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1. Concept

What is a SmartName?

A SmartName is a variable that refers to a value. You use them by inserting them in input fields all across Automation Engine. For example the SmartName `[File]` refers to the name of the task's input file, and the SmartName `[Date]` refers to the date the task is launched.

SmartNames are shown in green and between square brackets. For example `[File]`.

Where can SmartNames be used?

**Note:** Not all SmartNames can be used everywhere. Learn about limiting the places where they can be used in *SmartName Scopes* on page 15.

- **In Task Tickets, Workflow Steps and Access Points**
  
  See an example of a *ReportMaker* ticket:

  ![Image](image.png)

  The output file will be written in the Job Folder, in a subfolder 'Reports'. The output file name will start with the name of the input file name plus the suffix '_reportcard_' and ending with the date when this task is launched.

  **Tip:** You here also see how you can make combinations of SmartNames and regular (static) text.

  The report template that will be used starts with the customer's ID number and ends with '_Report_Template'. This makes the ticket smart enough to select the template that this customer prefers.

- **In some fields of the Job Setup**

  In this example a SmartName defines the code of the bar code in the Job Setup (the code is a variable that will be coming in from an XML file):
• As Workflow Parameters in Workflow Steps
When your workflow contains Workflow Parameters, you can pick them up as Workflow Parameters SmartNames in task tickets of tasks used in that workflow. Learn more about Workflow Parameters in Workflow Parameters.

• Inside SmartMarks
See this example of how a SmartMark (here in PackEdge) uses a Smart Text that also picks up 2 SmartNames:
• **Inside the setup of other SmartNames**

Some examples:

• You can create a custom SmartName that extracts the first 5 characters from the [Job Name]

• In below example, a conditional SmartName 'EXA_Which_Site_Is_Closest' compares the value of two other SmartNames

![SmartName example](image)

• **Inside some fields in the Customer setup**

• **In Configure, in some setup fields of Jobs and Products**

**Advantages**

SmartNames are a crucial part of Automation Engine's power. They bring speed and error reduction to your workflow through these effects:

• **Consistency.** Folders and file names will be consistent, no typing errors.

• **Automation.** You will rarely need operator intervention to edit workflows.

• **Integration.** SmartNames can pick up their value from other systems without human intervention.

• **Organisation.** Making workflows smart means you need to prepare less workflows. Smart workflows adapt to the input files and the variable job instructions.

When you first install or update Automation Engine, you already get many **Default SmartNames.** You can also make your own.

In the next chapters, we first give an overview of the general principles. Then we describe the different types of SmartNames in more detail. We both explain the default ones and then show you how to create your own.
2. General Principles

2.1. Using a SmartName

There are 2 ways to use an existing SmartName:

- click on to open the SmartName Browser. Choose a category, select the SmartName and click **Insert**.

- When you want to insert multiple SmartNames, press ALT while clicking **Insert**. Then, the SmartName Browser will not close.

- You can filter the shown SmartNames by entering text in the search filter top-right. Use double quotes ("") when an exact match is required.

- You can even combine search filters. For example when you type '123 exa', you ask to see SmartNames that contain both 123 and exa in their name or Tag (learn about tags [here]). Add a semicolon '123 ; exa' to see SmartNames that contain 123 or exa.
• Click **Refresh** to make sure that the most recent created SmartNames are also shown (or press CTRL-R or CMD-R).

• Click **New SmartName** if you want to create a new one from here, while keeping this dialog open.

• right-click in the field, choose **Insert SmartName...** and choose a SmartName from the offered categories.

---

**Important:** In both ways, make sure you first position your cursor in the exact place where you want to insert the SmartName.

**Tip:** It is possible to select and cut, copy and paste SmartNames.
2.2. The SmartNames View

The SmartNames View in your Pilot is where you

- see all your SmartNames, both the default ones that came with Automation Engine and the ones you created extra
- add filters to help find and organize them
- create, modify or delete SmartNames (if you have the User Access Right. Learn more in Managing User Access Rights.)
- test your SmartNames ("resolve").

As usual, you can control the columns in this view. To do this, go to the menu View > Select Columns in 'SmartNames'... (by default they are all shown).

You can add a Description to your custom SmartNames. This quickly reminds you what they are for, without the need to open and analyse them.

**Tip:** The SmartNames View is not available when your Pilot is in Jobs Overview mode.
Tip: When you choose **Tools > SmartNames**, the **SmartName View** opens as a separate window.

**Type - Category - Scope - Private - Tags (Overview)**

We here briefly describe what these columns mean. Find more detailed descriptions on some of them in the next pages.

- **Type.** The type is a very important distinction. It defines what kind of technique the SmartName will use to get (resolve) its value. Will it get the value from a database inside Automation Engine? Or by asking the database of an external system? Or from an XML file or from another SmartName? All types are documented in *SmartName Types (Overview)* on page 11 and later in even more detail.

- **Category.** Categories are an old way of helping you filter and group SmartNames. We recommend using **Tags** instead (see further).

- **Scope.** By default the **Scope** of a SmartName is **global**. This means you can use it everywhere. Defining a different (smaller) **Scope** for a SmartName means that you want to limit the zone where it can be used. For example: if you define the **Scope** 'Step and Repeat' then you indicate that this SmartName makes no sense to be used outside that concept of Step and Repeat. More on this in *SmartName Scopes* on page 15.

- **Private.** You can save a SmartName as **Private**. Private SmartNames are not visible when applying SmartNames in a ticket. They do not appear in the list or the **SmartName Browser**. Two example use cases:
  - the SmartName is only used as a sub-component of one or more other SmartNames (that users will see and use)
  - you are still testing a new SmartName in the **SmartName View** and you do not want other users to already use it.

- **Tags.** Adding custom tags to a SmartName helps you filter and group them. Learn more on this in *SmartName Tags* on page 16.

**The right panel**

On the right side of the **SmartNames View**, you can add more SmartNames to the list and you can test them extensively. Learn more in *Testing SmartNames* on page 20.

**Advanced Search Criteria for SmartNames**

As in many other **Views** in the Pil**ot**, you can use **Advanced Search Criteria**. To activate this, type in the **Find** field or press CMD-F (Mac) or CTRL-F (Windows). You see the criteria of the current filter. Click the + or - to add or remove extra lines of criteria.

This screen shot is an example of a filter that shows all SmartNames with **exam** in their **Tag**.
Click **Save** to save this filter. Define if this filter is for yourself or for all users. Decide if you want to **Add to my views bar**.

See an example of custom **Smart Views**:

**2.3. SmartName Types (Overview)**
Later in this document we describe each type in detail. Here is an introduction:

**Database Query SmartNames**

These retrieve a value from an external database. This is useful when there is no other way that the external system can send the information to Automation Engine (via XML or CSV or E-mail ....)

Learn more on in *Database Query SmartNames* on page 62.

**String Extract SmartNames**

These SmartNames extract a part of a string of characters (text or numbers). For example: when the input is '123-abc', then extracting all characters before the '-' will result in '123'.

**Note:** The string from which the value of the SmartName is extracted can contain other SmartNames. For example: extracting the first 5 characters of the [JOB ID].

Learn more on in *String Extract SmartNames* on page 39.

**System Value SmartNames**

These retrieve a value from one of Automation Engine's own databases. You get these when you install or update your Automation Engine server software. For example [Access Point E-mail Sender] (only valid in the context of an Access Point)

Learn more on in *System (Value) SmartNames* on page 29.

**Script SmartNames**

These use **JavaScript** to define a value.

Learn more on in *Script SmartNames* on page 65.

**XMP Path Query SmartNames**

These retrieve a value from the XMP (metadata) section of a PDF. For example when it was last modified or the PDF version number.

Learn more on in *XMP path Query SmartNames* on page 52.

**Xpath Query SmartNames**

These use XPath Queries to retrieve a value from an XML. The **Xpath Builder** is a great help to construct these **XPath expressions**.

Learn more on in *XPath Query SmartNames* on page 46.
Conditional SmartNames
These return a value based on a condition. For example a SmartName 'Trapping size' has these conditions: if the workflow parameter 'Printprocess' is 'flexo', then return '0,2' and if the workflow parameter is 'digital' then return '0'.
These SmartNames are also often used to route workflows in one or the other direction.
Learn more on in Conditional SmartNames on page 55.

CSV Text Extract SmartNames
These extract a value from a CSV file. For example take the value from field 5 on line 2.
Learn more on in CSV Text Extract SmartNames on page 43.

2.4. SmartName Categories
SmartNames are sorted into categories, so you can find them more easily. The SmartName View and the SmartName Browser show you these categories and their members:

CTP Flexo
These SmartNames are useful when working with the View modes of the category CTP Flexo.

Date
Use SmartNames of this category to insert the [Date] or [Time] of their execution.
Automation Engine

File Information
These SmartNames return file-related information from within the file itself (for example [Media Box Width]) or from within the Automation Engine database ([File Type], [Folder of File], [SmartID]...). The most popular one is [File], representing the name of the ticket’s input file.

Global
This is a full list of all the SmartNames that can be used anywhere throughout Automation Engine. The ones with a limited Scope will not be listed here.

JDF
These SmartNames are only used in tasks where JDF constructs are used. Learn more about JDF in What about JDF?

Job Information
These SmartNames refer to most of the fields in a Job setup, including the details of Customer and CSR for that Job. Information on the location of the Job is part of the category Path Information. Any custom Job Parameters are also a separate category.

Job Parameters
When you are in a Job context of a Job that has custom Job Parameters, you will see them here. Their name automatically starts with 'jp. '

Miscellaneous
• Some SmartNames return the name of the Automation Engine server(s). They are useful when you use Assistant servers.

• [Auto-Number1] will add a sort-number to a group of output files. This helps sorting files. Learn more here.

Page Information
These SmartNames offer information on the (PDF) page attributes, typically height and width. You typically use these in the (page) imposition related tasks like the Export Imposition to PDF File.

Path Information
These SmartNames correspond to the Job’s location. Learn more in System (Value) SmartNames on page 29.

Tip: If these SmartNames are greyed out (unavailable), it means that the field you want to insert them into is not a path field.

Plate Information
These SmartNames offer information on the plate attribute of a (page) imposition. You typically use these in the task Export Imposition to PDF File.
Product Information
These SmartNames are only useful when you use the *Products* tool in Automation Engine. Much like the category *Job Information*, this category relates to the many fields in the *Products* database of Automation Engine. Learn more about setting them up in *Product (Part) Properties*.

Task Information
This category of SmartNames allows to insert task related information (Task Name, Operator, Application Version...). Learn more in *System (Value) SmartNames* on page 29.

Workflow Context
These SmartNames pick up specific names or paths of folder or files in a workflow context. They help avoiding that you have to make complex workflows or create complex custom SmartNames to achieve the same result. Learn more in *System (Value) SmartNames* on page 29.

2.5. SmartName Scopes

Depending on where you are in Automation Engine, different SmartNames may be available for use.

Global SmartNames
These SmartNames are available everywhere where SmartNames are offered.

SmartMarks SmartNames
These SmartNames are only available when using SmartMarks. In *Concept* on page 4, find an example where a SmartName was used to decide the Smart Text in a SmartMark.

Step and Repeat SmartNames
These SmartNames are only available in *Step and Repeat* tasks, excluding the 'Dynamic' S&T tasks.

Mark Information
These default SmartNames are only available in the task *Add Marks to Imposition* (page workflows only).

Stripping SmartNames
These default SmartNames are only available when retrieving values from JDF files (with the *Import JDF Stripping* task).

Imposition SmartNames
These default SmartNames are only available when working with impositions (for example, in the *Export Imposition to PDF File* ticket).
Unit Text Field SmartNames

SmartName enabled unit text fields are available in tasks where units have to be entered. You can do unit conversions and simple arithmetic using the operators +, -, *, and /. You can also use parenthesis ( ) if necessary while calculating. PowerTrapper, Change Imposition Layout and Create CAD sheet and a few examples of tasks that offer such unit text fields.

Some examples:

```
[Width] inch
```

```
9 inch + 3 mm
```

2.6. SmartName Tags

Creating a Tag

The Scope of a SmartName defines where it can be used. The Category of a SmartName helps filtering. Adding Tags to a SmartName is an extra tool that enables you to organize them via custom filters.

**Note:** Tags are also shown in a separate column in the SmartNames View.

You can add one or more Tags when you save a new SmartName. When the Tag already exists, it will appear in light blue:

```
Save As: EXAL_XML_OrderID
Tags: 
 ได้เลยexamples  CLOH
Private
Description:
Save  Cancel
```

**Tip:** In the Tags field, press the space bar to get a drop-down list of all the Tags that were already created on your Automation Engine.

To add a Tag to an existing SmartName, select it, right-click and choose Info to edit and add one or more Tags.

To remove a Tag from a SmartName, select it and press the Delete button.
Tagging multiple SmartNames

1. In the SmartNames View, (filter and) select the SmartNames you want to tag.
2. Right-click and choose Tags... A dialog will show what Tags they already have in common: Tags that are not assigned to all selected SmartNames are shown in grey.

3. To add a Tag to all selected SmartNames, add the Tag and click OK.
4. To remove a Tag from all selected SmartNames, delete the Tag and click OK.

Filtering SmartNames on Tags

To filter SmartNames on Tags,

• in the SmartNames View, select the search field and type the name of a Tag.

Tip: It is also possible to add a search row by pressing the Add "+" button in the Scope bar, and choosing Tags from the attributes list (that pops up on the left).

• when selecting a SmartName from the SmartNames browser, enter the Tag in the search field.

To filter on multiple Tags, separate the names by a space. For example to filter on SmartNames that have both examples and OLH as Tag, type "examples OLH" into the search field.
To filter on SmartNames that have *either* examples *or* OLH as a Tag, then separate the Tags by a semicolon ";" (see screen shot).

### Renaming a Tag

To rename a Tag, follow these steps:

1. Go to the **SmartNames View**, filter on the **Tag**.
2. Select all SmartNames that contain that Tag.
3. Right-click and choose **Tags...**.
4. Double click the Tag to edit it and type the new name.
5. Click **OK**.

### 2.7. Creating a SmartName (General)

These are the general steps to create a new SmartName. Find more detailed instructions per SmartName type further in this document.

1. In your Pilot, select **Views > SmartNames**.
2. Click on the Create a new SmartName icon in the toolbar. Alternately, choose **File > New SmartName**.

   This opens the SmartName setup dialog:
Note: Click ▼ to select the attribute from a drop-down list.

3. Select the **Type**. We introduced the available types in *SmartName Types (Overview)* on page 11. See further in this document for a detailed setup instruction per type. Depending on which **Type** you choose, the dialog adapts to offer different options.

4. Select the **Scope**. We introduced the available scopes in *SmartName Scopes* on page 15.

   Note: You can easily change the **Scope** later; this does not affect the setup options.

5. Set all the required attributes. This is a general introduction; see the specific settings per type further in this document.

6. Check the **Result** value (bottom left in the dialog).

   Depending on the example input data (file), you can already here see the example result with the already chosen settings.

7. **Formatting Options...**. You can still change the formatting of that result (text, number, data and time). Learn more details in *Formatting SmartNames* on page 67.

   For example, your SmartName already extracts a date out of an XML, but you also want to change the format of that date from 25-Aug-14 to 25-08-14.

8. Click **Save** and enter a logical **Name** and a suitable **Description**.

   When you use **Save As...**, the dialog stays open. This is very useful when creating multiple variations of a SmartName one after the other.

   *SmartName Tags* on page 16 explains all about adding **Tags**.
Decide if your SmartName should stay Private. Learn more about Private SmartNames in The SmartNames View on page 9.

9. Click OK.

You can use Save As... in the Add SmartNames dialog to enter a new name for the SmartName. This is useful when creating multiple variations of a SmartName one after the other from the same dialog.

10. Check the result of your new SmartName in more situations or tasks. Learn more in SmartName Relations and Dependencies on page 24.

2.8. Testing SmartNames

While creating new SmartNames you will want to test them. Instead of having to test them in a often complex workflow, you can use tools available in the SmartNames View.

This part of the View contains 2 main sections:

- Include SmartNames From: This part serves to show extra SmartNames that were not appearing in your list yet. Choose if you also want to show Workflow Parameters and/or Product (Part) Parameters. Learn more in Also Show Workflow Parameter SmartNames on page 20 and Also Show Product (Part) Parameter SmartNames on page 21. The reason that you also want to see them here is to test them as well. The next feature enables that:

- Resolve all using: This part allows you to test your SmartNames. You can test them on a task or on a file. Learn more in Test your SmartNames with ‘Resolve All Using’ on page 22.

2.8.1. Also Show Workflow Parameter SmartNames

Follow these steps to show extra Workflow Parameters in your list of SmartNames:

1. In Include SmartNames From, check A workflow and browse to the workflow that has the Workflow Parameters you want to see here.

They will immediately appear in your list of SmartNames (unless you have a filter setting that prevents that).
2. Tip: When your list shows many SmartNames already, it is possible you do not easily see them appear. Because they are here all shown starting with the prefix \texttt{wfp}, you can easily check their presence by typing a name filter ‘\texttt{wfp}’. Alternatively, you could also use the \textbf{Category} filter \textbf{Workflow Parameters}.

\begin{figure}[h]
\centering
\includegraphics[width=\textwidth]{Automation_Engine.png}
\caption{Automation Engine}
\end{figure}

\subsection*{2.8.2. Also Show Product (Part) Parameter SmartNames}

\textbf{Note:} This feature is only useful when you are using Automation Engine’s \textit{Products} tool.

Follow these steps to show extra \textbf{Product (Part) Parameters} in your list of SmartNames:

1. In \textit{Include SmartNames From}, check \textbf{A product part:} and browse to the product file that has the Product (Part) Parameters that you want to see here. They will immediately appear in your list of SmartNames (unless you have a filter setting that prevents that).

2. Tip: When your list shows many SmartNames already, it can be hard to find them back in the list. Because they are here all shown starting with the prefix \texttt{pp}, you can easily see them appear by typing a Name filter ‘\texttt{pp}’ or ‘\texttt{ppp}’. Alternatively, you could also use the Category filter \textbf{Product (Part) Parameters}.
2.8.3. Test your SmartNames with 'Resolve All Using'

The Resolve All Using tool in the SmartNames View enables testing your SmartNames. The basic principle is that you give an example input which is then tested on all SmartNames.

**Tip:** If the SmartName you want to test is a Workflow or Product (Part) Parameter, then first make it appear in the list by using the feature Include SmartNames from. Learn more on in Also Show Workflow Parameter SmartNames on page 20 and Also Show Product (Part) Parameter SmartNames on page 21.

"Resolve all using:" - An example:

1. Make sure the SmartName you want to test is visible in the list.
2. If you want to test the SmartName by using it in a task, then first make sure you have a finished task given a certain input. Then check A task and browse to the task in your task monitor dialog. If you want to test the SmartName by using it on a file, check A file and browse to that file.
3. Click Show to start resolving all your SmartNames with the selected file or task. This also adds an extra column to your SmartNames View. The example in this screen shot shows how the selected file `666-2712_ReportCard.pdf` made the SmartName `[Everything before the _ ]` resolved (resulted) in the 666-2712.
Set example values

This is useful for SmartNames that have dependencies. For the selected SmartName, you can type in a manual value instead of needing to select a file or a task as input example.

**Tip:** Not all SmartNames allow you to enter an example value. This will for example work for most **System** type SmartNames and for the **CSV Text Extract** type SmartNames. This is because the value of these SmartNames is a "given" and can be overruled by your new example value. The value of SmartNames that are "calculated" can not be overruled; the resolving mechanism will simply calculate them when needed.

See an example in the below screen shot.

- You made a custom SmartName [File - only part before _], which is a string extract with the _ (underscore) as separating character.
- This SmartName of course a depends on the system SmartName [File]. If you then select the main SmartName [File], you will be able to set an example value.
- In our example, we enter the value "coco_765869".
  - See how this value is shown as a manually entered example value: the ✤ icon indicates this.
  - See how the SmartNames (that depend on the SmartName [File]), also react and resolve a value: the SmartName [File - only part before _] results in 'coco'.

---

![Automation Engine](image)
Remove all Examples Values
Click this to remove all the example values from your SmartNames View.

Show results as Plain text
In some exceptional cases it can be necessary to insert a SmartName although the user interface does not offer to insert this SmartName in this place. Use this function to see the SmartName as plain text so you can then select, copy and paste it anyway in the dialog or ticket where you really want it. Test carefully, because these cases are really exceptional.

A ‘plain text’ version of a SmartName looks a bit like XML code. For example [Folder of File] is in plain text written as <<filefolder/>> and [Product Name] as <<bstpr:productname/>>.

Reload Resolved Values
This ‘refresh’ function is useful when the input for you test has changed in the meantime.
For example you are setting up SmartNames that are reading parts of an XML file and you already did a test here. You typically want to test again after you know that the content of the XML file changed (your test will show new values).

2.9. SmartName Relations and Dependencies
In SmartNames View, when you right-click on one or on a selection of multiple SmartNames, you get these extra functions:
Tip: Most of those are also available from the View menu.

Attention: How SmartNames relate to each other is very important when you need to manage many of them. Such checks are very important especially when you plan to rename or delete a SmartName!

Highlight Related SmartNames

Choose this function to highlight all SmartNames that need one or more of the currently selected SmartNames: 'Need' can mean that the one you selected is based on the other(s) or it can mean that the other(s) are based on the one you selected. This highlighting is a feature that stays active until you switch it off again.

For example: see this screen shot of the ones related to the SmartName [File]:
Select Related SmartNames

Choose this function to select all SmartNames that need one or more of the currently selected SmartName. In this example [Fuel Cost] also gets selected because it [Fuel Cost no km] needs it (to extract the unit 'km').

<table>
<thead>
<tr>
<th>Name</th>
<th>Result</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>[Fuel Cost]</td>
<td></td>
<td>Script</td>
</tr>
<tr>
<td>[Fuel Cost no km]</td>
<td></td>
<td>String Extract</td>
</tr>
</tbody>
</table>

Select Dependencies

Choose this function to select all SmartNames that are used in the currently selected SmartNames. If you select the SmartName [Fuel Cost no km] in the example below and then activate Select Dependencies, the SmartName [Distance] will also get selected. This is because [Distance] is used in the definition of [Fuel Cost no km].

<table>
<thead>
<tr>
<th>Name</th>
<th>Result</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>[Distance]</td>
<td></td>
<td>XPath</td>
</tr>
<tr>
<td>EXA_SN_Distance_Extract_No_Units</td>
<td></td>
<td>String Extract</td>
</tr>
<tr>
<td>EXA_SN_XPATH_Distance_Ind_Unit</td>
<td></td>
<td>XPath Query</td>
</tr>
<tr>
<td>EKA_WFP_Distance_From_A_No_Units</td>
<td></td>
<td>String Extract</td>
</tr>
<tr>
<td>EKA_WFP_Distance_From_B_No_Units</td>
<td></td>
<td>String Extract</td>
</tr>
<tr>
<td>Fuel Cost</td>
<td></td>
<td>Script</td>
</tr>
<tr>
<td>[Fuel Cost no km]</td>
<td></td>
<td>String Extract</td>
</tr>
<tr>
<td>INW_distance to france</td>
<td></td>
<td>XPath</td>
</tr>
</tbody>
</table>

Display Selected SmartNames Only
This function is no longer about selecting but about limiting the SmartNames that are displayed. This function helps when the selected ones are spread far out over your long list of SmartNames. See how the limited focus is also shown at the top.

When you want to see all your SmartNames again, then simply choose the function **Display All SmartNames**.

**Display Unused SmartNames**

When it's time to cleanup your SmartNames you will want to know which ones are not being used (any more). Choose this function to display only the unused SmartNames. You will first get this warning dialog:

Press continue to start the search. When done, decide what to do with them (delete? tag as 'unused'?).

### 2.10. Exporting and Importing SmartNames

SmartNames can be exchanged by exporting and importing (workflow) tickets that use those SmartNames.

Learn more about exporting and importing (workflow) tickets in *Exchanging Workflows*.

**Caution:** SmartNames of custom Job Parameters ([jp. ]) will not be imported. When you import a workflow that uses them, they will not be added into the job setup tab 'Parameters'.

**Why Exchange SmartNames?**

Exchanging SmartNames is typically done...
• with other people (during an Esko training or to send to Esko Customer Service).
• with other servers (colleagues that use another Automation Engine server in another plant of your company).

**How to Recover a SmartName that was Deleted?**

Your SmartNames are a standard part of the Automation Engine backup data. When you want to restore SmartNames that were (accidentally) deleted, you can get them back by restoring a backup of that configuration. The deleted SmartName of course has to be part of that backup.

Learn more about backups and how to restore them in *The Automation Engine Server Web Page*. 


3. System (Value) SmartNames

We will first list the default SmartNames of this type (**System SmartNames**), then show you how to create your own (**System Value SmartNames**) and end with some examples.

3.1. Default System SmartNames

We here describe the **System** type SmartNames that come with an install or update of your Automation Engine server.

**Remember:** In **SmartNames View**, the column **Description** already describes the SmartName briefly.

**Note:** Default System type SmartNames can not be changed. You can not double click and open them. You can not copy them.

- **Access Point Customer**, **Access Point E-mail Sender**, **Access Point E-mail Subject**, **Access Point Host**, **Access Point Name**, **Access Point User** can all be used when using (specific) Access Points.
- **Access Point Path**: the path to the folder on the (S)FTP server that will be scanned.
- **Access Point Protocol**: describes the used file transfer protocol. For example 'FTP' or 'GDRIVE' (for a Google Drive Access Point).
- **Application Name** and **Application Version**: mentions the name and or the version of your Automation Engine software.
- **Assembly**: Assembly method as defined in the JDF file (**Assembly/@order**), only used in page imposition tasks.
- **Auto-Number1**: the main reason to use this SmartName is to add control over sorting the files in the workflow. If you choose as output file name *[File]_[Auto-Number1]* then each output file will get an (increasing) number. For example: your task input files are banana, lemon and mango.pdf. Then the output file names will be banana_1.pdf, lemon_2.pdf and mango_3.pdf.

**Attention:** This SmartName is only valid when the task has multiple input files and if those are grouped as one 'token'. This is often the case in page workflows. Learn more about tokens in *Understanding Tokens (Grouping of Output Files)*. That page explains how you can group input files into one 'token' by using the **Data Collector**.

**Note:** Notice that this SmartName is not related to version numbering!

- **Back**: the distance between the center of the back of the section and the trim box of the page (typically used to add collating marks to a page imposition).
- **Backing up**: the "backing up" method of the press (turn or tumble) as defined in the JDF file.
- **Book Name** and **Book Number**: name and number of the book (**ImposeProof** only).
- **CDI Device Name**: name of CDI device (used in the *CTP Flexo view modes*).
- **CSR for the Job**: name of the customer service representative of the Job.
- **Customer's Product Reference**: name that your customer gives to the Product item.
- **Customer's Job Reference**: name that your customer gives to "his" job order.
- **Date**: the current date, formatted YYYYMMDD.
- **Device ID, Device Model Description, Device Model name, Device Model Number, Device Type**: as defined in the JDF file, used for page imposition "Stripping" tasks.
- **E-mail Address of the CSR for the Job**: the e-mail address of the customer service representative for the Job.
- **Extension of File**: the extension of the input file.
- **File**: the name of the input file without extension.
- **File Type**: the file type of the input file, for example PDF or PDFSC (= Esko Normalized PDF).
- **Folder URL**: the URL of the folder of the input file, the full path. Formerly known as [File URL].
- **First Folder of File**: the name of the first folder of the input file. For example: When the Folder URL is file://aeserver01/ShareThatYouMadeContainer/FirstFolder/SecondFolder/banana.pdf here, the First Folder of File is 'FirstFolder'.
- **Folder of File**: the name of the folder of the input file. In above example this is 'SecondFolder'.
- **Folder of First Input of Master Workflow**: name of the folder of the input file of the most outer workflow.
- **Folder of Input**: the name of the folder of the input file (same as Folder of File).
- **Folio**: the page name of the current page (relates to Mark Information).
- **Folios**: a range of page names (folios) containing prefixes and suffixes (for example ~A~,-C--~E~,-G~).
- **Imposition Name**: the name of the imposition (page workflows).
- **Ink Name**: the name of the ink(s) (relates to Plate Information).
- **JDF Device ID** and **JDF Device Name**: the ID and name of the machine or software (RIP or workflow) that interprets JDF.
- **JDF Sheet Name** and **JDF Signature name**: the sheet and signature name in the JDF file.
- **Job Category ...**: the category of the Job as defined in the Job setup, maximum 7 categories.
- **Job Colors**: the numbers of colors in the job (file) as found in the JDF file.
- **Job Colors Mode**: the Job color mode ('Black&White' or 'Full') as found in the JDF file.
- **Job Container Name**: the name of the Container where the Job has its Job Folder.
- **Job Container URL**: the URL of the Container where the Job has its Job Folder.
- **Job CT URL**: the URL of the "ctt" folder of the Job (= where image files can be created during normalization).
- **Job Customer Contact 1, 2, 3**: the name of the 1st, 2nd and 3rd contact of the Customer of the Job.
• **Job Customer Description**: the description of the **Customer** of the Job.
• **Job Customer E-mail 1, 2, 3**: the e-mail address of the 1st, 2nd and 3rd contact of the **Customer** of the Job.
• **Job Customer ID** and **Job Customer Name**: the ID and name of the **Customer** of the Job.
• **Job Customer Info 1, 2, 3, 4, 5**: the 1st etc., info of the **Customer** of the Job.
• **Job Description**: the description of the Job.
• **Job Due Date**: the due date of the Job (YYYYMMDD).
• **Job Due Time**: the due time of the Job (HHMMSS).
• **Job File Format**: the file format of the Job (standard format is Esko normalized PDF).
• **Job ID** and **Job Name**: the ID and name of the Job.
• **Job Temp URL**: the URL of the "temp" subfolder of the Job Folder.
• **Job URL**: the URL of the Job's **Job Folder**.
• **Layer Name**: the name(s) of the layer(s).
• **Layer Names**: the names of the layers used in this sheet (page imposition workflows).
• **Layer Number**: the number(s) of the layer(s).
• **Local Server**: the name of the server where the task runs.
• **Mark Height** and **Mark Width**: height and width of the current mark.
• **Master Server**: name of the Automation Engine master server. This is the one that runs the "task manager".
• **Media Box Height** and **Media Box Width**: the height and width (mm) of the Media Box of the first page of the input file.
• **Merged Plate Name**: This the name of the same as the CDI Job name, ending with an extension ".par". This is also the name as it appears in the queue of the CDI's "Expose" application. This name is defined in the **Create Merged Plate task**.
• **Name (without extension) of originating Input of (enclosing) Workflow**: the name of the first input of the (enclosing) workflow.

**Note**: The "enclosing workflow" is the workflow that the task, in which the SmartName is used, is part of.

• **Name of first Input of Master Workflow**: the name of the first input of the (most outer) workflow.
• **Name of Folder of Job**: the name of the **Job Folder**.
• **Name of Folder of originating Input of (enclosing) Workflow**: the name of the **folder** of the first input of the (enclosing) Workflow.
• **Name of originating Input of (enclosing) Workflow**: the name of the first input of the (enclosing) Workflow.
• **n-th Input File**: the index number of the input file (the how many'th it is).
• **Number of Pages**: the number of pages of the input file.
• **Number of Pages (RunList)**: the number of pages in the RunList.
• **Operator**: the Automation Engine user that launched the task.
- **Order ID**: the Order ID of the Job.
- **Padded Page Label**: the page label padded with zeros (extra zeros in front).
- **Padded Page Number**: the page number padded with zeros (extra zeros in front). Only used in the **Split Pages** task.
- **Page Label**: the label of the page. Only used in the **Split Pages** task.
- **Page Height** and **Page Width**: the vertical and horizontal trim size of the page.
- **Page Number**: the page number (starting from 1) or page range if the 'One Ups' contain more than one page.
- **Page Numbers**: a range of page numbers. For example: \(1-5, 7, 9-11\).
- **Page Range**: the range of imposed pages available in the output file (**ImposeProof** only).
- **Paper Height** and **Paper Width**: the vertical and horizontal size of the paper (page workflows).
- **Plate Height** and **Plate Width**: the vertical and horizontal size of the plate (page workflows).
- **Plate Template Name**: the name of the plate template (page workflows).
- **Press**: the name of the press as defined in the JDF file (Device/@FriendlyName or Device/@DeviceID).
- **Print Group Name**: the name of the print group (collection of sheets) or sheet. This is used in (Black & White) page workflows.
- **Product Customer Description**, **Product Customer ID** and **Product Customer Name**: the description, ID and name of the customer for that **Product**.
- **Product Custom Field 1, 2, 3**: the custom field 1, 2 and 3 of the **Product**.
- **Product Description**, **Product ID** and **Product Name**: the description, ID and name of the **Product**.
- **Product Ordered Copies**: the amount of ordered copies that were ordered of this **Product Part** in this Job.
- **Product Part Custom Field 1, 2, 3**: the custom field 1, 2 and 3 for the **Product Part**.
- **Product Part Data Zone**: the URL of the **Data Zone** of the **Product Part**.
- **Product Part Name**: the name of the **Product Part**.
- **Product Part Status**: the status of the **Product Part** (the Esko system name).
- **Project ID**: the Project ID of the Job.
- **RunList Name** and **RunList Number**: the name of the RunList and its number in the imposition.
- **Section Number**: the number of the section, starting from 1 (this is related to **Marks**).
- **Server**: the name of Automation Engine's (**Master**) Server.
- **Sheet Colors** and **Sheet Colors Mode**: the number of colors in the sheet and their color mode ('Black&White' or 'Full'), as found in the JDF file (page workflows).
- **Sheet Descriptive Name**: a short description of the sheet as defined in the JDF file (StrippingParams/@DescriptiveName), used in page workflows.
- **Sheet Index**: the index of the sheet (starting from 0), used in page workflows.
• **Sheet Name** (scope 'Stripping'): the name of the sheet as defined in the JDF file (StrippingParams/@SheetName), used in page workflows.

• **Sheet Name** (scope 'Plate Information'): the name of the sheet, used in page workflows.

• **Sheet Number**: the number of the sheet (starting from 1), used in page workflows.

• **Sheet Side**: the side of the sheet: Front or Back (used in page workflows).

• **Sheet Side SmartID**: the SmartID of the sheet side (unique identification number).

• **Short Task ID** and **Short Workflow Task ID**: the short version of the task ID number and the (most outer) workflow task ID number. For example: '5439'.

• **Signature Name**: the name of the signature as defined in the JDF file (StrippingParams/@SignatureName), used in page workflows.

• **SmartID**: the SmartID of this file's version (unique identification number calculated from a combination of an identifier of the file itself and of its external references).

• **Stripping Part Number**: Stripping part number as defined in the JDF file, used in page workflows.

• **Sub Order ID**: the sub order ID of the Job.

• **System Defined**: this is used when outputting .imp files (page impositions). It is a combination of the imp name, sheet number, sheet side and layer name.

• **Task ID**: the ID of the task in Automation Engine, the long version. For example: 'afbdf6ac-8d82-4eee-af4d-b2408041640f'.

• **Task Name**: the Esko system name of the task (workflow) ticket. For example the Add SmartMarks task is called "batchbrix.smartmarks".

• **Task Owner E-mail**: the e-mail address of the owner of the task.

• **Ticket Name**: the name of the ticket of the task (the name you gave the ticket).

• **Time**: the current time (when the SmartName is calculated), formatted HHMMSS.

• **Trim Box Height** and **Trim Box Width**: Height and width of the Trim Box (mm) of the first page of the input file.

• **URL of first Input of Master Workflow**: the URL of the first input file of the (most outer) workflow.

• **URL of Folder of Input**: the URL of the folder of the input file.

• **URL of Folder of originating Input of (enclosing) workflow**: the URL of the folder of the first input of the (enclosing) workflow.

• **URL of Input**: the URL of the input file.

• **URL of originating input of (enclosing) workflow**: the URL of the first input of the (enclosing) workflow.

• **Variant Name** and **Variant Number**: the name(s) and number(s) of the variant(s) (used in page imposition workflows).

• **Web** (scope 'Imposition'): this is the index of the web in the print group (used in page workflows).

• **Web** (scope 'Plate Information'): this is the number of the web (for multi-web printing in page workflows).

• **Workflow Task ID**: the ID of the (most outer) workflow task.
3.2. Creating System Value SmartNames

As we introduced in *SmartName Types (Overview)* on page 11, a **System SmartName** is a query to one of Automation Engine's own databases. Think of it as a question to Automation Engine. As you can see in *Default System SmartNames* on page 29, there are already a lot **Default System SmartNames**. Still, there are still some cases where it makes sense to create your own extra **System Value SmartNames**.

### 3.2.1. Concept

When creating your own **System Value SmartName**, your question can be one of these 3:

- "Give me the Job URL, the full network path to the Job's Job Folder"
- "Give me the Product Part URL, the full network path to the Product Part file"
- "Give me the Product Part Data Zone URL, the full network path to the Product Part Data Zone"

These questions usually come up in these 2 cases:

- when you receive a file and you want to store it in a Job or Product related folder
- when you want to get a file from (under) those places.

In both cases, you need to add 1 or more parameters in your question that you do know. For example: "Where is the Job Folder if I tell you that the Order ID is 12345 and the Customer ID is 67888?"

**Note:** In a perfect world, you have a perfect data structure that is very logic and it never changes. Then you would maybe not have these questions. However, it can for example happen that your data **Containers** fill up and you may not be sure on which one the Job Folder was created. Or the files that you receive need more analysis to interpret where they belong to.

### 3.2.2. Creating a System Value SmartName - Generic Steps

We here only show the basic generic steps to create such a SmartName. See further for 3 specific examples.

1. In the **SmartNames View**, click on 'SmartNames View'.
2. Choose the **Type 'System Value'**.
3. Choose a **Scope**. If you are not sure, choose **Global**. Learn more about *SmartName Scopes* on page 15.
4. **Which System Value**: choose the type you are looking for. A list of attributes will appear. These will help to find what you want.
5. Check the attribute(s) that you do know, one could be enough.
6. Enter the value of each checked attribute. This will probably also be a SmartName. You obviously need to prepare these SmartName(s) first.
7. Check the Result value already shown below left. This will only be possible when you are in SmartNames View and are using the Resolve all using tool. Learn more in Test your SmartNames with 'Resolve All Using' on page 22.
8. Click Save as... to save your SmartName.

3.2.3. Example of Looking for the Job URL

Example: Finding the Job URL by using the name of an incoming design file

- You have created a Job '1237' and you are waiting for the customers design file.
- You receive a design file via E-mail or FTP. Your customer does not know what Job name you already created. The name of the design file is '78999_Banana.pdf'. This name starts with how the customer names this job/design: the Customer's Job Reference, followed by a free name reflecting the design variant (here the banana flavor).
- The setup of your Job '1237' also includes this Customer's Job reference '78999' (this information came in earlier via your business system).
- You created a SmartName 'EXA_FILE_ALLBEFORE_', a String Extract SmartName that extracts from a file name all characters before the '_'. Learn more in String Extract SmartNames on page 39.
- Your System Value SmartName now needs the settings as in this screen shot:

![Screen Shot of SmartName Settings]

- Save your SmartName with a logical name. For example 'Find Job via Cust Ref Nrs in Design File'.

3.2.4. Example of Looking for the Product Part URL

Example: Finding the full Product Part URL by asking the Product ID

- Your business system sends you an XML with a list of product items on which you need to launch a workflow.
- Business systems often do not know how your prepress data is structured. The XML mentions the Product ID but does not know the exact path to that Product Part. So you need to find out that URL.
• For example, we look for the full URL of the Product ID '12345'. What the business system does not know is the folder and the name of the PDF. The PDF name is 'tomato_juice.pdf', it has no reference to the Product ID.

• You first need to create a SmartName that extracts the Product ID from the XML. See this example:

Learn more about extracting values from an XML file in XPath Query SmartNames on page 46.

• Your System Value SmartName then uses that XPath Query SmartName:
See (below left) how the Result shows the complete URL to the PDF. This is what we were looking for.

- Save your SmartName with a logical name. For example 'Find ProdPart URL via Prod ID in XML file'.

3.2.5. Example of Looking for the Product Part Data Zone URL

Example: Finding the Product Part Data Zone URL by using the name of an incoming design file

- You have a workflow where your business system creates new Products on your Automation Engine, even before the design file has arrived.
- One of those is the Product '6662712_Yolo_Juice' that is waiting for its design (and has no thumbnail display yet). The number before the underscore is the product ID.

- You have a Folder Access Point (or E-mail or FTP or WebCenter) that you scan for incoming designs.
- When a design comes in, you first want to copy it to the right destination: to its Product Part Data Zone.
• You need a **System Value SmartName** as in this screen shot:

![System Value SmartName screenshot]

• Save your SmartName with a logical name. For example 'Find ProdPart DataZone URL via ProdID in Design File'.

• Your **Copy or Move File** ticket now uses this SmartName:

![Copy or Move File screenshot]

• You probably want to continue your workflow with the **Manage Product Status** task to change the status of this **Product Part** to 'Design File Arrived'.
4. String Extract SmartNames

When automating your workflow, you will quickly feel the need to extract a part of a file name or a network path. String Extract SmartNames offer to do just this.

**Note:** A String is a series of characters. These can be numbers, text or even symbols.

4.1. Creating a String Extract SmartName

To create a String Extract SmartName, follow these steps:

1. In SmartNames View, click on ![String Extract icon](image).
2. Choose the Type 'String Extract'.
3. Choose a Scope. If you are not sure, choose Global. Learn more about SmartName Scopes on page 15.
4. In Extract part of..., decide from what you will extract something. In the canvas, you can
   - type. This is mostly done to test your SmartName while creating it (you see the result below left)
   - insert SmartNames. This is the most typical use, for example to extract parts of a [File] or a [Folder URL].
   - right-click and choose an option: Cut, Copy, Paste, Clear Contents or Insert SmartName.
5. Define what you want to extract. Choose from these 3 methods:

- **Start from character.** Learn more in *Start From Character* on page 41.

- **Use separation character.** Learn more in *Use Separation Character* on page 41.

- **Use regular expression.** A "Regular Expression" is a standard language in computer science. It enables very specific ways to extract parts of a string. Learn more in *Using Regular Expressions* on page 74.

**Caution:** Results can vary if your input string is considered as a text or as a number! This is decided in the *Formatting Options*. The default is that your string is assumed to be text. Learn more about this in *Formatting SmartNames* on page 67.

**Note:** The Result will update itself only after you changed a setting or clicked somewhere in a different field. Tip: press the 'Tab' button to make sure that the Result is re-calculated.
6. Click **Save** to save your SmartName and close the dialog. Click **Save As...** to save your SmartName but keep the dialog open (to create more SmartNames).

### 4.1.1. Start From Character

This method allows to decide the start and end character that you extract. Some examples:

**Example 1: "First 5"

Your input string is '874095620banana' and you want to extract the first 5 characters.

Choose **Start from character**. For **Start from Character** choose '1' and for **Number of Characters** choose '5'. This will result in '87409'.

**Note:** This method is mostly used to extract the first characters of a file name. To extract the last part of a file name, you need to use **Regular Expressions**. Learn more in **Using Regular Expressions** on page 74.

**Example 2: "All except the first 3"

Your input string is '8740956202537435'. You want to extract all of the characters except the first 3.

Choose **Start from character**. For **Start from Character** choose '4' and for **Number of Characters** leave the default setting to '999'. This will result in '0956202537435'.

### 4.1.2. Use Separation Character

This method allows to separate the string into parts every time a certain **Separation Character** occurs, and extract one of the parts.

You can choose a **Separation Character** from the list but you can also type in a different one.

![](image)

The **String Part** is where you choose which part of the string you want to extract.

**Example 1: "Everything before the (first) underscore"

Your input string is '12345_678901' and you want to extract everything before the underscore '_'.

Choose **Separation Character** ' _' and set the **String Part** to '1'.

---

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This will result in '12345'.

**Example 2: "The 3rd part"

Your input string is '87409_5620_27_923' and you want to extract the number '27' which is the 3rd part of the string (if you separate it with the '_').

Choose **Separation Character** ' _ ' and set the **String Part** to '3'.

This will result in '27'.

**Note:** If you want the part after the last '_', then this is not possible using the **Use separation character**. To do that, you need to use the method **Use regular expression**. Learn more in *Using Regular Expressions* on page 74.

**Example 3: "Everything after the '@'"

Your input string is 'Franky.Fruit@FruitCo.com' and you want to extract everything after the '@'.

In **Separation Character**, type in '@' and set the **String Part** to '2'.

This will result in 'FruitCo.com'.

### 4.1.3. **Use Regular Expression** (link)

Learn all about **Regular Expressions** in a separate section of this chapter, in *Using Regular Expressions* on page 74.
5. CSV Text Extract SmartNames

A CSV Text Extract SmartName allows you to create a SmartName that finds a value in a specific field of a CSV file. We will first illustrate the generic steps to create such a SmartName and then show a concrete example.

**Note:** Although the name of this SmartName type contains the word 'text', the value that is extracted can also be a number or any other character type.

5.1. Creating a CSV Text Extract SmartName

To create a CSV Text Extract SmartName, follow these steps:

1. In SmartNames View, click on ![](smart_names_icon.png).
2. Choose the Type `CSV Text Extract`.
3. Choose a Scope. If you are not sure, choose Global. Learn more about SmartName Scopes on page 15.
4. Define where your CSV can be found and set some options:
   - **CSV Source:** Define the path and name of the CSV file. You typically use SmartNames here.
   - **Text Encoding:** Indicate the Text Encoding of the CSV file. The default encoding is Unicode UTF-8.
   - **Field Separator:** Indicate which character is used to separate the fields in the CSV. If you're not sure, open your CSV in a simple text editor.
   - **Quote Character:** Indicate if the value in the CSV contains quotes that you do not want to keep. For example: in the CSV a value is written as "25000" but you want to extract only the 25000.
   - **Ignore line breaks:** Check this option if the CSV only contains one record (column).
   - **Ignore first line:** Check this option if the first line of the CSV contains the names of the columns. Use Select Field... to preview the effect of this.
5. Define which specific field in the CSV you want to extract.
   - Type the number of the field and line in Extract text from field ... on line ....
   - or click on Select Field... to get a preview of your CSV file and there click the field you want to extract. The field and line number will then be entered automatically.

**Note:** A preview of your CSV file will only appear if the field CSV Source can already find your CSV input file.

6. Check the result in Result.
7. If needed, set any **Formatting Options**. Learn more in *Formatting SmartNames* on page 67.

8. Click **Save** to save your SmartName and close the dialog. Click **Save As...** to save your SmartName but keep the dialog open (to create more SmartNames).

### 5.2. Example

- You are working with the **Products** tool and have set up some integration with your business system. You have set up a workflow where your **Jobs** are created automatically.

- You also get (from another system) a CSV file with the ordered copies (amount) that a **Product** is to be produced in that Job context. The CSV is written in the **Job Folder**, in a subfolder **CSV** and with a specific name. The screen shot shows how the **CSV Text Extract SmartName** can be set up:

  ![CSV Text Extract SmartName](image)

- This SmartName [Find Amount in local CSV] can now be used in your automated workflow where you use the **Link Product to Job** task.
6. XPath Query SmartNames

As mentioned in *SmartName Types (Overview)* on page 11, **XPath Query SmartNames** use "XPath queries" to extract a value from an XML file. XPath, the XML Path Language, is a standard query language for selecting nodes from an XML.

In Automation Engine, there are many tasks that can read parts of an XML, often without the need to create a SmartName first. You can there directly enter an 'inline' XPath expression in the ticket's input field. See for example the *Create Job task*.

**Tip:** Many of such tasks and tools are described in the chapter *Integrating with External Systems*.

To help you build such XPath queries, **Esko** offers the *The XPath Builder* on page 47. This tool is available throughout Automation Engine, wherever you can create XPath queries.

6.1. Creating an XPath Query SmartName

To create an **XPath Query SmartName**, follow these steps:

1. In **SmartNames View**, click on ![SmartName Icon].
2. Choose the **Type 'XPath Query'**.
3. Choose a **Scope**. If you are not sure, choose **Global**. Learn more about **SmartName Scopes** on page 15.
4. The large canvas is where you define your **XPath Expression**. Initially, there is an example expression about 'vsize'. It will be removed automatically when you have used the **Edit** button and created your own. In this canvas, you can:
   • Type an XPath expression (if you know how to do this).
   • Click on **Edit** to open the **XPath Builder**. This tool helps you create an Xpath expression. Learn more in *The XPath Builder* on page 47.
   • Click on **Insert SmartName** to insert SmartName(s) into your XPath expression. This is in most cases not needed.
   • Right-click and choose an option: **Cut**, **Copy**, **Paste**, **Clear Contents** or **Insert SmartName**.
5. **Separator**: If the XPath Expression returns multiple elements, decide what character you want to use as separator.

6. **XML Source**: Define the path and name of the XML. Or keep the default SmartName [URL of Input].

7. **Result**: See the result of your XPath Expression. This is possible when the XML Source can be found. The Result is also visible when you are in SmartNames View and are using the tool **Resolve all using** and have manually selected an example XML. Learn more in *Test your SmartNames with 'Resolve All Using'* on page 22.

8. **Formatting Options**: Learn more in *Formatting SmartNames* on page 67.

9. Click **Save** to save your SmartName and close the dialog. Click **Save As...** to save your SmartName but keep the dialog open (to create more SmartNames).

### 6.2. The XPath Builder

**Introduction**

**XPath** is a language that describes how to locate elements and attributes in XML (Extensible Markup Language) files. You can find a full specification on [http://www.w3.org/TR/xpath/](http://www.w3.org/TR/xpath/) and a tutorial on [http://www.w3schools.com/xpath/](http://www.w3schools.com/xpath/).

Think of an **XPath Query SmartName** as a **String Extract SmartName** but then to get a string from an XML file.

The **XPath Builder** is an XML editor available in the Pilot. Anywhere in the Automation Engine where there is a field that allows an **XPath Expression**, you can access the **XPath Builder** by clicking on its icon **XPath**.
Note: If you are an expert in building XPath expressions, you can also directly type XPath expressions in this field. The syntax for doing this is "XPath:" followed by a valid XPath expression for the input file. Example: `xpath://Orders/Job/Longname`

The XPath Builder panel

- On top of the panel, you see the resulting XPath Expression that is probably a result of what you have clicked below.

Attention: This top field also offers to add SmartNames to this expression (see the icon on the right).

- Adding SmartNames to your XPath expression is only supported when you use this tool while you are creating a SmartName (see Creating an XPath Query SmartName on page 46).

- Adding SmartNames to your XPath expression is not supported when you are creating an 'inline' XPath expression. Several tasks allow this and show this by offering an `XPath` icon in that field. For example the Create Job task. It does not matter if you type that SmartName in yourself or click `XPath` to use this Builder tool to add it to your XPath expression.

- The large canvas shows the Example XML Content.
• When possible, the example XML is automatically taken from the context. For example when you open the XPath builder from the XPath Query SmartName dialog, then the input file is used as an example XML.

• When no example XML is available automatically, right-click in the canvas to see these extra ways to get and manage XML content: Cut, Copy, Paste, Clear and Paste from File....

• Use CTRL-F (Windows) or CMD-F (Mac) to open a Find tool. This is very handy when your XML is a large file and you quickly want to find the string you want to select.

  Note: This area has XML syntax highlighting: specific colors indicate a specific kind of node.

• On the right you have tools that help you create the XPath Expression by offering smart selections and even help you edit the XML content.

6.2.1. Building XPath Expressions

Select XML node

To build an XPath Expression, make sure that the Select XML Node button is clicked. Simply click on an XML node to automatically create an XPath to that node. The resulting XPath is shown in the XPath Expression field at the top.

  Note:
  • The created XPath will be an "absolute XPath" from the root node to the selected node.
  • The selected node will be highlighted in yellow.
  • When the selected node is used in a list, an index number will be used in the XPath. For example: /PurchaseOrders/PurchaseOrder[1]/Address[2]/Street/text().
  • The generated XPath takes namespaces into account by using the local-name function. For example: /*[local-name()='PurchaseOrder'][@*[local-name()='PurchaseOrderNumber']='99503']/*[local-name()='Address'][@*[local-name()='Type']='Billing']/*[local-name()='Street']/text().

  Note: By selecting Enforce namespaces, the XPath Builder will verify any used namespace.

Add Condition

To add certain conditions to the XPath, click Add Condition. Then click on the desired XML node to add it as a 'predicate' to the XPath Expression.
Note:

- You can also add a condition by clicking on the desired XML node while holding the Alt key.
- The predicate nodes are highlighted in green.
- When using predicate nodes, the indices in the XPath are replaced with predicates. For example: `/PurchaseOrders/PurchaseOrder[@PurchaseOrderNumber='99503']/Address[@Type='Billing']/Street/text()`.
- When using predicates, it is possible that the XPath Expression selects multiple XML nodes. The number of matches is displayed beneath the XPath Expression.

**Options**

- **Select siblings.** Select this option to select all occurrences of the selected element at this level.

**Tip:** This option is especially relevant when working with 'repeating content' in the Map data task. You there need to **Select siblings** to avoid that only the first element would be repeated (you would so get a list of only 1).

- **Enforce namespaces.** Select this option to enforce XML namespaces (`xmlns`).
Tip: XML namespaces provide a method to avoid element name conflicts. In XML, element names are defined by the developer. This often results in a conflict when trying to mix XML files from different XML applications.

• Use prefixes. Check this option if you want to use XML namespaces in your XPath Expression in a shorter way.

Note: This option overrules the option Enforce namespaces.

Tip: This option is especially useful when querying XMP.

6.2.2. Editing Example XML Content

Format XML

Under Example XML Content, click on Format XML to format the example XML. This can be used to make the XML more readable. It will typically remove unnecessary spaces and lines.

Edit XML

To edit the example XML, follow these steps:

1. Under Example XML Content, click on Edit XML.

Note: This will make the XML content editable. Also, the buttons Revert and Apply will become visible.

2. Edit the XML in any way you want.

3. When finished making changes, click Apply.

Note: The changes will be automatically validated. If the XML is not valid, an error message will appear and the location where the parse error occurred will be visible and highlighted in a red color.

4. Before you click Apply, you can click on Revert to undo all changes made to the XML content.

Note: You can undo/redo the last edits using (on Windows) Ctrl-Z and Ctrl-shift-Z or (on Mac) Command-Z and Command-Shift-Z.

Note: If you clicked Apply but did this in error, you can still click Cancel.

Note: It is also possible to edit the XPath Expression itself manually. When you do this, take the following into account:

• After editing the XPath, press Enter to validate the updated XPath Expression.

• If the updated XPath Expression is not valid, an error message will be displayed beneath the XPath Expression.

• The corresponding XML nodes will be highlighted in grey.
7. XMP path Query SmartNames

XMP stands for ‘eXtensible Metadata Platform’. It allows embedding data about a file, known as metadata, into the file itself. It is a standard defined by Adobe.

Esko also uses XMP as format for metadata in its processed files (Normalized PDF, View data, LEN and other RIP output)

**Note:** A full specification of how Esko uses XMP is available as part of the Automation Engine Online Help. Find the white paper in its section "Related Documentation".

Because XMP is actually XML embedded in a file, you can also use SmartNames to query that metadata. **XMP path Query** SmartNames are very similar to **Xpath Query** SmartNames. The main difference is that the source file is not a XML but a file with embedded XMP. The way to that metadata is also an **Xpath Expression**.

**Tip:** When using an XMP XPath SmartName in the **Output** field of a this task ticket, and the XMP XPath cannot be resolved (because there is an error in the SmartName or the queried data cannot be found), the output file is saved in a /xmp_unresolved subfolder.

7.1. Creating an XMP path Query SmartName

When creating an **XMP path Query SmartName**, it is typical is that we first need to indicate our example input file, the one that contains the example XMP.

To create an **XMP path Query SmartName**, follow these steps:

1. In **SmartNames View**, in **Resolve all using**, check **A file** and browse to your (example) file that has the XMP metadata.
2. In **SmartNames View**, click on ![icon](image) 
3. Choose the **Type** ‘XMP path Query’.
4. Choose a **Scope**. If you are not sure, choose **Global**. Learn more about **SmartName Scopes** on page 15.
5. The large canvas is where you define your **Xpath Expression**. Initially, there is an example expression about 'vsize'. If 'vsize' is mentioned in the XMP of the input file you selected, it will already return a **Result** value (below left). This example expression will be removed automatically when you have used the **Edit** button and created your own. In this canvas, you can
   - type an Xpath Expression (if you know how to do this).
   - click on **Edit** to open the **XPath Builder** and create your expression there. Learn more in **The XPath Builder** on page 47.
   - click on **Insert SmartName** to insert SmartName(s) into your **Xpath Expression**. This is in most cases not needed.
• right-click and choose an option: Cut, Copy, Paste, Clear Contents or Insert SmartName.

6. Separator: If the XPath Expression returns multiple elements, decide what character you want to use as separator.

7. Result: See the result of your XPath Expression.

8. Formatting Options: Learn more in Formatting SmartNames on page 67.

9. Click Save to save your SmartName and close the dialog. Click Save As... to save your SmartName but keep the dialog open (to create more SmartNames).

7.2. Examples

Remember the many System SmartNames on 'Size'

There are many SmartNames that you no longer need to create yourself via XMP queries. Remember these default (system type) SmartNames with Scope Page Information that may already deliver exactly what you were looking for:

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
<th>Type</th>
<th>Scope</th>
</tr>
</thead>
<tbody>
<tr>
<td>Folio</td>
<td>A range of page names (folios) containing prefixes and suffixes</td>
<td>System</td>
<td>Page Information</td>
</tr>
<tr>
<td>Layer Name</td>
<td>The name(s) of the layer(s)</td>
<td>System</td>
<td>Page Information</td>
</tr>
<tr>
<td>Layer Number</td>
<td>The number(s) of the layer(s)</td>
<td>System</td>
<td>Page Information</td>
</tr>
<tr>
<td>Number of Pages</td>
<td>Number of pages in the RunList</td>
<td>System</td>
<td>Page Information</td>
</tr>
<tr>
<td>Page Height</td>
<td>Vertical trim size of the page</td>
<td>System</td>
<td>Page Information</td>
</tr>
<tr>
<td>Page Numbers</td>
<td>A range of page numbers (numbers are going from 1, for example)</td>
<td>System</td>
<td>Page Information</td>
</tr>
<tr>
<td>Page Width</td>
<td>Horizontal trim size of the page</td>
<td>System</td>
<td>Page Information</td>
</tr>
<tr>
<td>RunList Name</td>
<td>Name of the RunList</td>
<td>System</td>
<td>Page Information</td>
</tr>
<tr>
<td>RunList Number</td>
<td>Number of the RunList in the imposition</td>
<td>System</td>
<td>Page Information</td>
</tr>
<tr>
<td>Variant Name</td>
<td>The name(s) of the variant(s)</td>
<td>System</td>
<td>Page Information</td>
</tr>
<tr>
<td>Variant Number</td>
<td>The number(s) of the variant(s)</td>
<td>System</td>
<td>Page Information</td>
</tr>
</tbody>
</table>

Learn more about them in Default System SmartNames on page 29.

What if my file does not have the XMP information I'm looking for?

For example: you want to get the 'vsize' of a native PDF. Your workflow does not create a normalized PDF version of it (where you would automatically get that extra XMP). In that case, you can use the LinkEdge task to create an XML containing the same XMP as you would find inside a normalized file.

The next step is then to use an XPath Query SmartName to get that specific XMP information from inside that XML file. Learn more on how to do this in XPath Query SmartNames on page 46.

Which application created this file?

Most files with metadata will have a note about which application created the file. Follow these steps:

1. Follow the generic steps as explained in Creating an XMP path Query SmartName on page 52.
2. In the example XML, use CTRL-F or CMD-F to find for the string 'CreatorTool'.
3. Select the node. For example: see how the 'CreatorTool' is selected in the example below:
4. Click **OK**.
5. Check the **Result** and **Save** your SmartName.
6. Tip: to shorten this name, create another **String Extract SmartName** or a **Regular Expression**.

### Which options were used when RIP’ing this file?

It can be useful to see with what resolution or distortion your RIP file was made. There are tools to quickly detect that in Automation Engine, but your remote print site may not have those tools. It can therefore be useful to extract that value and use it in a file name or (FTP) folder name.

Follow the similar steps as in above example. See the screen shot to detect even more RIP options in the XMP of a LEN file (made with **FlexRip** or **Imaging Engine**).
8. Conditional SmartNames

Conditional SmartNames base their value on one or more conditions. The condition can be very basic or can be built up of several criteria and sub criteria. You can also define the order in which the conditions need to be met.

After documenting how to create a Conditional SmartName, we illustrate their power with some examples.

8.1. Creating a Conditional SmartName (generic)

To create a Conditional SmartName, follow these steps:

1. In SmartNames View, click on \[\text{ conditional }\].
2. Choose the Type 'Conditional'.
3. Choose a Scope. If you are not sure, choose Global. Learn more in SmartName Scopes on page 15.
4. The dialog initially contains 2 blocks.
   
   • A "conditional block". Each conditional block has one or more criteria and ends with the Return value for that block.
   
   • You can create extra conditional blocks using the buttons Add / Remove (Windows) or + - (Mac).
   
   • You can also right-click in the line If xxx of the following are true: and Duplicate that block. Use the functions Move Up / Down or drag and drop the blocks to define their order.
   
   • The order of the blocks is the order that they will be checked, from top to bottom.
8.2. Setting up a Conditional Block

To set up a conditional block, follow these steps:

- **If All - Any - None of the following are true.** Choose the relation between the condition and your (one or more) criteria.

- Per criterion, you need to
  - select the attribute from the drop-down. Choose between the SmartName **File** or any **Other** SmartName.
  - select the text or number expression from the drop-down list. You can choose any of the following expressions from the drop-down, depending on whether it is a text or numeric condition:
Automation Engine

• For a text criterion, choose from the following expressions:
  • **Contains**, **begins with**, **ends with**, **is** and **is empty**.

    Use ' ' (space) for 'AND' and ';' for 'OR'. For example, a text criterion specifying:
    • "'Inkname' contains 'Pantone C'": this will resolve all ink names that contain
      'Pantone' and all that contain 'C'.
    • "'Inkname' is 'C; M; Y; K'": this will resolve the ink names that are
      specifically any of these.
    • Use double quotes to specify the exact text corresponding to the attribute.
      For example: "Inkname contains "reflex blue": this will only resolve for
      "reflex blue".

• For a number criterion, choose from the following expressions: **equals**, **is greater than**, **is less than**, and **is between**. Some important notes:
  • If the attribute does not correspond to a number, it will be ignored.
  • You can use standard unit symbols and unit conversions are done in background.
    For example: if you specify "equals 5 mm" then this is not a problem when the file's
    XMP is defined in in (inches).

**Note:** Unit conversions only work with units of the same kind. For example if the specification is "equals 5 mm" then this will fail to resolve when the XMP mentions "6 ppi" or just "6".

• **Note:** Number expressions will not resolve to text strings. For example: "Job Name equals MyJobName " will be ignored because equals is used for numbers, not text.
**Note:** Quotes (" ) and semicolons (;) are not accepted as values in the text and number conditions.

- Adding criteria: You can add a criterion to a condition by clicking the +.
- Adding sub criteria. When you hold Alt while clicking the +, your new criterion will be a sub-criterion of the one above. See *Examples* on page 58 where we use it to exclude some attributes that were selected in the one above.

### 8.3. Examples

**Plate distortion depending on cylinder size**

A **Job Category** is used to define size of the cylinder on which the product will be printed. This circumference has an effect on the distortion that is required for the plate. A **Conditional SmartName** defines the distortion setting for the RIP.

![Distortion based on Cylinder Size](image)

**ReportMaker Template depends on the Customer**

The ReportMaker ticket uses a SmartName to select its template. A conditional SmartName checks who the customer is.
• First we check if it is our biggest customer ‘FruitCo’ (ID 777).
• Then we check if it is any customer of the group ‘SuperToy’ (any of those 3 IDs).
• If it is none of the above, we use a generic template for all other customers:

Dot Gain Compensation depending on the Press and type of flexo plates

If the press chosen for the Job is the flexo press Nilpeter, then the DGC file depends on the category where the type of plates is defined: conventional flexo plates or digital flexo plates (CDI):

Find the French only version (using a sub criterion to exclude some attributes)
Our SmartName is looking for Jobs that are in the French language, but not in combined language versions. See how the extra sub criterion (ALT-‘+’) excludes the categories that contain the Canadian and Belgian version Jobs that combine French with another language:

**Smart preflight checking a workflow parameter 'Print Process' to check allowed line width**

Our workflow includes PitStop preflight. It is Smart Preflight because it uses SmartNames. Our example shows how the preflight profile will check line width but have it depend on the print process that the file will be printed in. The print process is defined as a workflow parameter.

- This is our workflow parameter: `[wfp.Print Process]`

- This is how we set up our conditional SmartName (3 print processes each get a condition on line width (mm)): 
• This is how our SmartName is used inside the PitStop Profile (there named 'variable'): 
9. Database Query SmartNames

9.1. Concept

**Database Query SmartNames** ask a question to an external database. They pick up information from other systems, typically business systems (planning, production...). They only ask information, they do not write information into that external system.

**Note:** Database Query SmartNames may not be used to pick up information from a database from Automation Engine itself. For such use cases, you use the System (Value) SmartNames. Learn more in System (Value) SmartNames on page 29.

Some typical examples when you use Database Query SmartNames:

- In the Tabular Step & Repeat task. You can fill its many fields with Database Query SmartNames and so pick up all the required values. Narrow-web label printers often use this and base their queries on press type and die-shape.

- As a RIP option that you pick up from an external system. For example your business system that created your Job may have informed you about main production decisions like the press, the amount of plates and their size. But the distortion factor may need to be picked up from another external system closer to the press room. In that case, you use a Database Query SmartName in your RIP’s setting for distortion.

How do Database Query SmartNames compare to the other tools that access databases?

- A Database Access Point also does a database query but its other main feature is that it triggers a workflow, and maybe you do not want that to happen at the moment you pick the information.

- The Interact with Database task can read and write into external databases and can be used as any step of a workflow. But it does not return you the values immediately, you get them in a separate XML file from where you need to pick them up again (then via Xpath Query SmartNames).

**Note:** In cases where that XML is already available, it is advised to use the information from the XML. For example: the XML that was used to create the Job, is stored in the Job Folder and it also contains all the Step & Repeat information. In that case it is advised to pick up that Step & Repeat info locally instead of asking it again to an external system (which always means network traffic and small delays).

Basically, Database Query SmartNames is the preferred tool when you only want to pick up a value and when an extra return-XML has no added value.
9.2. Creating a Database Query SmartName

First set up the link to that external database

Setting up a link to an external database is done in **Tools > Configure > External Databases**. Learn more on this in *Configuring links to External Databases*.

Now create the Database Query SmartName

To create a **Database Query SmartName**, follow these steps:

1. In **SmartNames View**, click on ![SmartName icon].
2. Choose the **Type** 'Database Query'.
3. Choose a **Scope**. If you are not sure, choose **Global**. Learn more in *SmartName Scopes* on page 15.
4. Choose the **External Database** from the drop-down list. If you need to create, change or test the link to an external database, click **Configure**.
5. Write your **SQL Command** in the canvas. You can **Insert SmartNames** into your command.

**Note:** Esko does not provide training in SQL commands. Contact your own IT database specialist to help set these up.

6. Check the **Result**. The result will be (re-)calculated when you click any option outside the canvas.
7. If needed, set any **Formatting Options**. Learn more in *Formatting SmartNames* on page 67.
8. Click **Save** to save your SmartName and close the dialog. Click **Save As...** to save your SmartName but keep the dialog open (to create more SmartNames).

**Learn more about integrating with external databases**
Learn more about using SQL commands in the chapter *Integrating with External Systems*, in the sections

- *Database Access Point*
- *Interact with Database task*
- *An elaborate example.*
10. Script SmartNames

**Script SmartNames** use **JavaScript** to get a value. Typically, other SmartNames are inserted into the script.


---

**Attention:** Before you create a **Script SmartName**, check if it can be built using standard tools as

- a **Conditional SmartName**
- a **Regular Expression** (in a **String Extract SmartName**).

---

### 10.1. Creating a Script SmartName

To create a **Script SmartName**, follow these steps:

1. In **SmartNames View**, click on ![Script SmartName Icon](image).
2. Choose the **Type** 'Script'.
3. Choose a **Scope**. If you are not sure, choose **Global**. Learn more in **SmartName Scopes** on page 15.
4. The canvas initially shows a JavaScript template that returns the value "hello".

**Attention:** This template is important. The script needs to be a function returning a value that is called from the body of the script. Learn more in this **Esko KB article**.

Replace it with your own JavaScript. You will probably **Insert SmartNames** into your script. See some examples in **Examples** on page 66.
5. Check the result in Result. The result will be (re-)calculated when you click any option outside the canvas.

6. If needed, set any Formatting Options. Learn more in Formatting SmartNames on page 67.

7. Click Save to save your SmartName and close the dialog. Click Save As... to save your SmartName but keep the dialog open (to create more SmartNames).

10.2. Examples

The following examples are just a few basic samples of what a JavaScript can do. If you need help, Esko has specialists available through Esko Solution Services (Not Esko Customer Service).

Calculating: Multiply

This JavaScript multiplies the values of 3 Job Parameters (number SmartNames):

![JavaScript example for calculating transport cost]

Extracting a few lines from a text:

This JavaScript returns the first 2 lines of a SmartName, in this case the Job Description:

![JavaScript example for extracting text lines]
11. Formatting SmartNames

A lot of data that end up in SmartNames can come from external systems. And a lot of information that you send back out to external systems may also be decided by SmartNames. These systems can store their information in a different language, in a different regional format or even a specific custom format. That is why it may be needed to change the format of a SmartName.

The formatting options are different whether your data is a Text, a Number or a Date or Time.

Note: A data string that contains both numbers and text characters is seen as Text. For example: 789_87_banana is Text.

The option Formatting Options... is available when you create any SmartName.

11.1. Text Formatting

When, in Formatting Options..., you select the Data Format ‘Text’, you get the following options:

- **Remove leading and trailing spaces**: If your SmartName value includes space characters at the beginning or end, use this option to remove those spaces.

- **Text Case**:
  - **Keep** the original case of the SmartName value.
  - change the text case using Make Upper Case or Make Lower Case.

- Specify any special **Encoding** of the SmartName value. Choose
• **None** to leave it like it is.

• **XML Encoding.** If your SmartName output will be used inside an XML file, your value can contain a character that has a special meaning in XML (a 'reserved character'), then this encoding will replace that character by a by an XML entity reference. For example '10<20' will be formatted to '10&amp;lt;20'.

• **URL Encoding.** Similar to the above, this will replace the reserved characters for URLs with the typical 'percent encoding'. For example 'Digital Flexo' will be formatted to 'Digital%20Flexo'.

• **Custom Encoding:** Use it to define custom replacements of characters or strings. Click **Edit** and add one or more lines of rules. The rules will be executed from top to bottom. For example:

   - First all '/\ will be replaced by a ' -' (needed when you use this text to become a Windows-supported path)
   - then all ' ' (spaces) will be replaced by a Dollar sign
   - then all '@' will be replaced by 'at'
   - then all words 'Limited' will be replaced by 'Ltd.'

The Result will update after a new setting as soon as you click in a different field.

### 11.2. Number Formatting

When, in **Formatting Options...**, you select the **Data Format 'Number'**, you get the following options:

**First check or define the Input Format Options.**

Why first? Because this might already have an effect on the Result that you will be checking when you start the actual (output) formatting options. The **Input Format Options** allow you to inform Automation Engine how your input is constructed, how it should be interpreted.
For example: Your input is '123456,789' and you want to indicate now that your **Decimal Separator** is the ',' (comma) and that there is no **Thousands Separator** (None). You will already see a change in the **Result**.

### (Output) Formatting Options

Now define how you want this **Result** formatted.

**Note:** If the **Result** is already what you want, this means that the default settings in the **Formatting Options** panel may already be the ones you want.

- **Decimals**: Indicate how many decimals you want. Select **Auto** to keep the number of decimals like it was in the original value of the SmartName. See in above screen shot how the setting 'decimals: 2' takes one decimal away and rounds the number to '79'. Another example is to round values with too detailed numbers like '67,50000000' to shorter ones like '67,5' (one decimal left).
- **Decimal Separator**: Select the type you want. In above screen shot we confirm that the comma is the one we want (to keep).
- **Thousands Separator**: Select the type you want. See in above screen shot how it adds the point in between '3' and '4'.

**Note:** The decimal and thousands separators cannot be identical.

- You can choose to **Add leading zeros** to the value of the SmartName to get a certain number of **Needed Digits**. If the value of the SmartName has less digits in the integer part than the specified number of needed digits, leading zeros will be added until the number of needed digits is reached. For example, if the number of needed digits is 5, "123" becomes "00123".
- You can choose to **Convert** the value of the SmartName to another unit.
• **Length.** Choose, in both directions, from **Millimeters, Centimeters, Decimeters, Meters, Inches, Mils** and **Points**

• **Angle.** Choose, in both directions, from **Radians** and **Degrees**.

• **File Size.** Choose, in both directions, from **Bytes, Kilobytes, Megabytes, Gigabytes** and **Terabytes**.

• **Resolution.** Choose, in both directions, from **Pixels per Inch, Pixels per Millimeter, Pixels per Centimeter, Lines per Inch, Lines per Millimeter** and **Lines per Centimeter**.

• **Time.** Choose, in both directions, from **Milliseconds, Seconds, Minutes, Hours, Days** and **Weeks**.

### 11.3. Date and Time Formatting

When, in **Formatting Options...**, you select the **Data Format 'Date and Time'**.

It is very important that you **first** check or define the **Input Format Options....**

### 11.3.1. Input Format Options

**Date and Time** descriptions appear in many different formats. Before a SmartName value can be re-formatted, it will be required to first explain Automation Engine how your input value is constructed. This is what you do in **Input Format Options.**
11.3.2. Output Formatting Options

Once your input format is well understood by Automation Engine, you define the output Formatting Options.

You here have the same options as in Input Format Options on page 70.

Note: If your Date and Time serves a field in any Automation Engine database, it needs to be formatted according ISO 8601.

11.3.3. Example

You have a workflow where your MIS sends you an XML every time a new Job has to be created on Automation Engine (see an example of such workflows in Examples of integrating with an external system).

The XML from the MIS mentions the Job's Due Date but has its own particular way of mentioning the date and time. We will need to reformat it to the standard ISO 8601 (that Automation Engine requires in this example).

Follow these steps to get the result as shown in the screen shot:
In the setup of the SmartName, you see our input value 'Wednesday, October 1 2014, 3:35 AM'. Normally this date would in this canvas not be written out like this but it would show up as another SmartName, one that picks up that date from the XML that we mentioned earlier.

Click **Formatting Options...**, do not check or change any settings there yet.

Click **Input Format Options...**, Choose **Custom** and **English**.

In **Custom Format**, type the string that you see in the screen shot. This is what those codes mean:

- 'EEEE': 'E' means 'day of the week. 4 times 'E' means the day is written out in full text.
- then there is a comma and a space
- 'MMMM': 'M' means 'month'. 4 times 'M' means the month written out in full (text).
- then a space followed by 'd', meaning the day of the month (number)
- then a space followed by 'y', meaning the year, in (full) number
- then again a comma and a space
- then 'h:mm', meaning the hour (in 12 hour system), followed by a colon, followed by the minutes
• then a space and 'a', meaning 'AM'.

• Indicate that this time is one from the New York time zone.

• Click OK to confirm and close the Input Format Options dialog.

• Now set the (output) Formatting Options: Choose the ISO 8601 format and choose the same New York time zone.

• Check the Result: you should see a ISO 8601 format of the custom description that we received.

• Save the SmartName with a logical name.

• This SmartName (date) is one that we can now use in the Create Job task, for the Job Due date.
12. Using Regular Expressions

Regular Expressions are text patterns that are used to match strings. They can contain a mix of plain text and special characters to indicate what to match. Find more information about this standard tool on Wikipedia.

In Automation Engine, they are used for special cases where SmartNames do not offer a solution. You can use Regular Expressions in:

- **String Extract SmartNames**
- **Some tasks:** Select File, Select Marked File, Wait for Files, Download from EskoCloud...
- **Some Workflow Controls:** Data Splitter, Sort and Router (when using 'matches' or 'does not match').
- **In Configure > Smart Job Location** (when setting up a rule, in the field 'Matches'.)

**Note:** Above tools also offer the RegEx Builder, a tool that helps you build the expression.

### 12.1. A Selection of Useful Characters in Regular Expressions

<table>
<thead>
<tr>
<th>Character</th>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>^</td>
<td>Beginning of the string. ^abc will only lead to a match if the string begins with abc.</td>
<td>^C matches &quot;Cyan&quot; but doesn't match &quot;PANTONE 120 C&quot;.</td>
</tr>
<tr>
<td></td>
<td>OR</td>
<td>cat</td>
</tr>
<tr>
<td>$</td>
<td>End of the string. xyz$ will only lead to a match if the string ends with xyz.</td>
<td>120$ matches &quot;PANTONE 120&quot; but doesn't match &quot;PANTONE 120 C&quot;.</td>
</tr>
<tr>
<td>.</td>
<td>The . matches any single character.</td>
<td>ab.d matches &quot;abcd&quot; as well as &quot;ab9d&quot; or &quot;ab-d&quot;.</td>
</tr>
<tr>
<td>[abc]</td>
<td>Brackets enclosing a set of characters indicates that any of the enclosed characters may match the target character.</td>
<td>[abc] matches &quot;a&quot;, &quot;b&quot; or &quot;c&quot; but doesn't match &quot;x&quot; or &quot;y&quot;.</td>
</tr>
<tr>
<td>[^abc]</td>
<td>The ^ inside the brackets means that none of the enclosed characters may match the target character.</td>
<td>[^abc] matches &quot;x&quot; or &quot;y&quot; but doesn't match &quot;a&quot;, &quot;b&quot; or &quot;c&quot;.</td>
</tr>
<tr>
<td>[a-zA-Z]</td>
<td>The - inside the brackets is used to show a range of characters.</td>
<td>[a-zA-Z] matches all upper and lowercase characters, [0-9] matches all digits.</td>
</tr>
<tr>
<td>\d</td>
<td>matches a numeric character (digit) (exactly the same as [0-9]).</td>
<td>\d\d matches &quot;96&quot; but doesn't match &quot;5a&quot;.</td>
</tr>
</tbody>
</table>
### Character Specifications

<table>
<thead>
<tr>
<th>Character</th>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>\D</td>
<td>matches any non-numeric character (exactly the same as [^0-9]).</td>
<td>\D \D matches &quot;A+&quot; but doesn't match &quot;A4&quot;.</td>
</tr>
<tr>
<td>\s</td>
<td>matches a whitespace.</td>
<td>\d \s matches &quot;5 &quot; but doesn't match &quot;5a&quot;.</td>
</tr>
<tr>
<td>\S</td>
<td>matches any non-whitespace character.</td>
<td>\s \S matches &quot;6&quot; but doesn't match &quot;.&quot;.</td>
</tr>
<tr>
<td>\w</td>
<td>matches an alphabetic (word) character (exactly the same as [a-zA-Z0-9]).</td>
<td>\w \w matches &quot;9d&quot; but doesn't match &quot;5+&quot;.</td>
</tr>
<tr>
<td>\W</td>
<td>matches any non-alphabetic character (exactly the same as [^a-zA-Z0-9] or [^\w]).</td>
<td>\W \W matches &quot;+ &quot; but doesn't match &quot;5+&quot;.</td>
</tr>
<tr>
<td>?</td>
<td>The ? matches the character to its left 0 or 1 times.</td>
<td>esk\w? matches &quot;esk&quot; as well as &quot;esko&quot; but doesn't match &quot;eskonv&quot;.</td>
</tr>
<tr>
<td>*</td>
<td>The * matches the character to its left 0 or more times.</td>
<td>c* matches &quot;&quot;, &quot;c&quot;, &quot;cccc&quot; etcetera. esk\w* matches &quot;esk&quot; as well as &quot;Esko&quot;.</td>
</tr>
<tr>
<td>+</td>
<td>The + matches the character to its left 1 or more times.</td>
<td>c+ matches &quot;,&quot;, &quot;c&quot;, &quot;cccc&quot; but not &quot;&quot;. esk \w+ matches &quot;esko&quot; as well as &quot;Esko&quot; but doesn't match &quot;esk&quot;.</td>
</tr>
<tr>
<td>{n}</td>
<td>The (n) matches the character to its left exactly n times.</td>
<td>a{3} matches &quot;aaa&quot; but doesn't match &quot;aa&quot; or &quot;abc&quot;. ab{3}c matches only &quot;abbbc&quot;.</td>
</tr>
<tr>
<td>{n,}</td>
<td>The (n,) matches the character to its left at least n times.</td>
<td>a{3,} matches &quot;aaa&quot; or &quot;aaaaaa&quot; but doesn't match &quot;aa&quot; or &quot;abc&quot;.</td>
</tr>
<tr>
<td>{n,m}</td>
<td>The (n,m) matches the character to its left at least n times, but no more than m times.</td>
<td>a{3,5} matches &quot;aaa&quot;, &quot;aaaa&quot; or &quot;aaaaaa&quot; but doesn't match &quot;aa&quot; or &quot;aaaaaa&quot;.</td>
</tr>
<tr>
<td>\</td>
<td>Escapes characters with a special meaning. The \ can precede a special character (like * or [ ) if you want to search for it literally.</td>
<td>esko\artwork*nv matches &quot;esko\artwork*nv&quot;. ?$ matches &quot;?&quot; at the end of a line.</td>
</tr>
</tbody>
</table>

### Some examples based on the above list

<table>
<thead>
<tr>
<th>Regular Expression</th>
<th>Matches</th>
<th>Doesn't Match</th>
</tr>
</thead>
<tbody>
<tr>
<td>\d{6}-\w{5}-\d{1,3}.pdf</td>
<td>312454-ESKO4-1.pdf 235682-USA12-23.pdf</td>
<td>31245A-ESKO4-1.pdf 312456-USA-23.pdf</td>
</tr>
<tr>
<td>PANTONE \d+ C$</td>
<td>PANTONE 120 C PANTONE 15 C</td>
<td>PANTONE 120 U PANTONE 15 CU</td>
</tr>
<tr>
<td>[Yy].*</td>
<td>Yes</td>
<td>N</td>
</tr>
</tbody>
</table>
12.2. Using Parentheses to Extract

**Use ( ) in the regular expression to define what to extract**

Parentheses are used to define what you want to extract (to "capture a group").

Example:

- **Input string**: lemon
- **Regular expression**: le(mo)n
- **Output**: mo

**What if I want to extract multiple groups?**

Automation Engine does not support this. Only the first group in the string between ( ) will be extracted.

Example:

- **Input string**: lemonandmango
- **Regular expression**: le(mo)na(nd)man(go)
- **Output**: mo

**What if the input string already contains ( )?**

When the input string already contains a set of parentheses, you have to "escape" those characters, by adding a \ in front of them.

Example:

- **Input string**: ab(cd)e
  - We want to extract the group between the ( ).
- **Regular expression**: .*\((.*))\).*
  - In human language: something, then an open parentheses, then the group we want to extract, until there's a closing parentheses, followed by something.
- **Output**: cd

### Table: Regular Expression Matches

<table>
<thead>
<tr>
<th>Regular Expression</th>
<th>Matches</th>
<th>Doesn't Match</th>
</tr>
</thead>
<tbody>
<tr>
<td>y</td>
<td>no</td>
<td></td>
</tr>
<tr>
<td>(Cyan)</td>
<td>(Magenta)</td>
<td>(Yellow)</td>
</tr>
</tbody>
</table>
Extracting the last character of a string

The SmartNames function *Start From Character* on page 41 makes it easy to extract the first \(x\) characters of a string. With *Regular Expressions*, you can extract the last character(s). See this example (you can change the number to extract more (last) characters):

Example input string: *banana*

Regular expression: `.*(.{1})`

Output: *a*

Extracting the server name from the SmartName 'Operator'

Example input string: *Chantal@AESERVER01*

Regular expression: `(.+@.+)`

Output: *Chantal*

Extracting the domain from an E-mail address

Example input string: *michael.jackson@esko.com*

Regular expression: `.+(@(.+)[a-z]+`

Output: *esko*

Extracting the part of a file name after the last underscore

Example input string: *Banana_v03_271265_p003.pdf*

- with the file extension
  - Regular expression: `.*_(.*)`
  - Output: *p003.pdf*

- without the file extension
  - Regular expression: `.*_(.*)\.*`
  - Output: *p003*

Extracting the part of a file name between the 2nd and 3rd underscore

Example input string: *Banana_v03_271265_p003.pdf*

Regular expression: `[\^_]*([^\^_]*)(.*)\.*`

Output: *271265*

Extracting a number from a file name
Example input string: Cosmo453_Advertisement_4.pdf
Convention in human language: something_something_number.pdf
Output: 4

**Defining a specific file selection - containing an 'exclude'**

Some typical examples for use in the Select File task:

- To select all files except files where the name contains _report:

```
(?!.*_report).
```

- To select all files but exclude MAC files (starting with .):

```
(?!\.).*
```

- To select all ArtPro files, but exclude the automatically generated backup file:

```
(?!.* BU).*\.ap
```

**Defining a specific file selection**

- To select the file and the report of the file:

```
<file/>.pdf<file/>_report.pdf
```

- To select only files with specific extensions. For example only the ARD and MFG files:

```
.*\.ard|.*\.mfg
```

### 12.4. The RegEx Builder

Much like the XPath Builder helps to build XPath commands, the RegEx Builder will help you create Regular Expressions.

To open the RegEx Builder:

- In an input field that allows many types of input data, click on RegEx.

- In an input field that only allows regular expressions only, click on Edit.

- For example: When you create a SmartName of the type 'String Extract'.
We will use examples to explain the functionality in this tool.

**Important:** Do check these examples in the below order. They explain different features, from basic to more advanced ones.

### 12.4.1. RegEx Example 1 - Extracting the Domain Name from an E-mail Address

1. Open the RegEx Builder. The top part shows a `Pattern Editor`.
   
   You can choose to hide it. However we will use it in these examples.
2. Add a text example in the field below. In our example, a typical E-mail address:

3. Analyse the pattern in your example text and re-create that pattern in the top field. To get the domain name from this E-mail address ('esko'), we need everything after the '@' and before the last '.

Follow these steps:

- After the text pattern (by default present and highlighted in green), type an '@'
- then click the Text button to add another text pattern
• then add a ','
• then click Text to add another text pattern.
Notice how the Regular Expression has started building itself.

4. We need the text right after the '@', so we select the 2nd text pattern. This highlights it in blue. We then click on Extract Selection.
Note: You can also right-click the selected pattern and choose Extract Selection from there.

5. The regular expression was updated. The part of the example text that this expression matches is highlighted in green.

6. When you see that the correct part of your example will be extracted, this means that the regular expression - that was automatically built - is correct. This expression will indeed extract the domain name from an E-mail address.

Tip: In this case, the pattern editor helped us create the regular expression. This also works vice versa: You can write or paste an expression in its field and when you then press 'Enter', the matching pattern will appear in the pattern editor above.

7. Optionally, to further test that expression, you can add more examples. In every example, you want to see the part that will be extracted highlighted in green:
12.4.2. RegEx Example 2 - Extracting a Number at the End of a File Name

**Attention:** We here describe the case where the number always appears after a known separator character. This number could be a page number for example. Example 4 shows what you could do when there is no character that you can use as a separator.

Follow these steps:

1. Add one or multiple examples of such file names in the below field (one per line). We here add 3 examples.
2. Then construct the pattern that re-occurs in these names:
   - Anything (Text)
   - followed by a `.`
   - followed by a Number
   - followed by a `.
   - followed by another Text for the file extension.

8. Click OK to close this panel and have the regular expression copied to the field from where you opened this tool.
Important: In above image, you can notice that a text pattern can contain both letters and digits.

3. In the pattern field, select what you want to extract (the number pattern) and click on Extract Selection.

The examples highlight that result in green:
Notice how the 3rd example does not match the definition of the patterns. This is because it has no characters in front of its '_'.

4. Click OK to close this panel and have the regular expression copied to the field from where you opened this tool.

12.4.3. RegEx Example 3 - Extracting everything after the first underscore

**Note:** This example explains the option **Match as few characters as possible.**

Follow these steps:

1. Add one or multiple examples of file names containing multiple underscores (one per line).
2. Construct the pattern. We want to extract everything after the first '_', **no matter how many '_' there are in that name!**
   - We start by adding a text pattern,
   - then type an '_'
   - and then add another text pattern.

3. See above how the 3 examples show a different result. They seem to use the last underscore to decide the split of the name.
4. We need to specify that it is the **first** underscore that will decide the extraction. To do this, click on the small arrow on the right of the first text pattern. There, activate the option **Match as few characters as possible.** Click OK.
Note: See below how this option inserts a '?' in the regular expression and in that one text pattern. In *RegEx terms*, this is also known as “non greedy”.

5. Select the first text pattern and click **Extract Selection**.
6. We now see the result we want. In each example, only everything before the first '_' is highlighted.

7. Click **OK** to close this panel and have the regular expression copied to the field from where you opened this tool.

12.4.4. **RegEx Example 4 - Extracting a number without a separator character**

**Note:** This one is very similar to example 2, but here we also need the option **Match as few characters as possible** that we introduced in example 3.

1. We now have names of which we only want the numbers at the end of the file. We enter some examples and create the pattern:
   - Some text pattern,
   - followed by some number
   - and then a '.'
   - followed by some text (the file extension).
2. Notice in the above image how the text pattern tries to grasp all the characters possible (see the green part in the examples). It has to leave one number at least because there is still a number pattern before the '.'.

**Note:** This is a good example of the RegEx term "greedy".

**Note:** We mentioned earlier that a text pattern can contain both letters and digits.

3. By forcing the initial text pattern to match as few characters as possible (= the opposite of "greedy"), the numbers pattern now contains all numbers at the end of the file name. This is what we were looking for:
**Note:** The effect of this option is only visible after clicking **OK** in that 'Options' dialog. What you see above is when you re-open that 'Options' dialog.

4. Click **OK** to close this panel and have the regular expression copied to the field from where you opened this tool.

### 12.4.5. RegEx Example 5 - Extracting the last 6 characters or less, when another pattern allows it

We want to extract the last 6 characters, also when the input string has less than 6 (then we extract as many as there are). We also show how another pattern influences the result, depending if it's "greedy" or not.

Follow these steps:

1. After opening this editor, we enter these 6 example lines:
2. Click on **Text** to add a second text pattern. In that one, set the **Minimum Number Of Characters** to '1' and the **Maximum** to '6'.

   This is what you see before you click **OK**:
3. Click **OK** to confirm these options. Then, select the second pattern (darker blue) and then click **Extract Selection** to see what this pattern currently extracts.

See how, in all example lines, the resulting expression still only extracts the last character (green highlight):
The reason that we don't see the last 6 characters in green is because of the other text pattern. That first pattern is also still "greedy": it tries to match as many characters as possible, which only leaves the minimum of 1 character for the second text pattern.

4. In the first text pattern, we now select the option **Match as few characters as possible**. This is how we tell it to "not be so greedy". We also set its **Minimum Number Of Characters** to '1'.

The combination of these 2 options means that this pattern will always take 1 character, possibly more, but leave the priority to the other patterns.

This is what you see before you click **OK**:
5. Click OK to confirm those options.

Now again select the 2nd pattern (darker blue) and click Extract Selection.

Our example lines now show that this expression extracts what we wanted:
6. You saw above that patterns can influence each other. To also understand what the 1st pattern really does in our example, select it and click **Extract Selection**.

Our example lines now show that it minimally takes one character and then takes as many extra characters as the second pattern allows to take (which wants 6 maximum).
7. Before you click OK to close this editor and transfer the expression, make sure that the field **Regular Expression:** contains the expression you wanted; in this case you want the one from the second pattern.

So, as you did in step 4, select the second pattern again and click **Extract Selection** to make sure the expression is `.+?(.{1,6})`. 
Then click **OK** to close this editor and have that regular expression copied to the field from where you opened this tool.

**12.4.6. RegEx Example 6 - Extracting the last line of a multiline input**

**Note:** This example uses the option **Dot matches all**.

Our input (file) is a multiline document and we want to extract only the last line.

1. Our example text has 5 lines. When we set the option **Multiline example**, it is now seen as only 1 example.
2. Add a text pattern *below* the first one. Set the option 'Dot matches all'. In Regular Expressions, the regex dot character matches by default all characters excluding line break characters.

Activating this option makes it also see the line breaks. The below text pattern is now seen as the last line of text:
3. Click OK to close this panel and have the regular expression copied to the field from where you opened this tool.

12.4.7. RegEx Example 7 - Selecting a specific range of files

This is an example that can be used in the Select File task.

In our example, we want to select all files except files starting with a '.' (the hidden MacOS files) and files of which the name ends with '_report'.

1. In this task, the RegEx Builder is slightly different. You can add several rows of patterns. See the word 'or' on its left side:

2. Construct this pattern:
   - We add the first text pattern to define all files starting with a '.
   - Below that first pattern, we add a second one
     - that specifies a text ending with '_report',
• followed by a '.'
• and then a pattern representing the file extension.

3. We add a few examples below. We see the first effect of our regular expression:

4. The result is not yet what we want. The file lemon_REPORT.ai was not matched. We correct this by indicating that this expression needs to be Case insensitive:
5. Now the regular expression matches all the files that we do not want:
6. By setting the option **Exclude patterns**, we reverse the logic. The patterns that we described are now used to exclude files from our selection. We now get the result we wanted:

7. Click **OK** to close this panel and have the regular expression copied to the field from where you opened this tool.
13. SmartNames of Parameter Values

The chapter "SmartNames" describes the many ways how to create a SmartName that will resolve in a string like “flexo” or “123”. But how do you create a SmartName that resolves in Parameter Values that are not a free text string?

For example you want a SmartName to decide a button in the interface that indicates to rotate 90 degrees. Or you want a SmartName to decide an internal value that is shown in a drop-down list, for example “any user”.

We illustrate both cases with an example:

Creating a SmartName of a User Interface Button

Some buttons in task tickets can be transformed into SmartNames. Follow these steps to create such a SmartName:

1. Right-click the button and see if the option Copy Parameter Value appears. If so, click the option.

   This option is for example available for the Orientation buttons of the Marks that you can set in the Add Marks to Imposition task. See below how you can Copy their Parameter Value and how the list of buttons also offers to be decided by a SmartName.

2. Go to the dialog where you create the SmartName, right-click and Paste the Parameter Value.
An example: Let's create a Job Parameter (which always becomes available as a SmartName). We here show the manual creation but it would normally be created automatically based on input from an external system. In the Job Setup, we create the Job Parameter **Text Mark Rotation** and for its **Value** we paste (Ctrl-V) the Parameter Value of the button. The screen shot shows that the resulting value is "270".

3. Now use that SmartName in the Ticket instead of the button. Click on the SmartName icon and select it.

### Creating a SmartName of an Automation Engine internal value

This example shows how to create a SmartName that will return the value of "**Any user**" (a choice from a drop-down list):

1. Right-click the interface value and see if the option **Copy Parameter Value** appears. If so, click the option.

2. Go to the dialog where you are creating the SmartName and **Paste** the value there. You will see it appear as "Any User...@".
An example workflow: Your Jobs are created via XML files that you receive from your business system. The XML contains the name of the Esko user that should handle this Job and therefore should receive an item in his To Do list (from the Wait for Action (Checkpoint) task that is automatically started when the Job is created). The Create Job task maps that user to the custom Job Category 5. The Wait for Action (Checkpoint) task then picks it up as the SmartName Job Category 5.

For this to work, the business system needs to know exactly how to write the Automation Engine User names. In our example, the business system also needs to learn how to tell Automation Engine that the To Do of a Job is for Any User. In that case, the business system needs to mention in the XML that the Job is for "Any User@@", because only that value will match the drop-down choice Any user.

This screen shot shows how the Create Job task created the correct string in the custom Job Category named ForWhichOperator:

And the SmartName of this Job Category is then used in the To: field of the Checkpoint task: