

Getting Started with BarTender Cloud

USER GUIDE

SUPPORTS: BARTENDER® CLOUD



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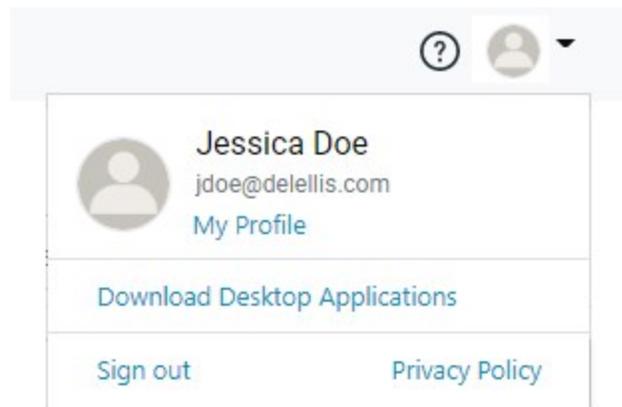
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Getting Started with BarTender Cloud

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.

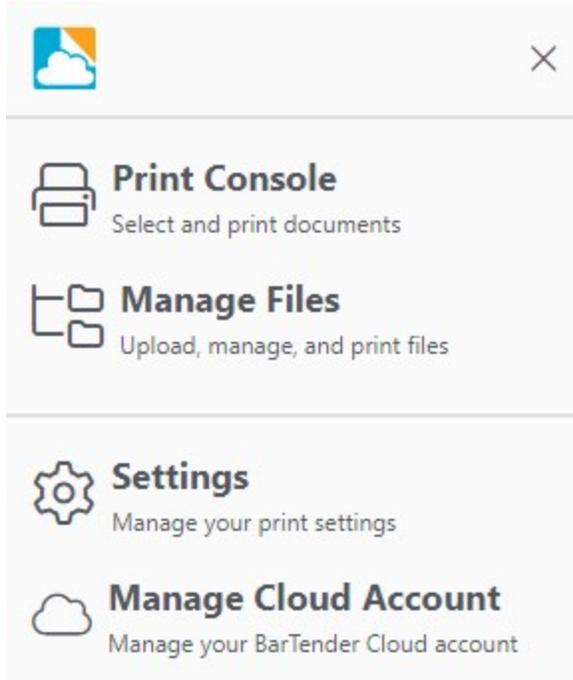
BarTender Cloud is a software as a service (SaaS) product that offers click-and-print functionality in a cloud-based setting that makes it easy to manage, select, and print BarTender documents. By using BarTender Cloud, anyone can print BarTender documents remotely, no matter what kind of device, operating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

After you sign in to BarTender Cloud, you can click  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.

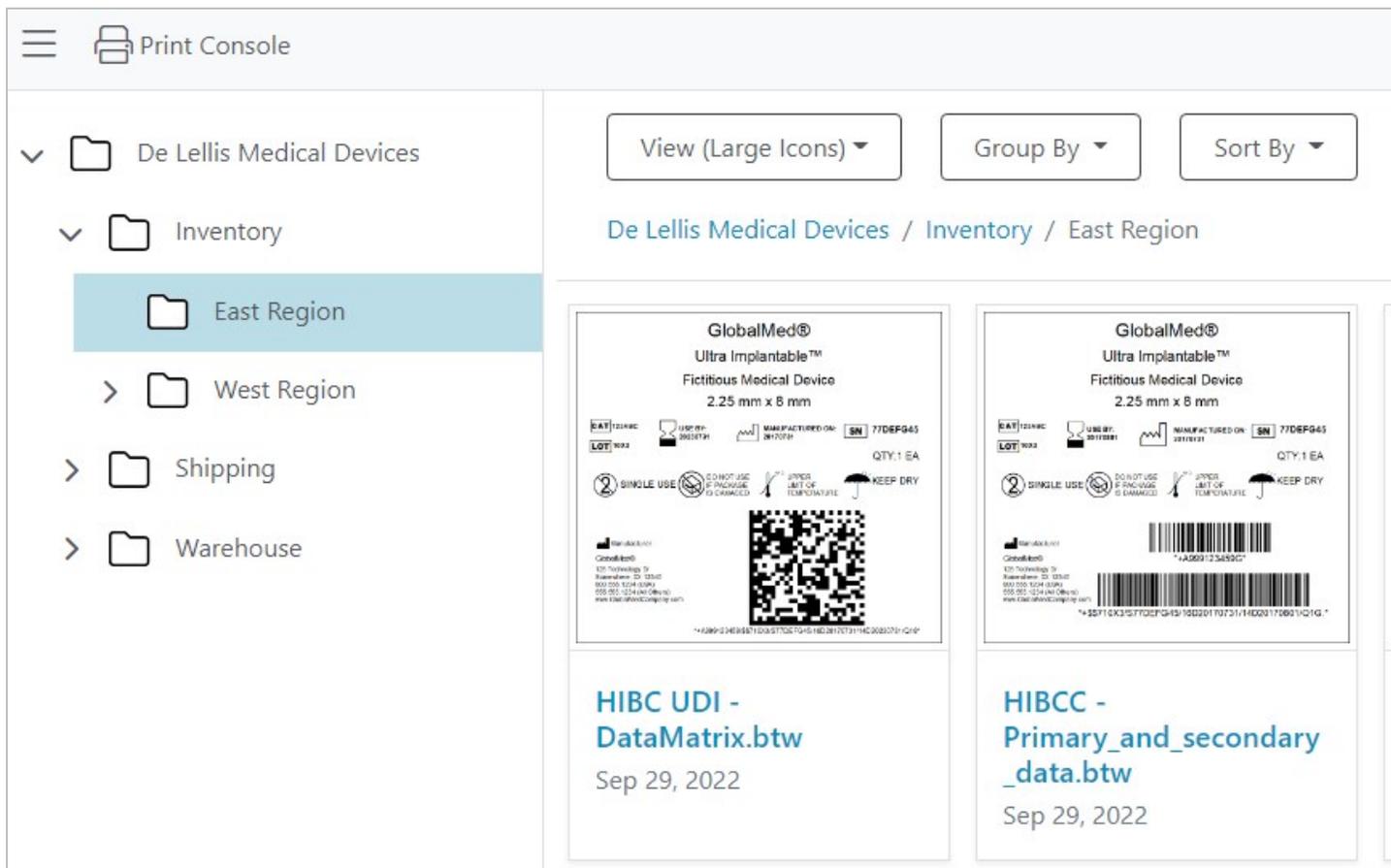


Locating and Printing Your BarTender Documents

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.



The screenshot shows the BarTender Print Console interface. On the left is a navigation pane with a folder hierarchy: De Lellis Medical Devices (expanded), Inventory (expanded), East Region (selected), West Region, Shipping, and Warehouse. On the right, there are controls for 'View (Large Icons)', 'Group By', and 'Sort By'. Below these is a breadcrumb path: 'De Lellis Medical Devices / Inventory / East Region'. Two document thumbnails are displayed, each representing a medical device label. The left thumbnail is titled 'GlobalMed® Ultra Implantable™ Fictitious Medical Device 2.25 mm x 8 mm' and includes icons for 'SINGLE USE', 'DO NOT USE IF DAMAGED', 'LIMIT OF TEMPERATURE', and 'KEEP DRY'. It also features a QR code and a HIBC UDI - DataMatrix.btw label with the date 'Sep 29, 2022'. The right thumbnail is titled 'GlobalMed® Ultra Implantable™ Fictitious Medical Device 2.25 mm x 8 mm' and includes similar icons and a barcode. It features a HIBCC - Primary_and_secondary_data.btw label with the date 'Sep 29, 2022'.

Printing Documents

The first time that you use BarTender Cloud to print a document, you are prompted to install the Print Gateway service. By installing this service on any Windows device, you can print to any printer that is connected to your device. Printing to PDF is also supported (for Windows and other devices).

Driverless printing is also supported. This means that when a printer is connected to the client device but the BarTender Cloud server does not have a driver installed for that printer, the server can still stream a printable file to the client printer without using the driver.

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: ▼

The Print Gateway service is running. [Configure](#)

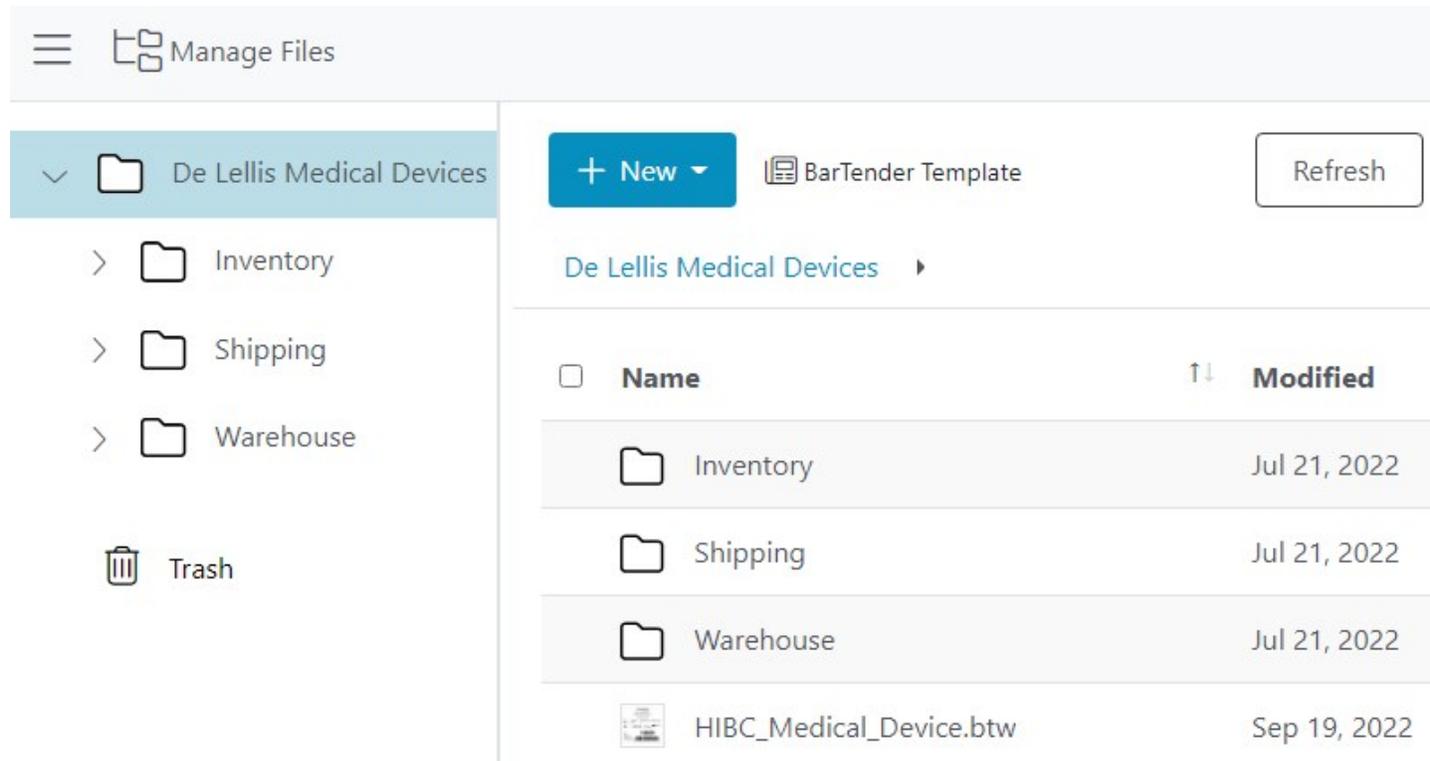
Copies:

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**.



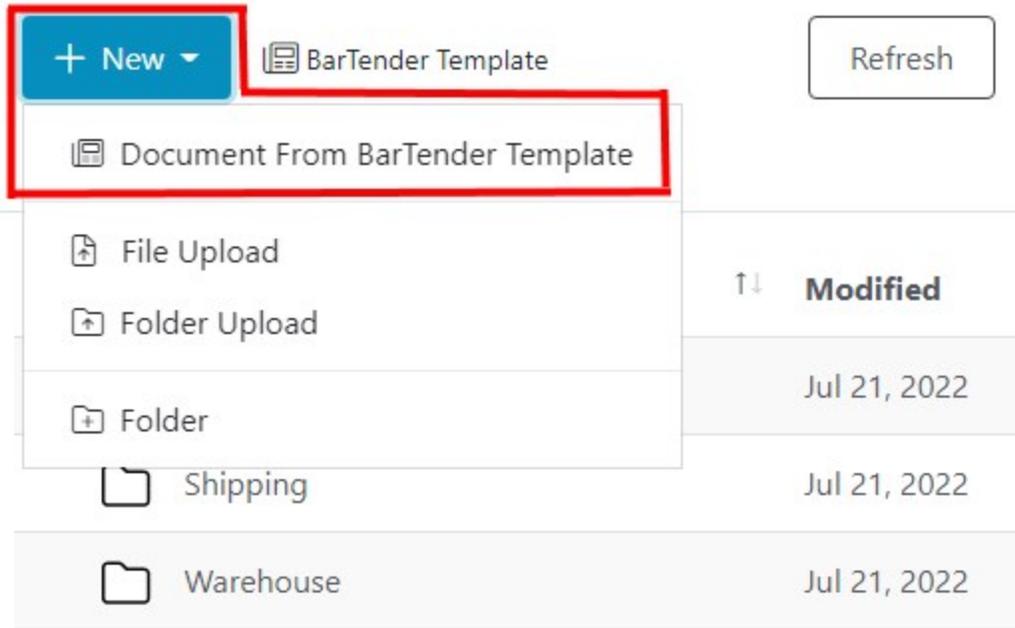
<input type="checkbox"/>	Name	↑↓	Modified
<input type="checkbox"/>	Inventory		Jul 21, 2022
<input type="checkbox"/>	Shipping		Jul 21, 2022
<input type="checkbox"/>	Warehouse		Jul 21, 2022
<input type="checkbox"/>	HIBC_Medical_Device.btw		Sep 19, 2022

Creating a New BarTender Document from a Template

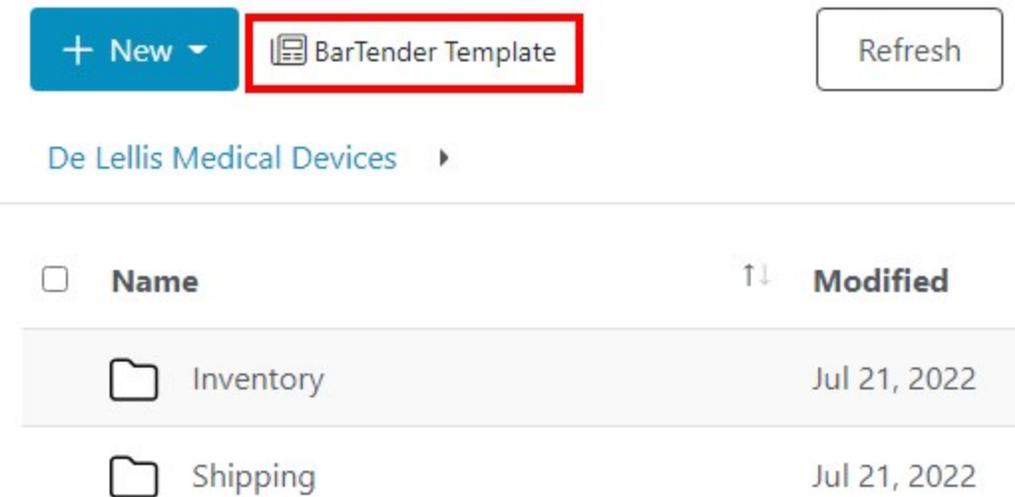
BarTender Cloud provides a variety of preconfigured templates that you can use to print labels quickly and efficiently without using BarTender Designer. When you create a new BarTender document by using a template, the document is saved in BarTender Cloud in the folder that you specify.

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 , 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 a filter** or use the search bar to filter the available templates.

Add a filter

 Life Sciences X

 Search templates



HIBC Medical Device UDI

HIBC UDI label with two Code 128 barcodes and primary and secondary data structures

4.4"x4"

 Life Sciences [Create](#)



Medical Device UDI - DataMatrix

HIBC UDI label with 2D DataMatrix barcode

4.4"x4"

 Life Sciences

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 , 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

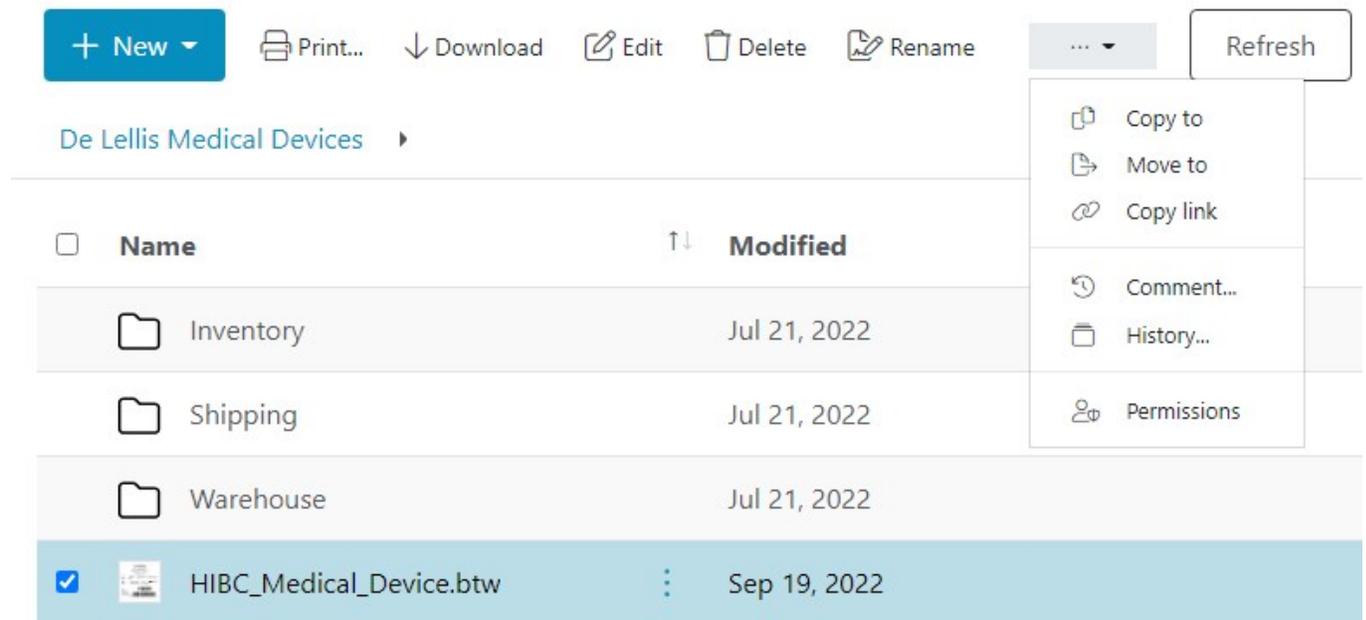
1. In the folder navigation pane, select the folder in which you want to create the new folder.

2. On the toolbar, click , 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.



The screenshot displays the BarTender Cloud interface. At the top, there is a toolbar with the following items: a blue '+ New' button, 'Print...', 'Download', 'Edit', 'Delete', 'Rename', a three-dot menu, and a 'Refresh' button. Below the toolbar, the breadcrumb path 'De Lellis Medical Devices' is shown. The main area contains a table with two columns: 'Name' and 'Modified'. The table lists three folders: 'Inventory', 'Shipping', and 'Warehouse', all with a modification date of 'Jul 21, 2022'. Below these is a document named 'HIBC_Medical_Device.btw' with a modification date of 'Sep 19, 2022'. A context menu is open over the document, showing options: 'Copy to', 'Move to', 'Copy link', 'Comment...', 'History...', and 'Permissions'.

<input type="checkbox"/>	Name	Modified
<input type="checkbox"/>	Inventory	Jul 21, 2022
<input type="checkbox"/>	Shipping	Jul 21, 2022
<input type="checkbox"/>	Warehouse	Jul 21, 2022
<input checked="" type="checkbox"/>	HIBC_Medical_Device.btw	Sep 19, 2022



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.

The screenshot shows the BarTender Cloud interface. At the top, there is a toolbar with various actions: New, Download, Delete, Rename, Copy to, Move to, Copy link, and Folder Color. The Folder Color button is highlighted with a red box, and its dropdown menu is open, showing options for Change color and Reset. Below the toolbar, the breadcrumb path is 'De Lellis Medical Devices'. The main content area is a table with columns for Name, Modified, and Modified By. The 'Shipping' folder is selected, and its icon is highlighted in light blue.

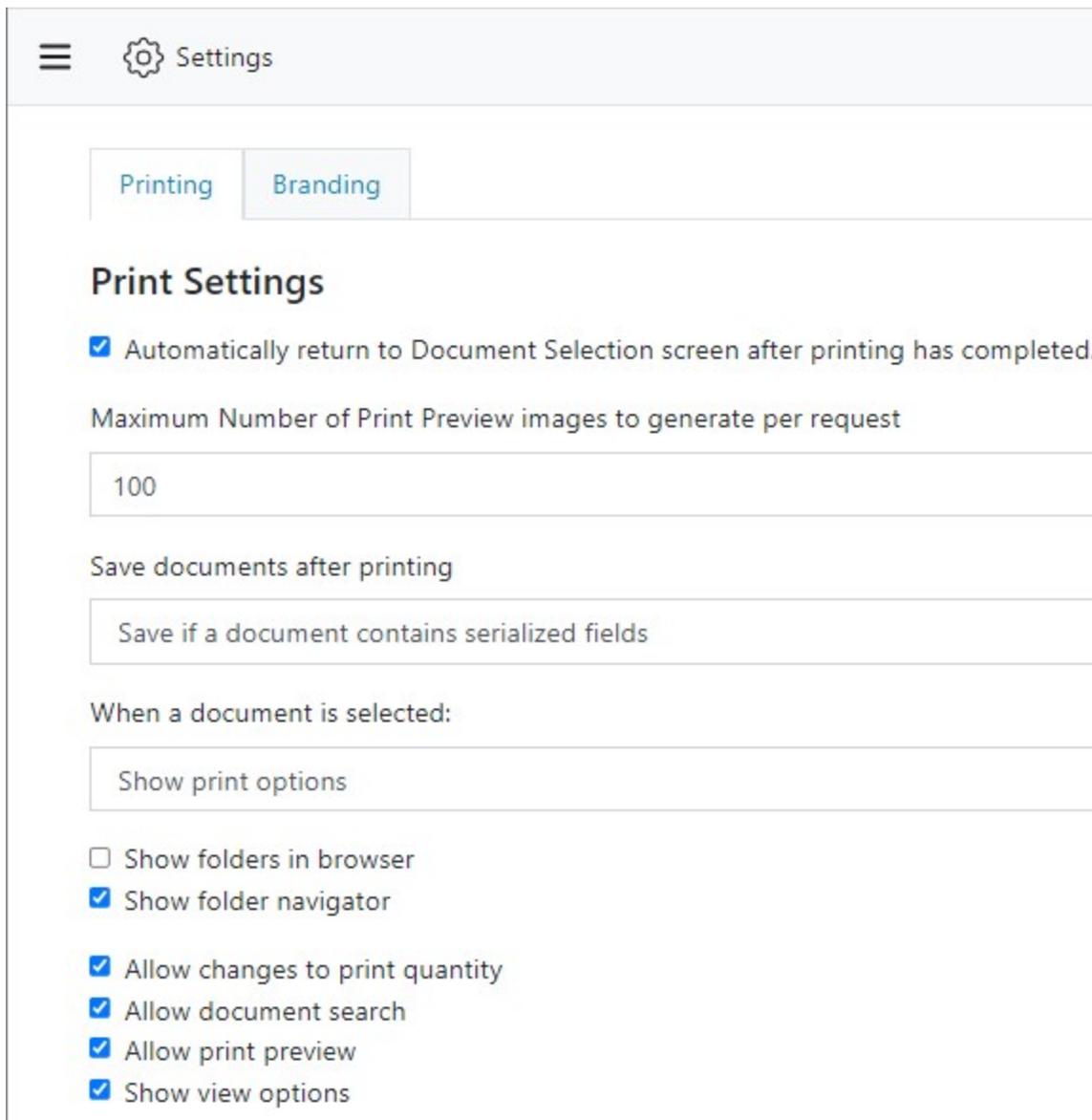
<input type="checkbox"/>	Name	Modified	Modified By
<input type="checkbox"/>	Inventory	Jul 21, 2022	
<input checked="" type="checkbox"/>	Shipping	Jul 21, 2022	

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.

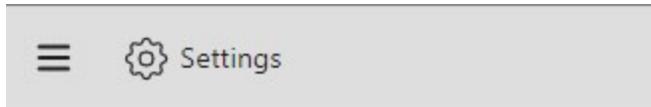


The screenshot shows the BarTender Cloud Settings interface. At the top, there is a hamburger menu icon and a gear icon labeled "Settings". Below this, there are two tabs: "Printing" (which is selected) and "Branding". The main content area is titled "Print Settings" and contains several configuration options:

- Automatically return to Document Selection screen after printing has completed.
- Maximum Number of Print Preview images to generate per request:
- Save documents after printing:
- When a document is selected:
- Show folders in browser
- Show folder navigator
- Allow changes to print quantity
- Allow document search
- Allow print preview
- Show view options

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.



Brand Icon

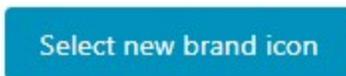


Image must be .png or .jpg and 2MB or less in size

Managing Your BarTender Cloud Account

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

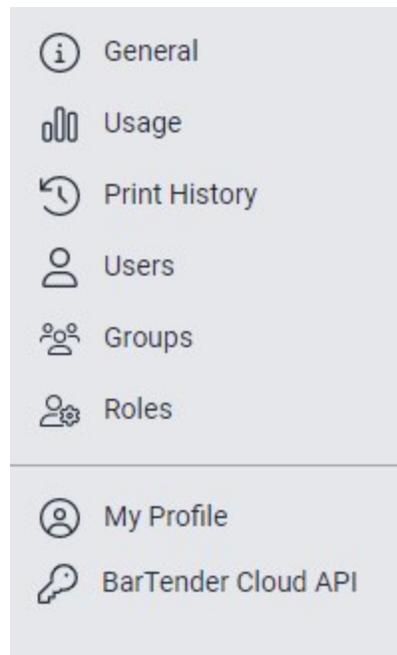
- Administrators can use the **General**, **Usage**, **Print History**, **Users**, **Groups**, and **Roles** property pages to view and configure global account information; view usage statistics and print history data; and manage user accounts, groups, and roles.
- All users can use the **My Profile** 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 or (for administrators) register a web application that can be used to access the BarTender Cloud REST API to automate printing processes.



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

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**.



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/Promotions:** 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](#)
- [Manage Files View](#)
- [Locating and Printing a Document](#)

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>.

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