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2. What's New for WebCenter Administrators?

Troubleshooting

Troubleshooting Tool on page 128

Migration

- Exporting Task Types on page 170
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3. WebCenter Administration Basics

WebCenter installs with a minimal configuration because every installation has different needs. This guide explains how to set up WebCenter and make it ready for use.

3.1 A Note on Web Browsers

Due to differences between the Web browsers, some configuration issues in Firefox and Safari require extra action in order for WebCenter to function properly. Anyone using WebCenter with either of these browsers on any platform should consider performing these configuration changes.

Mozilla Firefox

Refreshing pages may not get the most current data from the WebCenter Web server. In order to ensure the most current data is seen, caching must be disabled, or you must press ctrl-r on any suspect pages to forcibly reload them.

To disable caching, do the following:

1. Log in and start Firefox.
2. In the Address field, type about:config and press enter.
3. Scroll down to the network.http.use-cache entry and double-click it so that its value changes from true to false.
4. Restart Firefox.

Safari

When using Safari, the built-in browser for Apple Macintosh computers running OS X, there is no way to configure caching. When using the Back button, click Refresh to ensure you see the most current data.

3.2 Understanding the WebCenter Page Layout

Header

The top right of the WebCenter page always shows:

- the name of the current user,
- an icon to go back to the user's start page,
- the Cart icon,
- a link to the WebCenter Welcome page,
- Admin (if the user is a member of the Admins group),
- Contact,
- Logout.
Top Menu Bar

By default, the top menu bar contains the following menus: My Work, Projects, Task Types, Search, My WebCenter, Create (if you are a Project Manager) and Upload (see The Default WebCenter Menus for more details). An administrator can customize the menus.

If you have the optional Task Management module and the User Can Create Task Type permission, Task Types also appears in the top menu bar.

Documents Pages

Below is a sample of project's Documents page, in grid layout, for a user who is a Project Manager.

- **Area 1** is the project actions area, allowing you to perform actions on the whole project (for example, mail a link to the project to a reviewer, add the project to your favorite projects...).
- **Area 2** is the Project Details area, containing the project icon, the name and description of the project, the project status...
- **Area 3** shows links to the project pages. For example, click Members to view the project members. The page you are on is shown in bold.
- **Areas 4 and 5** are part of the content pane, that changes depending on the project page you are on. Here, on the Documents page, they show the project folders and documents.
- **Area 4** is the Folders pane, showing the projects folders. Click a folder to see the documents it contains.
- **Area 5** is the document pane, that can show the documents in a list or grid view, with or without thumbnails.

Notes

- To act on many documents at once, select their checkboxes and then choose an action in the Actions menu.
• To select all documents in the current folder, select the checkbox before the Documents header.
• To switch to a list layout, click Show as List.
• Hovering over a thumbnail shows a larger version of it in a pop-up window.

For Graphic documents viewable by the WebCenter Viewer, you can click the zoom icon to show an even larger thumbnail (500 x 500 pixels). This is applied to all Graphic documents on which you hover until the page is reloaded.

The pop-up window closes when you move the cursor off the thumbnail.

There is usually more than one way to accomplish a task by using a combination of menu entries, action menus, and clicking status messages. Many methods will lead to the same result.

3.3 Filtering Content

As more information is managed over time by WebCenter, some pages can potentially show large amounts of information. To reduce the time needed to show the page when it first loads, some pages have a filter and a Go button at the top.

To use the filter, enter a search string with an asterisk either before it, surrounding it, or after it in the Search field, and click Go. For example, on the Companies page, to only see those companies with the word Containers in their name, enter *Containers* and click Go.

When filtering users, use the last name of the user.

To show all the items, up to the truncation limit, click Go with nothing in the field.

**Note:** The truncation limit prevents lists of thousands of items from impacting response time; if you know in advance that your search will return that many items, refine it with the filter. The truncation limit can be changed; contact Professional Services at your local Esko office for more information.
3.4 The Admin Menu

All administration is done initially by Admin, the administrative user who has full control over WebCenter.

The Admin user and members of the Admins group have the Admin link in the right side of the header.

Click Admin to open the Admin menu. The Users page is shown by default.
To return to the normal WebCenter menus, click Exit Admin.
4. WebCenter Preferences

The Preferences menu in the Admin section of WebCenter allows you to set system-wide preferences in a number of categories:

- General
- Passwords
- Security
- Document Types
- Notifications
- Menus
- My Work
- Reports

4.1 General Preferences

Click General on the Preferences menu to set system-wide preferences.

Note: The individual users can override nearly all of these properties for themselves in My WebCenter > My Preferences. Those users who have changed these settings are not affected by later changes made to the same fields in Admin > Preferences > General by an administrator.

General

- Language sets the language used by the user interface.
- Start Page sets the page that appears when you log on.
- Default Project Page sets the page that appears when clicking a project name.
- Default Document Page sets the page that appears when clicking a document name.
- Units sets units for all measurements to either Metric (mm, cm, dm, m) or Imperial (in, ft, yd).
- Thumbnails: selecting Show thumbnails shows thumbnails in document lists by default.

Project Lists

- Show ... rows sets the number of projects displayed in the List layout.

Document Lists

- Default Layout sets the default view for document lists: Grid or List layout.
- Show in Grid sets the number of documents displayed on a single page in the Grid layout (defined as a number of Columns and Rows in the grid).
- Show in List sets the number of documents displayed on a single page in the List layout (defined as a number of Rows in the list).

Search Results - All

Show in List sets the number of documents displayed on a single page in the Search results List layout (defined as a number of Rows in the list).
Search Results - Documents

- Default Layout sets the default view for document Search results pages to Grid or List layout.
- Show in Grid sets the number of documents displayed on a single page in the Search results Grid layout (defined as a number of Columns and Rows in the grid).

Search Results - Projects

- Default Layout sets the default view for project Search results pages to Grid or List layout.
- Show in Grid sets the number of projects displayed on a single page in the Search results Grid layout (defined as a number of Columns and Rows in the grid).

Discussions

- Discussions per Page sets the number of discussion threads displayed per page on the Discussions pages.
- Postings per Page sets the number of discussion posts displayed per page on a Discussions page.

Roles

Invite Group Default sets the system-wide default state of the ‘Invite Group’ check box, available on the Manage Roles page and in the Members area of the Project Creation page (when creating a project based on a project/template that contains roles).

Bill Of Materials

Use Bill of Materials enables the Bill of Materials functionality for the entire WebCenter system. See Bill of Materials on page 146 for more information.

My Work Defaults

- My Approvals Assignee Filter sets what users view by default in the My Approvals section of their My Work page (approvals assigned to Me, Me or Group I Am In or Group I Am In).
- My Tasks Assignee Filter sets what users view by default in the My Tasks section of their My Work page (tasks assigned to Me, Me or Group I Am In or Group I Am In).
- Non Started Tasks sets whether users’ My Work page displays tasks assigned to them that aren’t started yet.

Viewer Preferences

- Viewer and Workflow Applet: When opening a document in the Viewer or when creating a workflow, WebCenter will download a Java applet to your computer.

From Java 1.7.0_21 (for Windows and Mac OS X 10.7 or later), you will get a security warning as the one below when the applet is downloaded. This makes the WebCenter applet look like a security risk for your computer.
You can adapt how this security warning will look like when downloading the applet. In Viewer and Workflow Applet, choose either:

- **Signed (sandboxed)** if you want to run the applet in a strict sandboxed environment (with no access to your computer’s resources). As the applet is signed by Esko, the security warning looks less threatening.
Note:
As the applet is sandboxed, it will also show a warning when trying to print from the Viewer. You will just need to click OK to be able to print.

Note that due to a bug in Java 1.7.0_21, you need to leave Always allow this applet to access the printer deselected or you will get a security error (Printing failed java.lang.SecurityException: checkPrintJobAccess).

- **Signed (not sandboxed)** if you want to run the applet without restricting it to a sandbox (the applet can request additional access to your computer's resources). This means that you will not get an additional warning when printing from the Viewer.

  As the applet is signed by Esko, the security warning looks less threatening.

- **Unsigned** if you want to run the applet as a default unsigned applet. You will get the default security warning that does not mention Esko, but the applet will be sandboxed. This means that you will have an additional security warning when printing from the Viewer, as for the Signed (sandboxed) applet.
Tip:
By default, the applet is set to run as Signed (sandboxed). This will work fine for most users.
More frequent users may want to switch to the Signed (not sandboxed) option to avoid always having to click an extra warning away when printing from the Viewer.
Mac OSX 10.6 users running Java 1.6.0 may also want to switch to the Signed (not sandboxed) option to avoid getting a warning when closing the Viewer by clicking ⌘.

- **Viewer Style** sets the type of Viewer to be used to view documents (Restricted, Normal or Advanced).
- **Annotation Color** sets the color in which annotations will be displayed in the Viewer (you can set Viewer Default or choose a color in the list).
- **Annotate Approved Documents** sets if and how the users are allowed to annotate documents that are already approved.
  - Select **Enabled** if you want the users to be allowed to annotate approved documents.
  - Select **Warn if Approved** if you want to display a warning before allowing the users to annotate approved documents.
  - Select **Read-Only if Approved** if you don’t want the users to be allowed to annotate approved documents.
  - Select **Warn if Approved or Rejected** if you want to display a warning before allowing the users to annotate approved or rejected documents.
  - Select **Read-Only if Approved or Rejected** if you do not want the users to be allowed to annotate approved or rejected documents.

**Project Autoname Generation**
Use the **Project Autoname Generation** settings to automatically generate project names.
These settings use a naming template (Prefix, Suffix and Counter Length) to define the automatically generated names.

For the Prefix and Suffix, use building blocks. You can find a list of the building blocks you can use by clicking Help at the top right of the page.

**Note:** Make sure to read the notes at the bottom of the page for restrictions. The building blocks are case-sensitive.

The Counter Length is a numerical field that gets incremented for each new Project using the same prefix. It is placed between the prefix and the suffix.

In the Counter Length field, enter the length of that incremental counter. For example, enter 5 for numbers that will be five digits long.

Select **Use Automatic Naming for Creation of Blank Projects** if you want to automatically generate the names of projects created from a blank project.

**Approval Cycle Start when Uploading new Document or Version**
Define what should happen to a project’s/document’s approval cycle When uploading a new document or version. You can choose to:

- start the approval cycle automatically if the previous version’s approval cycle is ongoing or finished,
- always start the approval cycle automatically (if there is an approval setup),
- never start the approval cycle automatically.
Other Preferences

- **Host URL** sets the URL at which the WebCenter site can be accessed. This is the URL used to send automatic email notifications.
- **Host URL for internal use** sets the URL at which internal components, like Automation Engine, can access the WebCenter site. Use this to go through the local network (using your WebCenter server’s local computer name) instead of through the internet (using your WebCenter server’s public IP or computer name).

You should use this if, due to your setup, the DNS doesn’t know the WebCenter server’s public name inside your Local Area Network.

**Note:** You can only use this when Automation Engine and WebCenter are on the same LAN.

If this is not filled in, Automation Engine will connect to WebCenter using the Host URL.

For both Host URL and Host URL for internal use, you can choose to use either http:// or https://. Choose the protocol defined during the WebCenter installation.

4.2 Password Preferences

The Password Preferences determine whether passwords must meet security requirements, whether they expire, and whether or not users need to provide their passwords when approving or rejecting documents.

**Complexity**

You can enforce a number of password rules by enabling **Passwords must meet complexity requirements**. When this feature is not enabled the only requirement is that passwords be non-blank.

If **Passwords must meet complexity requirements** is enabled, WebCenter passwords:

- May not contain the user’s username, first name, or last name
- Must be at least six characters in length
- Must contain characters from three of the following four categories:
  - English uppercase characters (A through Z)
  - English lowercase characters (a through z)
  - Base 10 digits (0 through 9)
  - Non-alphanumeric characters (for example: ! $ # %)

**Note:** Enabling this option expires all passwords. Users will be required to change their password on the next login.

**Expiration**

Enabling password expiration allows you to limit the length of time that a password may be used. When a user logs in with a password that has not been changed in the required number of days, he/she will be required to change their password before accessing the site.

To enable password expiration, select the option **Expire user passwords when they are ... days old** and type a number of days.
Note: To immediately expire all passwords without changing the other password preferences, click *Expire all passwords now* in the top right of the page.

**Approval**

Enable the option *Require password for approvals/rejections* if you want to force users to provide their passwords whenever they approve or reject a page or document in WebCenter.

### 4.3 Security Preferences

Use the **Security** preferences if you want to tighten the security in WebCenter.

By default, all the actions are allowed. Deselect them if you don’t want any user to perform these actions.

- **Allow removing documents with approval actions** lets Project Managers or project members with the *Delete* right delete documents that have already been approved/rejected/commented by at least one person/group.
- **Allow changing attributes of approved documents** lets Project Managers or project members with the *Change Properties* right edit the attributes of already approved documents.
- **Allow Force Approval** lets Project Managers Force Approve documents.
- **Allow Force Rejection** lets Project Managers Force Reject documents.
- **Allow changing attributes of inactive projects** lets Project Managers or project members with the *Change Properties* right edit the attributes of inactive projects (projects with the Non Active, Completed, On Hold or Cancelled status).
- **Allow changing members of inactive projects** lets Project Managers edit the members’ list for inactive projects.
- **Allow document operations on inactive projects** lets project members with the *Change Properties* right edit documents in inactive projects.

When this is selected, project members can:

- download documents (the project history is updated in that case),
- view documents,
- see a document history or the project history,
- copy documents to other projects (but not within the project).

But cannot:

- upload documents to the project,
- start an approval cycle or do approval operations on documents,
- move documents,
- delete documents,
- annotate documents.

**Note:** Administrators and the Project Manager for the inactive project can perform more document-related actions.

- **Allow Project Members with Download permission to e-mail a link for non-authenticated download of a document**, allows Project Managers and members of a project with Download permissions to send a download link for a file within their project to non-WebCenter users.
This link will only be valid for a certain number of days (enter that number in the **download link will be valid for ... days** field). The default value is 14 days.

**Note:**
- By default, this option is deselected.
- If you deselect this option after non-authenticated download links have been sent, these download links will become invalid.
- When a non-WebCenter user clicks a link that is invalid, expired or tampered with (for example if the URL was changed), he/she will see a web page stating that the link is invalid.
- Changing the link validity (number of days) will only apply to new links.

### 4.4 Document Type Preferences

The Document Types page controls the kind of files WebCenter supports. The document types you enable here are available for selection:

- When uploading a new file.
- In the **Search for** field when searching for documents.

To enable document types, select the corresponding option in the **Enable** column. Click **Save** to confirm.

On this page you can control the system wide settings for Automatic Document Naming, Default Attribute Category and Start Task for new Documents/Versions. You can either choose **None** or choose a different value. Similar settings can be found in each project and template on the Document Creation page, here you are able to choose **None, Default** (using the system wide settings) or **Custom** (defining project/template wide settings).

You can set up an **Automatic Document Name** per document type, as well as a **Default Attribute Category**. At the top of the page you can choose whether you would like to apply these settings to blank projects, by enabling the options **Apply Automatic Naming to Documents in Blank Projects** and **Apply Default Attribute Categories to Documents in Blank Projects**.

In the two columns **Start Task for new Documents** and **Start Task for new Versions**, you can setup a task to start automatically when you upload a (new version of) a specific file type. At the top of the page you can choose whether you would like to apply these settings to blank projects, by enabling the options **Apply Default Start Task options to new Documents in Blank Projects** and **Apply Default Start Task options to new Versions in Blank Projects**.

**Note:**
If you disable a document type and you already have documents of that type in WebCenter, they can still be found by selecting **All** in the **Search for** field when searching.

**Document Details** pages for those document types will still be available, and the documents can still be downloaded and have new versions uploaded.
4.5 Notifications Preferences

The **Notifications** page allows you to specify exactly which events in WebCenter should trigger an e-mail notification to the users involved.

For every event or action in WebCenter, you can determine whether it:

- is logged in the project history (select **Include in Project History**).
- triggers an e-mail notification to:
  - the Project Manager only (select **Manager**),
  - all the members involved with the event (select **Involved People**),
  - all the project members (select **Members**).

**Tip:** Click on **Involved People** to see a list of involved people for each event.

You can also set up WebCenter to **Send a reminder to the assignee/approver when a task or an approval is overdue** and **Repeat the reminder every x days until the task or approval is finished**.

To limit the number of overdue reminders, you can set the system to only send reminders for **Started tasks** or **Tasks that can be completed** (for example, for tasks having a predecessor needing to be completed before they can be started).

Those options are available when **Send a reminder...** is selected.

4.6 Menus Preferences

The **Menus** preferences allow you to define what users can see by customizing the WebCenter menus. For example, you can remove certain menus for some users, so they have a simpler user interface to work with (they only see the menus they need to use).

You can assign custom menus to users and / or companies (see **Edit a User** on page 69 and **Edit a Company** on page 62).

The **Menus** page contains the **Default** menu, and any custom menu you have already created.

You cannot edit or delete the **Default** menu, but you can use it as a basis for creating custom menus.

From here, you can create/update a custom menu either **through the WebCenter user interface** or **using XML**. You can also **delete a custom menu**.

4.6.1 Create a Custom Menu through the WebCenter User Interface

You can create a custom menu for each category of users, to make it more convenient for them.

You will need to:

1. Determine which menus a particular group of users needs, and which menus they don’t need.
2. On the **Admin > Preferences > Menus** page, click **Add Menu**.
3. **Create your custom menu**.
4. **Assign the menu to the user, group or company you created it for**.
5. Log in to WebCenter as one of the users to which you gave the custom menu, and check whether the menu works.

Create a Custom Menu

1. On the Admin > Preferences > Menus page, click Add Menu.
2. On the Add Menu page, enter a Menu Name and Menu Description for your new menu.
3. Click the type of menu you want to customize: Main Menu, Project Details or Document Details.

You are starting with a copy of the Default Menu.

At left, you can see the Menu Gallery (1) containing the default menu items in bold, and the default sub menu items under them.

At right, you can see the Menu Builder Canvas (2) (which is a graphical representation of the menu). This reflects any changes you make.

At the bottom (3), you can see and edit the details of the menu or sub menu item currently selected.

4. Edit the menu as desired:
   - Add a Default (Sub) Menu Item on page 25,
   - Add a Custom (Sub) Menu Item on page 26,
   - Remove a (Sub) Menu Item on page 28.

   Tip: You can also re-order the menus, or the sub menus within a menu, by drag-and-dropping them on the Menu Builder Canvas. You cannot drag-and-drop a sub menu to a different menu though.

5. Click Save at the bottom of the page.
6. When you are done editing your custom menu, you can click Return to go back to the **Menus** page.

Add a Default (Sub) Menu Item

To add a default menu or sub menu item:

1. Drag it from the **Menu Gallery** into the **Menu Builder Canvas**.

   **Note:**
   
   You can add the same sub menu item to different menus on the **Menu Builder Canvas**, but you cannot add the same sub menu item twice to the same menu, or add the same menu twice to the **Menu Builder Canvas**.
   
   To quickly see whether a (sub) menu item is already used in your custom menu, you can select it in the **Menu Gallery**: this highlights where it is used on the **Menu Builder Canvas**.

   **Tip:** After making a change, you will see that the **Default Menu** label above the **Menu Gallery** becomes **Custom Menu**. You will also see a **Revert Menu** link under it. Click this link if you want to cancel all your changes and go back to an unedited copy of the default menu.

2. In the **Edit Menu** area at the bottom, you can change the properties of your (sub) menu:

   a) To define what the (sub) menu is called:

      1. If you don't want to translate the (sub) menu (it will have the same name in all languages):
         1. Choose **Simple** as **Label Type**.
         2. In **Label**, enter the name to give your (sub) menu.
      
      2. If you want to define a new name in different languages:
         1. Choose **New Localized** as **Label Type**.
         2. In **Language Tag**, enter a new language tag to associate to that menu name in all languages (this language tag is how WebCenter refers to that menu name internally. It must be unique).
         3. In the dialog that opens at right, enter the translations of that menu name in all your WebCenter languages. You need to enter at least the English name.

         **Note:**
         Make sure your `customizationConfig.xml` file contains language tags for all the languages you use here (see **Customize the Language Files**).
         
         If this is the case, your translations will automatically be added to your custom language files. If you didn't have a custom language file for one or more languages in which you add a translation here, these files will be created automatically.
         
         Otherwise, your (sub) menu will use the value your entered in the **Language Tag** field as a **Simple Label** (it will be shown as it is for all languages).

      
      3. If you want to use an existing WebCenter string (piece of user interface text) and its translations as menu name:
         1. Choose **Existing Localized** as **Label Type**.
2. In Language Tag, enter the language tag that is associated with the string you want to use in your language files (in your custom language files if you have any, otherwise in your default language files).

Tip: When you start typing a language tag, the Language Tag field shows all language tags starting with the characters you typed; you can select the desired one in the list.

3. The dialog that opens at right shows the translations of that string in all your WebCenter languages.

Note: You can edit those translations (click Edit and enter the new translations), but then they will be changed on every WebCenter page that uses that string.

b) To define who can see it:

In Visible To, select who will see this (sub) menu.

If you want to limit the menu’s visibility to certain groups, select Groups and enter the names of the groups that can see the menu, separated by a semicolon (example: GROUP1; GROUP2). You can see this example when hovering on the field.

By default, the menu is visible to All Users.

c) To define where a user goes to when clicking it:

- If you want the (sub) menu to link to a specific page (within WebCenter or external):
  1. In URL Type, select Provide URL.
  2. In URL, enter or paste the URL of the page to link to.
- If you want it to show the results of a (global) saved search:
  1. In URL Type, select Saved Search.
  2. In Saved Search, select the global saved search you want to link to.
- If you want it to use it as a shortcut to create a Project with a specific characteristic:
  1. In URL Type, select Create Project with Characteristic.
  2. In Characteristics, select the characteristic you want to use for the Project.
- If you want it to use it as a shortcut to create a Project from a specific template:
  1. In URL Type, select Create Project with Template.
  2. In Project Template, select the template you want to use for the Project.
- If you want it to show a list of Projects that have a specific characteristic
  1. In URL Type, select Project List with Characteristic.
  2. In Characteristics, select the characteristic of the Projects you want to show.

Note: You can only select a Parent Menu when creating a new (sub) menu, not when editing an existing one.

3. Click Save at the bottom of the page.

Add a Custom (Sub) Menu Item

1. On the Menu Builder Canvas, click where you want to add your sub menu (if you want to add a top-level menu, you can click anywhere on the canvas).
2. In the Edit Menu area at the bottom, click Add Custom Menu.
3. Still in the Edit Menu area, define the properties of your (sub) menu:
   a) To define what the (sub) menu is called:
      • If you don’t want to translate the (sub) menu (it will have the same name in all languages):
         1. Choose Simple as Label Type.
         2. In Label, enter the name to give your (sub) menu.
      • If you want to define a new name in different languages:
         1. Choose New Localized as Label Type.
         2. In Language Tag, enter a new language tag to associate to that menu name in all languages (this language tag is how WebCenter refers to that menu name internally. It must be unique).
         3. In the dialog that opens at right, enter the translations of that menu name in all your WebCenter languages. You need to enter at least the English name.

         Note:
         Make sure your customizationConfig.xml file contains language tags for all the languages you use here (see Customize the Language Files).
         If this is the case, your translations will automatically be added to your custom language files. If you didn’t have a custom language file for one or more languages in which you add a translation here, these files will be created automatically.
         Otherwise, your (sub) menu will use the value your entered in the Language Tag field as a Simple Label (it will be shown as it is for all languages).
      • If you want to use an existing WebCenter string (piece of user interface text) and its translations as menu name:
         1. Choose Existing Localized as Label Type.
         2. In Language Tag, enter the language tag that is associated with the string you want to use in your language files (in your custom language files if you have any, otherwise in your default language files).

         Tip: When you start typing a language tag, the Language Tag field shows all language tags starting with the characters you typed; you can select the desired one in the list.
         3. The dialog that opens at right shows the translations of that string in all your WebCenter languages.

         Note: You can edit those translations (click Edit and enter the new translations), but then they will be changed on every WebCenter page that uses that string.

   b) To define who can see it:
      In Visible To, select who will see this (sub) menu.
      If you want to limit the menu’s visibility to certain groups, select Groups and enter the names of the groups that can see the menu, separated by a semicolon (example: GROUP1; GROUP2). You can see this example when hovering on the field.
      By default, the menu is visible to All Users.
   c) To define where a user goes to when clicking it:
      • If you want the (sub) menu to link to a specific page (within WebCenter or external):
1. In URL Type, select Provide URL.
2. In URL, enter or paste the URL of the page to link to.
   • If you want it to show the results of a (global) saved search:
     1. In URL Type, select Saved Search.
     2. In Saved Search, select the global saved search you want to link to.
   • If you want it to use it as a shortcut to create a Project with a specific characteristic:
     1. In URL Type, select Create Project with Characteristic.
     2. In Characteristics, select the characteristic you want to use for the Project.
   • If you want it to use it as a shortcut to create a Project from a specific template:
     1. In URL Type, select Create Project with Template.
     2. In Project Template, select the template you want to use for the Project.
   • If you want it to show a list of Projects that have a specific characteristic
     1. In URL Type, select Project List with Characteristic.
     2. In Characteristics, select the characteristic of the Projects you want to show.

d) To define where to put it in the menu structure:
   • If you want this menu item to be a top-level menu, select Top Menu in Parent Menu. This will place it at the right of the Menu Builder Canvas, after all the other menus.

   Tip: You can re-order the menus by drag-and-dropping them.
   • If you want it to be under an existing menu item, select this existing menu item in Parent Menu.

   Tip: You can also re-order the sub-menus within a menu by drag-and-dropping them.

   Note: You can only select a Parent Menu when creating a new (sub) menu, not when editing an existing one.

Click Add when you are done.

4. Click Save at the bottom of the page.

Remove a (Sub) Menu Item

1. To remove a menu or sub menu item from your menu, select it in the Menu Builder Canvas and click the grey cross beside it.
2. Click Save at the bottom of the page.

4.6.2 Update a Custom Menu through the WebCenter User Interface

Note: You cannot edit the Default menu.

1. On the Admin > Preferences > Menus page, click the name of the menu you want to update.
2. On the Edit Menu page, edit your menu as desired (as explained in Create a Custom Menu on page 24).
3. Click **Save** at the bottom of the page when you are done editing the menu.

### 4.6.3 Create a Custom Menu Using XML

You can create a custom menu for each category of users, to make it more convenient for them.

**Note:**

Menus are XML files, so you can edit them using an XML editor (you can find various freeware XML editors on the internet, for example XML Marker or Notepad++).

See the WebCenter Customization Guide for more details on how to edit the XML files to create custom menus.

You will need to:

1. Determine which menus a particular group of users needs, and which menus they don’t need.
2. Download the default menu to use as a starting point (click the **Download Menu** link corresponding to the Default menu, then save it to a file when it opens in your browser).
3. In an XML editor, remove the menu items that are not necessary for those users.
   This allows you to simplify the WebCenter interface, especially for occasional users. For example, you can create a menu that only contains **My Work** for approval users.
4. Add custom menu items, to link to the WebCenter pages of your choice.
   This allows you to make the pages most used by your users more accessible. For example, you can add menu items linking to saved searches, or to project creation from a specific project template.
5. When you are done editing the menu file, save it under a meaningful name.
6. Upload your custom menu:
   a) click the **Menu Upload** button on the **Menus** page
   b) on the **Menu Upload** page, browse to your XML file,
   c) give your custom menu a Name and a Description,
   d) click **Upload**.
7. Assign the menu to the user, group or company you created it for.
8. Log in to WebCenter as one of the users to which you gave the custom menu, and check whether the menu works.

### 4.6.4 Update a Custom Menu Using XML

To update a menu you have created:

1. On the **Menus** page, click the **Download Menu** link corresponding to the menu to update.
2. Edit it in an XML editor (see the WebCenter Customization Guide).
3. On the **Menus** page, click the **Menu Update** link corresponding to the menu to update.
4. On the **Menu Update** page:
   a) browse to the XML file you edited,
   b) change the menu’s Name and / or Description if necessary,
c) click Update.
This updates your custom menu.

Note: You cannot edit the Default menu.

4.6.5 Delete a Custom Menu

To delete a custom menu:

1. On the Menus page, click the Delete Menu link corresponding to the menu to delete.
2. Click OK in the confirmation dialog.
3. If your menu is assigned to users and / or companies, you need to assign another menu to them.
   In the Menu Deletion page:
   a) Select the new menu to assign to them.
   Note: This will assign the same menu to all those users / companies. If you want them to
   have different menus, you need to edit the users / companies individually from the Users or
   Companies page.
   b) Click Delete.

4.7 My Work Preferences

The My Work preferences allow you to define what users can see on their My Work page.

Default and Custom My Work Pages
As an Admin, you define a default My Work page, that will be available to all WebCenter users.
You can also define custom My Work pages for specific users or companies, when editing that user
or company (see Create a User on page 67 and Create a New Company on page 62).
Users can then customize their personal My Work page to a certain extent, by adding or removing
predefined sections (using My WebCenter > My Work Setup ).
Note that they can only add sections that you (as Admin) have made visible for their user role or group.
In the My Work preferences, you can:
• create a new My Work section (to use in the default or custom My Work pages),
• change what the default My Work page looks like.

4.7.1 About My Work Sections

A My Work page contains different Sections, displayed either on the Left Column or Right Column
of the page.
WebCenter has the following default sections, that you can use in the default and custom My Work pages:

<table>
<thead>
<tr>
<th>This section...</th>
<th>will show...</th>
</tr>
</thead>
<tbody>
<tr>
<td>My Approvals</td>
<td>a list of documents a user has to approve or reject.</td>
</tr>
<tr>
<td>My Recently Submitted Approvals</td>
<td>a list of documents a user has recently approved or rejected.</td>
</tr>
<tr>
<td>Approvals to Follow Up</td>
<td>a list of documents for which a user is Approval Master.</td>
</tr>
<tr>
<td>My Tasks</td>
<td>a list of tasks assigned to a user</td>
</tr>
<tr>
<td>My Recently Handled Tasks</td>
<td>a list of tasks a user has recently handled</td>
</tr>
</tbody>
</table>

Custom My Work Sections

You can create a My Work section from any html page. You can define which users will be able to see and use the sections you create, and you can even specify the height the section will take in the page. For details, see Create a My Work Section on page 31.

4.7.2 Create a My Work Section

To create a section to use in My Work pages, you need an html page, whose content will be shown in the section.

2. Click Create New My Work Section.
3. Give your new section a Name.
4. In the Type option, indicate if this section will show:
• an html page specifically designed for this purpose (Generic),

**Note:** Please contact Esko’s Professional Services if you require such a web page.

• a Saved Search (a search you have saved, see *To Save a Search* for more information),

• an External Web Page.

**Note:** We recommend you do not add WebCenter pages as My Work sections.

5. If you have chosen to show a saved search, select the Saved Search to show.

6. If you have chosen to show an external web page, enter or paste its address in the External Web Page field (for example: http://www.esko.com).

7. **Scope**, choose which type of users will be able to use this section in their My Work page:

   • All Users,
   • Administrators,
   • Project Managers.

**Note:** You can also change this for the default My Work sections.

8. If desired, you can change the height of the section.

   To do this, add &h= followed by the desired height in pixels at the end of the URL. For example iframe.jsp?url=http://www.esko.com&h=400 has a height of 400 pixels.

   WebCenter calculates the width automatically.

9. **Role Groups**, choose either:

   • All Users if you want all users of the type specified in Scope to be able to use the section,
   • Specific Groups if you want to restrict the section’s visibility to specific groups (within that user type).

   In this case, select the groups which will be able to use this section.

10. Click Create.

### 4.7.3 Edit the Default My Work Page

1. **Click** Admin > Preferences > My Work. The My Work Sections page appears.

2. **Click** Default My Work Setup. The Default My Work Setup page appears.

3. In the Available Sections column, select a section to add and click either:

   • Left Column >> to add it to the left column,
   • Right Column >> to add it to the right column.
Do this for all the sections you want to add.

**Note:** To remove a section from the left or right column, select it and click <<.

4. If you don’t want the users to be able to click through to the Document Details or Project Details page from their My Work page, select Show Simplified My Work page.

5. Click Save to make changes.

### 4.8 WebCenter Reporting

A WebCenter Report is a document derived by querying the WebCenter database. It contains information of selected parameters in tables and also represented in Pie Chart and Bar Chart. WebCenter 12 is integrated with Jasper Reports, an open source reporting engine. Jasper reports allows creating reports which go well beyond what search results can do.

The report is created based on a report definition (template). The report definition is an XML file (.jrxml). The JasperReports scheme or a ZIP file containing this jrxml file, supports files such as images and style sheets. Report templates can be created in iReport, a free visual designer tool for JasperReports.

The WebCenter Reports feature can be accessed by an Admin or member of the ADMIN group.

Using WebCenter Reports, you have the:

- Ability to calculate averages and compare actuals to targets (KPI’s).
- Ability to create charts, such as Bar Chart and Pie Chart.
- Freedom on terminology, look, logo’s, amount of detail required to be displayed.
- Choice of report output to PDF, XML, XLS, CSV, TXT, RTF, HTML and XHTML.
- Ability to create one PDF with a general report and iterate over a set of sub-reports.

### 4.8.1 Accessing WebCenter Reports

The WebCenter Reports feature can be accessed by an Admin or member of the ADMIN group.
1. Log in to WebCenter as an Admin user.
2. Click Admin > Preferences > Reports.
3. The Reports page appears with the list of available reports.

   This page displays the report name, report actions, report description, last modified and the user who uploaded the report (Creator). The Reports page also displays Upload Report, Download Report, Update Report and Delete Report buttons.

   **Note:** The built-in reports cannot be deleted.

4. Click the desired report name to go to report details page, where you can run the report.

### 4.8.2 Types of Reports Available

The WebCenter Reports comes with two default reports. The default reports have a typical WebCenter look. However the report definitions can be downloaded and changed in iReport to a different look.

**Note:** Reporting is a separate license in WebCenter. Without this license you can only run the default reports.

The default reports provided are as follows:

- **Approval Statistic (built-in)** report: This report is on duration of approvals. This report has lots of parameters to filter the report on customers, duration and influence on what is shown in the report and how it is displayed.

- **Task Management (built-in)** report: This report is on the duration of tasks. This report comes with many parameters, for example to filter on a task type (showing all CAD Design tasks and disregarding all other tasks).
You can also create a custom report using **iReport** tool. To create a new custom report, you can start from a blank template, use the template provided by Esko, or just modify the built-in reports. Upload these to WebCenter and then let WebCenter run the report. One report design is typically used over and over again, for example to create a weekly or monthly report.

**Note:** To learn how to create such reports, read the **CustomReport.doc** document.
4.8.3 Configuring a Report

To configure a WebCenter Report:

1. Click on the desired report name link on the Reports page.
2. In the Reports Details page that appears, specify the Report parameters.
   
   This can be very simple or very complex depending on the amount of parameters foreseen by the report design. Most often, the time span on which to calculate the report is a parameter. But equally so the report could accept a customer ID (a drop down of customers will be shown) or an option to show more or less detail or what type of charts to use.

   The mandatory fields (parameters) are marked by an *.
3. Under Report Output:
   
   a. Click the Upload Report to Project check box if you want to upload the generated report directly to the required project folder. When it is not selected, the report is generated on the UI.
   
   b. Specify the report Document Name and output Format. By default PDF is the output format.

   Note: HTML and XHTML formats are not available if the Upload Report to Project option is selected.

4. In Report is visible for groups, select or enter the name of the groups that can run this report. To remove a selected group, click the minus sign in front of its name.

5. In case the jxml defines projectId as a parameter (with uiTypeID set to PROJECT), an additional Project Report checkbox appears on the report details page. In case this option is enabled, this report will only be used as a project report.

   You can also set which roles in the project(s) can run this report (in addition to the groups you defined). This way it is possible to create a report that can only be run by the CSR or the SALES person but not by other people (for example suppliers and other external people).

   In Report is visible for roles, select or enter the name of the roles that can run this report. To remove a selected role, click the minus sign in front of its name.

6. Click the Save button, to save the parameters. The next time you want to run this report, you can use the same parameters. If you want to run the same report with two sets of saved parameters you need to upload the report definition twice.

4.8.4 Running a Report

To run a WebCenter Report:

1. Click on the desired report name link on the Reports page.
2. In the Reports Details page that appears, specify the Report parameters.

   This can be very simple or very complex depending on the amount of parameters foreseen by the report design. Most often, the time span on which to calculate the report is a parameter. But equally so the report could accept a customer ID (a drop down of customers will be shown) or an option to show more or less detail or what type of charts to use.
The mandatory fields (parameters) are marked by an *.

3. Click the Run Now button. The report is generated as per your specification. The Report Successfully created message appears in the Reports Details page.

4.8.5 Managing Reports

The Reports page also helps you in managing the existing reports. You can Download Report, Update Report and a Delete Report.

Note: The built-in reports cannot be deleted.
5. CAD Options

Use the CAD menu to set options related to working with ArtiosCAD. You can also create a CAD document from a standard directly from within WebCenter.

5.1 CAD Download Format

Synchronize with Defaults

WebCenter users can download ArtiosCAD files in different formats as specified in Defaults of the ArtiosCAD instance running on the Application Server.

On the CAD > CAD Download Formats page, you can enable or disable download formats for all users.

Click the Synchronize button to import the settings from ArtiosCAD Defaults. A successful status message should appear after a few moments, and the list of formats is populated. Select the formats you want to make available for WebCenter users.

Note: The two native ArtiosCAD formats do not require any configuration.

Download formats and users

User and group permissions for the download formats are set in Users > select user > Download and Groups > select group > Download, respectively. You must set permissions on the formats before users can download documents.

Note: Members of the Admins group are granted all download format permissions by default, and the Change and Use Group Permissions buttons are unavailable when attempting to change permissions for those users.

5.2 Boards

The CAD > Boards page shows the types of boards that can be used for CAD designs (paper, corrugated board, folding carton...).

These boards are defined in ArtiosCAD. They cannot be edited, created or deleted from WebCenter. However, you can set the boards’ default location(s) and use them in a Restricted Set.

5.2.1 Assigning a Board to a Company or Location

You can assign a specific board to a Company, or a Location of that company.

1. In the CAD > Boards page, browse the Boards tree to find the board you are interested in.
2. Click that board to show the Edit Default Locations for board ... page.
Note: You can only assign boards to companies/locations, not boards folders.

3. On that page, select the companies/locations to associate with this board, and click Finish.

Tip: If you want to assign this board to all companies/locations, select the checkbox next to Company at the top.

The users in these companies/locations will see the board as default.

5.2.2 Creating a Boards Restricted Set

You can create a Restricted Set of boards, so that users can pick from a short list of relevant boards when creating a design.

To do this, click Create Boards in Restricted Set, then add boards to the Restricted Set as explained in Create a Restricted Set on page 85.

Note: The data Type is always Text in a boards Restricted Set.

5.3 Run a CAD Standard from WebCenter

A CAD standard is a default ArtiosCAD document, to be customized with parameters supplied by the user to make a design. This will be a 2D design, that can be made 3D if the standard has fold information.

In WebCenter, an ARD document template is used as the CAD standard, and attributes are used as the parameters needed to make the design.

In practice, you create a new document from the ARD document template, filling in the template's attributes' values to give your parameters.

5.3.1 CAD Standard Configuration

You need to:

1. Set up an attribute category containing the attributes necessary to create the design, and their default values.
2. Set up a document template with this attribute category.

Create an Attribute Category

You will need to create attributes that match the CAD standard's parameters in ArtiosCAD. They must have the same name as the corresponding parameters, and any parameter required in ArtiosCAD must translate into a Required attribute in WebCenter.

Generally, you will use at least BOARD (this is always Required), and mostly L (length), W (width) and D (depth).
BOARD parameter: Creating different board attributes will allow the usage of different board restricted sets. Attributes will be selected by WebCenter, if the name of the attribute starts with “BOARD”.

Other parameters are less standardized. You need the person who built the standard to clearly indicate which parameters are needed.

Here is an overview table of the attributes you will probably need the most:

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Use case</th>
<th>Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>BOARD</td>
<td>The type of board to use for the design.</td>
<td>A Restricted Set of Text type.</td>
</tr>
<tr>
<td></td>
<td>Used for every CAD standard (this is a Required attribute).</td>
<td>Set your desired values in the Restricted Set.</td>
</tr>
<tr>
<td>L, W and D</td>
<td>Length, Width and Depth.</td>
<td>Prompted values (the user can set what he/she wants) of Float type.</td>
</tr>
<tr>
<td>ISSTANDARD</td>
<td>To indicate if an ARD document template should be used to run CAD standards or not.</td>
<td>A Restricted Set of Text type. The values in the Restricted Set must be YES and NO.</td>
</tr>
<tr>
<td></td>
<td>• ARD document templates to be used for CAD standards should have YES as ISSTANDARD value.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• ARD document templates NOT to be used for CAD standards should have NO as ISSTANDARD value.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>This should be a Hidden attribute.</td>
<td></td>
</tr>
<tr>
<td>UNITS</td>
<td>To set units other than the user’s default units.</td>
<td>A Restricted Set of Text type. The values in the Restricted Set must be mm and in.</td>
</tr>
<tr>
<td></td>
<td>If no unit is set, the standard will be run in the units set in My WebCenter &gt; My Preferences by the user.</td>
<td></td>
</tr>
<tr>
<td>ISCORRUGATED</td>
<td>To indicate whether the resulting design should be corrugated.</td>
<td>A Restricted Set of Text type. The values in the Restricted Set must be true and false.</td>
</tr>
<tr>
<td></td>
<td>If this attribute is not present, the design is understood NOT to be corrugated.</td>
<td></td>
</tr>
</tbody>
</table>

1. Create the Restricted Sets needed by your attributes as listed in the table above.
   See Create a Restricted Set on page 85 for details.

2. Create your attributes (the ones listed in the table above as applicable, and any other attribute you may need to run your particular CAD standards).
   Assign the relevant Restricted Sets to your attributes. See Create an Attribute on page 87 for details.

3. Create an attribute category containing all the attributes you have just created.

4. Add a Creation View to your attribute category and click Use Grid Layout.
a) Make the BOARD attribute Required.
b) If you are using the ISSTANDARD attribute, make it Hidden.
c) Change the Visibility of your other attributes as desired.

Tip: You can add use a Label to change how your attributes appear to the user (for example, you can show the L attribute as Length).

If you want to work with several CAD standards, you can either reuse this attribute category for more designs, or create more attribute categories.

Create an ARD Document Template

You now need to set up an ARD document template using the attribute category you just created.

For this, you need to use an ARD document corresponding to the CAD standard in ArtiosCAD (same default design).

1. Set up your Document Library as explained in Create Document Templates on page 46.
2. Upload your ARD file into the Document Library.
3. Link the attribute category you just created to this ARD file.
4. Point to the Document Library in:
   • existing projects in which you want to create a design from a CAD standard,
   • project templates that will be used to create projects with designs from CAD standards.

   See Create Document Templates on page 46 for details.

5.3.2 Run a Standard in an Existing Project

To create a design from a CAD standard in an existing project:

1. If your project isn’t already linked to the Document Library:
   a) In the Project Details page, click Configure then Document Templates.
   b) Select Template, then select your document library in the list.
   c) Under When the document library contains ARD files..., select either:
5.3.3 Run a Standard at Project Creation

To create a design from a CAD standard when creating a project from a project template:

1. If your project template isn't already linked to the Document Library:
   a) In the Project Details page, click Configure then Document Templates.
   b) Select Template, then select your document library in the list.
   c) Under When the document library contains ARD files..., select either:
      • Always run the ARD as a standard if you want to be able to use any ARD document template in the document library to run a CAD standard,
      • Run the ARD as a standard when the IsStandard attribute is set to 1 if you only want to use some ARD document templates to run CAD standards.

These ARD document templates must have the ISSTANDARD attribute assigned, with the default value set to YES (see Create an Attribute Category on page 39).

d) Click Save.

2. When creating a project from your project template:
   a) Click New in the Documents section of the Create Project page.
   b) Select your ARD document template from the pop-up and click OK.
Tip:
If you have many ARD document templates, use the Filter field to filter them alphabetically on the file name.
You can also filter them based on document characteristics if you have created a custom project creation page to do so (see Create a Project and Run a CAD Standard in the Customization Guide).

d) Fill in the attributes to use in the Documents section.
   For example, specify the BOARD to use, and the L (length), W (width) and D (depth) of the design.

d) Fill in the rest of the project settings as desired and click Create Project.

Your project containing your design is created.
6. Project Management for Administrators

Most Project Management tasks in WebCenter will be carried out by dedicated members with the Project Manager role.

However, Administrator users have some additional options: they can view and edit all Projects, create project and document Templates, and Find Locked Documents in the system, so they can reset them.

6.1 Projects

The Project Management page (Admin > Project Management > Projects) lets members of the Admins group manage all projects in WebCenter.

For more information about managing projects, see the WebCenter User Guide.

6.2 Project Templates

Members of the Admins group can create and configure project Templates. Those are pre-configured projects that Project Managers use to quickly and easily create new projects.

You can manage all project templates from WebCenter’s Templates Management page (Admin > Project Management > Templates).

- Click Create a new template in the header to create a new project template.

  **Note:** You can also save a project as a template.

- Click the name of an existing template to edit it.

- To delete a template, select it in the list and click Delete in the actions menu. Click OK to confirm the deletion.

6.2.1 Create a Template from Scratch

1. Click Admin > Project Management > Templates, then Create a new template.
2. In the Create a new template page, select Start from a Blank Template and click Continue.
3. Enter the Template Name and optionally a Description.
4. To use a custom thumbnail, select Specify New Thumbnail and Browse for it.
   To use the default thumbnail, leave that choice selected.
5. Click Finish.
Your template is created. You can now define attributes, upload a document to the template, add project members...

### 6.2.2 Create a Template from a Project Template

1. Click **Admin > Project Management > Templates**, then **Create a new template**.
2. In the **Create a new template** page, select **Use a Project Template** and click **Continue**.
3. Select the **Template** to use and click **Continue**.

<table>
<thead>
<tr>
<th>Tip:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Use the filter to only show certain templates.</td>
</tr>
<tr>
<td>• Click a template to view its details in another window. Click <strong>Close Window</strong> to return to the <strong>Create a new template</strong> page when you are done looking at the template details.</td>
</tr>
</tbody>
</table>

4. Enter the **Template Name** and optionally a **Description**.
5. Choose the **Thumbnail** to use:
   - To use a new thumbnail, select **Specify New Thumbnail** and Browse for it.
   - To use the default thumbnail, leave that choice selected.
   - To keep the thumbnail of the project template you are using, select **Use Template Thumbnail**.
6. Click **Finish**.

Your template is created. You can now define attributes, upload a document to the template, add project members...

**Note:**

The project template is created with the same folder structure, documents, characteristics, attributes, members, and security as in the original template.

Any documents in the template are copied into the new template as new standalone documents, even if they were linked documents in the template.

The list of Approval Users is copied if it is applicable; if there are conflicts, a warning appears and you will have to configure new approval settings.

### 6.2.3 Save a Project as a Template

1. Create the project as desired, or open an existing project.
2. On the **Project Details** page, click **More actions...** then **Save as Template**.
3. Enter the name of the template and a description in the appropriate fields.

   To use a custom thumbnail, click **Specify New Thumbnail** and enter the complete path and filename in the associated field or **Browse** for it. To use the default thumbnail, leave that choice selected.

4. Click **Finish**.
6.2.4 Changing What Users See When They Create a Project

It is possible to change the terminology used for project creation so that the Project Creation page talks about "Designs" instead of "Documents", or "Client" instead of "Customer", for example...

You can achieve this by customizing the terminology in the attribute category of the project or template used as a basis for project creation.

You need to:

1. Make an attribute category with *custom project creation terminology*.

   **Attention:** Your custom terms will not be automatically translated, and will show as you enter them for all languages in which you run WebCenter.

2. Make a project template (or a project that will be used to create other projects) using that attribute category.

Users creating projects from this project template will see your custom terminology on the Project Creation page.

6.3 Document Templates

As an Admin, you can create and configure **Document Templates**. Those are "dummy" documents that have a document type, file format, and attributes useful to real-life projects.

Those document templates will be used by Project Managers / other users to create document placeholders for future project documents.

For example:

1. You (the Admin) create a **Document Library** containing the document templates, and project templates referring to that document library (see Create Document Templates on page 46).
2. When creating a project from one of these project templates, the Project Manager will create placeholders from the document templates, to mark where the project deliverables should go.
3. When using the **Upload** function, a project member (with the **Add** right) can also create a placeholder from a document template, to indicate the characteristics (document type, file format, and attributes) of the final document to be uploaded.

   **Note:** This is only possible through the normal WebCenter upload (see Upload via Upload Document and Upload Multiple Documents), not the Java applet upload or when uploading documents from other applications like Automation Engine and ArtiosCAD.

6.3.1 Create Document Templates

1. Create a project template that will contain all your document templates (this will be your **Document Library**).
Having all the document templates in one location makes them easier to manage, and saves disk space.

2. If desired, create a folder to contain your document templates.

Note: If the project in which placeholders are created contains a folder with the same name, that folder will be used as default destination for the placeholders.

3. To create document templates:
   a) Upload a document of the right file format into the Document Library.
      You can use any document type (enabled in the Preferences) except Page Lists.
   b) Define attributes for your document template: choose an attribute category and fill in default attributes values.
      Note: This is important, as when users will create placeholders from this document template, the placeholders will have the attributes (and default values) you define here.
   c) Repeat for all document templates you want to create.

Tip:
   - If you want a document template to always be used when creating placeholders of a certain file type, call it Default.<extension>, using the extension of that file type.
     For example, call it Default.pdf so it is always used when users create .pdf placeholders (in projects using document templates from the Document Library).
   - You can also create a generic document template called Default (without the extension), that will be used automatically for file types who don't have a Default.<extension> template associated.
     For example if a user wants to create a .png placeholder but there is no Default.png document template in your Document Library, then the Default template will be used.

4. Create a project template for each kind of project that will be required by Project Managers.

5. In each of these project templates that need document templates, point to the Document Library:
   a) In the Project Details page, click Configure then Document Templates.
   b) Select Template, then select your document library in the list.
c) If your document library contains ARD files, and you want to use them to run ArtiosCAD standards, select either:

- Always run the ARD as a standard if you want to be able to use any ARD document template in the document library to run a CAD standard,
- Run the ARD as a standard when the IsStandard attribute is set to 1 if you only want to use some ARD document templates to run CAD standards.

These ARD document templates must have the IsStandard attribute assigned, with the default value set to 1.

Select Never run the ARD as a standard if you are not working with CAD standards.

d) Click Save.

Projects created from one of those project templates will keep the project template’s link to the document library.

Project Members can then create placeholders from the document templates in the document library.

Note:

If you know that the Project Managers will always use the same set of placeholders in all their projects, you can also:

1. Create a document library.
2. Add document templates to the document library.
3. In the document library’s Project Details page, go to Configure > Document Templates, and select your document library (itself) in the Templates list.

   This identifies it as the document library, containing the document templates.
4. Project Managers can create projects directly from the document library project template, and automatically have all the documents templates as placeholders in those projects.

Note that this approach is less flexible!

6.4 Project Creation Settings

As an Admin user, you can configure the Project Creation Settings for a project or template. You can find these settings in the project or template’s Configure section, under Project Creation. These settings define what is displayed on the Project Creation Page when you create a new project from this project or template.

First of all, you can choose whether you want to Use Automatic Naming and define the naming scheme.

Furthermore, you can choose what features are displayed on the Project Creation Page. You can choose the following options:

- **Set Project Manager**: Show/hide the project manager selection on the project creation page. If you hide it, the project manager will be the same as used in the template or parent project. If you choose to show this section, it will default to the person creating the project.
- **Set Status**: Show/hide the project status selection on the project creation page. If you hide the project status, the new project will be created using the first available active project status.
• **Set Customer**: Show/hide the customer selection. You can make this a required field. Hide this field to use the customer set in the source project or template.

• **Set Description**: Show/hide the description field. You can make this required.

• **Set Due Date**: Show/hide the due date selection. You can make this a required field.

• **Upload Documents**: Show/hide the documents section. You can make this section required, so that the project creator has to add at least one document.

• **Assign Roles**: Show/hide the role assignment section. You can decide for each role whether it is required to assign a group or user to it and/or whether you can assign multiple users or groups to this role.

• **Invite other members**: Show/hide the members section to enable/disable adding additional members to the project.

• **Set Attributes**: Show/hide the attributes section. You can show or hide the creation view of the project attributes of the source template or project.

• **Select Thumbnail**: Show/hide the project thumbnail section. If you hide this section, the thumbnail of the source project or template will be used.

• **Set Planning (Tasks)**: Show/hide the task planning section. You can make these fields required.

• **Default Planning Method**: You can set the default planning method to **Forward** or **Backward**. Even if the Set Planning section is not displayed, the setting you choose here will be used for the new project.

### 6.5 Document Creation Settings

As an Admin user, you can configure the **Document Creation Settings** for a project or template. You can find these settings in the project or template’s **Configure** section, under **Document Creation**. These settings define what happens when you add documents to your project.

The settings are organized per **Document Type**. Per type you can set the following options:

• **Automatic Document Naming**: Use this setting to enable/disable autonaming for a specific document type. Choose **None** to disable autonaming. Choose **Default** to use the system wide autonaming settings or choose **Custom** to enter a specific naming scheme for this project or template.

• **Default Attribute Category**: Use this setting to assign an attribute category to a specific document type. Choose **None** to not use a default attribute category. Choose **Default** to use the system wide settings or choose **Custom** to select a specific attribute category.

• **Start Task for new Documents**: Use this setting to start a task of the specified type when adding a document to the project. The task is automatically started, assigned to the uploader and the uploaded file is linked to the task. Choose **None** to not start a task upon upload. Choose **Default** to use the system wide settings or choose **Custom** to select a specific task type.

• **Start Task for new Versions**: Use this setting to start a task of the specified type when adding a new versions of a document to the project. Choose **None** to not start a task upon upload. Choose **Default** to use the system wide settings or choose **Custom** to select a specific task type.
6.6 Project Statuses

The **Project Status** feature allows you to review the current project standing. This feature can be accessed by an ADMIN or a member of the ADMIN group, Project Managers and an User.

An administrator can add statuses in WebCenter. This works similar to task statuses (whereas the statuses are not shared). A status has a name, an icon and a type. The types are Not-active, Active and Completed. The WebCenter has the functionality to limit the actions possible in not-active and completed projects. It is most typical to add active statuses, for example: **Briefing, Design, Prepress, Printing**. An administrator can limit the statuses for a project and this can be done for every project separately.

The Project Manager can perform following:

- Set the Project Status.
- View Project Status.
- Search Project Status and Filter projects based on Project Status.

The Project Status will appear as follows when a specific project is selected:

An administrator can limit the statuses for a project and this can be done for every project separately. Go to a project or a template as an administrator and click on the **Configure** tab. By using Add Project Statuses and Remove Project statuses (select with the check boxes and take remove from the action drop down), you can get a specific set of statuses.
The administrator can decide the sequence of the statuses. This sequence is purely used for sorting. When the projects are sorted based on Project Status, this is the sequence used. The sequence is system wide.

Apart from showing the Project Status in many project overview pages (and also in the search results), the project statuses can be used in the Workflows. For example: To decide different operations or assignees depending on the current project status.

**Note:** By using the Set Project Status node in Workflow, you can set the status for the current project.

In the following example, let us consider six toll gate statuses to be allowed for the HADW556 project. The Project Statuses are set as TG0, TG1, TG2, TG3, TG4 and TG5. The WebCenter has many more statuses, but only these statuses are allowed for this project. The TG0 to TG5 statuses are in this sequence in the entire system.

**Note:** You can only decide per project whether you can have these statuses, but you cannot change the sequence of the statuses per project.
6.6.1 Viewing a List of Project Statuses

The available Project Status can be viewed in the Project Status page. In the Project Status page, you can add, edit and delete the Project Status. You can also choose or add an icon, a color for the Project Status and decide the sequence of the statuses.

1. Click Admin > Project Management > Project Status. The Project Status page appears.
6.6.2 Adding a Project Status

You can add a new Project Status through the Project Status page. You can also choose or add an icon, a color for Project Status and decide the sequence of the statuses.

1. Click the Add Status link on the Project Status page.

2. In the New Status page, type the Name of the status and select the Project Status type.
   You can add multiple statuses at a time. When the new status is marked as Active, it is added just behind the previous active status. When the new status is marked as Non Active or Completed, it is added at the end of the Project Statuses list with no rules applied.

3. Click the Save button to make changes. The Project Status page appears with the new status.
6.6.3 Editing a Project Status

You can edit the existing or newly added Project Statuses through the Project Status page. In the Project Status page, you can change the Name, Language key, Sequence number, Add Icon and Set Color.

Type the sequence number in the Display Order column to change the sequence number. The change in sequence number appears only after saving the changes. For example: If the Display order is changed for thinking phase2 status from 4 to 2 then it appears as follows.
The language string key has to be added to the XML formatted language key file (wcstrings_<2 character ISO language code>.xml for English: wcstrings_en.xml) for all used languages. By default the language (en) has to be added.

**Note:** The language key field is not mandatory. If you want all languages to follow the same names (Not translated stage names), you leave the language key field empty.

Type the **Name** of the Project Status to change the Project Status name and click the **Save** to make changes.

The new status will be set to Esko Green as default color. You can select a **Color** for a dropdown for each project status. This color will be used in the calendar-view of the project overview.

**Note:** You cannot add your own new color.

For Example: The Thinking Phase 2 has Esko Green as the default color.
Once you select the required color from the drop down list, click the Save button to make changes. Here, the Color is changed to Red.

You can change an icon for the existing Project Status in the Project Status page. The Project Status icon can be selected from the Icon Gallery or you can also upload an icon. WebCenter allows JPG, JPEG, GIF, BMP and PNG file types as icons.

**Note:** The UI is optimized for an icon height of 16 pixels. Icons will be placed in overviews without any scaling.

Click the Select Icon button, to select the required icon from Icon Gallery.
In the **Icon Gallery** window, select an icon via the radio button and click the **OK** button. The gallery allows filtering of icons by its name.

![Icon Gallery]

Click the **Browse** button to upload an icon of your choice. The icon can be re-used for other statuses.

**Note:** You can change the icon of the built-in Project Statuses. When no icon is set, the name of the status is used instead.

### 6.6.4 Deleting a Project Status

You can delete a Project Status and this status will be marked as deleted/obsolete in the WebCenter database. When a project status is marked as deleted, it will no longer appear in any of the locations where a Project status can be selected. The Projects and Templates having the deleted status will still keep this status. You can however no longer change projects to the deleted status.

Select the required Project Status and click on **Delete** in the **Actions** menu.
Click the OK button to confirm the deletion.

### 6.6.5 Customizing a Project Status

An Administrator can set allowed statuses for Templates or for Projects. By doing this an Administrator can limit the number of Project Statuses to be used for a specific project. When adding a new project status to the system, this status will be also added to all projects and templates. When a project is created from a template or from another project, it inherits the allowed statuses from its source. This happens only once and does not happen when the template changes later.

1. Log in to WebCenter as an Admin user.
2. Click the Admin > Project Management and select Projects or Templates.
3. Click the required Project or Template link from the list.
4. Click the Configure > Project Statuses. This displays a table with the current allowed statuses for this Template or Project.
5. Select the required Project Status from the list and then click the Add Project Statuses link.

**Note:** By default a blank Project will get the list of all statuses as allowed statuses.

6. Click the Save button to make changes.

**Note:** The Project Status cannot be re-ordered here, the order is inherited from the system order.

You can remove allowed statuses for a template or project by selecting the status and select Remove from the Actions menu.

### 6.6.6 Searching based a Project Status

You can search for projects based on their Project Status. Choose Search from the menu bar and select Project or Tasks. On the (advanced) Project Search page and the Task Search page, the list box will contain the list of all the Project Statuses.

In addition to all individual project statuses, the list also contains the following:

- Show All (default): show all projects (or tasks of all projects).
- Show All Active: show only projects or tasks of projects with an active status.
- Show All Not Active: show only projects or tasks of projects with a non-active status.
- Show All Completed.
6.6.7 Filtering based on Project Status

In Favorite Projects, Projects I Manage, and in Projects I am Invited to, you can filter on all Project Statuses individually. You can also use the filters to look for a combination of statuses: Show All, Show All Active, Show All Not Active, Show All Completed.

6.6.8 Setting a Project Status to Active or Non Active

An Administrator can set a project to Active by giving it an Active status. Whether a status is active or not is determined when the status is added.

If a project has been set to a Non Active status, by default the permissions for all members are masked with the View and Download permissions, so that these two permissions are still enabled if and only if they were enabled already, while all other permissions are disabled.

However, whether certain actions can still be performed in non-active projects, also depends on the security settings for the system. An Admin user can change these settings on the Security page (Preferences > Security). It is possible to allow or disallow changing attributes, changing members and document operations in inactive projects.

6.7 Find and Unlock Locked Documents

Locked documents are documents that users have downloaded and are working on, and want to flag to prevent others from working on them.
The Admin user (or any member of the Admins group) can find locked documents belonging to all users and unlock them so that others may work on them without receiving warnings that they are locked.

This is particularly useful for freeing up documents that have been locked by users who are absent for longer periods of time, or who have left the project entirely.

1. Click **Admin > Project Management > Find Locked Documents**.
2. Either filter for users by entering (part of) their last name in the **Search users by last name** field, or click **Go** right away to see all locked documents.
3. Select the document(s) to unlock by selecting the corresponding boxes.
4. Click **Unlock checked items**.

### 6.8 Delete View Files

View files (that make files viewable in the WebCenter Viewer) take a certain amount of disk space. If necessary, Admin users can delete those view files.

**Note:** You can only delete view files per project (for all of the project’s documents at once), not per document.

1. Use the **Search** to find the projects whose view files you want to delete.
2. Select the projects whose view files you want to delete, and click **Delete View Files** in the actions menu.

   Confirm your choice by clicking **OK**.

   **Note:** When deleting view files, Viewer annotations, document metadata and thumbnails are kept.

You can see that the view files have been deleted on each document’s **Documents Details** page.

### 6.8.1 Regenerate View Files

Users can regenerate documents’ view files as needed provided that:

- they have the View permission on those documents,
- those documents’ view files can be regenerated.
Note:
Most view files can be regenerated, except for:
- page lists coming from Automation Engine,
- documents uploaded via Automation Engine with the *Upload only view files* option.

If you need to regenerate the view files:

1. Go into the project whose view files you deleted.
2. Select the documents for which you want to regenerate view files.
3. Click *View and Annotate* in the actions menu.
7. Managing Companies

Entering Company and Location information lets you further refine projects and users when they are created.

7.1 Create a New Company

1. Click Admin > Companies > New Company.
2. Enter the information about the new company (Company Short Name, Company Legal Name, Phone...).
   Fields with asterisks next to them are required to have information in them.
3. Do you want the users of this company to see custom menus instead of the default WebCenter menus?
   Custom menus allow you for example to simplify the user interface, so the users only see the menus they need to use. See Menus Preferences on page 23.
   Note: Users linked to a company will always see the menu assigned to the company, when the Default menu is assigned to them as a user.
   • If yes, choose the menu to assign to the company in Menu.
   • If no, leave Default in Menu.
4. Click Create.
   A status message saying the company was created successfully appears at the bottom of the page.
   You can create an additional company by filling out the form again and pressing Create.

7.2 Edit a Company

1. Click Admin > Companies.
2. Either type in a Filter or click Go to see the list of companies.
3. Click the name of the company to change.
   This opens the Edit Company page.
4. In the Name and Menu tab, you can change:
   • the Company Short Name,
   • the Company Legal Name,
   • the Menu that the users of this company will see (see Menus Preferences on page 23 for information about menus).
   Click Save to save your changes before switching to another tab.
5. In the Locations tab, you can edit the company’s location(s):
• click a location to edit its details (Location Name, City, Country...),
• to delete a location, select it and click Delete Location(s) in the actions menu,
• to add a location, click the New Location link and fill in the new location’s details.

6. In the My Work tab, you can change what the company users will see on their My Work page.
   • Select Use Default My Work Setup to use WebCenter’s predefined My Work page,
   • Select Use Custom My Work Setup to set up a custom My Work page for this company.
     Then pick the Sections you want to display on the Left Column and Right Column of the My Work page.
     Click Save when you are done.

7.3 Delete a Company

If the company you delete has users assigned to any of its locations, WebCenter issues a dependencies warning.

You must reassign the users to another location or delete the users before you can delete the company. There is no dependency check if there are no users assigned to any location.

If the company is only assigned as a customer, it will be deleted when you confirm the deletion.

**Note:** Attempting to delete multiple companies will stop on the first company that has dependencies. To delete the rest of the companies, reselect them and delete them.

1. Click Admin > Companies .
2. Either type in a Filter or click Go to see the list of companies.
3. Select the checkbox of the company to delete.
4. Click Delete Company in the actions menu.
5. Click OK to confirm the deletion. The company is deleted.

7.4 Add Locations

1. Click Admin > Companies .
2. Either type in a Filter or click Go to see the list of companies.
3. Click the name of the company for which you want to add a location.
4. Click the Locations tab. The current locations for the company are displayed.
5. Click New Location at right.
6. Enter the appropriate information and click Add Location. The new location is created.

7.5 Edit a Location

1. Click Admin > Companies .
2. Either type in a Filter or click Go to see the list of companies. Click the name of the company for which you want to edit a location.

3. Click Locations on the menu. The current locations are displayed.

4. Click the name of the location to edit.

5. Change the information as desired and click Change. The information is changed and a confirmation message appears.

7.6 Delete a Location

If the location you delete still has users assigned to it, WebCenter issues a dependencies warning. You must reassign the users to another location or delete the users before you can delete the location.

Attempting to delete multiple locations will stop on the first location that has dependencies. To delete the rest of the locations, reselect them and delete them.

1. Click Admin > Companies.

2. Either type in a Filter or click Go to see the list of companies. Click the name of the company for which you want to edit a location.

3. Click Locations on the menu. The current locations are displayed.

4. Select the location(s) to delete by selecting the checkbox next to the name.

5. Click Delete Location(s) in the actions menu.

6. Click OK to confirm the deletion.
8. Managing Users

8.1 Licensing and Users

- Basic concepts
  - Access to projects and documents is controlled by user and group permissions.
  - **User**
    - Everyone who logs in to WebCenter is a user. Users log in using a username and password assigned to them by an Administrator.
  - **Group**
    - A Group is a logical set of users connected by a common element of your choosing, such as function or location. You can assign tasks to groups, you can set up groups as approvers or even as project managers.
  - **Role**
    - A Role is a placeholder object that project managers can use in their projects or templates to set up approvals, assign tasks to, use in workflows, etc., without being forced to use specific users and groups just yet. Upon project creation, or even later in the process, the project manager can assign the role(s) to the actual user(s) and/or group(s). This provides more flexibility in setting up templates/projects.
  - **Default users**
    - One user, admin, and two groups, Admins and Users, are created by default in WebCenter. Members of the Admins group are WebCenter system administrators and can perform any function.

- Types of users
  - You can create as many users as you want. The number of users who may use the system at the same time, which is called concurrent access, is determined by the licenses you have purchased. The licensing model distinguishes between three types of users: guaranteed users, concurrent users, and editor users.
  - **Guaranteed users**
    - A guaranteed user can always access WebCenter, regardless of how many concurrent users are logged on at the time.
  - **Concurrent users**
    - Any other user who does not have guaranteed access can log on to WebCenter as long as the maximum number of concurrent users is not exceeded.
Note:
For every three guaranteed users you create, one concurrent user license is blocked permanently. For example, if you have a license for 25 users with a database of 100 non-guaranteed (concurrent) users, then at any time 25 concurrent users could be logged in at once.

If you granted 25 users guaranteed access, but none of them were logged in, then only 17 concurrent users could log in simultaneously, because 8 concurrent licenses would be blocked by those 25 guaranteed users (25 x 0.333 = 8.333).

However, those 25 guaranteed users could all be logged in at once, with no licenses available for concurrent users.

You could mix the availability by guaranteeing 21 users (blocking 7 concurrent licenses so you have 18 left), so even when those 21 guaranteed users are all logged in, 4 concurrent users can still log in. These could be any of the 79 concurrent users of your database.

Editor users
These are ArtiosCAD Enterprise users. They have guaranteed access but do not take away concurrent licenses.

You will have a fixed number of editor users, determined by the license you have purchased. When that number is reached, you cannot set more users to be editor users.

Generally, your system will either have guaranteed and concurrent users, or editor users.

If you have editor and concurrent users, and all your concurrent access licenses are in use, a concurrent user will not be able to access WebCenter, even if you have editor licenses left (a concurrent user cannot use an editor license to log in).

What if the user limit is exceeded?
When the limit of users with concurrent access is reached, no concurrent user may log in until another user logs out.

To prevent users from blocking access for others, there is a configurable time limit of 30 minutes of inactivity. After any users (guaranteed or not) have been inactive for that amount of time, they are logged out automatically, thereby allowing other users to log in.

Note: The Admin user can always log in, even if the user limit is reached.

8.2 Check the Licensing Status

1. Click Admin.

The Users page opens by default.

The Users page shows:

- The Total number of users in the database. This is how many users you have created.
- The number of Purchased concurrent licenses. This is how many users can be logged in at the same time with no users having guaranteed access (click Explain License Model or see Licensing and Users on page 65 for details).

This number can be increased at any time by purchasing more licenses from Esko.
• The number of purchased editor licenses. This is how many ArtiosCAD Enterprise users you have a license for. These users have guaranteed access.

• The number of concurrent licenses blocked for users with guaranteed access. Every three guaranteed users block one concurrent user.

  The number of guaranteed users is shown in parentheses.

• The number of guaranteed users currently logged in.

• The remaining number of concurrent accesses. This is how many non-guaranteed users can be logged in simultaneously.

• The number of concurrent users currently logged in.

2. To see the users who are currently logged in, click Show Users that are Currently Logged in.

Users who simply close browser windows do not actually log off until their sessions expire due to inactivity (usually after 30 minutes). Users should always click Log Off when they are done using WebCenter.

3. To forcibly log off a non-guaranteed user to make more concurrent licenses available, click Log user off next to that user’s licensing status. Use this with caution as data loss may result. It would be prudent to try contacting the user in question before using this command.

8.3 Create a User

1. Click Admin > Users > New User.

Step 1: User Info in the Create New User wizard appears.

2. Type the basic user information into the appropriate fields (Username, First Name, Last Name...).

Note: Required fields are indicated with an asterisk *.

3. Do you want to use LDAP authentication (single sign-on) for this user?

• If yes: enable the Use LDAP to Authenticate User option. This will allow the user to use his regular Windows network user name and password to log on to WebCenter.

• If no, provide the user’s initial Password and confirm it.

  Enable the option Require the user to change the password at first login to force the user to choose a new password when they first log on to the system.

4. Do you want this user to see custom menus instead of the default WebCenter menus?

Custom menus allow you for example to simplify the user interface, so the users only see the menus they need to use. See Menus Preferences on page 23.

• If yes, choose the menu to assign to the user in User Menu.

• If no, leave Default in User Menu.

5. Does the user need guaranteed access?

• If yes, enable the option User Has Guaranteed Access or is an ArtiosCAD Enterprise User.

Note: You can also use this option to make editor users, if you license allows it (see Licensing and Users on page 65).

• If no, leave the option disabled and proceed to the next step.
For more information on guaranteed access and its licensing implications, see *Licensing and Users* on page 65.

6. Does the user need special permission in WebCenter?

<table>
<thead>
<tr>
<th>If the user needs...</th>
<th>Select the option...</th>
</tr>
</thead>
<tbody>
<tr>
<td>no special permissions</td>
<td>Normal User</td>
</tr>
<tr>
<td>Project Manager permissions, but only for projects and users belonging to his or her own company</td>
<td>Project Manager with Limited Visibility of Companies and Groups</td>
</tr>
<tr>
<td>Project Manager permissions on the complete system</td>
<td>Project Manager with Full Visibility</td>
</tr>
</tbody>
</table>

7. Does the user need the ability to create new task types in WebCenter? (only if the user is a *Project Manager*)

- If yes, enable the option *User Can Create Task Type*.
- If no, leave the option disabled and proceed to the next step.

8. Does the user need the ability to create new users? (only if the user is a *Project Manager*)

- If yes, enable the option *User Can Create User*, then click *Continue*.

  **Note:** A Project Manager creating users will have less options than an Admin: for example he / she will not be able to give the new user LDAP (network) sign-on or guaranteed access.

- If no, click *Continue*.

  **Tip:** You can keep track of users created by other users: the *Owner* column of the *Users* page shows who created each user.

9. In *Step 2: Assign to a Company*, optionally select a company to which you want to assign the user. Note that this can be very important to filter the content and users the new user will be able to see.

10. If you:

    - are creating a *Normal User* or a *Project Manager with Full Visibility*, the wizard is complete. Click *Finish* to create the user.
    - are creating a *Project Manager with Limited Visibility*, click *Continue* and proceed to the next step.

11. In *Step 3: Assign Visible Companies*, select the companies that this user should be able to see, then click *Continue*.

    The selection you make here filters the list of users in the next step so that this Project Manager can never see users from the companies you did not select in this step. By default, only the company of the Project Manager himself (the one you selected in the previous step) will be selected.

12. In *Step 4: Assign Visible Groups*, select the groups the user should be able to see, then click *Finish*.

    Only groups containing members that belong to one of the companies you assigned in the previous step will show up in the list. In addition, some groups may be set to be visible to all users (such as the ADMINS group).
8.4 Editing Users and their Preferences

8.4.1 Edit a User

1. Click Admin.
2. On the Users page, filter the list of users if desired, and click the User Name of the user to edit.

   The Profile page appears.
3. Make the required changes:

<table>
<thead>
<tr>
<th>To edit the user's...</th>
<th>You should...</th>
</tr>
</thead>
<tbody>
<tr>
<td>user info (including password)</td>
<td>edit the fields on the Profile Page.</td>
</tr>
<tr>
<td>menu</td>
<td>choose a different menu in the User Menu list.</td>
</tr>
<tr>
<td>permissions</td>
<td>select the appropriate role from the options:</td>
</tr>
<tr>
<td></td>
<td>• Normal User</td>
</tr>
<tr>
<td></td>
<td>• Project Manager with Limited Visibility</td>
</tr>
<tr>
<td></td>
<td>• Project Manager with Full Visibility</td>
</tr>
<tr>
<td></td>
<td>For Project Managers, you can also select User Can Create Task Type and User Can Create User.</td>
</tr>
<tr>
<td>company or location</td>
<td>1. Click the Company/Location link at the bottom of the Profile page.</td>
</tr>
<tr>
<td></td>
<td>2. Select a new company and click Finish.</td>
</tr>
<tr>
<td>visible companies or locations (only applies to Project Managers with Limited Visibility)</td>
<td>1. Click the Visible Companies or Visible Locations links.</td>
</tr>
<tr>
<td></td>
<td>2. Make a selection of visible locations and/or companies and click Finish.</td>
</tr>
</tbody>
</table>

4. Click Change to confirm.

8.4.2 Change the Password for a User

1. Click Admin.

   The Users page appears.
2. On the Users page, filter the list of users if desired, and click the User Name of the user to edit.
3. Click the Password tab.
4. Type a new Password and Confirm it.
5. Click Change to save the changes.

8.4.3 Change a User’s License Status

1. Click Admin.
   The Users page appears.
2. On the Users page, filter the list of users if desired, and click the User Name of the user to edit.
3. Select or deselect the User has guaranteed access option and click Change.
   
   **Note:** Changing users’ licensing is effective immediately.

Alternatively, to change many users’ licensing status in a single operation:

1. Select the users on the User page.
2. In the actions menu, click Grant Guaranteed Access or Remove Guaranteed Access as desired.

8.4.4 Set the Preferences for a User

1. Click Admin.
   The Users page appears.
2. On the Users page, filter the list of users if desired, and click the User Name of the user to edit.
3. Click the Preferences tab.
4. Configure the Preferences as needed. For more information on the settings and options, see General Preferences on page 15.

8.4.5 Copy Preferences to Users

Use this to quickly copy previously defined preferences to one or several users.

1. Click Admin.
   The Users page appears.
2. Select the user(s) whose preferences you want to change and select Apply Preferences in the actions menu.
3. In the Apply Preferences popup, select the preferences to change, and deselect the preferences to keep.
   Other Preferences are the user preferences not mentioned above (for example: show thumbnails or not, search results layout, etc.).
4. Select who you want to copy the preferences from: in Take Preferences From, select another user, or select Default to use the default settings for the preferences you selected.
5. Click OK.

### 8.4.6 Edit a User's Group Memberships

1. Click Admin.
2. On the Users page, filter the list of users if desired, and click the User Name of the user to edit. The Profile page appears.
3. Click the Groups tab.
4. To add the user to one or more groups, select those groups (use Ctrl+click to multiple-select) in the Available Groups list and click the >> button.
5. To remove the user from one or more groups, select those groups in the Current Groups list (use Ctrl+click to multiple-select) and click the << button.

The changes are effective immediately.

### 8.4.7 Set Available Download Formats for a User

1. Click Admin.

The Users page appears.

2. On the Users page, filter the list of users if desired, and click the User Name of the user to edit.
3. Click the Download tab.
4. Select or deselect the download formats you want to enable.

**Note:** User permissions for download formats take precedence over group permissions for download formats.

5. Click Change.

**Note:**
Alternatively, you can click Use Group Permissions to make the user inherit the download formats from his or her group membership(s).

### 8.5 Delete a User

When deleting a user, WebCenter checks for dependencies, such as being a Project Manager or being an Approval User on an ongoing Approval Cycle, before deleting the user.

If there are dependencies, WebCenter asks you whether you want to view them (with links so you can remedy the dependencies) or cancel the deletion.

**Note:** Attempting to delete multiple users will stop on the first user that has dependencies. To delete the rest of the users, reselect them and delete them.

1. Click Admin.
2. Select the checkbox next to the name of the user to be deleted. To delete more than one user at a time, select additional checkboxes of users to delete.
3. Click Delete User(s) in the actions menu.
4. Click OK to confirm the deletion.
5. If there is a Delete Dependency confirmation, choose the desired option and click OK.
   Users cannot be deleted until any dependency issues have been resolved.

8.6 Managing User Memberships in Projects

8.6.1 View a User’s Project Memberships

1. Click Admin.
2. On the Users page, filter the list of users if desired, and click the User Name of the user to edit.
3. Click the Projects User is in tab.
   The projects for user ... page appears. You can filter the list of projects if needed, using the Show Projects, Manager Last Name, and Manager Group Name fields and the Modified list. Fill in the filter criteria and click Go.

   Note: This does not show Projects for which the user is the Project Manager or those Projects in which the user is a member by means of belonging to an invited Group.

4. You may uninvite the user from any of the Projects shown in this list by selecting the Project(s), and clicking Uninvite in the actions menu. The user must not be an Approver in an active Approval Cycle.

8.6.2 Invite a User to Multiple Projects

1. Click Admin.
2. On the Users page, filter the list of users if desired, and click the User Name of the user to edit.
3. Click the Projects User is in tab.
4. Click Invite to Projects.
5. Select the projects you want to invite the user to, and click Continue.
6. Select the permissions the user needs in the project and click Finish.

8.6.3 Uninvite Users from Multiple Projects

Note: If the user is an Approver in an ongoing Approval Cycle in a selected Project, the entire removal action is cancelled. You must stop the Approval Cycle and then perform the removal.

1. Click Admin.
2. On the Users page, filter the list of users if desired, and click the User Name of the user to edit.
3. Click the Projects User is in tab.

   The projects for user ... page appears. You can filter the list of projects if needed, using the Show Projects, Manager Last Name, and Manager Group Name fields and the Modified list. Fill in the filter criteria and click Go.

4. Select the Projects you want to uninvite the user from.

5. Click Uninvite in the actions menu.

6. Click OK to confirm.
9. Managing Groups

9.1 Create a New Group

1. Click Admin > Groups > New Group.
2. Enter the name of the group.
3. Choose who will be able to see this group: All Project Managers, Administrators Only, or Selected Project Managers.
4. Click Continue.
5. In Step 2: Select Group Members, select the members of the group by checking the checkboxes to the left of their names.
6. Is this new group visible to every Project Manager or only to Administrators:
   - If yes, click Finish. The group is created.
   - If no, click Continue. The, in Step 3: Assign group visibility to project manager(s), select the Project Managers that can see this group and click Finish.

Project Managers with Full Visibility are unavailable, as they can see all groups. By default, group members can see the group but you can still de-select the group members so that they don’t know this group exists.

9.2 Add Users to a Group

1. Click Admin > Groups.
2. Click the name of the group to edit. Click Add Users.

Attention: Members of the Admins group can perform any task and are not bound by any security restrictions; be careful when adding users to this group.

The list of users who are currently not members of the group is displayed.
3. Select the user(s) to add to the group.
4. Click Finish.

9.3 Remove Users from a Group

1. Click Admin > Groups.
2. Click the group to edit.
3. Select the user(s) to remove from the group.
4. Click Remove in the actions menu.
5. Click OK.
9.4 Copy or Move Users Between Groups

1. Click Admin > Groups.
2. Click the group to edit.
3. Select the users to copy from the group.
4. In the actions menu, click:
   - Copy users if you want to copy users from one group to another.
   - Move users if you want to move users from one group to another.
5. Either filter or click Go to show the list of groups.
6. Select the new group(s) into which the users will be copied or moved.
7. Click Finish.

9.5 Rename a Group

1. Click Admin > Groups.
2. Click the group to edit.
   - The ADMINS and USERS groups cannot be renamed.
3. Enter the new name of the group in the Group Name field and click anywhere else on the page.
4. Click OK.

9.6 Change the Group Visibility

1. Click Admin > Groups.
2. Click the group to edit.
3. Click the Visibility tab.
4. Select the desired visibility choice: All Project Managers, Administrators Only, or Selected Project Managers.
5. Depending on your visibility choice, proceed as follows:
   - If you chose Selected Project Managers, you will be prompted to select the individual Project Managers who should be able to see this group. Click Change when you have made your selection.
   - If you chose one of the other options, go directly to the next step in this procedure.
6. Click OK.
9.7 Set Group Download Formats

Configure the available download formats in WebCenter Preferences (Admin > Preferences > Download Formats) before setting group download permissions.

1. Click Admin > Groups.
2. Click the group to edit.
3. Click the Download tab.
4. Select or deselect the download formats you want to enable.

**Note:** User permissions for download formats take precedence over group permissions for download formats.

5. Select or deselect checkboxes to grant or deny permissions as desired.
6. Click Change.

9.8 Managing Group Memberships in Projects

9.8.1 View a Group’s Project Memberships

1. Click Admin > Groups.
2. Click the group to edit.
3. Click Projects.

9.8.2 Invite a Group to Multiple Projects

1. Click Admin > Groups.
2. Click the name of the desired group.
3. Click Projects.
4. Click Invite to projects.
5. Either filter or click Go to show the list of all projects to which this group is not invited.
6. Select the projects to which the group is being invited.
7. Click Continue.
8. Set the project permissions that this group will have in the projects to which it is being invited. The same permissions will apply to each project.
9. Click Finish.

### 9.8.3 Uninvite Groups from Multiple Projects

If a user in the group is an Approver in an ongoing Approval Cycle in a selected Project, the entire removal action is cancelled. You must stop the Approval Cycle first, and then perform the removal.

1. Click **Admin > Groups**.
2. Click the name of the desired group.
3. Click **Projects**.
4. Either filter or click **Go** to show the list of all Projects to which this group is invited.
5. Select those Projects from which the group is to be uninvited.
6. Click **Uninvite** in the actions menu.
7. Click **OK** to confirm the removal.

### 9.9 Overview of My Group's Tasks

*My Group's Tasks* lets the **Group Manager** quickly view the tasks assigned to their group or group members. It also allows to assign, re-assign, or distribute the tasks among the group members.

If a group member is ill or not available, the Group Manager can re-assign the task to an other group member. A Group Manager can also monitor the progress on a selected Group or Group Member. Using the filter options, the Group Manager can have a quick overview of the workload.

#### 9.9.1 Group Task Manager

Every department has a Department Manager. In WebCenter Department Manager are referred to as **Group Manager**. A group can have any number of Group Managers including 0. Group Manager is always part of a group.

A Group Manager likes to view the tasks assigned to a selected group or group members, which will assist him in distributing the tasks and also get a quick view on the current status of a task.

The *My Group's Tasks* feature allows Group Managers to:

- View task assignments for a selected group and the workload overview.
- View tasks assigned to a group member and the workload overview.
- Re-assign any task assigned to a group member.
- Review the task overview filtering on status and due date.

#### 9.9.2 Assigning a Group Manager

The *My Group's Task* page can only be accessed by a Group Manager. Only a member of ADMINS can turn a group member into a Group Manager.
1. Log in to WebCenter as an Admin user.
2. Click Admin > Groups > Groups.
3. Search for the required Group Name or click the Group Name from the list available.
4. Select the Group Manager check box for the desired group member.
   You can assign multiple Group Managers to one group. The same user can also be Group Manager to multiple groups.

9.9.3 Using My Group's Tasks

To access My Group's Tasks feature, log in as Group Manager. Click My WebCenter > My Group's Tasks to view the Group Tasks for Group page.

Viewing Task Assignments

You can view the tasks assigned to a selected group and also for a group member within the group.

1. The task list for assigned group appears.

   **Note:** If a Group Manager manages or is assigned to multiple groups, WebCenter displays the list of managed groups. You can only view the tasks for one group at a time.

2. In the Tasks assigned to drop-down list box, select the group or group member for whom you want view the task assigned.

3. A task list assigned to the selected group or group member appears. Also in the list are:
   - Task Name
   - Project Name
   - Assigned to
   - Status
   - Lead Time
   - Due Date
   - Created Date
   - Started Date
   - Estimated Date
   - Task Documents

Viewing a Workload Overview

During editing/re-assigning, the Group Manager can have an overview of number of tasks assigned and how many are overdue. The Task Count is the number of assignments assigned to a group member. The Task Count displayed is based on the filtering criteria and tasks with past due-date always appears. The non-active projects do not appear and are not counted.

1. The task list for assigned group appears.

   **Note:** If a Group Manager manages or is assigned to multiple groups, WebCenter displays the list of managed groups. You can only view the tasks for one group at a time.

2. The workload overview appears for the selected group.
If the task is past the due date, it appears in red.

Reassigning a Task

A Group Manager can re-assign a task to a group or a group member. A task can be re-assigned only to a group member within the same Group. In addition to this when the task is reassigned, the WebCenter UI displays the previous assignee in **Previous** column.

1. **Note:** Ensure to log in as **Group Manager**.

1. The task list for assigned group appears.

   **Note:** If a Group Manager manages or is assigned to multiple groups, WebCenter displays the list of managed groups. You can only view the tasks for one group at a time.

2. Select the new assignee in the **Assigned to** drop-down list box. This list contains group and group members name.

3. WebCenter shows changed tasks with a yellow background indicating the change.

   **Note:** Even if a task is not initially assigned to a group, the Group Manager has all the rights to re-assign the task to a group member.

4. Click **Save** to commit the changes.

Filtering Based on Task Status and Due Date

A Group Manager manages multiple tasks at a time and this might lead to delay. Using the **Search Tasks Status**, one can see tasks in a more specific status.

For example, you can filter the tasks which are in Completed or In Progress status. By filtering the task, a Group Manager need not re-assign completed tasks or tasks which cannot start because a predecessor is not complete.

Similarly the tasks can also be filtered by **Due Date**. This gives a Group Manager a quick view of the task for the required time line. Using this information Group Manager can view what is due this week or this month to make the required planning.
1. **Note:** Ensure to log in as **Group Manager**.

The task list for assigned group appears.

**Note:** If a Group Manager manages multiple groups, WebCenter displays the list of managed groups. You can only view the tasks for one group at a time.

2. In the **Search Tasks Status** drop-down list, select the desired task status.

3. In **Due Date**, select the required due date and then click **Go**.

**Note:** To set the Due Date filtering, setting a task status filter is not necessary. The Due Date changes to completion date, if the task status is filtered to completed.

The following are the default due dates settings available:

- All
- Today
- Next 3 days
- Next week
- Next 2 weeks
- Next month
- Next 3 months
- Overdue
- Week overdue, all the tasks which are overdue for less than five days

**Filtering Based on Sort by**

Using **Sort by**, the Group Manager can view tasks for a selected group in ascending or descending order.

For example, in **Sort by**, if **Due Date** is selected then the tasks for the selected group appears with the earliest due date. Similarly if **Due Date Reversed** option is selected, then the tasks for the selected group appears with the latest due date.

1. **Note:** Ensure to log in as **Group Manager**.

The task list for assigned group appears.

**Note:** If a Group Manager manages multiple groups, WebCenter displays the list of managed groups. You can only view the tasks for one group at a time.

2. In the **Sort by** drop-down list, select the desired option.

3. The tasks list appears as per the option selected in **Sort by**.

The **Sort by** option is indicated by an arrow. For example, if Due Date is selected then it would appear as:

![Due Date](Sep 2, 2011)

The size arrow can also be used for sorting.
10. Managing Roles

10.1 Roles

A Role is an assignment that you can create in WebCenter to be used later on in Projects. You can assign a Role to Project Templates, Projects, Tasks and Approvals. You can set up project permissions, approval settings and tasks for a Role within a project or template.

You can assign these Roles to real users and groups later on. When you assign a Role to a real Users or Groups, you are essentially assigning these settings as well. You can create versatile Project Templates using Roles which will help you to reduce the number of Project Templates.

Roles are created at a global level which the Project Managers (or Selected Project Managers) can use in individual projects and templates. You can invite these Roles just like Users and Groups.

Roles are effective after real members (Groups, Users) are assigned into each of the Roles. A project Role assignee will be treated like a standard project member. Once you assign the Role to a project, these take over the role’s security setup, approval setup and task assignments.

Multiple assignments of Roles are possible. For example, if you have a "Designer" Role, you can invite this Role to all the Projects that require a designer either after creating a Project or via the Project Template with assigned Roles.

You can use Roles:

- To combine with Workflows: the tasks assigned to Roles will be picked up by the users or groups who are assigned to these Roles either at the beginning or later during the project execution. The project manager can decide who will get assigned to the Roles. Since WebCenter keeps track of Role assignments:
  - the notifications will be sent out correctly
  - the task will be shown in the respective members' to-do list
  - the necessary access rights will be assigned to the members to perform the task (depending on the role)
  - the approval notifications will be sent out correctly.

- In Project Templates: features associated with Roles are inherited from Project Templates during project creation. If you create a new project based on a template, it will have the roles from its template including the current/default Role assignment (if any). Adding Roles (instead of user Groups or individual Users) to your Project templates makes them more versatile.

Although the Roles are defined for entire WebCenter, the assignment of Roles is done per project and is independent of the User. Therefore, you can assign the same user or group to a "Designer" Role in one project and restrict the access for the same User/Group in other projects.

You can create Roles as an administrator. Read more in Creating a Role on page 82.
10.2 Creating a Role

1. Click Admin > Roles > New Role.
2. Specify the name of the Role.
3. Determine the visibility of the Role by selecting from All Project Managers, Administrators, or Selected Project Managers. Click Continue.

Subsequent step depends on whether you selected Selected Project Managers visibility in this step.

<table>
<thead>
<tr>
<th>Choice</th>
<th>Steps</th>
</tr>
</thead>
<tbody>
<tr>
<td>Selected Project Managers</td>
<td>You should select which Project Managers are allowed to see the Role</td>
</tr>
<tr>
<td>All other</td>
<td>The New Role is created.</td>
</tr>
</tbody>
</table>

You can view these roles in the list of Project Members even after being resolved.

10.3 Renaming a Role

1. Go to Admin > Roles. This will lead you to the tab named General of Role Management page. You can see the list of available Roles in this tab.
2. Click on the name of the Role. Role names will be visible as links.
3. Enter the new name of the role in the Role Name field and click anywhere else on the page.

10.4 Changing the Role Visibility

1. Go to Admin > Roles. This will lead you to the tab named General of Role Management page. You can see the list of available Roles in this tab.
2. Click on the name of the Role (visible as a link) for which you want to change the Visibility.
3. Go to the Visibility tab and change the visibility.

You will have to choose from three Visibility choices: All Project Managers, Administrators Only and Selected Project Managers.

<table>
<thead>
<tr>
<th>Options</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Selected Project Managers</td>
<td>You will be prompted to select the individual Project Managers. Click Change when you have made your selection</td>
</tr>
<tr>
<td>All Project Managers and Administrators Only</td>
<td>You will be asked to confirm the selection. Click OK.</td>
</tr>
</tbody>
</table>
10.5 Deleting Roles

1. Go to Admin > Roles. This will lead you to the tab named General of Role Management page. You can see the list of available Roles in this tab.
2. Select the Roles from the list of Roles by toggling the respective check boxes.
3. Click on Actions > Delete Role(s) from the list header.

10.6 Converting Empty Groups to Roles

Previous versions of WebCenter made use of empty Groups to create roles. From WebCenter 12 onwards this is replaced by Roles. However, you can also convert any empty Group that serves as Role into a full fledged Role. This will ensure that any reference to such empty Groups will be retained and shifted to the new Role that is created during this process.

To convert an empty group to a role you need to follow these steps:

1. Go to Admin > Groups.
2. Select those Groups which you need to convert into Roles. You can use Show filter to filter out all the non-empty groups.
3. Go to Actions menu. Select Convert Group to Role action link in to execute the conversion into a Role.

You will be re-directed to a page detailing how many of the selected empty groups were converted and how many were not.

Note: The conversion can fail when:
• a non-empty group is selected for conversion. Only empty groups can be coverted into roles.
• a role with the same name as the selected empty group exists. Role names must be unique.
11. Project and Document Characteristics

Characteristics are descriptive tags that can be assigned to projects or documents to make them easier to find.

Characteristics are hierarchical. This means there can be different levels of characteristics for various product lines so that you can drill down through the information to find the exact characteristic desired when searching the database.

For example, you could create a master characteristic for Electronics, and then various sub-characteristics for types of appliances, entertainment equipment, or computers, and so forth. They are presented in a tree format - main categories with expandable branches. The characteristics tree configures the available characteristic names as well as how they are organized.

11.1 Create a Characteristic

1. Click Admin > Characteristics
2. Do you want to add a primary characteristic (a main category) or a secondary characteristic?
   • To add a primary characteristic, select the option button next to Root at the top of the tree and then click New Characteristic.
   • To add a secondary characteristic, select the option button for the characteristic under which to add the new one, and then click New Characteristic.

   There can be up to 17 levels of characteristics or at most 256 characters for the entire characteristics path from the root characteristic to the deepest-level characteristic.
3. Enter the name of the characteristic in the Name field.
4. Click Create. The new characteristic appears in the list.

11.2 Edit or Delete a Characteristic

When deleting a characteristic, WebCenter checks if the characteristic or any of its child characteristics are assigned to any Projects or documents. If such a dependency is found, you are prompted to remove the dependency and delete anyway, or cancel the deletion.

1. Click Admin > Characteristics
2. Do one of the following:
   • To edit a characteristic, click its name in the tree structure. Type a new name in the Edit Characteristic page and click Change to confirm.
   • To delete a characteristic, select it in the tree and click the Delete Characteristic link.

   If there are no dependencies, it is deleted immediately. Note that any sub-characteristics of the selected characteristic will also be deleted.
12. Project and Document Attributes

Basic concepts

Attributes are a way to assign user-configurable fields and their values to documents and projects. They can be:

- **Prompted** so that the user has to set a value each time it is used,
- **Calculated** from an ArtiosCAD formula,
- restricted to a group of preset values (a Restricted Set).

The Restricted Sets must exist before you can use them when creating an attribute.

Attribute Categories group attributes together for convenience. An attribute must be put into an attribute category before it can be used; however, the same attribute can be in multiple categories.

You must create an Attribute Category before adding attributes to it.

12.1 Create a Restricted Set

1. Click Admin > Attributes > Restricted Sets > New Restricted Set.
2. Enter information in the fields as appropriate:
   - **Name**: the name of the Restricted Set, up to 35 characters.
   - **Type**: the data type of the Restricted Set. There are six allowed types: Area, Distance, Float, Integer, Text, Volume, and Weight.
     A Float is a number containing a decimal point and an Integer is a whole number.
     The labels in parentheses after the name of the type indicate the units of measurement used in Imperial and Metric systems.
   - **Value**: an entry for the restricted set. Text values can be up to 255 characters long.

   Click Add to add the value to the set and clear the Value field. Enter as many values as desired, clicking Add after each one.

   Tip:
   
   You can sort the Values list using ▲ and ▼, or click the Sort button to sort it alphabetically (for Text Type Restricted Sets).
   You can also select one or more values and click Remove to remove them.

3. Click Create to create the Restricted Set.

12.2 Edit a Restricted Set

1. Click Admin > Attributes > Restricted Sets.
2. Either filter or click Go to show the restricted sets.
3. Click the name of the restricted set to edit.
4. Change the name, or add and remove values as desired. You cannot change the type.

**Note:** If you remove a value, the next time you access a project using the deleted value, you will be prompted to change it.

5. Click **Change** to make the changes.

### 12.3 Delete a Restricted Set

WebCenter checks if a Restricted Set is being used before deleting it. If it is in use, you will be prompted to either clear the restricted set from the attribute using it, or to cancel the deletion.

1. Click **Admin > Attributes > Restricted Sets.**
2. Either filter or click **Go** to show the restricted sets.
3. Select the checkbox of the restricted set to delete and click **Delete Restricted Set(s)** in the actions menu.
4. Click **OK** when asked to confirm the deletion.
5. If the restricted set is not being used, it is deleted immediately.

### 12.4 Create an Attribute Category

1. Click **Admin > Attributes > Attribute Categories > New Category.**
2. Enter the name of the Attribute Category to create, for example **Shipping Instructions.**
3. Click **Create.**

Once you have created the attribute category, you can add attributes to it, define views, etc. To do this, click the **Attribute category was created successfully. Edit ...** link (see **Add Attributes to an Attribute Category** on page 89 for details).

### 12.5 Rename an Attribute Category

1. Click **Admin > Attributes > Attribute Categories.**
2. Click the attribute category to rename.
3. Type the new name in the **Edit Category** page.
4. Click **Save.**

**Note:** Click **Save As Copy** if you want to duplicate the attribute category under the new name, while keeping the original category as it was.
12.6 Delete an Attribute Category

WebCenter checks if an Attribute Category is being used before deleting it. If it is in use, you will be prompted to either clear the category from the projects or documents using it and delete the category, or to cancel the deletion.

1. Click Admin > Attributes > Attribute Categories.
2. Select the attribute category to delete and click Delete Category in the actions menu.

If the attribute category is not being used, it is deleted immediately.

12.7 Create an Attribute

1. Click Admin > Attributes > New Attribute.
2. Enter information in the fields as appropriate:

<table>
<thead>
<tr>
<th>In the field...</th>
<th>Fill in the...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>name of the attribute (for example, Billable).</td>
</tr>
<tr>
<td>Description</td>
<td>description of the attribute contents (for example, Indicates whether work on this project should be billed by finance).</td>
</tr>
</tbody>
</table>
| Type           | data type of the attribute. Floats are numbers containing a decimal point (e.g. 3.1415) and integers are whole numbers (e.g. 42). Rich Text attribute type allows you in entering long and/or rich text. You can;  
	- add set of least 16 different colors.  
	- set the text bold and italic.  
	- use bulleted and numbered lists.  
	- Heading upto four levels and also add tables.  

In the Preview you will see the Rich Text editor. Click the Show Rich Text Controls link to view the broad pallet of text options. The Project Manager’s with change properties rights can add content from a document to the Rich text editor window. Here, the text (also Chinese, special characters), font types, bullet types, color, tables and headings are preserved. |
| Values         | choose either: |
In the field... | Fill in the...
---|---
• Prompted if you want to allow the user to enter any value.
• Calculated if you want to use an ArtiosCAD formula to calculate the attribute value (enter the ArtiosCAD formula in the field).

**Note:** You should set Calculated attributes to read-only as their values are automatically updated from ArtiosCAD and should not be changed by WebCenter users.

• Restricted Set to limit the possible values.

**Note:**
To choose a Restricted Set, it must be created before defining the attribute (see *Create a Restricted Set* on page 85).

Make sure that the Type of the Restricted Set is the same as the attribute type.

3. Select **Attribute is also a task specification** if you want to be able to use the attribute as a task specification.

For more information about task specifications, see "Basic Concepts of Task Management" in the User Guide.

4. Click **Create**.

### 12.8 Edit an Attribute

1. Click **Admin > Attributes**
2. Click the attribute to edit.
3. Edit the attribute as desired (change the Name, Description...).

**Note:** You cannot change the attribute type.

4. Click **Change** to make the changes.

### 12.9 Delete an Attribute

When deleting an attribute, WebCenter checks if the attribute or any of its child attributes are used in any projects. If it is, you are prompted to remove it from the project and delete anyway, or cancel the deletion.

1. Click **Admin > Attributes**
2. Select the attribute to delete and click **Delete Attribute(s)** in the actions menu.

   If the attribute is not being used, it is deleted immediately.

### 12.10 Add Attributes to an Attribute Category

1. Click **Admin > Attributes > Attribute Categories**.

   The **Edit Category** page shows two columns: the available attributes (that you can add to the category) at left, and the attributes that are already in the category at right.

2. To add attributes to a category or remove them from it, use the chevron (<< or >>) buttons to move them between the two columns.

   **Note:**

   Moving attributes between columns takes effect immediately.

   Attributes you have added to the category have an * in the left column.

   **Tip:** Use the search field to filter the available attributes list, and the ![up](arrow-up) and ![down](arrow-down) buttons to change the order of the attributes in the category.

   You can see a **Preview** of your attributes under the columns.

3. Click **Save** when you are done.

### 12.10.1 Attributes Views

**Default View**

When adding attributes to a category, only the **Default View** of the category exists at first (you can add other views). The **Default View** is the view that will be shown in the project or document details (on the **Attributes** page).
Note:

Users can edit attributes in the default view if they have Change Properties right on the project (for project attributes) or on the folder containing the document (for document attributes).

When editing attributes, they must fill in attributes that are required (they have a red *).

They cannot edit attributes that the Admin made Read Only.

Creation View

If you have added a Creation View of the attributes, users see it when they:

- create a project with attributes,
- create a document placeholder from a document template with attributes,
- upload one or multiple documents with attributes.

Note:

- If you haven’t added a creation view, users will see the default view instead when performing those tasks.
- When editing attributes, users must fill in attributes that are required (they have a red *). They will not be able to create the project / document placeholder if they don’t!

Users cannot edit attributes that the Admin made Read Only.
12.10.2 Add Attributes Views

- To add a creation view:
  a) Click Add Creation View in the Edit Category page.
     The attributes in the category are copied from the default view to the creation view.
  b) Use << to remove any attributes you don’t want to show in the creation view.

  Note:
  You cannot add attributes to the creation view if they are not already in the default view.
  To add more attributes to the creation view, switch the Current View to Default, add the attributes, then switch it back to Creation.

  c) Use a grid layout if desired (see Use a Grid Layout on page 93 for more information).

- To add a header view:
  a) Click Add Header View in the Edit Category page.
     The attributes in the category are not copied from the default view to the header view.
  b) Use >> to add attributes to the header view.

  Note:
  You cannot add attributes to the header view if they are not already in the default view.
  To add more attributes to the header view, switch the Current View to Default, add the attributes, then switch it back to Header.

Note: You cannot use a grid layout for the header view.
c) Click Save to save all your views.

12.10.3 Edit the Terminology for Project Creation

It is possible to change the terminology used for project creation so that the Project Creation page talks about "Designs" instead of "Documents", or "Roles" instead of "Placeholder Groups", for example...

You can achieve this by customizing the terminology in the attribute category of the project or template used as a basis for project creation.

You need to:

1. Click the attribute category to use on the Attribute Categories page.
2. Add a Creation or Header view to your attribute category and click Save.
3. Click Edit Terminology.
4. In the Edit Terminology pop-up, fill in the custom terms you want use instead of the default project creation terms.

For example, fill in Designs in the Documents field if you want to show "Designs" instead of "Documents" on the project creation page.

Any field left blank will still use the default term.

Attention: Your custom terms will not be automatically translated, and will show as you enter them for all languages in which you run WebCenter.
12.11 Use a Grid Layout

Adding a grid layout to your attribute category allows you to customize the way your attributes will be shown to users.

It also provides more advanced features, like making an attribute required (users have to fill it in) or read only.

1. Click Use Grid Layout in the Edit Category page.

   This shows extra options and buttons on top of your attributes column, and a Details table at right, containing information and extra options for the selected attribute.

2. Select Alternating Background if you want your rows to have an alternating background color.

3. Select Show also attribute types and restricted set types if you want the types of the attributes / attributes restricted sets to be displayed after each attribute (like Countries in the example above).

4. Add or remove columns and rows as desired:
   - Click \( \text{+} \) to add a row at the bottom of the table.
5. If you want an attribute to be displayed across several columns, select it and enter the desired number of columns in **Span Columns** in the Details table.

6. Format your grid as desired:
   - To add a **Title** row, click **Title** then fill in the **Title**, choose the number of **Columns to span** and the title **Style** in the pop-up that opens.
   - To add a **Spacer** bar, click **##** then fill in the bar's **Height** and **Color** in the pop-up that opens.
Note:

- You can use color names or hexadecimal codes.
- If you don't enter a Height, the bar will have a default height.
- If you don't enter a Color, the bar will be white.

- To add a Ruler, click then choose the number of Columns to span and fill in the Height and Color in the pop-up that opens.
- To add a Header Bar, click .

The example below has a Header Bar on top (showing Name, Value and Type), then a Title (Packaging information), a blue Spacer bar, and a black Ruler after two attributes.

Note: You can edit the formatting (color, height...) in the Details table at right when you select the cell.

7. You can change how an attribute will appear to the user by giving it a Label (in the Details table). For example, you could use a label to show Manufactured in: instead of Country. This is particularly useful if the users are not familiar with your attributes, or if you are using generic attributes for different purposes.

8. You can also format individual attribute cells using Styles (see Define Styles on page 96).

9. If desired, change the visibility of individual attributes: select a cell and choose the Visibility parameter to use:

   - Choose Editable if you want the users (with the right permissions) to be able to edit this attribute.
   - Choose Required if you want to make it mandatory for users (with the right permissions) to fill in this attribute.
     
     If a user doesn’t fill in a Required attribute during project creation for example, he / she will not be able to save the project.

   - Choose Read Only if you don’t want any user to be able to edit this attribute.
   - Choose Hidden if you don’t want to show this attribute to users.

Note: You can also use visibility Rules to determine when an attribute will be hidden / required / read only... See Add Rules on page 96.
12.11.1 Define Styles

Define styles to further customize your attributes layout.

1. Select the cell of the attribute to customize.
   
   This shows the Details table at right.

2. Click Add Style to define a custom style.

   **Note:** You can also use one of the predefined styles (WebCenter Attribute or WebCenter Title) if you want your attributes to have the default WebCenter look.

3. Define your style: enter a Style Name, a Background Color (use the color name or the hexadecimal code), choose a Font Family...

   ![Edit Style](image)

   Click OK when you are done.

You can see your style applied to the attribute cell in the Preview.

To apply it to another attribute cell, select the cell then select the style in the Details table.

You can edit or delete the style using the links in the Details table.

   **Note:** Once you have defined a style in the Default view, you can use it in the Creation view, and vice-versa.

12.11.2 Add Rules

If you want an attribute to be hidden / required / read only... depending on a condition, you should define a visibility rule for this attribute.
A rule makes the visibility of an attribute depend on one or more other attributes.

1. Select the cell of the attribute for which you need a visibility rule.
   This show the Details table at right.
2. Click Add Rule to define a visibility rule.
3. In the Edit Rule pop-up that opens, give your rule a name (choose a name that indicates what the rule does).

4. Define your rule.
   For example, you want the attribute Number of samples to only be visible (and filled in) if the Sample Needed attribute is set to Yes.
   a) You need to first define the condition: If The value of attribute Samples Needed = Yes.
   b) Then define what happens when this condition is fulfilled: The cell is: Required.
   c) Then define what happens when it is not fulfilled: Else, the cell is Hidden.

5. Click OK when you are done defining your rule.
   The Preview is updated to reflect the result of your rule.

**Note:**

The Preview is interactive: in the example above, you can choose Yes for the Samples Needed attributes in the Preview, and see the Number of samples attribute displayed.
You can choose No (or nothing at all) and have that attribute hidden.

To apply the rule to another attribute cell, select the cell then select the rule in the Details table.
You can edit or delete the rule using the links in the Details table.
Note: Once you have defined a rule in the Default view, you can use it in the Creation view, and vice-versa.

Note:
You can create more complex rules by clicking the And link to add more conditions.
Choose AND if both conditions should be fulfilled, or OR if at least one of them should.

You can define very complex rules if necessary.
In the example below, a warning message is made visible (but read only) when somebody requests more than 10000 samples or asks for more than 4 spot colors.
The warning message itself can be a title or an attribute (that you can use in several attribute categories).
12.12 Enhancing Attributes with Advanced Features from Grid Layout

You can enhance the attributes from the Grid layout view. You can restrict values to available cascading attributes, create multi-value attributes, add label images and add HTML help etc... to the attributes.

- Click Use Grid Layout in the Edit Category page.
- Click on any of the attributes. Its details will appear on the right side.

- **Label Image**: You can add a representative image as a label image. Read more in Create Image Label for an Attribute on page 99.
- **Restrict Values**: You can restrict values to imported attribute lists containing Cascading Dropdowns as columns. Read more in Installing Cascading Dropdowns on page 106.
- **Allow Multiple Values**: You can allow more than one value to an attribute. Read more in Create a Multi-Value Attribute on page 101.
- **Info Page**: You can provide additional information in an HTML page. Read more in Create HTML Information for an Attribute on page 102.

### 12.12.1 Create Image Label for an Attribute

You can create Project request forms or Order forms with graphical labels by setting image labels for specific Attributes in an Attribute Category. You can use this feature to make the form visually attractive and user friendly. In addition, you can add graphical (packaging) symbols and warnings to aid the user while filling in the forms.

1. Add the label images to the following folder on the WebServer: WebCenter\WebServer\tomcat\webapps\WebCenter_Inst\custom\AttributeLabelImages.
   Create a new folder custom if it does not exist yet and create a folder named AttributeLabelImages under this folder.
Note:

- For the best user experience, use .jpg images. It does recognize .gif, .jpeg and .png.

2. Open your Attribute Category and select the Attribute for which you want to give an image label.

3. In the cell details, enter the correct image name including the extension in the Label Image field and save your attribute category.

You can see image labels appearing instead of attribute names in the forms.
Tip: In case you wish to display a checkbox for the attribute, make sure you use an attribute with a restricted set containing only the values Yes and No.

12.12.2 Create a Multi-Value Attribute

There are situations when you are creating a new Project or filling in a Form, more than one value needs to be added as an attribute. For example, if you are producing a packaging that is intended for more than one market, you need to specify those markets as values in the respective attribute field. You can use a multi-value attribute for this purpose.

- Open your Attribute Category and select the Attribute for which you want to give more than one values.
- In the Details for the selected cell table (in the Grid layout), enable Allow Multiple values.

In your Project (as a form), you will have the particular attribute with an option to select more than one (or all) values in its response field. See an example below.
12.12.3 Create HTML Information for an Attribute

When you design Project request forms or new Order forms, you might want to provide additional information to the user who is filling in the information.

From WebCenter 12 onwards you can provide additional information as HTML help or information. This is especially useful when technical fields need to be supported with extended HTML help.

There will be an information icon that is added next to the attribute name or attribute image label. When the user clicks on this icon, a pop-up HTML page with the information will appear.

1. Create an HTML file with the additional information you want to provide along with the attribute. You can create textual information as well as images to explain the attribute.

2. Place this HTML file in the AttributeHelp folder (WebCenter\WebServer\tomcat\webapps\WebCenter_Inst\custom\AttributesHelp).

3. Open the Attribute category and select the attribute for which you want to provide HTML help or information.

4. In the cell details, enter the correct file name (of the HTML file) in the Info Page field and save your Attribute Category.
If you have an HTML information page linked to an attribute, you can see an information icon next to the attribute in the form that you created. When you click on the information icon, you can see a pop-up window with the information to help the User.
12.13 Restrict Attribute Values to Previously Selected Values

To setup a practical way to make a final selection from a previously made/calculated list of candidates, a new function has been introduced.

It applies to attribute categories or task specifications with a grid-layout having a first multi-value attribute (attribute A) and a second simple text, non-restricted set attribute (attribute B).

The result is Attribute B is restricted to the selected values of attribute A.

This can be set up only by administrators and used by all users who can edit attributes.

Usage:
Select Attribute B in the grid layout. In the cell details, set the Restrict Values selector on Attribute. This will display a dropdown with candidates for attribute B (this list is all plain-text multi-value attributes).
Select one of the candidates. This results in a behavior as shown in the below example: Final Country (which is attribute B) is restricted to the selected values for Possible Country.

Details/Limitations:

- This function only works in grid layout
- Attribute A and B must both be plain text attributes. Attribute A can be a restricted set or a plain text attribute (typically linked to a cascading dropdown).
- Attribute A must be multi-select
- Attribute B cannot be a restricted set or linked to a cascading dropdown
- Attribute B can still be multi-value, so you can select multiple values from the selected values of attribute A
- In search, attribute B is NOT shown as a dropdown, so it behaves as a simple text
- The dropdown only appears when the attribute is editable, else the selected value(s) is/are simply displayed as for a plain text attribute
- Auto-select: When attribute A has only 1 value selected, this value is automatically selected for attribute B.
- Auto-deselect: When attribute B has a value and attribute A's values are changed so that the value for attribute B is no longer a selected value for attribute A, the value for attribute B will be deselected. In case attribute B is multi-value, this logic is applied to each value separately.
- It is allowed that attribute A is itself restricted by yet another attribute.
- This function works identically for task specifications
- It is allowed to set visibility rules on both attribute A and attribute B
- When attribute A is taken away from the attribute category or if it is deleted from the system, attribute B becomes a plain text attribute. All set values are however remembered (even if they are multi-value, they will be displayed in their base form “value 1 | value 2”).
- When no values are selected for attribute A, nothing is displayed for attribute B (no empty dropdown either).

12.14 Cascading Dropdowns

Cascading Dropdowns are comprised of a set of dependant attributes that are imported into WebCenter. The choice of one attribute limits the choice of other attributes in these Dropdowns. These attributes will be visible as a dropdown while building your forms and projects and you can use them to customize and build intelligent forms. Using these, you can:

- retrieve relationships among values (for example, brand-sub brand roles).
auto-fill the values depending on the relationship (if you select a brand, a brand description will be filled in).
• do smart filtering (if you select a brand, you can filter the products that are available under the brand).
• use in advanced searching (Asset Browsing). Read more in Asset Browser on page 129.

You can use these imported values as mutually dependant restricted sets in WebCenter. You can access these attributes in Admin > Attributes > Attribute Categories. Read more in Project and Document Attributes on page 85.

12.14.1 Installing Cascading Dropdowns

Cascading dropdowns can be installed in WebCenter version 10.2 and later versions. You can create Cascading Dropdowns by following the steps below.

1. Go to WebCenter\WebServer\tomcat\webapps\WebCenter_Inst\custom. Create a folder named excel under the custom folder if it is not present. Only for WebCenter 10.2 users: go to webapp\javascript\cascading dropdowns and copy the two javascript files to webapp\javascript. We recommend that these two files are backed up.

2. You need to place an XML file named lists.xml and the excel file (with your attributes to be imported) in the excel folder.

   From WebCenter 12 onwards, you will find an example XML file called lists.xml and excel sheets in the excel folder under webapp\custom_example.

3. Adapt lists.xml according to your requirements, within the structure given in the example file. See an example below:

```xml
<lists>
  <list>
    <name>Countries and Managers</name>
    <file>CountryList.xls</file>
    <type>Excel</type>
    <sheet>Country</sheet>
    <column><columnName>CountryName</columnName></column>
    <column><columnName>CountryCode</columnName></column>
    <column><columnName>Region</columnName></column>
    <column><columnName>CountryManager</columnName></column>
    <column><columnName>RegionManager</columnName></column>
  </list>
  <list>
    <name>Countries</name>
    <file>CountryList.xls</file>
    <type>Excel</type>
    <sheet>Country</sheet>
    <column><columnName>CountryName</columnName></column>
    <column><columnName>CountryCode</columnName></column>
  </list>
</lists>
```
Note:

- `<lists>`: This tag is obligatory in this code. You can specify the rest of the details regarding the importing attribute list under `<list>` tag. In the above example, two attribute lists are being imported.

- `<name>`: You can specify the name of the list which should appear among the WebCenter attribute lists after this tag. There are two lists in the above example. The lists are named Countries and Managers and Countries. These names appear in as List names in the Restrict Values option.

- `<file>`: You should indicate the file name (including the .xls extension) after this tag. In the above example, it is CountryList.xls and this file is placed along with lists.xml in the custom folder.

- `<type>`: This should be Excel.

- `<sheet>`: Here you should specify the name of the work sheet in the excel file. Please avoid special characters and spaces in the sheet name. The sheet name in the above example is Country. You can make more than one lists from one sheet.

Remember:

You cannot make one list from the columns placed in different sheets.

As shown in the example, you can make two lists from the same excel sheet or from different sheets in the same excel file.

- `<column>`: Each column in the excel sheet should be specified separately under the `<column>` tag for each of the lists. In the example, five columns are specified under the list named Countries and Managers and two columns under the list named Countries. The data from the specified columns will be imported into WebCenter attribute categories.

- `<columnName>`: You should indicate name of the column here. Excel files get column names from the values placed in the first row. Please avoid special characters in the column names.

4. Save and close the lists.xml file.

Make sure that your XML is XML-compliant and in the right folder (excel).

5. Login to WebCenter as an admin. In the attribute category definition (Attributes > Attribute Categories and in Grid Layout), click on a text attribute (not on a restricted set).

A Restrict Values item will be visible in the Details section. This shows a dropdown with the lists you have configured in lists.xml.

These lists will have the values from the columns of the excel sheet.
Note: If you are uninstalling WebCenter, the custom folder should be backed up and placed back in the same location as before to restore the Cascading Dropdown functionality in the new installation. If this folder or one of the files is missing, you will lose the installed Cascading Dropdowns.

12.14.2 Using Cascading Dropdowns

The cascading attributes that have been imported will be visible in the attribute category definition. You can see a dropdown with the lists you have configured in lists.xml here. These dropdowns are filtered to the row combinations from Excel worksheets.

An example use case is when you want to use all your brands and sub-brands and the respective managers to be filled in to the project or for when you choose a product. If you have an excel file with the information that needs to be imported into WebCenter, you can import this by following the steps described in Installing Cascading Dropdowns on page 106.

1. Create an Excel file with Column Names in the first row and fill the columns with your brand related information that needs to be in the WebCenter Cascading Attributes.

Note:

- Please note that the columns that should be part of one list should be placed in one Excel Sheet. It is not possible to make one list out of the data placed in different sheets.
- The Cascading Dropdowns are filtered to the row combinations from the specified worksheet. The linking of row combinations is currently only possible for the columns placed in one Excel sheet.
- We recommend you delete the first empty lines at the bottom of the Excel sheet to avoid the Excel driver picking up completely empty lines and producing them as valid combinations.
- Make sure you save the Excel file as a .xls and not as a .xlsx file.
- The current driver for Excel sheets does not support Asian characters. Installing another driver can help solving this problem, but Esko does not have an out-of-the-box recommendation at this time.

2. Adapt lists.xml according to the information from the Excel file. Save and close the file.
The Excel file and the XML file should be placed in the folder named **excel**. See the location of the folder below.

See more on installation of this feature in *Installing Cascading Dropdowns* on page 106

**Note:** You can define more than one lists using columns from a single Excel sheet.

In the Admin mode, go to **Attributes > Attribute Categories** and click on any text attribute field.
Note:

- Make sure you are in Grid Layout.
- Bring a text attribute into one of the cells.
- Make sure that it is not a restricted set. You cannot view the lists of cascading attributes in the restricted sets category.

An item Restrict Values will be visible in the Details section. You can see the cascading attribute lists Esko Brands and Managers and Esko Group as lists. These are now available for use in your Projects and Forms.

3. Create attribute categories which contains the product and brand specific information and save it.
   a) Create specific attributes. Select the type as text if you want to have Cascading Dropdowns in the Details. Read more about creating attributes in Create an Attribute on page 87

   **Attribute Details**

   Define Attribute's Name, Description, Type then click Finish.

   Name:
   Esko Group

   Description

   Type:
   Text

   Restrictions:
   • Area (sq in, sq cm)
   • Area (sq in, sq mm)
   • Area (ft2, cm2)
   • Date and Time
   • Distance (in, mm)
   • Distance (in, m)
   • Float
   • Integer
   • Rich Text
   • String
   • Weight (lb, g)
   • Weight (kg, g)

   b) Create/edit attribute category. Bring these attributes to this category in the Grid layout. In this example, an attribute category is created with Esko brand related attributes. See the screenshot below.
c) Select the List and Column in the Restrict Values Section for each of the attributes that needs to contain Cascading Dropdowns. List indicates the list names given in the lists.xml file and Column indicates the column names in the Excel sheets associated with that list.

d) You can have more than one values in the attribute fields by enabling Allow Multiple Values. In the above example when a product has to be associated with more than one Ecosystems, you can enable Allow Multiple Values with more than one Ecosystems.

When you have defined attribute category with lists and columns, you will have Dropdowns available in each of the fields and it will respect the row combinations of Excel values. Therefore, when you select one value in a specific attribute field, the related information will be smartly filtered and automatically filled in if there is only one possible value left for those attribute fields.

The dropdowns interact in such a way that only those values are shown which are linked to the already chosen values for other columns. This will be a very handy feature when complicated forms have to be filled in.

In the example here, you can see that when WebCenter is selected, all the associated information is filled in from the same list. The associated data come from the columns of the list Esko Brands and Managers.

Note:
If you would like smart filtering and automatic fill in, the columns have to be specified in the same list in lists.xml.
If you want independent columns with all values irrespective of the selection, define separate lists.
Note:
You can apply rules to these lists to induce advanced customization. For example, you can set one attribute (Brand description) to be read-only. As a consequence when you select the attribute Brand(editable), the brand description (read-only) will be automatically filled in.

4. Apply the attribute category with embedded lists containing imported information to any related project or documents. You can also use these attributes to build Asset Browsers. Read more in Cascading Drop downs on page 105

Note: Cascading dropdowns are used in setting up an Asset Browser. Read more in

12.14.3 Troubleshooting

When a column contains lots of numbers, non-numbers are no longer appearing in the dropdown and the numbers are displayed with .0 after them

This is caused by the excel reader (which is a piece of Microsoft code) trying to figure out the data type in the column. It does not work according to the formatting type and therefore changing the formatting would not solve the problem. So if half (approximately) of the values are numbers, it interprets them as numbers and dumps all the rest. We are looking for a solution by enforcing the numbers to be interpreted as text.

To work around this problem, you can do add space to each value to make it pure text. The procedure to do this automatically is detailed below.

- Make a new column.
- Copy the header from the original column to this new column.
- Change the original column name.
- In the new column, set the value for the first (non-header) row to CONCATENATE(" ",X2). Here, X is the new column with the original data.
- Copy this to all rows (select the cells from the just entered cell all the way down and do a Ctrl-D).
- Save your file and close it

The Restrict values choice does not appear in the cell details while selecting a cell in the Attribute Category layout

You need to make sure that you :

- are in the Grid layout
- choose the right attribute type for the selected cell. It should be text (simple, not rich text) type.
• did not choose a restricted set.

If all the above settings are correct and you do not have the restrict values option, you have to check the configuration of the lists.xml. If WebCenter fails to find a lists.xml, it assumes that there are no lists and therefore does not show the restrict values option. The most likely cause is that lists.xml is not at the right location. It should be placed under WebCenter\WebServer\tomcat\webapps \WebCenter_Inst\custom|custom.

Check also the access rights to see if the access to read the xml is given.

The problem could arise if your lists.xml is not well-formed (not a valid xml). To check this, open the file with Internet Explorer. If you get a message "The XML page cannot be displayed", it indicates that your XML is not valid. Internet Explorer also points to other errors.

I get an error message in the Attribute Category layout

You will get an indication about what is going wrong by reading the error message. Most errors look like below:

• Cannot read list Project Code
• error:
• java.sql.SQLException: [Microsoft][ODBC Excel Driver] Cannot open database '(unknown)'. It may not be a database that your application recognizes, or the file may be corrupt. xxx\custom\excel \Products.xls

Check whether:
• the Excel file is open. You can check it by opening it yourself. If it is opened by someone else, Excel warns you about it.

Note: You need to close it after you open the Excel file. If you leave it open, it might result in the error described above.

• Check the location of the Excel file.
• Cross check the name of the Excel file with the one from the error message.
• Check for any typing errors in lists.xml.

I get an error message “List xxx is no longer configured”.

This means that the attribute category points to a list which is no longer configured correctly in XML filec(lists.xml). In this situation, all dropdowns will be replaced by simple text fields.

The dropdowns do not appear during project creation, document upload or attribute editing

Open the Attribute category layout as admin and see whether you get an error message. This situation points to the removal of lists.xml or one of its items.

After a re-install my Cascading dropdowns no longer appear.

If you are uninstalling WebCenter, the custom folder should be backed up and placed back in the same location as before to restore the Cascading Dropdown functionality in the new installation. If this folder or one of the files is missing, you will lose the installed Cascading Dropdowns.
13. WebCenter Configuration

The Configuration menu contains entries for configuring e-mail notifications, LDAP authentication, push-through folders, BackStage / Automation Engine Approval clients, the System Info page, etc.

13.1 Configure E-Mail

You can set up e-mail configuration using the Admin module. All changes to the setup are effective immediately.

1. Click Admin > Configuration > E-Mail Environment Setup.

2. Provide the required e-mail settings:

<table>
<thead>
<tr>
<th>Configuration Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>E-Mail Service Protocol</td>
<td>Set to the SMTP protocol.</td>
</tr>
<tr>
<td>E-Mail functionality enabled</td>
<td>To enable/disable e-mail functionality.</td>
</tr>
<tr>
<td>E-Mail debugging output in log</td>
<td>To enable/disable e-mail debugging output in log files.</td>
</tr>
<tr>
<td>E-Mail Service Host</td>
<td>Address for the preferred mail server that will act as the server for dispatching e-mail notifications.</td>
</tr>
<tr>
<td>E-Mail Service Port Number</td>
<td>Port number on which the e-mail server is listening for incoming e-mails.</td>
</tr>
<tr>
<td>Outgoing E-Mail Notifications &quot;FROM&quot; Address</td>
<td>Supply a valid e-mail address. This will be used as the &quot;From&quot; e-mail header for every e-mail sent by the system. This information is important for returning undelivered mail</td>
</tr>
</tbody>
</table>
### 13.2 Configure Search Crawler Setup

You can change the **Search Crawler Setup** from the WebCenter Admin section.

1. Go to the Admin section and choose: **Configuration > Search Crawler Setup** from the main menu (default is enabled).
2. Use the **Search enabled** option to enable or disable search.
3. Use the **Rebuild index on search crawler restart** to allow or disallow rebuilding the index upon search crawler restart (default is enabled).
4. **Last crawl activity** shows the date and time of the last search crawl activity.
13.3 Configure LDAP(S)

**LDAP**

LDAP (Lightweight Directory Access Protocol) is an application protocol for querying and modifying directory services running over TCP/IP.

In the context of WebCenter, it allows you to let users sign on to WebCenter with the same user name and password they use to log on to the corporate network.

**LDAPS**

LDAPS is the more secure variant of the protocol, and it uses SSL connections instead of plain (i.e. unprotected) connections. It requires you to install certificates on the server, as described in *Install Certificates for LDAPS on the Application Server*.

While logged in to the WebCenter web interface as an administrator:

1. Click *Admin > Configuration > LDAP Setup*.
2. Enter the name or IP address of the LDAP Server.
3. Type the User Distinguished Name (DN).
   - Example: `CN=BG System,OU=Users,OU=Gent,OU=Belgium,OU=Locations,DC=esko,DC=com`.
4. Provide the Password for the user you specified in the User Distinguished Name field in the previous step, and confirm it.
5. Enable the option Use secure connection (LDAPS) to encrypt all communication between WebCenter and the LDAP server.
6. Click *Save* to save the setup.

Note: Every time you change a setting on the LDAP Setup page, you must re-enter the full LDAP credentials.

13.4 Configure External Web Connections

An external web connection is a connection to some data in an external system (usually a MIS system). The MIS system calculates the data (for example the cost/price information for an order) and WebCenter retrieves this data through the external web connection and displays it on a WebCenter page.

After configuring the external web connection, you can choose to add a link to it in a WebCenter top-level menu, project menu or a My Work section. See the Customization Guide for more details.

13.4.1 Create an External Web Connection

1. Go to *Admin > Configuration > External Web Connections*.
2. Click the **New External Web Connection** link in the **External Web Connections** page.

3. Enter the **Name** to give your external web connection.

4. Enter the **URL** of the data you want to retrieve in your external system. This needs to be accessible by either the WebCenter Application Server or Web Server.

   You can use **SmartNames** in the URL. The supported SmartNames are:

   - all basic project properties (see **List of Available SmartNames** on page 163),
   - all project attributes,
   - Requestor SmartNames ([Requestor UserName], [Requestor Location], etc…). Here, Requestor indicates the user who is logged in.

   These SmartNames will be resolved when activating the connection, depending on the context. This means that for example:

   - if you are using the [Requestor UserName] SmartName, it will be resolved to the name of the user currently logged in to WebCenter (the one clicking the link to the external web connection).
   - if you are using the [Project Name] SmartName, it will be resolved to the name of the current project.

   So if you are using an order ID as project name and you want to connect to an external system containing information about that order ID, whose URL is http://ExternalSystem/OrderInformation.jsp, then you can use http://ExternalSystem/OrderInformation.jsp?orderID=[Project Name] as URL here.

   This will be resolved to for example: http://ExternalSystem/OrderInformation.jsp?orderID=Order_83289.

   **Note:** When using SmartNames, you should take into account where the connection will be used from (where in WebCenter it will be integrated).

   - You can use user-related SmartNames (such as [Requestor UserName]) if the connection is to be added to a top-level menu or a My Work section.
   - You can use user-related and project-related SmartNames (such as [Project Name]) if the connection is to be added to a project menu.

   See the Customization Guide for information about integrating a link to an external web connection into the WebCenter user interface.

5. **In Type**, select if your external system outputs **HTML** or **XML**.

   **Note:** If your external system outputs XML, you will need an XSL (eXtensible Stylesheet Language) file to transform this to HTML and display it in WebCenter. Your WebCenter installation comes with an example XSL file, that you can customize.

   See the Customization Guide for more details.

6. **Click the Test button** to test the connection to your external system.

   You should see a green check mark ✅ if the connection is successful.
**Note:** The test button will only check whether or not the main URL is reachable. It will not take into account any SmartName used to pass on parameters, as SmartNames have to be resolved from a specific context in WebCenter.

In the example above, the test will try to connect to `http://ExternalSystem/OrderInformation.jsp`, and not to `http://ExternalSystem/OrderInformation.jsp?orderID=[Project Name]`.

---

**13.4.2 Edit an External Web Connection**

- To edit an external web connection, click its name in the **External Web Connections** page.

  **Attention:** If you change the name of a connection here, you will also need to change it in the customization files used to integrate a link to this connection into the WebCenter user interface!

  See the Customization Guide for more details.

---

**13.4.3 Delete an External Web Connection**

- To delete one or more external web connections, select it/them on the **External Web Connections** page and select **Delete External Web Connection(s)** in the action menu.

  **Attention:** Deleting a connection that is in use will break the pages that use that connection. The system will show an error message on these pages.

---

**13.5 Configure Workflow Connections**

With a workflow connection, creating a project in WebCenter can automatically create a linked job in Automation Engine or any JDF-enabled workflow.

This way, the project files can automatically be copied into the workflow job (if desired), and the job parameters can be defined from WebCenter, based on project information and attributes.

This means that:

- WebCenter can acts the single interface for your customers, CSR and sales,
- all the data collected through WebCenter is available for workflow automation.

You can also define when the project will synchronize with the workflow job automatically, and if the WebCenter Project Manager can synchronize them manually.

You can also use a workflow connection to save documents (only approved documents or all documents) and the XML metadata about the documents and project to a network folder. This allows you to archive your documents and metadata externally.
To Configure a Workflow Connection

1. Create a connection to your workflow’s JDF hot folder.
2. Add that connection in a project template.
3. Define when the workflow jobs created will be automatically synchronized to the linked WebCenter projects.

13.5.1 Create a Workflow Connection

1. Click Admin > Configuration > Workflow Connections.

   The Workflow Connections page appears, listing the workflow connections already created (if any).

2. Click New Workflow Connection.

3. Enter a Configuration Name.

4. In Synchronization type, choose which purpose you want to define the workflow connection for:

<table>
<thead>
<tr>
<th>Options</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>To export your projects as JDF files (and automatically create jobs in your workflow system from your projects)...</td>
<td>1. select Project/Workflow (JDF), 2. in the URL field that appears, enter the address of your workflow’s JDF hot folders (in which to place the JDF file). This must be in an accessible network share, in UNC format (for example \MyWorkflowServer \MyJobContainer\HotFolder). 3. Click Test to test the connection to your workflow server. If your server is running and the connection is successful, you should see Connection OK.</td>
</tr>
<tr>
<td></td>
<td>Note: If you want to use a JMF connection to your Automation Engine server: 1. Click Setup JMF Connection. 2. Enter the name of your Automation Engine server in the pop-up that opens. This fills in the URL and tests the connection automatically.</td>
</tr>
</tbody>
</table>

   | To automatically archive your documents and metadata (as a ZIP file) in a network folder... | 1. select Document + metadata (ZIP), 2. in the ZIP folder field that appears, enter the address of the network folder to use for archiving your documents and metadata. This must be in an accessible network share, in UNC format. |
### Options | Description
--- | ---

Note: The ZIP file generated will contain:

- 
  - [documentversion_id].
    - [extension]: the archived document,
- 
  - [documentversion_id].
    - [extension].xml: the XML file containing the metadata of the archived document,

where [documentversion_id] is a unique number corresponding to that version of the document and [extension] is the file extension of the original document.

**Note:** You can define a workflow connection that will work for both purposes at the same time.

5. Enable the **Active Connection** option to activate this workflow connection.

   If you disable this option, there will be no synchronization between WebCenter and your workflow system, but the connection data will be saved, so you can reactivate it later.

6. Click **Create**.

### 13.5.2 Edit a Workflow Connection

1. On the **Workflow Connections** page, click the name of a workflow connection.
2. Change the workflow connection's **settings** as desired.
3. Click **Save**.

### 13.5.3 Delete a Workflow Connection

1. On the **Workflow Connections** page, select the workflow connection(s) to delete.
2. Click **Delete Configuration(s)** in the actions menu.

### 13.5.4 Add a Workflow Connection to a Project / Template

Once you have created a workflow connection, you need to add it to project templates that Projects Managers will use to create projects. You can also add the connection to individual projects if desired.

1. On the Project Details page of the project or template, go to **Configure > Workflow Connection**.
2. Select **Connect this project to a workflow**.

   This shows extra options.

3. In the **Workflow Connection** list, choose the workflow connection you defined.
4. Select **Allow manual synchronization by the Project Manager** if you want Project Managers to be able to synchronize the workflow job to the project on demand.

If you select this, Project Managers will have an extra action on the Project Details page: synchronize with workflow.

**Note:** Whether you enable manual synchronization by Project Managers or not, the workflow job will be automatically synchronized with the project when certain events occur (see *Define When the Project and Workflow Synchronize* on page 122).

5. Define when to automatically synchronize the workflow job to the project:

- select **Synchronize on all statuses** to synchronize whenever the project status changes,
- select **Only synchronize on a completed status** to only synchronize when the project has a completed status.

**Note:** There can be more than one completed project status defined in the system.

**Note:** Make sure you have selected **Project status change** as event that will trigger an automatic synchronization (see *Define When the Project and Workflow Synchronize* on page 122).

6. Select **Copy documents when synchronizing** if you want the project’s documents to be copied to the workflow job.

**Note:** When you are using a workflow connection that automatically archives your documents and metadata in a network folder (see *Create a Workflow Connection* on page 119), **Copy documents when synchronizing** is always selected.

You can also choose to copy **Only approved documents**, or **Only documents in (a certain) folder** (select the project folder containing the documents to copy). This will work even you rename the folder later. If you try to delete the folder, you will get a warning.

7. Define **Additional Settings** for the workflow job.

In Automation Engine, you can see these settings in the **Job Setup**. See the Automation Engine documentation for more information.

**Note:**

You can use SmartNames to define those **Additional Settings**.

Click the Insert SmartName button and select a SmartName in the list that appears next to the button. SmartNames are shown between brackets, like *[Project Name]*.

This list contains general project information ([*Project Name*], [*Customer Name*], [*due date*]...), and all the attributes defined in WebCenter. The attributes don’t need to have been added to the project to be available here.

You can use several SmartNames if desired, or a combination of SmartNames and text, for example **WebCenter_[Project Name]_[Customer Name]**.

a) Fill in the job’s **Order ID**. This is mandatory as it allows WebCenter and Automation Engine to identify the job.
We recommend you use the [AE_OrderID] SmartName (corresponding to the WebCenter AE_OrderID attribute created automatically when you created the workflow connection) for the job Order ID.

b) Fill in the job’s Suborder ID if needed (this is optional).

We recommend you use the [AE_SubOrderID] SmartName (corresponding to the WebCenter AE_SubOrderID attribute created automatically when creating the workflow connection) for this.

c) If you want to use a Automation Engine job template when creating the job (so that some of the Job Setup information is already defined), define the template to use in Template Name.

<table>
<thead>
<tr>
<th>Attention:</th>
</tr>
</thead>
<tbody>
<tr>
<td>If using SmartNames, make sure that they resolve to an existing Automation Engine job name.</td>
</tr>
<tr>
<td>SmartNames are resolved when the job is created via the JDF Hot Folder.</td>
</tr>
</tbody>
</table>

8. Click Save.

13.5.5 Define When the Project and Workflow Synchronize

Once you have created a workflow connection and added it to project templates, you need to define what events will trigger an automatic synchronization between the workflow job(s)/network folders and the WebCenter project(s).

You can set this for your whole WebCenter system, but you can also overrule in specific projects or templates.

System-Wide

1. Go to Admin > Preferences > Notifications.

   The Notifications page has a column called Synchronize with Workflow.

2. Select the events that will trigger an automatic synchronization.

   This means that when one of the events you selected occurs in a project, and the project is connected to another system, the synchronization will take place.

   For example, if you select Upload new document, the workflow job created will be synchronized to reflect the project when a user uploads a new document into the project.

3. Click Save.

At the Project/Template Level

1. Go to the project or template’s Notifications tab.

   You can only do this as an Admin user.

2. Select the events that will trigger an automatic synchronization in the Synchronize with Workflow column.

   When one of the events you selected occurs in a project, and the project is connected to another system, the synchronization will take place.
3. Click Save.

13.6 Configure Push-Through Configurations for Workflow Folders

13.6.1 About Workflow Folders

What is a workflow folder?
When creating a folder the Project Manager can define it as a workflow folder, using a push-through configuration defined by the Admin.

Any file that is uploaded into this folder will be automatically copied to a location defined in the configuration. For this reason, workflow folders are sometimes also referred to as “push-through folders”.

Workflow folders are particularly useful when that other location is a hot folder of a workflow system such as Nexus, Automation Engine or Odystar, so that the file will automatically be processed by the workflow system.

Note:
The Configuration for workflow folders needs to be defined by an Administrator.
Project Managers can then select one of the defined configurations when they create a new folder.

Recognizing workflow folders
Workflow folders have a yellow icon with an arrow on it.

The files in a workflow folder have two extra icons:

- The first shows whether the copy of the file was successful or not.
- The second is a button to copy the file again to the location defined in the configuration.

13.6.2 Create a Push-Through Configuration

   The Push Through Configurations page appears, listing the push through configurations already created (if any).
2. Click New Push Through Configuration to add a new configuration.
3. Enter a Configuration Name.
4. In the Destination UNC field, type the path to the target folder in UNC format (for example \MyWorkflowServer\Container_Data\WebCenter).
5. Choose a File Naming option:
   - **Document name**: documents copied to the destination folder will keep their original WebCenter name.
   - **[Project_name]_[Document_name]**: the copied documents will get a file name consisting of the project name, an underscore and the original document name.
   - **[Customer_name]_[Project_name]_[Document_name]**: the copied documents will get a file name consisting of the Customer name, an underscore, the project name, another underscore and finally the original document name.
6. Choose the Workflow Type to enable additional integration functionality:
   - Automation Engine,
   - Nexus,
   - Odystar.
7. Enable the Active Configuration option to activate the push-through mechanism for this configuration.
   If you disable this option, files will no longer be copied, but the configuration data will be saved, so you can reactivate it later.
8. Click Create.

### 13.6.3 Delete Push-Through Configurations

1. Click **Admin > Configuration > Push Through Configurations**.
2. Select the configuration you want to delete.
3. Click **Delete Configuration** in the actions menu.
4. Click **OK** to confirm.

### 13.7 Configure Workflow Approval Clients

When WebCenter and a compatible workflow approval server (such as Automation Engine, Nexus, or Odystar) are not on the same LAN and communicate over a large network, the workflow approval client (for example the Automation Engine Pilot) needs to have an account in WebCenter so that its messages are secure.

This is configured through **Admin > Configuration > Workflow Approval Clients** in WebCenter, and, in the case of Automation Engine, in **Tools > Configuration > Web Sites** in the Automation Engine Pilot.

**Attention:**

Configure the WebCenter account first so that it can be tested from within the workflow approval server.

WebCenter and the workflow approval server must use the same user name and password!
This is completely separate from a normal WebCenter user. Workflow approval clients may not log in to WebCenter.

Two manual configuration steps must also be performed outside of WebCenter to ensure proper communication between the workflow approval client and WebCenter systems that are not on the same LAN.

13.7.1 Create a Workflow Approval Client

1. Click Admin > Configuration > Workflow Approval Clients.
2. Click New Workflow Approval Client.
3. Enter the User Name and Password for the workflow approval client user.
4. Click Create.

Note: If you have several Automation Engine, Nexus, or Odystar sites communicating with WebCenter, you need to create a separate Workflow Approval Client for each site.

13.7.2 Change the Password for an Approval Client

1. Click Admin > Configuration > Workflow Approval Clients.
2. Click Change Password link next to the name of the client user.
3. Change the password and click Change.

13.7.3 Delete an Approval Client

1. Click Admin > Configuration > Workflow Approval Clients.
2. Select the client.
3. Click Delete Client(s) in the actions menu.
4. Click OK to confirm.

13.7.4 Configure the Approval Client Software

Configure the access to WebCenter in the client application for your workflow server.
For instructions, please consult the documentation of your workflow server (Automation Engine, Nexus or Odystar).

13.8 Upload Saved Search Results Template

You can upload an Excel file (.xls) to be used as template when users download search results to Excel files.
**Note:** This will only be used when downloading the results of **global saved searches** (you can upload one template per global saved search).

1. Go to **Admin > Configuration > Upload Saved Search Results Template**.
2. **Browse** to the Excel file to use as a template for a saved search.

   **Note:** Name it exactly as the saved search you want to use it for (ignoring the extension)!

3. If you want to update an existing template file (uploaded with the same name), select **Overwrite if template file already exists**.
4. **Click Upload**.

When downloading search results using that template, you will find the results data in a sheet called “Search Results”.

**Note:**

- You can upload a template containing charts and additional sheets referencing the main “Search Results” data sheet (for example through Pivot tables).
- In this case, remember to put referencing elements to “auto-update on open” to update the sheet automatically when the Excel document is opened.

### 13.9 View System Information

The System Info page lists various system statistics. Click **Admin > Configuration > System Info** to view the system statistics and properties.
## System Info

### WebCenter usage info
<table>
<thead>
<tr>
<th>Number of projects</th>
<th>11</th>
</tr>
</thead>
</table>

### Number of documents per type

<table>
<thead>
<tr>
<th>Type</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Graphic file</td>
<td>7</td>
</tr>
<tr>
<td>ArtiosCAD</td>
<td>1</td>
</tr>
<tr>
<td>Digital Film</td>
<td>1</td>
</tr>
<tr>
<td>Cape</td>
<td>0</td>
</tr>
<tr>
<td>Other</td>
<td>6</td>
</tr>
</tbody>
</table>

### User management info
<table>
<thead>
<tr>
<th>Number of licences</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of users</td>
<td>13</td>
</tr>
<tr>
<td>Number of guaranteed access users</td>
<td>3</td>
</tr>
</tbody>
</table>

### Filestore usage info
<table>
<thead>
<tr>
<th>MB used</th>
<th>905</th>
</tr>
</thead>
<tbody>
<tr>
<td>MB free</td>
<td>51730</td>
</tr>
</tbody>
</table>

---
13.10 Troubleshooting Tool

If you experience some problems with WebCenter, or if you want some real-time information on your WebCenter system, you can run the Troubleshooting Tool. To do this, you can either:

- Go to Admin > Configuration > Troubleshooting Tool in the WebCenter user interface.
- Go to http(s)://<server>/<instance>/tstools/index.html in your web browser.

Note:
- You can run the tool from this web page even if your WebCenter server is not running (some tests will fail if WebCenter is not running).
- When running this tool as a non-Admin user, you can only execute simple tests (advanced tests require Admin access).

The tool starts automatically. For each test, the tool gives a status and some extra information. You can use this information to troubleshoot your WebCenter installation and, if you cannot solve the problem, to call Esko customer support.

<table>
<thead>
<tr>
<th>Test status</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>OK</td>
<td>The test was executed and everything works as expected.</td>
</tr>
<tr>
<td>BAD</td>
<td>The test was executed, it could be working, but something requires attention.</td>
</tr>
<tr>
<td>FAILED</td>
<td>The test failed. Is is very likely that there is something wrong with the system.</td>
</tr>
<tr>
<td>SKIPPED</td>
<td>The test wasn’t executed due to a lack of rights (you didn’t log in as an Admin user) or because a previous (related) test failed.</td>
</tr>
</tbody>
</table>

13.11 Site Service

13.11.1 View Log Files

Go to Admin > Configuration > Site Service to:
- see system settings (click Show Site Defaults),
- download JBoss and Tomcat log files.
14. Asset Browser

Asset browser is a user-friendly feature to search and find assets in a large collection of WebCenter assets. You can customize the Asset Browser into the WebCenter Menu for easy access. In addition, you can create more than one Asset Browsers in the same WebCenter with different names for different sets of users for easy browsing. For example, a project manager can benefit from an Asset Browser which will collect Project Templates and a printer will benefit from one that points to finished Projects which are ready to be printed.

You can create a menu item which can be named “Assets” or “Repository” or simply “Search” or “Browse”. This menu will be linked to a highly configured Global Saved Search which will function as your Asset Browser. One Asset Browser can be linked to one Attribute Category as in saved searches. However, this Attribute Category can have multiple Cascading Drop downs resulting in multiple independent trees in the same asset browser. Read more in about Saving Searches as Asset Browser in Setting Up an Asset Browser on page 131.

A customized graphical Asset Browser will help you to visually browse through projects and graphical assets previously stored in WebCenter. To achieve this, you need to classify assets using custom attributes with graphical icons (Attribute Value Images). Read more about graphical labeling of attributes in Setting Up a Graphical Asset Browser on page 136.

You can set up a graphical browser or a tree browser and both. Technically, the Asset Browser has all the features of Saved searches which is enhanced with Tree and Graphical browsing through Cascading Attributes. Read more about Cascading Attributes in Cascading Dropdowns on page 105.

14.1 What You Need to Know about Asset Browsing

14.1.1 Concepts Used in this Section

<table>
<thead>
<tr>
<th>Concept</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asset</td>
<td>Any digital file including pictures, graphics (PDF, Illustrator, ...) and Office documents stored in the WebCenter. For example a piece of packaging design that is uploaded to WebCenter.</td>
</tr>
<tr>
<td>Asset Browser</td>
<td>A user-friendly way to find assets in a large repository. Read more in Asset Browser on page 129</td>
</tr>
<tr>
<td>Repository</td>
<td>A part of WebCenter which is considered to contain assets. WebCenter as a whole is a repository but by filtering you can pin-point to the specific section of the repository. You can achieve this by filtering on:</td>
</tr>
<tr>
<td></td>
<td>• certain document types</td>
</tr>
<tr>
<td></td>
<td>• range of projects based on project characteristics or naming conventions</td>
</tr>
<tr>
<td>Concept</td>
<td>Definition</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Saved Search</td>
<td>Highly configurable Saved Searches from WebCenter 12 onwards. Read more in the following sections from the WebCenter User Guide. Search enhancement</td>
</tr>
<tr>
<td>Tree browser</td>
<td>This tree is built based on your Cascading Attributes which you can put in the left panel to browse through the assets.</td>
</tr>
<tr>
<td>Search Parameter Panel</td>
<td>A panel appearing at the top of the search results of Asset Browser which you can use to further refine your search.</td>
</tr>
</tbody>
</table>

### 14.1.2 Organizing Assets in WebCenter

You can use the Asset Browser to its full extent by organizing Assets in WebCenter. You can upload the assets in bulk during the early stage of the WebCenter deployment which will grow with new designs and documents. For conducting effective search via an asset browser, you need to specify Attributes (metadata) for your assets while uploading them to WebCenter. You need to:

- define Attributes.
- assign those attributes to Attribute Categories
- assign the right attributes from this Attribute Category to the assets(documents) while uploading.

From WebCenter 12 onwards, you can assign these Attribute categories automatically to uploaded documents. This is done by:

- using default Attribute Categories using Document Types.
- using document templates with Attribute categories

Read more about this in *Using Autoname Generation* on page 165

When you store assets in specific projects you should ideally:

- have at least one project template created for projects specifically meant to store assets. This helps in setting up Security, Roles, Autonames and default Attribute Categories which will aid in better organization.
- not store too many documents in one WebCenter Project. Since Projects only have one level of folders, project browsing gets slow when there are too many documents or too many folders in the project. Asset Browsing will be easier when they are stored with pre-determined metadata in a set of projects.

**Note:** You do not have to specifically create “asset projects”. It is possible to design an Asset Browser for entire WebCenter site.
14.2 Creating Asset Browsers

14.2.1 Setting Up an Asset Browser

1. Save a Search using your own search settings.

   **Asset Browser** is essentially a highly configured Saved Document Search. Therefore, the features of Saved Searches are available in the Asset Browser. You can

   - set the **Saved search** to be **Global** or **Personal** as an administrator.

   **Note:** You should use the **Global** setting for Asset Browsers. **Personal** searches does not serve the Asset Browsing function since they can only be used by admins who create them.

   - filter on almost any property or attribute of documents in advanced ways.
   - define a drill-down (parameter) panel to appear at the top of the search results
   - assign the saved search to a menu item
   - assign which document properties or attributes will be displayed in the search results and in what sequence.
   - set the sorting order of the results
   - Set a preference on how many search results will appear per search result page.
   - Define what operations can be done in the saved search results
   - Define layout settings of the search results (grid versus list, number of results, thumbnails or no thumbnails, …)

   Read more in the following sections from the WebCenter User Guide. *Search enhancement*

   **To Save a Search**
   **To Search Content**

2. Add Cascading Attributes to the Saved Search. You need to follow the steps below.

   a) Log in as an administrator
   b) Import Cascading Attributes. Read more in *Installing Cascading Dropdowns* on page 106. Create an attribute category with these Cascading attributes with which you want to customize browsing and displaying.
   c) Go to Search > Saved Searches. Choose and edit the **Saved Search** from the previous step. If you did not save the Search, go to Search > Documents and restore the previous settings (within the same session) or start over.
   d) Click on the **Attributes** link. Add the Attributes from the Attribute Category that you want to assign to this search.

   **Note:** Only the Cascading attributes from the **Attribute Category** are available for tree browsing in Asset Browser.
Avoid using the same Attribute in different lists used in the same Asset Browser as it leads to unpredictable results.

e) Enable Search Panel Design. In the Search Panel Design, you should set these attributes to be Visible/Available.

**Tip:** The tree view in the Asset Browser requires the attributes to be set to Visible or Available in the Search Panel Design.

You will have a top panel with Visible/Available Attributes to refine the search. Selecting a value for one Attribute will limit the values for other Attributes.

**Note:** If the Attributes appear but not as dropdowns, check whether the Attribute Category is correctly configured. Assign it to a document to test whether the cascading effect works.

3. Create a Browsing Tree using Cascading Dropdowns.

A cascading attribute can be shown as a tree or as a set of mutually dependant attribute dropdowns where choice of one from a dropdown limits the choice available in other dropdowns.
You can choose from any of these two options or both views together. Read below some remarks about these options.

- The tree view takes more space and loads slower
- The tree view allows multiple selection
- The tree view can be restricted using the depth parameter
- Drop-downs in the top panel can also be restricted
- The tree view can be shown in a graphic way (using thumbnails). This takes even more space on the screen but creates a beautiful user experience provided you have good image representations.

a) Go to Search > Saved Searches. Choose and edit the Saved Search from Step 1. If you did not save the Search, go to Search > Documents and restore the previous settings (within the same session) or start with a new Search.

b) Click on Show Result Layout Options. This opens a panel with additional options.
c) Enter the list names that you have configured in `custom\excel\lists.xml`.

Note: You can add lists to the tree panel by clicking on Add List or remove them by clicking on the – icon. Use the arrows in the second column to move the lists up or down.

d) Set the properties for each list. These properties are applicable when a left tree panel is selected.

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Depth</td>
<td>If you leave it empty, all the columns from lists.xml will be available. If you need four columns out of five columns from your lists.xml, enter 4.</td>
</tr>
<tr>
<td>Height</td>
<td>You can set a maximum height for the tree here. If you leave it empty, the tree will take as much space as it requires. If the tree height is bigger than your entry in this setting, a scroll bar will appear.</td>
</tr>
</tbody>
</table>

Note: You can enter 1000 pixels or less for the best user experience. However, it can vary depending on the size of the user monitor.
e) Set the browsing style for Tree browsing and Image browsing by modifying the following fields.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tree panel width</td>
<td>Default Tree panel width is 300 pixels which you can increase or decrease depending on your requirements.</td>
</tr>
<tr>
<td>Image Area Style</td>
<td>For a browsing tree at the left hand side, choose Left panel only (no images) If you want to browse through an image panel at the top, choose Top panel only (no tree to the left) If you want both tree browsing and image browsing, choose Left panel and image panel</td>
</tr>
<tr>
<td>Allow Changing Image Area Style via Dropdown</td>
<td>If you want the user to change the browsing style, enable this option.</td>
</tr>
</tbody>
</table>

4. Save/Run this search.

If you have save it as a global saved search, all WebCenter users can run this asset browser from their saved search lists or from the menu if you have customized a menu item for this Asset Browser.

Note: You can restrict access to the Asset Browser by:
- deleting Saved Searches item from the Search menu for the restricted Users.
- deleting the menu item assigned for the Asset Browser.

When you run the search, you will get a tree in the search results. This tree will have branches according to the columns in the lists (Cascading Attributes). You can see in the screenshot below:
- 1. The user can choose from three options. This is only available when you have enabled Allow Changing Image Area Style via Dropdown. See the explanation above.
  - Show left Panel
  - Show Image Panel
  - Show left and image(top) panel
- 2. Tree Panel. This shows the information from the lists
- 3. Search Parameter Panel where you can refine your search using Attributes or document properties.
- 4. Image Panel
- 5. Search Results
14.2.2 Setting Up a Graphical Asset Browser

As already mentioned, the tree panel to the left can be replaced with a panel of images at the top. Alternatively, you can choose to have both at the same time which will give you synchronized results. These images are a representation of the attributes. From WebCenter 12 onwards you can configure an image label for an attribute.

1. Create images for each value of Attributes and lists (the lists you have configured in lists.xml for your Cascading Attributes).

Note:

- For the best user experience, use .jpg images. It does recognize .gif, jpeg and .png.
- The name of the Attribute (or lists) and the image should be entirely the same including the case of the letters. Extensions should be specified in lower case.
- The images appear as 100x100 pixels. If you add images exactly of this size, best performance is assured. If the sizes vary, it will be adjusted to fit into 100x100 appearance. Therefore, the image appearance will vary depending on your browser’s capacity to scale images. For instance, Internet Explorer does not give good results for .png images if they are differently sized.
2. Add these images to `WebCenter\WebServer\tomcat\webapps\WebCenter_Inst\custom\AttributeValueImages`.

If more than one WebCenter instance is used, you have to copy this setup to each instance.
Note:
Make sure that you have an image for each list used. In the above example screenshots above, this is Brand.jpg, Packaging.jpg and no image attached with Product.
Use a .jpg for the lists since list images will be frequently used. As mentioned earlier, WebCenter is optimized for .jpg. When some attribute value has no fitting image, the list image will be shown instead.

14.2.3 Removing the Search Button from the Asset Browser

If you keep the Search in the asset browser, for every search modification in the Asset Browser, you have to click it to refresh the results. You can remove this button from the Asset Browser to improve the user experience.

By removing the Search button, you can:
• save on screen space in the Asset Browser
• any change in the search criteria from the browsing tree or the search panel will update the results.

You can accomplish this by editing the Saved Search created for the Asset Browser:

1. Go to Search > Saved Searches > Edit Search
2. On the right hand side of the page, click on Show Result Layout Options
3. Disable the Show Search Button option.
14.3 Customizing the User Menu with the Asset Browser

14.3.1 Assigning a Menu Item for the Asset Browser

You can create and assign a Menu Item for easy access to your Asset Browser. The procedure is similar to assigning a menu item for Saved Searches. Read Add Custom Menu Items from WebCenter Customization Guide for details.

1. Go to Admin > Preferences > Menus. Download the XML file or create a new XML file and add the following code under the NON_ADMIN.

```
<menuitem>
  <name>AssetDemo</name>
  <labeltag>Asset Browser</labeltag>
  <url>dosavedsearch.jsp?searchName=AssetDemo</url>
</menuitem>
```

2. Assign the scope of this menu to the (set of) users or to a Company/Location. Read more in Add Custom Menu Items.

3. Save this XML and upload as a new menu.

This results in the following Menu Item named Asset Browser. The search results are directly available by clicking on this item. The name of the page is the same as the name of the Saved Search. In this example, the page appears as AssetDemo instead of “Search Results”.

14.3.2 Assigning Submenus to Dedicated Asset Browsers

You can customize your Asset Browser further by creating submenus for different asset browsers with a more dedicated and simplified user interface. This will help you to navigate easily between the asset browsers/saved searches. You do this by adding a submenu to the asset browser’s menu item which is explained in Assigning a Menu Item for the Asset Browser on page 139.
1. Set up dedicated Asset Browsers for your assets. These are Saved Searches called Brands and Packaging in this example.

2. Update the XML file with the similar fragment as in the example below. You can see that there are submenus for the set of Asset Browsers created in the previous step.

```xml
<menuitem>
  <name>Asset Browser</name>
  <url>dosavedsearch.jsp?searchName=AssetDemo&amp;actionMenu=Asset Browser</url>
  <labeltag>Assets</labeltag>
</menuitem>

<menuitem>
  <name>Brands</name>
  <url>dosavedsearch.jsp?searchName=Brands&amp;actionMenu=Asset Browser</url>
  <labeltag>Brands</labeltag>
</menuitem>

<menuitem>
  <name>Packaging Types</name>
  <url>dosavedsearch.jsp?searchName=Packaging&amp;actionMenu=Asset Browser</url>
  <labeltag>Packaging Types</labeltag>
</menuitem>
```

Note:
- This will result in submenu which folds out and permanent links on the top left below the main menu bar. The second one is caused by `&amp;actionMenu=Asset Browser`.  
- Check the spelling as every character is important.
- This code addition is not necessary if you use one menu item for a single Asset Browser alone. Example in Assigning a Menu Item for the Asset Browser on page 139.

3. Upload this XML to a new menu or update a previous menu in Admin > Preferences > Menus

4. Assign this menu to a set of Users or a User. You can also assign a menu item to a Company/Location. This versatility helps you to restrict the access to specific Groups and Users.

Clicking on Brands under Assets will bring you to the saved search called Brands. You can save this with simpler settings or with a graphical asset browser according to your preference. It is possible to give different names to the Saved Searches and the submenu items.
14.4 Advanced Options in Asset Browser

14.4.1 Configuring the Cart in the Asset browser

You can configure the Cart in the Asset Browser which can assemble the assets selected from the Asset Browser. From the Cart, you can:

- start the viewer
- download the assets
- start a new project with these assets
- modify the assets.

You can do several rounds of searching and browsing to add documents one by one to the Cart and then proceed with the actions listed above. The Cart has to be configured by the administrator while determining the settings of the Asset Browser (the Saved Search).

1. In the Search Settings, click on Show Result Layout Options which will open the Advanced Functions.
2. Enable Show Cart.
3. Save the search.

The next time you access the Asset Browser, the Cart will appear within a few seconds. You can now add your selections to the cart.

Read more about using the Cart in *Using the Cart from the Asset Browser*.

### 14.4.2 Configure Project Creation from the Asset Browser

Your Packaging Projects often involve modification of existing packaging or creation of new packaging with recurring elements. You can use a project template for these recurring elements. Asset Browser will help you to browse for these templates and existing packaging projects while setting up new Projects. You can either collect the relevant items to the Cart and start a new Project directly or start Project creation from the action list menu. Follow the steps below to configure this feature.

1. In the Search Settings, click on *Show Result Layout Options* which will open the Advanced Functions.

2. Enable *Show Project Creation Link*.

This will add a link to the search results action list (action list > Create project from selected) and to the Cart Cart > Create project from cart.

3. You can choose the template for the project creation from Asset Browser. For this, enable the Fixed Template option and select the template from the dropdown list.

<table>
<thead>
<tr>
<th>Option</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fixed Template</td>
<td>Select the template from the dropdown list.</td>
</tr>
<tr>
<td>Option</td>
<td>Result</td>
</tr>
<tr>
<td>------------------------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Template from Characteristics Path</td>
<td>You have to specify the path. For example, <code>projects\modificationTemplates</code>.</td>
</tr>
<tr>
<td>Note</td>
<td>Follow the correct spelling and letter case.</td>
</tr>
<tr>
<td></td>
<td>Projects can have multiple characteristics. The same template can appear in multiple asset browsers together with other sets of templates.</td>
</tr>
<tr>
<td>No Template Specified</td>
<td>This will result in the standard project creation user interface.</td>
</tr>
</tbody>
</table>

4. Save the search under the same name.

You can either use **Create Project from Selected** link or **Create Project from Cart** to create projects from your selected assets either from the selection or from the Cart. This will lead to project creation user interface depending on the template choice made in the steps.
above. When creating the project, the selected assets will be copied to the new project.

14.5 Tips and Tricks

**Tip:** In certain cases you might want to have your assets attached with different Attribute Categories to be shown in your Asset Browser. For instance, when you have graphical designs attached to one Attribute Category and photographs attached to another Attribute Category. If you want your Asset Browser to show these two types of assets, you can create a third Attribute Category combining these two Attribute Categories. You can create your Asset Browser attached with this Attribute Category. You can refine your Search Results from the Browsing Tree or using Search Panel. It is a good practise to name this combined Attribute Category with the name of the Asset Browser for future reference. However, this is not mandatory.

**Remarks**

- You might experience slow searching in Asset Browser if you use older versions of Internet Explorer. Consider upgrading or using quicker browsers like Google Chrome and Firefox on PC and Safari or Firefox on Mac.
- If the same value for an attribute exists in different Attribute Categories, the image label will be the same in the Asset Browser. For example if you have attribute named “lemon flavor” for Brand A and Brand B, you cannot have two different images for Brand A and Brand B.
- You cannot search for empty attributes. If you are doing a complex search with multiple checkboxes from the browsing tree with one of them without a value, the Asset browser does not give intuitive results.
- Attribute values or list names should not contain disallowed characters for the Windows Operating system file names when setting up a Graphical Asset Browsing. Avoid the double quote as well.
14.6 Troubleshooting

Problem: The asset browser works fine on one WebCenter Instance but not on another WebCenter Instance

- You need to copy all of the setup to each WebCenter Instance:
  - copy the Excel sheet containing the cascading attributes and the lists.xml configuring the cascading attributes to `webinstance\custom\excel` folder.
  - copy the images to `webinstance\custom\AttributeValueImages`.

Problem: You get a message box with “No Search Panel Exists for attribute xxx”

The chosen attribute is not set to Available or Visible in the Search Panel Design.

You should set it to Available or Visible.
15. Bill of Materials

15.1 What is a Bill of Materials?

A Bill of Materials (or “BOM”) is a list of all parts and assemblies required to build a complete shippable product. It shows what will be created and delivered during a project.

In WebCenter, this is a list of documents representing the deliverables. The documents can be actual production files or placeholder documents.

15.2 Enabling the Bill of Materials Feature

By default, the Bill of Materials functionality is disabled for the entire WebCenter system. This means that Bill of Materials features will not be visible.

To enable it, do the following:

1. Go to Admin > Preferences > General.
2. Under Bill of Materials, select the Use Bill of Materials option.
3. Click Save.

15.3 Viewing a Project's Bill of Materials

Every project has a Bill of Materials, which is by default empty.

If the Bill of Materials feature is enabled, you will see a Bill of Materials tab on your Project Details page. The tab header indicates how many documents are linked to the Bill of Materials.

Note:

You will only see the document(s) in the Bill of Materials (and their attributes) if you are either:

- an Administrator,
- the Project Manager,
- invited to the Project, with view permissions on all documents in the Bill of Materials.

Otherwise, you will see a message stating that you don’t have permissions to view the document(s) in the Bill of Materials.
When clicking this tab, you see the documents in the Bill of Materials, with information about the documents (folder, version, approval cycle, tasks...) and their Count. This indicates how many copies of that document are required for that project’s Bill of Materials.

**Note:** The count is specific for a document within a project. This means that the same document can be linked in multiple projects with a different count.

If a document has an attribute category assigned, you will see a + button. Click it to show its attributes (in list view), and click - to hide them again. To show/hide the attributes of all documents in the BOM, click + or - in the header of the table.

**Tip:** By default, the “Default” view for the attribute category is displayed, but if the attribute category has a view called “BOM”, this view is shown.
15.4 Editing the Bill of Materials

15.4.1 Who Can Edit the Bill of Materials?

Administrators and the Project Manager can always change the Bill of Materials. Other members can be allowed to change it, if they have the Change BOM permission. This permission can be set on the project’s Security page (see Project and Document Security in the User Guide).

Note: You can only set the Change BOM permission at the Project level, not at the folder level.

If a user can change the attributes on the attributes page, he/she can also change them on the Bill of Materials page.

Table: Permissions on Bill of Materials Documents

<table>
<thead>
<tr>
<th></th>
<th>Administrators</th>
<th>Project Managers</th>
<th>Users with Change BOM Permission</th>
<th>Users without Change BOM Permission</th>
</tr>
</thead>
<tbody>
<tr>
<td>Can add/remove documents to/from the BOM in active projects</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>NO</td>
</tr>
<tr>
<td>Can add/remove documents to/from the BOM in inactive projects</td>
<td>YES</td>
<td>YES</td>
<td>NO</td>
<td>NO</td>
</tr>
<tr>
<td>Can change the count of BOM documents</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>NO</td>
</tr>
</tbody>
</table>

15.4.2 Adding Documents to the Bill of Materials

You can only add documents to the Bill of Materials if:

- you are an Administrator,
- you are the Project Manager,
- you have Add and Change BOM permissions on the Project.

Adding Documents to the Bill of Materials at Project Creation

If you want Project Managers to be able to already add documents to the Bill of Materials when creating a Project, do the following:
1. As an Administrator, go to the Project or Template that Project Managers will use to create Projects, and click the Configure tab then Project Creation.

Tip: Use a Project or Template that contains a Bill of Materials with documents if you want Project Managers to have the option to copy these documents into their new Project’s Bill of Materials.

2. Select the Show check box for the Change Bill of Materials option.

   If you want Project Managers to have to add at least one document to the BOM when creating the Project, also select the Required check box.

   Click Change.

3. When a Project Manager creates a Project from that Project or Template, he/she will see a Bill Of Materials section on the Project creation page.

   • when creating the Project from a Template, that section will contain the documents in the Template’s Bill of Materials.
   • when creating the Project from a Project, he/she will have to choose whether to copy the documents from that Project’s Bill of Materials into the new Project’s Bill of Materials.

   To copy them, the Project Manager should select including BOM in the Copy setup from an existing project pop-up.

   Note: A Project Manager will not see a Bill Of Materials section on the Project creation page when creating a blank Project.

4. The Project Manager can still edit the Bill of Materials while creating the Project. He/she can:

   • add documents using the Upload, Copy and New links,
   • remove documents by clicking the - buttons in their rows,
   • change the Count of Bill of Materials documents,
   • edit the documents’ attributes (by clicking + and filling them in).

Add Documents from the Bill of Materials Tab

From the Project's Bill of Materials tab, you can:

• Upload a new document from your computer or network.
• Copy a document from another Project.
• Create a placeholder document from a document template.
• Add a document already in the Project to the Bill of Materials.

Upload a Document from your Computer or Network

To upload a document into your Project’s Bill of Materials:

1. Click Upload at the bottom of the Bill of Materials tab.
2. Click the Browse button and browse to your document.
3. If desired, select a document template to use for your document.

   Note: This is only available if the Project has been created from a Project/template containing document templates, or if the Project itself has document templates configured.
The template you choose will determine what attributes are associated with the document.

If you don’t select a document template, the document will have the attribute category associated with its document type in the Configure > Document Creation tab of the Project (see Document Creation Settings on page 49).

4. Fill in the attributes associated with the document (at least the required ones).

5. If desired, enter a new Name and a Description for your document.

   **Note:** If Automatic Document Naming is set up for document creation in the Project, the Name will be created automatically (you cannot enter it).

6. Enter the Count of this document (how many copies are needed for the Bill of Materials).

   This can be a fraction or a decimal number.

7. Choose where to upload the document (in the Project’s Root Folder or one of its sub folders).

   Choose Default (Template) if you want to use the folder defined in the document template you selected.

8. Click Save.

Copy a Document from Another Project

To copy a document from another project into your Project’s Bill of Materials:

1. Click Copy at the bottom of the Bill of Materials tab.

2. Select a Project (or start typing a Project name) in the second drop-down list.

3. Select a document in that Project (or start typing a document name) in the third drop-down list.

4. If desired, select a document template to use for your document.

   **Note:** This is only available if the Project has been created from a Project/template containing document templates, or if the Project itself has document templates configured.

The template you choose will determine what attributes are associated with the document.

If you don’t select a document template, the document will have the attribute category associated with its document type in the Configure > Document Creation tab of the Project (see Document Creation Settings on page 49).

5. Fill in the attributes associated with the document (at least the required ones).

6. If desired, enter a new Name and a Description for your document.

   **Note:** If Automatic Document Naming is set up for document creation in the Project, the Name will be created automatically (you cannot enter it).

7. Enter the Count of this document (how many copies are needed for the Bill of Materials).

   This can be a fraction or a decimal number.

8. Choose where to upload the document (in the Project’s Root Folder or one of its sub folders).

   Choose Default (Template) if you want to use the folder defined in the document template you selected.

9. Click Save.
Create a Placeholder Document from a Document Template

To create a placeholder document from a document template:

**Note:** This is only available if the project has been created from a project/template containing document templates.

1. Click **New** at the bottom of the Bill of Materials tab.
2. In the pop-up that opens, select the document template to use and click **OK**.

   The template you choose will determine what attributes are associated with the document.

3. Fill in the attributes associated with the document (at least the required ones).
4. If desired, enter a new **Name** and a **Description** for your document.

   **Note:** If Automatic Document Naming is set up for document creation in the Project, the Name will be created automatically (you cannot enter it).

5. Enter the **Count** of this document (how many copies are needed for the Bill of Materials).

   This can be a fraction or a decimal number.

6. Choose where to upload the document (in the Project’s **Root Folder** or one of its sub folders).

   Choose **Default (Template)** if you want to use the folder defined in the document template you selected.

7. Click **Save**.

Add a Document Already in the Project to the Bill of Materials

To add a document already in the Project to the Bill of Materials:

1. Click **Add to Bill of Materials** at the bottom of the Bill of Materials tab.
2. Select the Project document to add to the Bill of Materials.
3. Enter the **Count** of this document (how many copies are needed for the Bill of Materials).

   This can be a fraction or a decimal number.

4. Click **Save**.

**Tip:** In the Project’s **Documents** tab, documents that are in the Bill of Materials have a BOM icon. You can click this icon to see the Bill of Materials.

Add Documents from the Documents Tab

You can add documents that are already in the Project to the Project’s Bill of Materials.

To do this, select the document(s) to add and click **Actions > Add to Bill of Materials**. This adds the document to the Bill of Materials with a count of 1.
Add Documents from the Upload Page

You can also add a document to a Project’s Bill of Materials while uploading a document using the Upload button. You just need to select Add to Bill of Materials and specify a Count (see Upload via Upload Document).

Note:
You can only do this if:

- you are an Administrator,
- you are the Project Manager,
- you have the Change BOM permission.

Add Documents from a Workflow

You can add documents to the Bill of Materials automatically using the workflow’s Add to Bill of Materials task.

In the task’s Parameters, you can set the documents’ Count.

Tip: You can use a SmartName (for example a document or project attribute) to set the count.

Here is an example workflow using the Add to Bill of Materials task:
Tip: You can use the Select Document task to select all the documents in the BOM (select the Documents in the Bill of Materials option in the Parameters).

Add Documents from Automation Engine

You can add documents to a WebCenter Project's Bill of Materials using the Automation Engine Publish on WebCenter task (from Automation Engine 12.1).

When you publish an Automation Engine Product to WebCenter, the Product Properties and Product/Product Part Parameters will be taken as WebCenter attributes.

If there are existing WebCenter attributes with corresponding names, their values will be updated during publishing.

The following Product (Part) properties and Product (Part) Parameters are synchronized with WebCenter attributes:

<table>
<thead>
<tr>
<th>Automation Engine Properties/Parameter</th>
<th>WebCenter Attribute</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product Customer Reference</td>
<td>ae.p.cusref</td>
</tr>
<tr>
<td>Product Custom Field 1</td>
<td>ae.p.category1</td>
</tr>
<tr>
<td>Product Custom Field 2</td>
<td>ae.p.category2</td>
</tr>
<tr>
<td>Product Custom Field 3</td>
<td>ae.p.category3</td>
</tr>
<tr>
<td>Product Internal ID</td>
<td>ae.p.id</td>
</tr>
<tr>
<td>Product ID</td>
<td>ae.p.prodid</td>
</tr>
<tr>
<td>Product Name</td>
<td>ae.p.name</td>
</tr>
<tr>
<td>Product Description</td>
<td>ae.p.desc</td>
</tr>
<tr>
<td>Product Part Internal ID</td>
<td>ae.pp.pid</td>
</tr>
<tr>
<td>Part Default Angle</td>
<td>ae.pp.defaultangle</td>
</tr>
<tr>
<td>Part Default Dotshape</td>
<td>ae.pp.defaultdotshape</td>
</tr>
<tr>
<td>Part URL</td>
<td>ae.pp.url</td>
</tr>
<tr>
<td>Part Default Ruling</td>
<td>ae.pp.defaultruling</td>
</tr>
<tr>
<td>Part Preferred InkBook</td>
<td>ae.pp.preferredinkbook</td>
</tr>
<tr>
<td>Part Preferred InkBook UI</td>
<td>ae.pp.preferredinkbookui</td>
</tr>
<tr>
<td>Part Internal ID</td>
<td>ae.pp.id</td>
</tr>
<tr>
<td>Part Custom Field 3</td>
<td>ae.pp.category3</td>
</tr>
<tr>
<td>Part Custom Field 2</td>
<td>ae.pp.category2</td>
</tr>
<tr>
<td>Part File</td>
<td>ae.pp.file</td>
</tr>
<tr>
<td>Part Status</td>
<td>ae.pp.status</td>
</tr>
<tr>
<td>Part Status Nickname</td>
<td>ae.pp.status nickname</td>
</tr>
<tr>
<td>Part Status User</td>
<td>ae.pp.status_user</td>
</tr>
<tr>
<td>Part Status Notes</td>
<td>ae.pp.status_notes</td>
</tr>
<tr>
<td>Part Status Date</td>
<td>ae.pp.status_date</td>
</tr>
<tr>
<td>Part Folder</td>
<td>ae.pp.folder</td>
</tr>
<tr>
<td>Part Custom Field 1</td>
<td>ae.pp.category1</td>
</tr>
<tr>
<td>Part Name</td>
<td>ae.pp.name</td>
</tr>
<tr>
<td>Part Inks</td>
<td>ae.pp.inks</td>
</tr>
<tr>
<td>Part Barcodes</td>
<td>ae.pp.barcodes</td>
</tr>
<tr>
<td>Product Customer Name</td>
<td>ae.c.name</td>
</tr>
<tr>
<td>Product Customer Description</td>
<td>ae.c.desc</td>
</tr>
<tr>
<td>Product Customer ID</td>
<td>ae.c.id</td>
</tr>
<tr>
<td>Automation Engine Properties/Parameter</td>
<td>WebCenter Attribute</td>
</tr>
<tr>
<td>---------------------------------------</td>
<td>------------------------------------------</td>
</tr>
<tr>
<td>MyProductParameter1</td>
<td>ae.p.par.MyProductParameter1</td>
</tr>
</tbody>
</table>

When a Product or Product Part is published, corresponding WebCenter documents are automatically added to the Bill Of Materials of the Project.

The Product Amount for the Job (if given) becomes the Count property of the Bill of Materials.

15.4.3 Removing Documents from the Bill of Materials

To remove a document from the Bill of Materials, select it in the Bill of Materials tab and click Actions > Delete from Bill of Materials.

Note: Removing a document from a Project (or moving it outside that Project) removes it from the Project’s Bill of Materials as well.

15.5 How to Search for a Bill of Materials

15.5.1 Search for Projects that have a Bill of Materials

When searching for Projects using the normal search, you can specify that you only want to see Projects that have a Bill of Materials. To do this, select Only Projects with Bill of Materials in the Bill of Materials option.

15.5.2 Viewing the Bill of Materials in a Project Search

When searching for Projects, you can view a summary of the Bill of Materials documents per approval status for each Project found.

To do this, just select the View (List) option for Bill of Materials on the Search For Projects page. See Search Result Options in the User Guide for more information about displaying search results.
In the Bill of Materials column on the Search Results page, you can view the number of:

- approved documents,
- force approved documents,
- rejected documents,
- force rejected documents,
- documents waiting for approval,
- documents with a paused approval setup,
- documents without an approval setup,
- (all) documents,

... in each Project’s Bill of Materials.

Tip: Click one of the approval statuses’ icons (for example pending) to show the BOM documents with this status.

15.6 How to See if a Document is Part of a Bill of Materials

In the Project’s Documents tab, documents that are part of the Bill of Materials have a BOM icon. You can click that icon to go to the Project’s Bill of Materials page.

On the Document Details page, the BOM icon indicates whether the document is a part of a Bill of Materials. You can also click that icon to go to the Project’s Bill of Materials page.

Note: A document can be part of more than one Project’s Bill of Materials (if it is linked into multiple Projects).

15.7 Bill of Materials History

You can see all changes made to your Project’s Bill of Materials in the Project History.
You can see for example:

- new documents added to the Bill of Materials,
- documents removed from the Bill of Materials,
- changes to a document’s count.

## 15.8 Email Notifications for Bill of Materials Changes

To send email notifications when something has changed in your Bill of Materials:

1. In your Project, go to the **Notifications** tab and select who to **Notify by E-Mail** in the **Bill of Materials Changed** row.
2. Click **Save**.

The recipients will get emails when:

- a document is added to the Bill of Materials,
- a document is removed from the Bill of Materials,
- a document’s count is changed.

## 15.9 Working on the Bill of Materials from ArtiosCAD Enterprise

With ArtiosCAD Enterprise, you can see all your Projects and (ArtiosCAD) documents from WebCenter.

If you open a document in ArtiosCAD Enterprise, you can go to the Project’s Bill of Materials and see a list of all the Bill of Materials documents.

**Note:** You need ArtiosCAD Enterprise 12.1 to work with WebCenter Bills of Materials.

In ArtiosCAD Enterprise, you can:

- change the count of ArtiosCAD files in the Bill of Materials,
- add a document revision (A, B, C...) to an ArtiosCAD file (this is shown in the **Version** column of the **Bill Of Materials** tab, and in the document’s **Action History**),

**Note:** When you work with revisions on a Bill of Materials document, the latest version within a revision is the version in the Bill of Materials.
• add a print item to an ArtiosCAD file (this is shown in a separate column in the Bill Of Materials tab),
• change the order of the Bill of Materials documents.

Once you click OK, this is updated in WebCenter.

**Note:** You cannot add a document revision or a print item to an ArtiosCAD file, or change the order of the Bill of Materials documents from WebCenter.
16. Autoname Generation

Autoname Generation is a way of generating project and document names automatically in the WebCenter application. The administrator or a member of ADMINS group sets the rules for both project and document autoname generation. By default, this feature is not in use.

16.1 Structure of Autoname Generation

The structure of Autoname Generation consists of a Prefix, Suffix and Counter Length. A Counter keeps track of the count when a new project is created or when a new document is uploaded. The length defines the fixed length of the Counter.

For example: If the Prefix is `begin_`, Suffix is `_end` and the Counter Length is set to 4, then the Autoname will be generated as `begin_0001_end` and the next document or project name will be `begin_0002_end`.

Note:
The Project Autoname Generation happens at “transaction time”, meaning until the project or document is uploaded or submitted the autoname cannot be set or predicted.

The prefix and suffix parts can be defined using SmartNames. Here are few examples as below:

Example 1: If the Prefix is [Customer Location], Suffix is [EditField] and the Counter Length is set to 4. Here, the [Customer Location] and [Project Name] are selected using SmartNames, then the Autoname will be generated as Gent_0001/WebCenter_printpromotion and the next document or project name will be Gent_0002/WebCenter_printpromotion.
Example 2: If the Prefix is \[Customer Location\] \[Creation Date:dd.MM.yy\], Suffix is \[Customer ShortName\] and the Counter Length is set to 4. Here, the \[Customer Location\] \[Creation Date:dd.MM.yy\] and \[Customer ShortName\] are selected using SmartNames, then the Autoname will be generated as Gent_02.05.12_0001_BBC and the next document or project name will be Gent_02.05.12_0002_BBC.

16.1.1 Types of Autoname Generation

The following are the types of Autoname Generation in WebCenter.

- **System-wide project autonaming**
  
The System-wide project autonaming settings are set by an administrator to enable/disable project auto naming. The administrator can enter values for the Prefix, Suffix and also apply a Counter Length. The option *Use Automatic Naming for Creation of Blank Projects* allows to setup the autonamer generation for blank projects also. If default is selected in the template/project configuration settings, then all the projects created will be using the System-wide Project Autoname settings setup.

  ![Autoname Generation](image)

  **Note:** Blank projects are projects created without using a template.

- **Template-based Project Autonaming**
  
The administrator can use the Template-based project autonaming settings for projects created from a specific template or another project in the Project Creation page. Only the new projects from this template will follow the naming convention. Select *Use Automatic Naming* check box to use autonaming. The options available are Use Default Automatic Naming or Use Custom Automatic Naming. The Default Auto Naming will take effect if an autonaming already exists in System-wide Project Autoname settings setup.

  ![Template-Based Autonaming](image)

- **System-wide document autonaming**
The administrator can set up the document autonaming settings per document type on the Document Types page. The options available are None or Custom Automatic Naming options. The Custom option allows you to customize the required autoname setup. The option **Apply Automatic Naming to Documents in Blank Projects** allows you to setup autoname generation for blank documents also. The **Apply Default Attribute Categories to Documents in Blank Project** option allows you to add the default attribute category to documents which exits in blank projects.

For example: If you upload abc.ard file and the Prefix is [FolderName] the Counter Length is set to 4 and the Suffix is empty, then the autoname will generated as DESIGN_0001.ard.

Using the **Scope of the Counter** option the administrator can specify whether the counter will continue counting system wide, or whether it will reset for every project.

If the option **Reset per Project** is selected then, autoname will be generated as begin_0001_end and next document will be begin_0002_end and so on.

If **System wide Counter** is selected and files already exists, autoname will be generated as begin_0098_end and next can be begin_0112_end. The counter here depends on the number of files which are uploaded to the system and not on each of the project.

- **Template/Project-based document autonaming**

  The administrator can set up the document auto name settings per document type on the Document Types page. The Document Types page allows to enable/disable specific document types and is extended to also have a section for setting auto naming details per document type. The administrator can specify Prefix, Suffix and Length for each of the Document Types available.

**Note:**

Only newly uploaded documents will have the correct auto naming settings applied to them.

When the option **Apply automatic naming to Documents in Blank Projects** is selected, the default settings will be used when uploading documents in projects which are created without a template.
Using the **Scope of the Counter** option the administrator can specify whether the counter will continue counting system wide, or whether it will reset for every project.

If the option **Reset per Project** is selected then, autoname will be generated as begin_0001_end and next document will be begin_0002_end and so on.

If **System wide Counter** is selected and files already exists, autoname will be generated as begin_0098_end and next can be begin_0111_end. The counter here depends on the number of files which are uploaded to the system and not on each of the project.

The SmartName [Project Attribute] and [Document Attribute] contains an extra option. When selecting these options, an extra drop-down appears to select the attribute. It is advised to set such attributes required in the creation view of the attribute category, else this part of the name will remain blank.

**Note:** Changing or modifying the attribute value after creation of the project or document will not change the existing name.

### 16.2 Things to Keep in Mind

The following are the important points to be known when using Autonaming Generation:

- Autoname Generation is set on the project or document and not the user or role.
- The prefix field cannot be empty.
- If the counter length is 0 or left empty, no numeric part will be added.
- The Prefix and Suffix fields are limited to 150 characters and maximum number for Counter Length field is 20.
- The [EditField] SmartName can used only in the Suffix and if required, the administrator can edit this field. If the [Edit Field] is empty, then it is not replaced by any text, but left blank.
- In prefix or suffix, ensure not to use square brackets [ ]. The system will take it as a SmartName.
- The administrator can use several SmartNames if desired, or a combination of SmartNames and text.
• If a SmartName is selected and the attribute is empty or not found in the WebCenter application, then this field is left blank.

• When the document autonaming settings for a template are changed, these settings are not automatically applied to all projects which are already created from this template. The project created earlier continues to follow the old autonaming setup.

• Project Autoname Generation happens at “transaction time”, meaning that until the project or document is uploaded or submitted the autoname cannot be set or predicted.

• If autoname has been configured the following message appears, when creating a new project.

16.3 Using SmartNames in Autoname Generation

16.3.1 What is a SmartName?

A SmartName is a variable that refers to a predefined value, for example [Project Creation Date] refers to the creation date of the current project.

You can use SmartNames to fill in settings all across WebCenter. They are displayed between square brackets.

Folder: 

[Project Name]  

You can also combine them with plain text.

Folder:  

[Project Name]/designs
Using SmartNames ensures you can use existing information as a setting without having to remember it, and reduces errors.

### 16.3.2 Using a SmartName

You can use SmartNames anytime you see the SmartName symbol in a text field.

1. Click [].

2. In the Insert SmartNames dialog, select the desired SmartName using one of the following methods:
   a) Browse to the desired SmartName using the Categories, select it and click Insert. Alternatively, you can also double-click the SmartName.
   b) Scroll in the main Category list and double-click on the desired SmartName.
   c) In the main Category list, type the SmartName in the search field.

   - The search field has support for AND and OR operators.
   - Spaces can be used and will act as AND operators.
   - Semicolons can be used and will act as OR operators.
   - You can place your search term inside double quotes (”) when an exact match is required.
   - Using Ctrl-F (Command-F on Mac) will place the focus in the search field and clear the current text.
   - Using Alt-F (Command-Option-F on Mac) will place the focus in the search field and select the current text.

**Tip:**
- You can type the first letters of the SmartName you are looking for to show it in the list.
- The dialog closes automatically after inserting a SmartName. To keep it open (to insert more SmartNames), hold **Alt** while clicking the Insert button or double-clicking a SmartName.
- If there are several SmartName-enabled text fields, keep the Insert SmartNames dialog open and just click on the next SmartName-enabled field to insert SmartNames in it.

### 16.3.3 List of Available SmartNames

The following is the list of available SmartNames for Projects and Documents;

<table>
<thead>
<tr>
<th>SmartNames for Projects</th>
<th>SmartNames for Documents</th>
</tr>
</thead>
<tbody>
<tr>
<td>[Customer Name]</td>
<td>[Customer Name]</td>
</tr>
<tr>
<td>[Customer ShortName]</td>
<td>[Customer ShortName]</td>
</tr>
<tr>
<td>[Customer Location]</td>
<td>[Customer Location]</td>
</tr>
<tr>
<td>[Customer Location ShortName]</td>
<td>[Customer Location ShortName]</td>
</tr>
<tr>
<td>[Project Manager UserName]</td>
<td>[Project Manager UserName]</td>
</tr>
<tr>
<td>[Project Manager LastName]</td>
<td>[Project Manager LastName]</td>
</tr>
<tr>
<td>[Project Manager Location]</td>
<td>[Project Manager Location]</td>
</tr>
<tr>
<td>[Project Manager Location ShortName]</td>
<td>[Project Manager Location ShortName]</td>
</tr>
</tbody>
</table>
### SmartNames for Projects

<table>
<thead>
<tr>
<th>[Project TemplateName]</th>
<th>[Project Manager Location Code]</th>
</tr>
</thead>
<tbody>
<tr>
<td>[Requestor UserName]</td>
<td>[Project TemplateName]</td>
</tr>
<tr>
<td>[Requestor LastName]</td>
<td>[Author Name]</td>
</tr>
<tr>
<td>[Requestor Location]</td>
<td>[Author LastName]</td>
</tr>
<tr>
<td>[Requestor Location ShortName]</td>
<td>[Author FirstName]</td>
</tr>
<tr>
<td>[Requestor Company]</td>
<td>[Author Location]</td>
</tr>
<tr>
<td>[Project Attribute]</td>
<td>[Author Location ShortName]</td>
</tr>
<tr>
<td>[Project Creation Date]</td>
<td>[Author Company Customer Name]</td>
</tr>
<tr>
<td>[EditField]</td>
<td>[Author Company ShortName]</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>[Disk FileName]</th>
<th>[Folder Name]</th>
</tr>
</thead>
<tbody>
<tr>
<td>[Document Extension]</td>
<td>[Project Attribute]</td>
</tr>
<tr>
<td>[Document Attribute]</td>
<td>[Project Creation Date]</td>
</tr>
<tr>
<td>[EditField]</td>
<td></td>
</tr>
</tbody>
</table>

#### Note:
The EditField SmartName can be used only in the Suffix.

### 16.3.4 Using SmartNames in an Autoname

You can use SmartNames to set the prefix and suffix in AutoNaming. Click the Insert SmartName button and select a SmartName from the list that appears next to the button.

The SmartNames list contains general project information ([Project Name], [Customer Name], [due date]...), and all the attributes defined in WebCenter. You can use several SmartNames if desired, or a combination of SmartNames and text.
When selecting [Project Attribute], [Document Attribute] or [Project Creation Date], an extra option appears in which you can select a required attribute.

For example: WebCenter_[Project Name]_[Customer Name].

The following are few examples of using SmartNames for Autoname Generation:

| Prefix:       | Customer Location, Creation Date (dd.MM.yy) |
| Counter Length: | 4 |
| Suffix:        | EditField |
| Scope of the Counter: | Reset per Project |

The result will be Chicago_23.12.12_0001_printpromotion

| Prefix:       | Folder Name |
| Counter Length: | 4 |
| Suffix:        | EditField, Customer Location |
| Scope of the Counter: | Reset per Project |

The result will be CAD_0001_printpromotion_Chicago

Note: To know more on configuring project information see Project and Document Attributes on page 85.

16.4 Using Autoname Generation

16.4.1 System-Wide Project Autonaming

1. Log in to WebCenter as an Admin user.
2. Click Admin > Preferences > General. The General page appears.
3. In the Project Autoname Generation section, enter the text boxes with appropriate Prefix, Suffix and the Counter Length.
   Click [EditField] to select required SmartNames. The EditField SmartName can used only in the Suffix.
The option **Use Automatic Naming for Creation of Blank Projects** allows to setup the autoname generation for blank projects also.

4. Click **Save** to make the changes.

### 16.4.2 Template-based Project Autonaming

1. Log in to WebCenter as an Admin user.

2. Click **Admin > Project Management > Projects**. The list of available projects appears in the Project Management page.

3. Click one of the required projects and then click **Configure > Project Creation**. By selecting the **Use Automatic Naming** option allows the Admin to **Use Default Automatic Naming** or **Use Custom Automatic Naming**.

   **Note:** By selecting **Use Default Automatic Naming**, the auto naming is inherited from the settings in **System wide Project Autoname settings**.

4. If you select the **Use Custom Automatic Naming** option, you have to enter the text boxes with appropriate **Prefix**, **Suffix** and the **Counter Length**.

   **Note:** Click ![SmartName button] to select required SmartNames. The **EditField** SmartName can used only in the **Suffix**.
5. Click Change to make the changes.

16.4.3 System-Wide Document Autonaming

1. Log in to WebCenter as an Admin user.
2. Click Admin > Preferences > Document Types. The Document Types page appears.
   a) Select the Apply Automatic Naming for Creation of Blank Projects check box, this allows the Admin to setup autonaming for blank projects.
   b) Select the Apply Default Attribute Categories to Documents in Blank Projects check box, this allows the Admin to setup the default attributes to documents in blank projects automatically.
3. Select the required Document type and then choose the Automatic Document Naming. The options None or Custom are available.
   a) If you select None option, then the autonaming feature is not used.
   b) If you select the Custom option, enter the text boxes with appropriate Prefix, Suffix and the Counter Length. The Scope of the Counter specifies whether you want the counter to work on all the documents in the system, or only to work on the documents of the project when a new document is created.

   Note: Click [11] to select required SmartNames. The EditField SmartName can used only in the Suffix.
16.4.4 Template/Project-based Document Autonaming

1. Log in to WebCenter as an Admin user.
2. Click Admin > Project Management > Templates. The list of available templates appears in the Template Management page.
3. Click one of the required templates and then click Configure > Document Creation. The Document Types page appears.
4. Select the required Document type and then in the Automatic Document Naming section choose between None, Default or Custom options.
   a) If you select the None option, the autonaming option is not selected.
   b) If you select the Default option, the setting as per System wide Document Auto Naming Settings are taken into consideration.
   c) If you select the Custom option, you can enter the text boxes with appropriate Prefix, Suffix and the Counter Length. The Scope of the Counter specifies whether you want the counter to work on all the documents in the system, or only to work on the documents of the project when a new document is created.

   Note: Click \[\] to select required SmartNames. The EditField SmartName can used only in the Suffix.

   ![Document Types Image]

   The SmartName [Project Attribute] and [Document Attribute] contains an extra option. When selecting these options, an extra drop-down appears in which an administrator can select a required attribute.

5. Click Save to make the changes.
17. Migrating your WebCenter Data

As an Administrator, you can migrate your WebCenter data to a different WebCenter server, for example for testing purposes.

To do this, you will export different sets of data (Groups, Projects Templates, Task Types...) as XML files from a server, then import those XML files onto another server.

17.1 Possible Use Cases

1. A new upgrade/version of WebCenter is released and you want to test it on a test server, using the data from the production server.
2. You want to perform some tests on a test system, but don’t want to create dummy data. You can export your production data (for example a large number of groups with their visibility and download permissions) to the test system.
3. You want to copy data between different WebCenter installations.

17.2 Things to Know about Migrating Data

• You can migrate Groups, Projects, Templates, Attribute categories and Task Types between WebCenter systems. You can also import a Task Type’s Workflow into another Task Type (in the same or another WebCenter system).
• To migrate data, you export it as an XML file, then import that XML file on the new system.
• For best results, you should perform the migration in the following order:
  1. Groups,
  2. Attribute categories (with their attributes),
  3. Task Types (and Workflows),
  4. Templates,
  5. Projects.

17.3 Exporting Data

17.3.1 Exporting Groups

2. Search for the required group name(s) or select from the list available and then click Export Groups in the Action menu.
3. Save the XML file generated (ExportedWebCenterGroups.xml) to your computer or a network location.

Note:
- Downloading the XML file can take a few minutes depending on the size and number of groups selected.
- If an ExportedWebCenterGroups.xml file already exists in your download location, the file you download will be named ExportedWebCenterGroups(1).xml.

17.3.2 Exporting Attribute Categories

1. Go to Admin > Attributes > Attribute Categories.
2. Select the attribute categories to export and go to Actions > Export.
3. Save the XML file generated (exportAttributeCategory.xml) to your computer or a network location.

Note: If an exportAttributeCategory.xml file already exists in your download location, the file you download will be named exportAttributeCategory(1).xml.

17.3.3 Exporting Task Types

When migrating task types, the following is copied:
- the basic task type settings,
- the task type specifications and layout,
- the task type's workflow.

Note: If the task type's workflow uses other task types, you need to import these task types into the other system before (or at the same time as) importing the task type containing the workflow. Otherwise you will get an error message (Not all the items in the Workflow are available on this WebCenter) when importing the task type containing the workflow.

1. On the Task Types page, select the task type(s) to export and go to Actions > Export.
2. Save the XML file generated to your computer or a network location.

You can now import your task type(s) into another system.

17.3.4 Exporting a Workflow

You can export a workflow from a task type to an XML file, then import that XML file into another task type on the same or another WebCenter system.
Note: If the workflow uses other task types (than the task type it is part of), you need to import these task types into the other system before (or at the same time as) importing the workflow. Otherwise you will get an error message (Not all the items in the Workflow are available on this WebCenter) when importing the workflow.

1. On your task type’s Workflow tab, go to More actions... > Export.
2. Save the XML file generated to your computer or a network location.

You can now import your workflow(s) into another system.

17.3.5 Exporting Templates

1. Go to Admin > Project Management > Templates.
2. Search for the required template name(s) or select from the list available and then click Export in the Action menu.
3. Save the XML file generated (ExportedWebCenterProjects.xml) to your computer or a network location.

Note:
- Downloading the XML file can take a few minutes depending on the size and number of templates selected.
- If an ExportedWebCenterProjects.xml file already exists in your download location, the file you download will be named ExportedWebCenterProjects(1).xml.

17.3.6 Exporting Projects

1. Go to Admin > Project Management > Project.
2. Search for the required project(s) or select from the list available and then click Export in the Action menu.
3. Save the XML file generated (ExportedWebCenterProjects.xml) to your computer or a network location.

Note:
- Downloading the XML file can take a few minutes depending on the size and number of templates selected.
- If an ExportedWebCenterProjects.xml file already exists in your download location, the file you download will be named ExportedWebCenterProjects(1).xml.
17.4 Importing Data

17.4.1 Importing Groups

When importing Groups, the following details are imported:

- If no visibility settings are updated, then by default the group will be visible to All Project Managers.
- If users or Project Managers do not exist, WebCenter will not create them. Only the ones which are existing will be added.
- The download permissions for the group as specified in the XML, will be granted to the group.
- WebCenter only adds group members based on the user data in the migration file and does not remove existing group members if they do not exist in the migration file.

2. Click Import from XML on the Groups page.
3. Click Choose File and then select the XML file you exported.
4. Click Import. After the import completes, WebCenter shows a basic report.

```
<table>
<thead>
<tr>
<th>Groups</th>
<th>Import from XML</th>
<th>New Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>Import Group feedback</td>
<td>Import from XML</td>
<td>New Group</td>
</tr>
<tr>
<td>Number of Groups Created</td>
<td>99</td>
<td></td>
</tr>
<tr>
<td>Number of Groups Modified</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Number of Groups Not Changed</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Number of Groups Not Imported</td>
<td>0</td>
<td></td>
</tr>
</tbody>
</table>
```

Tip: Click the Download Detailed Report in XML link to download a detailed report of the import.

17.4.2 Importing Attribute Categories

1. On the Attribute Categories page, click Import.
2. Browse to the XML file that you saved during the export step and click Import.
17.4.3 Importing Task Types

1. On the Task Types page, select Import from XML.
2. Browse to the XML file that you saved during the export step and click Import.

**Note:** If you get an error message stating Not all the items in the Workflow are available on this WebCenter, it is because you are trying to import a task type containing a workflow that uses task types that are not available on this system. See Exporting Task Types on page 170 to know how to avoid this.

17.4.4 Importing a Workflow

1. On your task type’s Workflow tab, go to More actions... > Import.
2. Browse to the XML file that you saved during the export step and click Import.
3. If the Workflow tab already contained a workflow, confirm that you want to overwrite the existing workflow with the one you are importing by clicking OK.

**Note:** If you get an error message stating Not all the items in the Workflow are available on this WebCenter, it is because you are trying to import a workflow that uses task types that are not available on this system. See Exporting a Workflow on page 170 to know how to avoid this.

17.4.5 Importing Templates

When importing Templates and Projects, the following details are imported:

- The project will be created only with the information found in the XML file.
- If group members, tasks, attributes are not found in XML file, WebCenter will not create them.
- The project properties: User members, Permissions, Characteristics, Approval setup, Documents, Document autoname settings and Notifications are not imported through the XML file.

1. Go to Admin > Project Management > Templates.
2. Click Import from XML on the Template Management page.
3. Click Choose File and then select the XML file you exported.
4. Click Import. After the import completes, WebCenter shows a basic report.
17.4.6 Importing Projects

When importing Templates and Projects, the following details are imported:

- The project will be created only with the information found in the XML file.
- If group members, tasks, attributes are not found in XML file, WebCenter will not create them.
- The project properties: User members, Permissions, Characteristics, Approval setup, Documents, Document autoname settings and Notifications are not imported through the XML file.

1. Go to Admin > Project Management > Projects.
2. Click Import from XML on the Project Management page.
3. Click Choose File and then select the XML file you exported.
4. Click Import. After the import completes, WebCenter shows a basic report.

Tip: Click the Download Detailed Report in XML link to download a detailed report of the import.
17.5 Migration File Contents

**Migration Files for Groups**

In the XML migration file for Groups, you will find the following information:

- Group names.
- Visibility type.
- List of users.
- List of Project Managers that have visibility on the selected group.
- Download permissions for the selected group.

**Migration Files for Projects and Templates**

In the XML migration file for Projects and Templates, you will find the following information:

- Name, description, manager, company and location, sales person, status.
- Project group members and group member permissions.
- Attribute category and attributes.
- Tasks and task sequence.
- Project creation information and Project autoname option.
- Document library option.