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1. Introduction
This document describes all the touching points between Automation Engine and WebCenter and how they work together. The goal of this document is that it will be used by training/support people to better understand how this is setup.

1.1 What to use when?
There are 2 different types of integrations:
• Pushing data - exchanges the meta data from a job to a project and vice versa.
• Pushing files – exchanges files from Automation Engine to WebCenter and vice versa.

<table>
<thead>
<tr>
<th></th>
<th>AE to WCR</th>
<th>WCR to AE</th>
<th>WCR 2 AE (workflow)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data</td>
<td>Create/Modify WebCenter Project</td>
<td>Sync Workflow*</td>
<td>Sync Workflow-task</td>
</tr>
<tr>
<td>File</td>
<td>Publish to Web</td>
<td>Push Through Folder</td>
<td>Launch Workflow-task</td>
</tr>
</tbody>
</table>

* can also push a file

2. Setup WebCenter link in Automation Engine

2.1 Description
Automation Engine needs to know how to connect to WebCenter, so this needs to be configured in the “Configure” tool in Automation Engine. This can only be done by an administrator in Automation Engine.

2.2 How to setup?
• In Automation Engine, as an admin user, go to “Tools -> Configure”. You will get the Automation Engine Dialog.
• In this Dialog, scroll down to the “WebCenter Sites” Node. In the field “Website”, fill out the address of your WebCenter installation.
  o Tip: to validate the address, click the ‘Open’ button. If your website is running, you should see the WebCenter login page.
  o Tip: when you fill out the address of your WebCenter website, be aware that this is also the address that will be included in the notification mails (approval start email) when putting links to the documents. So, you should make sure that the address can accessed from the outside. Make sure to not use an internal address, but an address you want your users to use when the use WebCenter.
  o If Automation Engine and WebCenter are in the same LAN, leave the toggle “WebCenter and Automation Engine are in the same LAN” on.
Tip: How to verify that WebCenter and Automation Engine are on the same LAN?
If you can connect from WebCenter’s application server, this is the system where JBOSS is installed, to AE’s jobfolder with the credentials of the ‘BGSystem’ user (password Drupa2000), then WebCenter and Automation Engine are on the same LAN.

NOTE: the ‘Check Connection’ in AE’s configure window, does not check the validity of the ‘In the same LAN option’. Since WebCenter 12, this is not working anymore because of the changes to the JMS connection.

If Automation Engine and WebCenter are not on the same LAN, you need to do some extra configuration:

• In WebCenter, log in as an Admin user, and go to the page ‘Admin -> Configuration -> Workflow Approval Clients’
• Click the link ‘New Workflow Approval Client’ in the upper right corner.
• You will get a screen, where:
  • Name: name of the workflow approval client, you can pick any name you want.
  • Password: password of you approval client, you can pick any password you want.
  • Confirm Password: reconfirm your password.
  Hit ‘Create’ when you are done. A new approval client will be created.

• Once you have created the approval client in WebCenter, use the name and password in the AE Configure setup:
  • Fill out the name and password of the WebCenter’s Approval Client.
  • Note: the ‘Check Connection’ button will NOT check the validity of your WebCenter’s Approval client name or password!
  • Save your changes.

• Note: It’s recommended to close your pilot and start it again in order to have an updated list of WebCenter sites in your tickets.
2.3 Best practices
Use the “check” button to verify if the connection is OK, not the “Open” button.

2.4 Troubleshooting
URL needs to have the right forward slashes.

3. Publish documents on WebCenter

3.1 Description
From Automation Engine, you can publish any document in your job to WebCenter. The main purpose of this is that you want to ask people to approve a document and get their approval back to AE. Though, asking for approval is not mandatory, you can also just publish the document to WebCenter.

3.2 How to setup?
Once you have defined your WebCenter site in AE, you can publish files to WebCenter and ask for approval feedback.

To publish documents to WebCenter, use the ticket ‘Publish on WebCenter’.
Destination tab:
- Site: select the WebCenter site you want to Publish to
- Project: name of your project where you want to upload your document. If your project does not exist, it will be created if you have the correct credentials! Meaning that the user that does the upload – see field ‘User name’ – needs to be project manager in WebCenter in order to be able to create projects.
- Folder: your destination folder. It will be created if it does not exist, but only when the user has the right credentials, meaning that he needs to be PM of the project in order to have the right to create new folders.
- Document name: the name of your document in WebCenter. If you leave this blank, it will be the name of the document that you upload.
- Document Description: description of the document. This is the version comment in WebCenter.
- Project Template: when a new project is created, it will be created based on the template. We strongly recommend that the ‘Create Project’ ticket is used to create projects.
- UserName: name of the WebCenter user. This needs to be a valid username in WebCenter. All WebCenter actions will be done under this user’s account.
- Password: the WebCenter password for the user. Use Encrypted and type in the password of the user.

Remarks:
- Note on template visibility: you can only use templates that are visible by the user that executes the request. For a PM with limited visibility in WebCenter, the list of templates is filtered in following way. We check for
  - Company visibility:
    - Check whether the project has a location. If not, having visibility on one of the locations of the company is enough to have visibility on the project/template.
    - If yes, we need to check the locations too: check whether the project has a location and the visibility record also specifies a location. Check whether these two locations match.
Link between Automation Engine and WebCenter

- **Template member visibility:**
  For each group member in the template, including the PM, we check whether the group can be seen by the PM. If the template is not visible because of one of the reasons mentioned above, the template will be removed from the list of available templates.

- **If the project does exist, but you do not have upload rights to the project, the upload will fail with an error.**
- **If the document already exists, you will create a new version of the document.**
- **If the document exists, but in a different folder, the task will fail.**
- **When creating a project using the upload task, the manager of the resulting project is:**
  - The original manager group of the template if the user that executes the request is part of that group.
  - The user who executes the request otherwise.

**Publish tab**
In this tab, you can specify what you will publish:
- **The toggle “Prepare for viewing and annotation” should be on when you are in the ‘AE and WCR are on the same LAN’ situation.** (see explanation above)
  When this toggle is on, the graphic files that are published will first be rasterized into files readable for the viewer, and they will be published together with the original document.

  This toggle cannot be turned on when WCR and AE are not in the same LAN.
  If WCR and AE are on the same LAN, this toggle should be on for several reasons:
  - makes the upload faster,
  - it avoids having trouble in files with external references,
  - you can select the ticket of the PDF proxy file

  If you do not have this option on, WebCenter will launch a ‘Prepare for viewing task’ on its ‘On Board Graphic Engine’.

- **Resolution for non-images (line work, text, etc.):** This option is about the resolution of the rasterized files. If you have selected a resolution, it will be the max resolution you will have in the viewer when viewing the files in WebCenter.
  Options:
  - **Optimal:** this option will determine the best resolution of the rasterized file, based on the size
of the original document. The algorithm makes sure that for smaller files, you will rasterize with a high resolution, for bigger files, the resolution will be smaller, ensuring that you can view the file in a decent way in the viewer without making very large rasterized files. It is recommended to select this option.

- Custom: with this option, you can put in a fixed value for the resolution of the rasterized files. Be aware that if you will out a high resolution, you will potentially create large rasterized files. If you choose a small value for the resolution, you will have a low quality view of the document in the WebCenter viewer.

- Anti-Aliasing: when you put this option on, text will be more readable in the viewer. Default value is on.

- Automatic grouping of input file into digital film sets. When you chain the publish task just after a RIP task that creates digital films, you want to publish these files as one document. Basically it means that a set of digital film files, LEN files for example, will be bundled in WebCenter as one document. Each digital film will make up one separation of the document. Default value is on.

- Make available for download: You can choose whether or not you want the make the documents available on WebCenter.
  - If you do not turn the option on, it means that you will only publish the rasterized files top WebCenter. The files will only be viewable, and will not be downloadable, even if the permissions in WebCenter allow you to download the document. This option will be used when you only want the users in WebCenter to view and approve the file. If you do not want your production files to be put on WebCenter, you will turn this option on.
  - Make available for download, Input file: this option means that the input files will be send to WebCenter. You will do this if you want to expose the document in WebCenter. WebCenter users will be able to download the document if they have the permissions.
Link between Automation Engine and WebCenter

- Make available for download, PDF files for proofing: you can select here an AE ticket for doing the normalization. If you select this option, you will publish a derived PDF file as document to WebCenter, instead of the real input file. You will use this if you do not want to publish the production files, but rather publish a ‘PDF proxy’ file to WebCenter. You will also use this if the documents that you publish are not self-contained.

Approval tab
In this tab, you can specify approval related options.

o Start Approval Cycle: toggle this on if you want to have an approval cycle started on this document. If you want to have an approval cycle on this document, you need to have an approval rule specified in the project or folder where you upload the document to. If the document sits in a folder, WebCenter will apply the folder approval setup if it exists. If not, the project approval setup is taken. You do not need any special rights to start the approval cycle.

o Approval due date: you can select an approval due date. Only if the uploader has ‘change approval rights’ in WebCenter, the due date that he specifies, will be taken into account. The due date specified in AE will take priority over the due date specified in WebCenter.

Following table shows how the system reacts to the different combinations of approval setups and being supplied a due date for a new version.

Note that all date calculating happens in working days.

<table>
<thead>
<tr>
<th>Current Approval Setup</th>
<th>WF gives no due date</th>
<th>WF gives due date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Simple No Due date</td>
<td>No due date</td>
<td>Fixed due date, taken over from WF</td>
</tr>
<tr>
<td>Simple fixed due date</td>
<td>Fixed due date from the existing approval setup</td>
<td>Fixed due date, taken over from WF</td>
</tr>
<tr>
<td>Simple with Lead Time</td>
<td>Lead Time taken over from project/folder</td>
<td>Fixed due date, taken over from WF</td>
</tr>
<tr>
<td>Staged No Due Date</td>
<td>No due date(s)</td>
<td>All stages get the final due date</td>
</tr>
<tr>
<td>Staged Fixed Due Date</td>
<td>Fixed due dates are taken over from old version</td>
<td>All due dates are shifted to bring the due date of the last</td>
</tr>
</tbody>
</table>
### Link between Automation Engine and WebCenter

<table>
<thead>
<tr>
<th>Staged Lead Times (forward)</th>
<th>Lead Times Forward</th>
<th>Lead Times with fixed due date, due date is taken from the WF</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staged Lead Times with final due date</td>
<td>Staged Lead Times with final due date, due date is the one of the old version</td>
<td>Staged Lead Times with final due date, due date is the one of the workflow</td>
</tr>
</tbody>
</table>

- **Status feedback**: with this option you can specify whether you have one ‘Approval’ tasks in AE for each file that is uploaded, or whether there is only one approval task per published file. The option has only effect on documents that are published together. If you turn on the option ‘Launch a task per file’, you will have one ‘Approval’ task per document that is published. If you turn on the option ‘Launch one single task for all files’, you will have only one Approval task if you have published a set of documents. Note: This option has only an effect on feedback of the approval task. It does not change the behavior of the approval in AE nor in WebCenter.

- **Continue with the Next Step in the Workflow Task**: This option specifies whether you want to cancel/stop the workflow when one or more documents were rejected, or whether you want to continue the workflow.

- **Annotations**: You can specify the location of the annotations file.

### 3.3 Best practices

When uploading a document, it is possible to create a Project if it does not exist. **This is not recommended anymore!!!** The recommended method is to use the “Create/Modify WebCenter Project”-ticket.

### 3.4 Troubleshooting

If you get errors in the publish task and the log file does not give you an indication what might go wrong, then try to do the same steps in the normal WebCenter GUI using the user account that if filled out in the publish ticket. If the error is due to permissions, you will quickly figure out what goes wrong.
4. Link AE Product with WebCenter BOM + document attributes

4.1 Description
When a Product/Product Part is published from AE (Publish on WebCenter), the WebCenter Documents corresponding to the Product/Product Parts are automatically added to the Bill of Materials of the specified project. The Automation Engine Product Amount for the Job (if present) is automatically updating the Count property of the Bill of Materials. You can also push the Automation Engine Product properties and Product/Product Part parameters to WebCenter. If there are existing WebCenter attributes with corresponding names, their values will be updated during publishing. The following Product properties and Product/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.p.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 UI</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>
</tbody>
</table>

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<table>
<thead>
<tr>
<th>Automation Engine Properties/Parameter</th>
<th>WebCenter Attribute</th>
</tr>
</thead>
<tbody>
<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.statusNickname</td>
</tr>
<tr>
<td>Part Status User</td>
<td>ae.pp.statusUser</td>
</tr>
<tr>
<td>Part Status Notes</td>
<td>ae.pp.statusNotes</td>
</tr>
<tr>
<td>Part Status Date</td>
<td>ae.pp.statusDate</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>MyProductParameter1</td>
<td>ae.p.par.MyProductParameter1</td>
</tr>
<tr>
<td>MyProductPartParameter1</td>
<td>ae.pp.par.MyProductPartParameter1</td>
</tr>
</tbody>
</table>

4.2 Best practices
Synchronization of the Product Properties and Product/Product Part parameters with the WebCenter Document Attributes and the addition to the Bill of Materials is only supported from WebCenter 12.1 onwards.

4.3 Known limitations
It is not possible to push WebCenter Document Attributes to the Product Parameters.

4.4 Step by step Example

4.4.1 WebCenter side

4.4.1.1 Automatically create the attribute and category
If you want to create these WebCenter attributes automatically, you can use the import Attribute Categories functionality in WebCenter: go to Admin > Attributes > Attribute Categories and click the
‘Import’ link. You can import an XML file containing attributes and categories. Browse to the following location on the server (web server or application server) “WebCenter\Examples\AEProductCategory” and import the file AEProductCategory.xml. The attribute category “AEProductCategory” will be created, containing the attributes listed above. You can change the layout and the labels if you want so and you can save the category under a different name.

The first part of the following step “Creating the attributes” (creating “ae.p.cusref”) can be skipped if you imported the attributes using the “AEProductCategory.xml” file.

4.4.1.2 Creating the attributes

For this example, we will use one product property (Product Customer Reference) and one product parameter (My Parameter) to push to the WebCenter attributes. So first we will create the attributes we need.

Login as Admin and go to Admin > Attributes > Attributes > New Attribute. In the name field, fill in “ae.p.cusref”. You can add a description if you want. The type will be Text. Click Finish. Do the same steps but fill in “ae.p.par.My Parameter” as name for the “My parameter” product parameter.
4.4.1.3 Creating the attribute category
To attach these attributes to our WebCenter documents, we will first create an Attribute Category that we can assign to a document. You are still logged in as Admin so go to Admin > Attributes > Attribute Categories > New Category. Fill in a name (e.g. My AE attributes) and click Create. You should get the message “Attribute category was created successfully. Edit My AE attributes!”. Click on this message link.
We will now add our attributes (Product Customer Reference and My Parameter) to our attribute category. Fill in “ae.p.cusref” in the attributes filter to search our attribute. Click on it and click on the “>>” button to add it to our category. The attribute appears at the bottom in the preview section. You can build very complex attribute categories (see WebCenter documentation) but one thing that might be handy to change is the name of the attribute because we still see “ae.p.cusref” in the preview as name for our attribute. Click on Use Grid Layout and click on the “ae.p.cusref” cell. A details section appears on the right side where you can set a new name in the Label field.

Do the same steps for the “ae.p.par.My Parameter”: Click on the cell below the “ae.p.cusref” attribute. Fill in “ae.p.par.My Parameter” in the attributes filter to search it, click on it to select it, and add it to the attribute category by clicking the “>>” button. You can give it a name as well by clicking on the cell and filling in the label field in the details section. Click the Save button to save our attribute category.

4.4.1.4 Creating the template
There are several ways to assign the attribute category to uploaded documents. For this example we will use a template where we will setup an attribute category for Graphics and Images. Later on, the
template will be used from the AE side to create a project with our product.  
As admin, go to Admin > Project Management > Templates > Create a new template. Select Start from a Blank Template and click Continue. Fill in a name for our template (e.g. My AE Template). You can also enter a description and thumbnail if you want. Click Finish.  
The template is now created. Click on the ”My AE Template” link and go to the Configure tab. Click Document Creation. For the document type Graphics and Images, select as Default Attribute Category “My AE Template”. When we now upload documents in this template (or project from this template) the default attribute category for Graphics and Images will be applied.

4.4.2 AE side

4.4.2.1 Creating the job
Login to AE as admin and create a new Job by clicking Job > New Job. Click ok. A window opens where you can specify the properties of the job. Fill in an Order ID (E.g. 123456) and fill in a Job Name (E.g. My Job). Click ok.

4.4.2.2 Creating the product and setting the properties and parameters
Select Products in the View. Create a product by right clicking Product > New Product. Choose a Graphics file from one of your containers and click ok -remember we set our attribute category for Graphics and Images. A window opens where you can set your Product properties and parameters. Click ok again.

Our product is now created. We will now set the parameters to be updated in WebCenter. Right click on the product and select Product Properties. Fill in Customer’s Product Reference (e.g. 123) – one of our attributes – on the opened tab. In the job tab, fill in an amount for “My Job” (e.g. 50). This will update the Bill of Materials property count in WebCenter. In the parameters tab, click “add” to add a new parameter. As name, fill in “My Parameter” – this is our other attribute. As value, take “example”. Click ok. Click ok to close the properties window.

4.4.2.3 Publish to WebCenter
Now we will publish our product to WebCenter. Right click on the product and select New Task > Publish on WebCenter. A popup opens. In the first tab, select as Site your WebCenter. In the project field, fill in a name for our project (e.g. My AE Project). In the Template field, fill in the name of our template “My AE Template”. Fill in the Site Logon parameters User Name and Password. Go to the Publish tab and check off “Prepare for viewing and annotating”. Check” Make available for download” and select the Input Files radio
button. In the approval tab, deselect “Start the Approval Cycle” - we haven’t setup an approval cycle in the template so approval would fail.
Now our task is ready to get launched. Click Launch at the top. A new task appears in the Tasks list at the bottom. If you wait a bit, the state should be completed.

4.4.3 Result
If we now go back to the Bill of Materials of our My AE Project in WebCenter and we click on the + to open the attributes we see:

Our product is published and added to the Bill of Materials with the Job Amount 50. The values of the AE Product Customer Reference property and the My Parameter of our product are updated as well with the values 123 and example respectively.

5. Create/Modify WebCenter Project

5.1 Description
You can create a new WebCenter project, based on an Automation Engine Job. Use the AE ticket ‘Create or Modify WebCenter Project’.

5.2 How to setup?
You first need to configure your WebCenter site, see previous section;
Fill out the options:
- **Project Name**: Name of the project you want to create or update.
- **Project Template**
  If a new project is created, it will be based on this template. The list of templates is filtered with the user’s visibility. (See below for user’s visibility on templates). We use the Site Login user credentials to get the list of templates.
- **Project Status**
  This is the new status that will be assigned to the project. If you have selected a template, the statuses are limited to the
available statuses of that template.

- **Customer Company**
  Company of the project.
  You get a list of the available companies when clicking the refresh button next to the company drop down box.
  Note that you need to specify the “Project Manager Username” first, as the list of available companies will be filtered by the visibility of the project manager.

- **Customer Location**
  Location of the company of the project.
  If you click on the refresh button, the list is limited to the location of the selected company. You need to select a company first, before the list of location is filled out.

- **Project Description**
  Description of the project.

- **Project Manager Username**
  This is the project manager of the new project. The project manager can be a user or a group. If you want to specify a user, you need to fill out his username.
  If you have filled out a Project Manager Username, the list of available Companies is filtered using this user’s visibility. With other words, only the companies that are visible for this user are listed.

- **User Name**
  WebCenter user name. All actions will be done under the credentials of this user.
  The user needs to be project manager in order to be able to create or modify the project.

- **Password**
  Password of the WebCenter user.

Note: For filtering the list of templates, it is the credentials of the user who is executed the request that will be used. (as filled out in the Site Logon, User Name)
For a PM with limited visibility in WebCenter, the list of templates is filtered in following way. We check for
- Company visibility:
  - Check whether the project has a location.
    If not, having visibility on one of the locations of the
company is enough to have visibility on the project/template.
If yes, we need to check the locations too: check whether the project has a location and the visibility record also specifies a location. Check whether these two locations match.
  o Template member visibility:
    For each group member in the template, including the PM, we check whether the group can be seen by the PM.
    If the template is not visible because of one of the reasons mentioned above, the template will be removed from the list of available templates.

If the project already exists, and you only want to update a field, you need to specify the name, the login name and password, and the field you want to update.

When running this task, besides the update or creation of the project, the Job properties are send to WebCenter and mapped to the project’s attributes.
The mapping of the job properties to WebCenter attributes is done by name mapping.

**Date type attributes/properties**
When sending dates in the job properties to WebCenter, the date has to be formatted in AE in following format: “MMM dd, yyyy HH:MM”, example ‘Apr 10, 2013 21:42’, otherwise the date attribute will not be recognized by WebCenter and will not be filled out.

5.3 Troubleshooting
When something goes wrong, check the following things:
  o AE’s task overview, check the log info. Most of the time, you find the reason for the failure at the end of the log file.

6. WebCenter View

6.1 Description
The AE WebCenter view provides a view on documents in a WebCenter project. You can see the documents with their approval status in WebCenter.
The user can also download the documents from this view.

6.2 How to setup?
In AE, click on the WebCenter icon in the AE views.
If the WebCenter View is not configured, you will get a configuration page where you can fill out your WebCenter address and the username/password that will be used to connect to WebCenter.
Link between Automation Engine and WebCenter

If the WebCenter View is already configured, but you want to change the configuration, you can right-click in the window and you will get the configuration window again.

6.3 Best practices
In the configuration, you need to specify the project name. It is common practice to map jobs on project using the job name/project name. On the configuration page, use the smartname [JobName] for the project name.

6.4 Troubleshooting
If you do not see anything appearing in your job Webview, right click on the view and select configure. This will show you the configuration details of your Webview. Copy the value of the URL, open a browser window and go to this URL. You should get the WebCenter login window.
To log in, use the same credentials as in the configure page. If you can log in with the user name of the configure page, retype the password in the configure page that you just used for logging in to WebCenter. This ensures that the password is still up-to-date. Try again to connect to WebCenter.
If it still does not work, verify that the project name you try to access really exists in WebCenter. Ensure that the smartnames resolve correctly to the project in WebCenter.

7. Push through folder

7.1 Description
This function is used to copy documents from WebCenter to a location in your LAN. Often it is used to upload documents to a job in AE. The folder is typically a hotfolder that can be picked up by a workflow system (like Automation Engine)

7.2 How to setup?
1. As a WebCenter administrator go to Admin > Configuration > Push Through Configurations
2. Fill out the correct information
   a. Configuration Name: name of your configuration
   b. Destination UNC: location of the (hot)folder
   c. File naming: allows to rename the file so it contains an indication of e.g. the project
   d. Workflow type: different type of workflows to connect to
3. Add a folder to a project/template
4. Actions > Edit Folder Properties
5. Toggle on “Workflow (advanced)” and select the configuration you just created
6. Now, when someone uploads a document to this folder, the document will be pushed to the push through folder

![Edit Folder Properties](image)

7.3 Best practices
Use the “File naming” option to indicate the project that the document came from. Using “<Project Name>_<Document Name>” allows the workflow to strip off the first part, indicating the project name, and based on that information move the file first to its job on Automation Engine

7.4 Troubleshooting
In the documents information there is an indication if the document was pushed successfully. There is also a button that allows you to push the document again to the (hot)folder

![Documents](image)

7.5 Known limitation
There is no way to remove the document from WebCenter after it has been pushed. This way, the customer might end up with a whole lot of documents, just to get it to Automation Engine

8. Workflow Connection

8.1 Description

**Note: WCR’s administration guide is outdated regarding the WF connections**

With a workflow connection, you can hook up your WebCenter project to an AE job. Workflow connections can also be used to archive/synchronize documents in your project.
When creating the workflow connection, you need to select the purpose of the connection. Is it

- a project synchronization type?
  In this case, a JDF ticket describing the project will be written on a hotfolder or it will be send to a URL. (see below for the setup details)
  This is typically used when you want to hook up your WebCenter project to an AE job.

- a document synchronization type?
  In this case, documents in your project will be zipped, together with some metadata and this zip file will be written on a hotfolder.
  This will typically be used in combination with external systems. People use it for archiving or synchronization purposes.

### 8.2 How to setup?

Creating a new Workflow connection:

![Configuration](image_url)

When creating a new Workflow connection, you need to specify whether it is a Project/Workflow (JDF) and/or whether it is a Document type connection.

- **Project/Workflow JDF**: when this option is on, a JDF ticket describing the project will be written when a synchronization event occurs.
  You need to specify the URL where the JDF will be written.
  You can work with hotfolders, in this case the URL needs to be a share in your system where the JDF will be written. If you want to sync with AE, this share needs to be a JDF hotfolder for AE.
  You can also work with a JMF address. In this case, a JMF message will be posted to an address on each sync event.
  The address where the JMF is posted is [http://<servername>:4411/JDFP/JMF](http://<servername>:4411/JDFP/JMF). The easiest way to configure the JMF connection is to click on the “Setup JMF Connection”.

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When you do so, you need to fill out the name of the AE server in the pop up, and the rest is filled out for you.

Pro and cons using hotfolder versus JMF: there is no difference in functionality that you get when working with JMF or JDF, the only difference there is, is that if you work with JMF, you will get an immediate reaction from AE when you send messages to the server. With JDF, there is a polling mechanism where the server checks every so many minutes whether there is something in the hotfolder. So, you do not get immediate result in AE. On the other hand, if AE is not up and running for some reason, and you send an JMF message to the server, the message is lost, whereas the JDF ticket will stay on the hotfolder as long as it was not processed by AE.

- **Document + metadata (ZIP)**
  When the connection is a document-type connection, a zip file containing the document together with meta-data info on the document will be created every time an event occurs (see below for how to setup the events). You need to specify the location where this zip file will be written. This share needs to be accessible from the WebCenter’s application server for the user BGSystem.

### 9. Synchronize Project

#### 9.1 How to setup?
As an admin user, go into the project details, click on the ‘Configure’ tab. Note that this tab is only available for administrators. In the configure section, you have the ‘workflow connection’ tab:
If there are workflow connections defined in the system, you can toggle the ‘Connect this project to a workflow’. If you do so, you will see the connection settings appearing:

- **Workflow connection**: select the workflow connection you want to use. In a typical use-case, there will only be one connection defined in the system.
- **Option ‘Allow manual synchronization by the Project Manager’**: When the option is toggled on, there will be an icon appearing next to the project name. Clicking this icon will trigger a synchronization.
- **When synchronizing on the project status changed event**:
  - **Synchronize on all statuses**: meaning that if the synchronize action on notification type ‘Project status changed’ is on (see below), the synchronization is done every time the project status changes.
  - **Synchronize on Completed status**: meaning that if the synchronize action on notification type ‘Project status changed’ is on (see below), the synchronization is only done when the new status is a completed status. This option is used when you want to archive a project when the project reaches a completed status.
  - **Copy Documents when synchronizing**: with this option, you can set whether you want to copy documents or not. If you do so, you can choose to
Link between Automation Engine and WebCenter

- Only copy approved document. This includes also the forced approved documents and the approved with comments.
- Only to copy documents in a given folder. The use case for this option is that customers only want to archive documents in a given folder. Each time a synchronization is done, the documents are copied to the AE job.
- Only for the ‘Project’ type of synchronization: The additional settings only come into play when you use the ‘Project’ type of synchronization. (clicking the help balloon gives some explanation, will not describe it here). They are used to identify the AE job when syncing the WebCenter project to the AE job. See also “Best practices” below.

Common problem with the synchronization tool is the location where the AE job is created. In WebCenter, we specify what we want in the job, but not where the job will be created. The physical location of the job is specified in AE, in the ‘Configure -> Jobs -> Smart Job Location’. This location needs to be specified using smartnames (there needs to be variation in the location depending on the project name), so that different jobs will go to different location. If this is not the case, you will get error message saying that ‘nested jobs are not allowed’.

Note: if you do not have any workflow connection defined in the system, you will see following page:

Clicking on the link will bring you to the page where you can set up a workflow connection.

**Defining the synchronization events.**
Ones you have set up a workflow connection and hooked up your project to a workflow, you need to specify on which event the
synchronization will be triggered. You can do this in the notification tab of a project:

Note that the 'synchronize with Workflow’ is only available if you project is connected to a workflow.

On this page, you can specify for each event whether you want to trigger a synchronization with the workflow.

**Note on documents that are copied with the document-centric actions**

Some of the events are seen as document-centric events: i.e. they are rather a document event than a project event. Such events are document upload, new version upload, approval events.

For these events, when a synchronization is triggered, not all the document in the project will be synchronized, but only the document where the event happened, will be synchronized.

The use case for this is that for certain situations, you only want that the documents are copied only ones into the AE job, because they might start a workflow task when they arrive in the job. If all the documents would be synchronized every time an event occurs, some documents would get copied multiple times.

**Project synchronization to AE**

When a project is synchronized from WCR to AE job, the following WebCenter project properties are mapped to job properties:

- Project name -> Job Name
- Project Due date -> Job Due date
- Project Customer info is mapped to the job customer info, including the sales person.
- Project attribute category -> job category
- Project attributes -> Job parameters. Name matching is used. In AE, new properties will be created if they do not exist yet.
- Project ID -> Job Project ID
9.2 Best practices

Round tripping of synchronization between AE and WCR

When AE creates the WebCenter project, the order ID and suborder ID of the AE job are stored into the project’s “AE_OrderID” and “AE_SubOrderID” attributes, even when the project’s attribute category does not have these attributes.

When it is necessary that the updates to the WebCenter project, also update the AE job, the configuration settings in the webcenter project should use the attributes “AE_OrderID” and “AE_SubOrderID” for getting back to the AE job.

Note that the attributes “AE_OrderID” and “AE_SubOrderID” always exist on installations where workflow connections are defined (unless they explicitly removed from the system).

9.3 Known limitation

The synchronization can only be done if WebCenter and AE (or the component that reads the info) is on the same LAN.

10. Launch workflow from workflow

10.1 How to setup?

Imagine a workflow on WebCenter that preflights all the PDF documents in the root folder. When the preflight is OK, the workflow completes. When the preflight failed, the workflow will pick up the preflight report that then needs to get checked.

Create a task type with following setup:
10.1.1 Sync Workflow
The “Sync Workflow” has no setup and will just execute the “Sync Workflow” that has been setup in the Project.

10.1.2 Submit Workflow

Fill out the options:
- Workflow Connection: all the Workflow Connection setup in WebCenter that are setup using JMF
- Workflow Name: the name of the workflow on Automation Engine
- Map attributes to Workflow Parameters -> This will add the document attribute and project attributes to the “Workflow Parameters” on Automation Engine. This gives the possibility to have different parameters per document
- Launch in:
  - Job – This will launch the workflow from a certain job
    - Orderid
    - Sub-orderid
  - Container – This will launch the workflow from a container (if no job management is used)
    - Folder
Link between Automation Engine and WebCenter

10.2 Example

- In WebCenter, create an attribute category with one attribute “Printing Process”
- Use the above workflow and add it to your project
- When uploading documents, the user is asked to specify the “Printing Process”

![Task: Upload Documents](image)

- When the user completes the task, the workflow will launch on every document. The attributes of the document will be pushed as workflow parameters to Automation Engine
- Based on the workflow parameters, the workflow can route in a specific way
11. Upload Pagelist to WebCenter

Since 12.1, it is possible to send a multipage PDF file directly to WebCenter without going over an imposition. Following sections explain how to do this. Note that it is still possible to publish impositions to WebCenter like before.

11.1 AE Runlists

AE 12.1 has the notion of “RunList”: this is a sequence of pages, but without imposition information.

If you send a runlist from AE to WebCenter, you will see the pages in the right sequence and you can do an approval on the pages which will come back to AE, but you will not see extra information like sheet information.

You can use this workflow if you want to send pages to WebCenter in the right order to get them approved, but you want to do the positioning afterwards.

A Runlist in WebCenter will have ‘NoImposition’ as Sheet Name and the Sheet Side will always be 0. Other than that, for a WebCenter user, there is no difference between a pagelist coming from a runlist or coming from an imposition.
11.2 How to setup?

In AE 12.1, there is a new ticket “Create Runlist”. When you right click on a multipage PDF file, you can run the ‘Create Runlist’ task on the file:
You can fill out the name of your Runlist. If you do not fill out a name of the Runlist, the name of the input PDF file will be the name of the Runlist.

As a result of this task, a RunList is created which is shown in the 'Imposition Gallery'. You need to switch to the 'Pages' view to see the Runlist and its pages.

To publish the Runlist to WebCenter, right-click the Runlist and select the task type ‘Publish Imposition on WebCenter’.
The ‘Publish Imposition on WebCenter’ will open:

The ‘Publish Imposition on WebCenter’ ticket is a chained ticket. The first element has following tabs:

- **Selection**: this tab is empty if you have selected the Runlist. If you would start from an imposition, this tab would allow you to select a page range.
- **Mockup**: here you can specify which extra’s you put on the pages.
- **Publish**: in this tab, you can select the some details of the data that is send to WebCenter, such as the ‘Make available for download’ and resolution of the view files. This tab has the same functionality as described in the regular ‘Publish to WebCenter’ ticket, see section [Publish documents on WebCenter](#).

In the second element in the chain, you can specify the destination details: WebCenter site, project etc... (Ensure to click the second step in the ticket as shown in the screenshot):
This ticket is the same as the WebCenter Publish ticket. For a description of the parameters, see section Publish documents on WebCenter.

If approval is required – which can be specified in the approval tab – the approval feedback comes back in the page overview and also in the proofs view. In the pages view, the approval status is indicated in a color above the page and if you hover over the page, you can see the details of the approval.
11.3 Known limitation
When publishing a Runlist or an Imposition to WebCenter, WebCenter and AE always need to be on the same LAN.