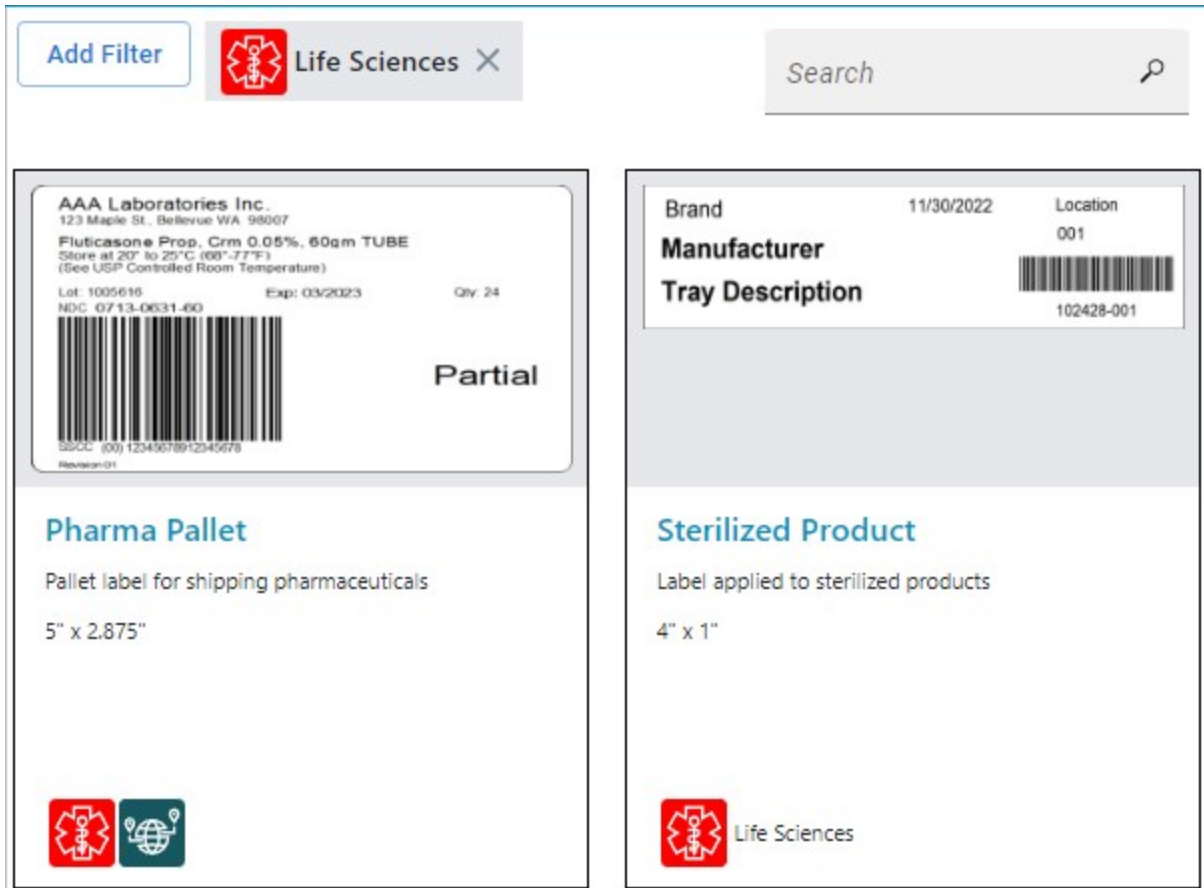
4. Point to the template that you want, and then click **Create**. Alternatively, click the template.

5. 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.

Uploading Documents and Folders

To get started with BarTender Cloud, upload documents and folders in the Manage Files view.

To upload items

1. In the 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 kinds of scripts, certain actions, and connections to non-cloud databases are not supported for uploading.

Creating New Folders

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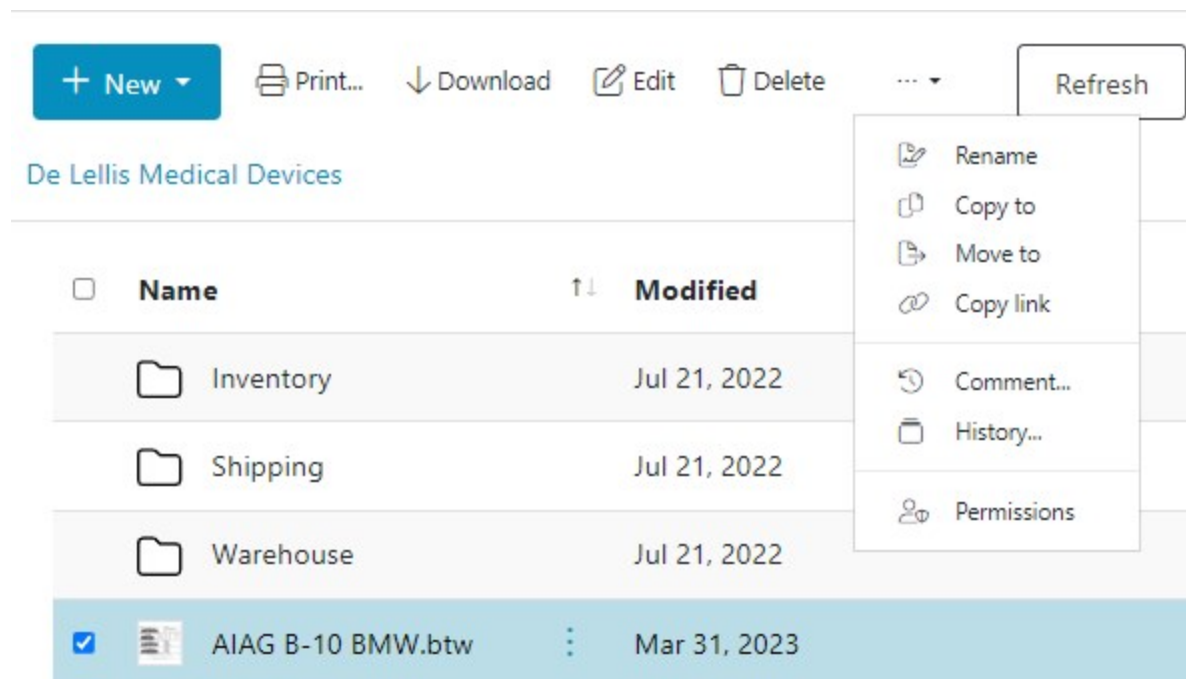
To create a new folder

1. In the folder navigation pane, select the 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 the 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 Manage Files View topic in the BarTender Cloud help system.
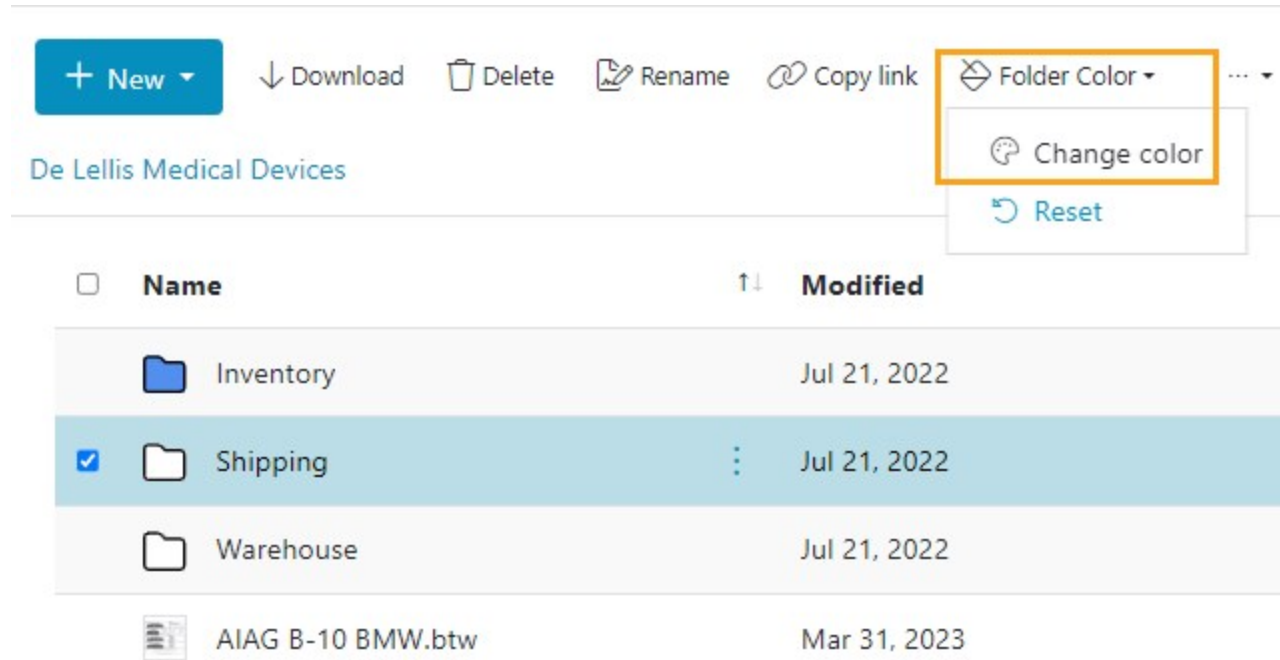
Depending on the size of your browser window, some of these options might not be visible. In this case, click ··· ▾ to view these options in a menu, as shown.

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.
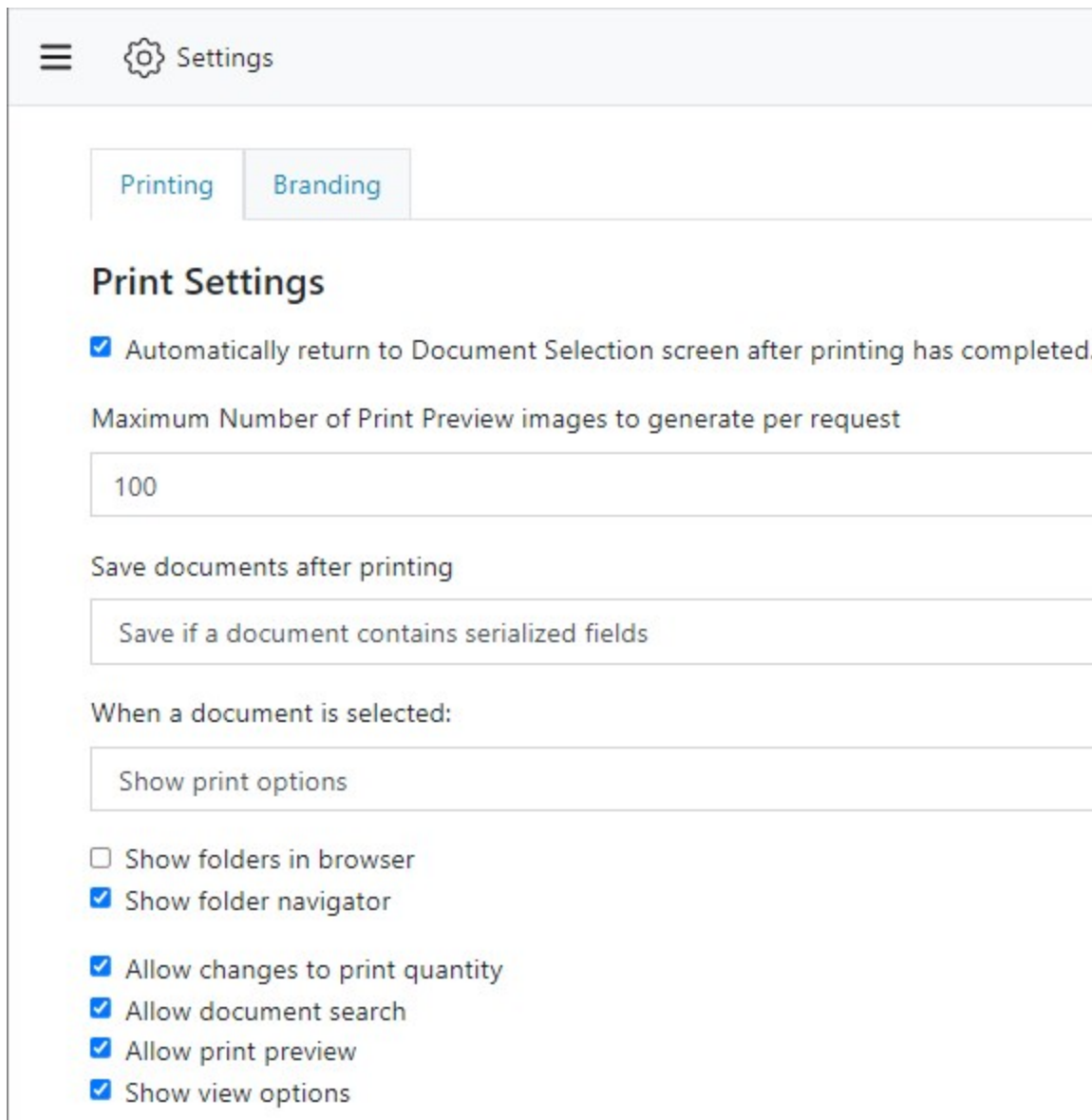
Configuring Print Settings and a Custom Logo

As an administrator, you can use the Settings view to configure print settings for BarTender Cloud and customize the BarTender Cloud interface with your company's logo. To display this view, click ☰ on the toolbar, and then click **Settings**.

Configuring Print Settings

When you click the **Printing** tab in the Settings view, you can use the **Print Settings** features to specify how BarTender Cloud appears to the print operator and how it behaves before, during, and after a print job is run.

Customizing Your Logo

You can replace the default BarTender Cloud logo with your company logo. To do this, click **Select new brand icon** on the **Branding** property page in the Settings view.
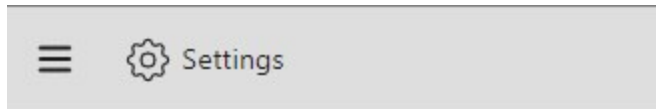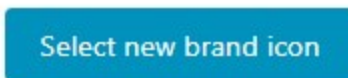
Managing Your BarTender Cloud Account

The Manage Cloud Account view provides administrators and non-administrators with role-specific features, as follows:

- Administrators can use all the property pages in this view to view and configure global account information; view usage statistics and print history data; view event log data; manage user accounts, groups, and roles; and register a web application that can be used to access the BarTender Cloud REST API to automate printing processes.

- Non-administrators can use the **General** property page to view subscription information, use the **My Profile** property page to update their profile information and upload a profile image for themselves, and use the **BarTender Cloud API** property page to manage a private access token.

Administrators can display this view by clicking ☰ on the toolbar and then clicking **Manage Cloud Account**.

Non-administrators can display this view by clicking the main menu in the upper right corner of the BarTender Cloud window and then clicking **My Profile**.
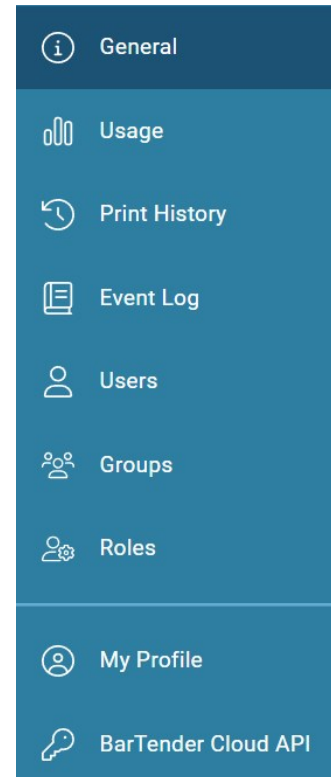
> ⓘ   Access to the BarTender Cloud REST API is included with the Automation subscription plan.

Configuring General Information

Click **General** in the left navigation pane to display the **General** property page, where you can configure the following information:

- In the **Company Information** area, you can enter and edit your company's name and address.

- 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.

Viewing Usage Data

Click **Usage** in the left navigation pane to display the **Usage** property page, which you can use to view your account usage information.

Viewing Print History Data

Click **Print History** in the left navigation pane to display the **Print History** property page, which you can use to view, sort, and filter your print history data. The Print Job Summary dashboard provides an overview of the data, and the table below the dashboard displays detailed information.

Creating and Modifying a User Account

Click **Users** in the left navigation pane to display the **Users** property 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, click **Create User**. In the **Create User** dialog, enter the new user's email address in the **Email** field, assign one or more roles to the user in the **Role** list, and then click **Invite**. An invitation to register with BarTender Cloud is emailed to the user.

To modify a user account, point to the user name, click the ⋮ icon that appears, and 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 an email invitation to register with BarTender Cloud to a user who has not yet responded to the initial invitation.

- **Edit**: Opens the user profile so that you can edit the user's first name, last name, and user roles.

- **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

Click **Groups** in the left navigation pane to display the **Groups** property page, which you can use to create, edit, and delete user groups.

Creating and Modifying User Roles

Click **Roles** in the left navigation pane to display the **Roles** property 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, click **Create Role**. In the **Create Role** dialog that appears, enter a name and description for the new role, and then customize the permissions that you want the role to have.

To modify an existing user role, click ⋮ next to the role that you want, and then click **Edit**. In the **Edit Role** dialog, make the changes that you want to the role's name, description, and access permissions.

Configuring Your User Profile Settings

Click **My Profile** in the left navigation pane to display the **My Profile** property 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.

Accessing the BarTender Cloud REST API

Click **BarTender Cloud API** in the left navigation pane to display the **BarTender Cloud API** property 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.

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
- Managing Your Documents
- 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*.