

# Automation Engine

Integrating with WebCenter

11 - 2021

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# 1. Introduction

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Automation Engine is not available outside its intranet (LAN). You should see it as an *in-house* system. Automation Engine can of course be connected with many other systems. And those systems can be web-enabled. Those systems will also have a different kind of users.

WebCenter is such a system. It is typically used by

- your colleagues working in places outside the intranet (in other plants, other countries, sales people on the road etc.)
- your customers or other business partners.

If you look at **what is communicated** between Automation Engine and WebCenter, we distinguish these types:

- exchanging files: exchanging files from Automation Engine to WebCenter and vice versa.
- exchanging information: exchanging the meta data from a Job to a Project and vice versa.
- sending direct commands to the WebCenter application (advanced setups).

Let's have a look at the **main integration concepts** between these 2 Esko products:

- WebCenter users want to send instructions or data to the Automation Engine users
- WebCenter workflows contain steps that are prepress actions. These are 'sub-contracted' to Automation Engine. For example: WebCenter can not pre-flight designs, so it will ask Automation Engine to do that.
- Automation Engine sending commands to WebCenter.

## Publish and Approval

New or changed designs that were made print-ready need approval from the customer. Because the customer cannot directly access Automation Engine's Jobs or Containers, the prepress department will have Automation Engine publish the document to WebCenter. WebCenter then manages this approval process with the customer and delivers the (final) answer back to Automation Engine.

## Using WebCenter as a centralized product management system

WebCenter can be used to store all the prepress data centrally. Local prepress sites then download to their Automation Engine the data that they need for prepress or production tasks. This means that the files in Automation Engine Containers are actually temporary data whereas the long term data storage is then on WebCenter.

**Important:** Automation Engine does not keep track of versions of files. WebCenter does and that is important when you use WebCenter as your central storage of prepress data.

**Note:** Mind that you can choose to do this for only a *part* of your prepress data. For example only for the files of some of your largest customers where prepress production is done in different countries.

**Note:** When Automation Engine users from different sites need data from the central WebCenter storage, then several types of access rights will define what data they can see and what they can do with it.

**Note:** The parameters of a Automation Engine Product (Part) can be pushed as document attributes on WebCenter (when the document is part of a BOM).

Apart from storing the prepress data centrally on the web, WebCenter can also use Automation Engine as background server of some prepress functionality. A WebCenter workflow where your customer is working with your sales rep could include a workflow step where Automation Engine is asked to preflight the PDFs.

### **Automation Engine sending commands to WebCenter**

All the above is possible through a handful of tasks and features that handle such communication. Automation Engine can go a lot further than this and instruct WebCenter in much more detail. Some examples:

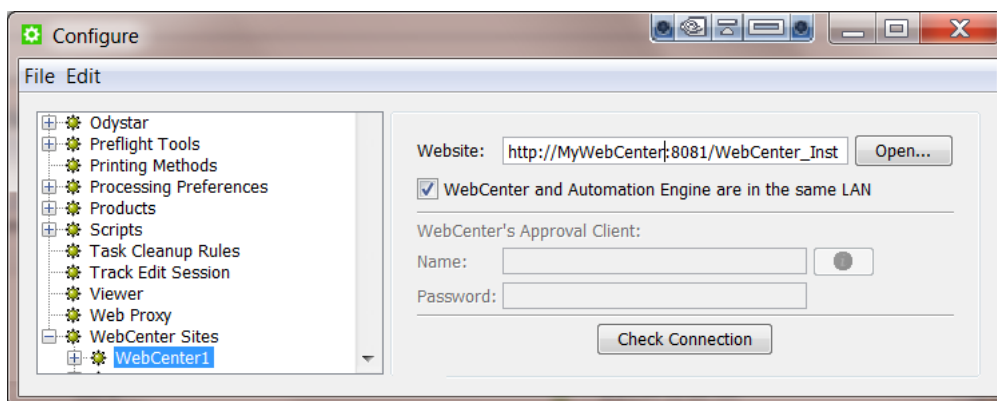
- Automation Engine managing WebCenter users, groups, customers (create, delete...).
- Automation Engine managing WebCenter documents (download, download metadata, delete, set attributes...).
- Automation Engine managing WebCenter projects (create, manage members, get lists, get document lists...).
- and much more.

This advanced technique is enabled by the [Integrate with WebCenter task](#) on page 20 in Automation Engine. It offers over 50 different commands to send to WebCenter.

**Note:** Automation Engine can also be told by an external system to send these commands to WebCenter. For more on this topic, see the chapter on **Integrating with External Systems**.

## 2. WebCenter Sites

Go to **Tools > Configure > WebCenter Sites** to configure links from Automation Engine to WebCenter sites.



### Website:

Specify the web address of the WebCenter site. After you entered the WebCenter address, click **Open...** to check if the WebCenter site is up and running. If you are redirected to the login page, it means that the address is correct and that the site is up and running.

**Tip:** Be aware that this address is also the address that will be included in the notification e-mails when adding links to documents (approval cycle start E-mail). You should therefore make sure that the address can be accessed from the outside. Make sure to not use an internal address, but one that you want your (external) users to use when they use WebCenter.

### WebCenter and Automation Engine are in the same LAN

Select this toggle if this is true. This will most likely be the case. Deselect this toggle if WebCenter and Automation Engine are not in the same LAN.

**Note:** How can you verify if these two systems are in the same LAN? They are in the same LAN when you can connect from WebCenter's application server, this is the system where JBOSS is installed, to an Automation Engine Job Folder with the credentials of the **System Account** (by default the user BGSYSTEM or the one you changed it to, using [the System Account page in the Server Web page](#)).

### WebCenter's Approval Client:

If WebCenter and Automation Engine are not in the same LAN, you first need to create an Automation Engine **Approval Client** in WebCenter. This is necessary to give Automation Engine permissions to listen to the approval messages that are stored in WebCenter.

**Tip:** If the **Approval Client** does not exist yet, follow these steps:

1. In WebCenter, log in as **Administrator**.
2. Go to the **Admin** section. In **Configurations**, select **Workflow and Tunnel Approval Clients**.
3. Click the link "**New Workflow and Tunnel Approval Client**".
4. Enter a **User name** and a **Password** for the Automation Engine client. Mind that this is also the user name and password that have to be entered when configuring the WebCenter site in Automation Engine.

Fill out the client **Name** and **Password** and click the **Check Connection** button. This will check if the user can log on successfully.

The **Info** button displays the following information: *"In case Automation Engine and WebCenter are not in the same local area network (LAN), the retrieval of the approval results is secured by a name and password. The name and password specified in Automation Engine must match the name and password specified in WebCenter by the WebCenter administrator. When clicking the 'Check' button, the WebCenter version will be checked and the name and password will be validated by WebCenter."*

### Check Connection

When you click this button, you should, after a few seconds, get a window saying "**Check OK**". The software version of that WebCenter will also be mentioned.

**Note:** The button will check the validity of the user name or password to connect to that WebCenter but **not** of your WebCenter's **Approval Client**.

**Note:** Passwords are encrypted.

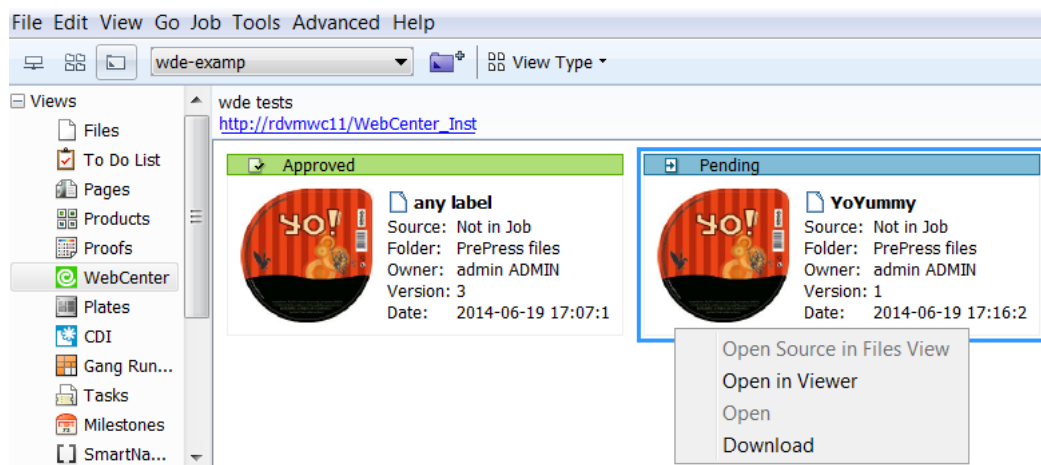
**Note:** When you connect to a secured WebCenter site (for example one that uses HTTPS://), then you have to export its security certificate and import it on the Automation Engine server. If this is not done, publishing from Automation Engine to WebCenter will result in an error. Learn more on how to do this in the chapter **Install SSL Certificates on the Workflow Production Server** of the [WebCenter documentation](#).

**Tip:** After configuring a new WebCenter site, it is recommended to close your Pilot and start it again in order to see the updated list of WebCenter sites in your tickets.

### 3. The WebCenter View in Automation Engine Pilot

When a **Job** is selected in the Automation Engine **Pilot**, the **Views** category '**General**' offers a view named **WebCenter**.

This View shows you all documents in a WebCenter project related to this **Job** without having to open a browser to look at the project in WebCenter itself. The Pilot user can also see the documents' approval status in WebCenter and can also download those documents from this View.



#### How to set up

In the Pilot, in the list of Views, click on the WebCenter icon. If the WebCenter View is not configured yet, you will get a configuration page where you can fill out your WebCenter address and the user name/password that will be used to connect to WebCenter. If the WebCenter View is already configured, but you want to change the configuration, you can right-click in the window and you will get the configuration window again.

**Tip:** In the configuration, you need to specify the Project name. It is common practice to map Jobs to WebCenter Projects using the SmartNames [Job Name] / [Project Name]. On the configuration page, use the SmartName [Job Name] for the Project name.

#### Troubleshooting

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

## 4. WebCenter Integration Tasks

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### 4.1. Create or Modify WebCenter Project task

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#### Concept

This task allows to create a WebCenter Project from Automation Engine. If the project already exists, it will be updated with new or changed parameters.

**Tip:** Some users want a WebCenter Project for every new Job in Automation Engine.

- When you manually create a Job, you can (in the advanced tab) select this task to be launched when you create the Job.
- In a workflow, you can insert this task as a step after the **Create Job** task.

The WebCenter Project that you create is not limited to having the attributes that you defined here in this task. The Project can also get extra attributes from the selected Project Template or the Customer Company.

#### Requirements

To use this task successfully, you need

- **in Automation Engine:**
  - to be in a Job context, a Job with minimally an **Order ID**.
  - the user name and password of a WebCenter **Project Manager**.
- **in WebCenter:**
  - a **Project template** with **attributes matching the Automation Engine Job parameters (Order ID, SubOrder ID, and - if used - any custom parameter defined in the Parameters tab of the Job setup)**.

**Note:** Make sure the WebCenter attributes have the correct **type** for your Job parameter data. For example, when passing on a *date* parameter, the corresponding WebCenter attribute should have the type 'Date and Time'. When passing on a *numeric* value, the WebCenter attribute should have the type 'Numeric' ('Float' or 'Integer'). For more information about attributes, see the WebCenter documentation.



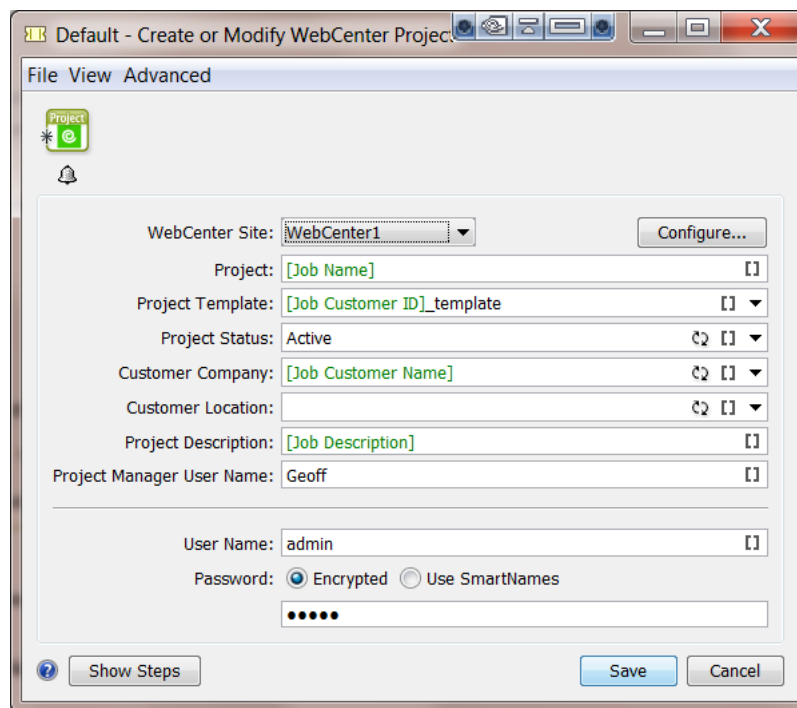
**Attention:** If the WebCenter attributes do not have the exact same name as the Automation Engine Job parameters, the Job parameters will not be passed on.

- Optionally, check the WebCenter naming of **Customer Company** and **Customer Location**.

#### Task Options

Most fields allow both direct input and/or using SmartNames.





- **WebCenter Site:** Select one of the configured WebCenter sites. Optionally, click **Configure...** to access the Configure panel where those are set up. Learn more in '[WebCenter Sites](#) on page 5'.
- **Project:** The name of the WebCenter Project.
- **Project Template:** Define if you want the new Project to be based on a Project template.

**Note:** Make sure you select a Project template with attributes that match the Automation Engine Job parameters.

- **Project Status, Customer Company, Customer Location:** Click the refresh button to get an updated list.
- **Project Description:** If you want, define a description for this Project.
- **Project Manager User Name:** Define which WebCenter user will be the manager of this Project.

**Note:**

- This user must already exist in WebCenter.
- This *can* be the same user as the one you use to contact WebCenter with (the user and password fields further below). Also, that user that contacts WebCenter in this ticket must have **at least as much visibility** in WebCenter as the Project Manager user that you enter here.

- **User Name:** This the user that you contact WebCenter with and who will create or modify the Project.

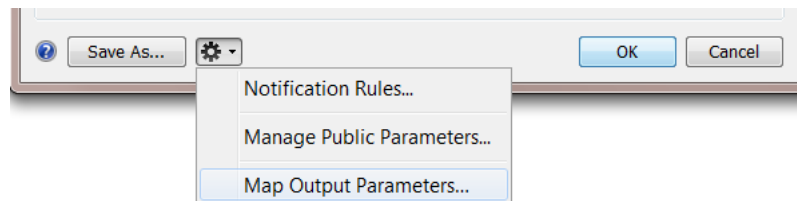
**Note:** The user you enter here must be a Project Manager in WebCenter to be able to *create* Projects.

- **Password:**
  - Encrypted. Type it in. It will not be shown visible.
  - Use SmartNames. Some customers prefer a SmartName because they do not want Automation Engine users to know this password or because they want the latest changes in that password to be automatically picked up here.

### Modifying workflow parameters using this task

As mentioned in [Modifying Workflow Parameters During a Workflow](#), this task can also be used to modify **Workflow Parameters**.

This task allows you to modify the value of a specific Workflow Parameter with the value of the Project ID of the created or modified WebCenter Project. The mapping of the Project ID to a specific Workflow Parameter can be done using the **Map Output Parameters** dialog.



## 4.2. Publish on WebCenter task

The **Publish on WebCenter** task allows to upload files from Automation Engine to a WebCenter Project.

Optionally, you can request WebCenter to start an approval cycle on those files. In that case, this **Publish on WebCenter** task will remain in a waiting status until the WebCenter sends back the final answer of that cycle ('approved' or 'rejected').

**Note:** An approval cycle in WebCenter ends when all approval members have answered or when someone used a 'forced approve' or 'forced reject' answer.

This ticket has three tabs:

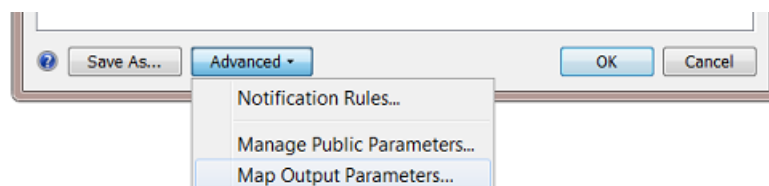
- **Destination:** Define in which WebCenter Project you want to publish the file.
- **Publish:** Define what version of the file you want to make public on WebCenter.
- **Approval:** Define if and how you want to start an approval cycle.

### Modifying workflow parameters using this task

As mentioned in [Modifying Workflow Parameters During a Workflow](#), this task can also be used to modify **Workflow Parameters**.

This task allows you to modify the value of a specific Workflow Parameter with the value of the **Document Version ID** of the document you publish in WebCenter.

The mapping of the Document Version ID to a specific Workflow Parameter can be done using the **Map Output Parameters** Dialog. When you open this task ticket as part of a workflow, you will find it in the **Advanced** settings.



## 4.2.1. Destination

**Note:** You can use SmartNames in most of the fields.

Destination | Publish | Approval

WebCenter Site: WebCenter1 Configure...

Project: [Job Name] [X]

Folder: PrePress files [X]

Project Template: [Job Customer Name]\_template [X]

Document Name: [File] [X]

Document Description: [X]

Document Attributes:

| Name ^              | Value    |
|---------------------|----------|
| [Bar code from XMP] | bar code |
| [Trim Box Height]   | Vsize    |

Add Remove

---

User Name: Elvis [X]

Password:  Encrypted  Use SmartNames

.....

- **WebCenter Site:** Select the WebCenter site you want to publish the document to. Click the **Configure...** button if you want to add or change WebCenter sites. Learn more in '[WebCenter Sites](#) on page 5'.
- **Project:** Define in which WebCenter Project you want to publish the document.

**Tip:** Use [JobName] as Project name to map your Jobs in Automation Engine to the Projects in WebCenter.

**Important:** If the WebCenter Project does not yet exist at publish time, it will be created. Mind that the user that does the publish needs to be **Project Manager** in WebCenter to be able to create a Project in WebCenter.

**Remember:** The recommended method to create a WebCenter Project is by using the **Create or Modify WebCenter Project** task.

**Note:**  
When this task creates the Project, the Project manager will be :

- the Project Manager of the Template group if the WebCenter user executing the task is part of that group.
- or the WebCenter user executing this task.

- **Folder:** Define in which folder of that Project that the documents should be stored.

**Note:** If the folder does not exist yet, it will be created if the user is a **Project Manager** in WebCenter. With user we here mean the WebCenter user that you define further below in this ticket.

- **Project Template:** If the task needs to create the WebCenter Project, define here which existing Project template should be used.

**Note:** Some WebCenter users do not see all Project templates. Templates are filtered according the user's visibility. When you define a user's visibility, you can list a set of companies and/or a set of groups. The effect on this is the following:

1. If a template has a customer defined, this customer (= company), needs to be in the list of companies that the user can see. If the company is not in the list of visible companies of this user, the template is not visible for this user. This means that this user can not use this template to create a new Project.
2. When the template has group members, WebCenter checks whether the user can see all the group members. As soon as there is one group in the template that is not visible to this the user, the template is considered as 'not visible' for this user. Again, the user will not be able to create a new project based on this template.

- **Document Name:** This field allows you to set a specific name of the published document. If left blank, it takes the original name of the document.

**Note:** If the document already exists, the task will create a new version of the document.

**Note:** If the document already exists in a different folder of that Project, the task will fail.

- **Document Description:** This will be the document's description in WebCenter.
- **Document Attributes:** This allows to set specific attributes for the document in WebCenter. These may have different names than what you call them in Automation Engine. For example you can map some metadata from the PDF to a Document Attribute.
- **User Name** and **Password:** Enter the name and password of the WebCenter user that will connect to WebCenter and upload the document.

**Note:** The task will fail in error if this WebCenter user lacks upload rights, even if the Project exists.

## 4.2.2. Publish

In this tab you decide what version of the input file you want to publish and/or if you want to prepare special view data for the WebCenter Viewer.

- [Allow Viewing and Annotating in WebCenter](#) on page 13.
- [Allow Downloading in WebCenter](#) on page 13.

## Allow Viewing and Annotating in WebCenter

Select **Publish Annotations** when you also want to publish the XFDF files that were created by the *Inspection tasks*. Learn more in *Inspection Results as Annotations in Viewers*.

Select **Prepare for viewing and annotating** to have the graphic files prepared into raster data for the (WebCenter) **Viewer**. These rasterized data will then also be published to WebCenter.

**Note:** The graphics kernel that is used to prepare the files for the Viewer follows the settings that were chosen in the Configure tool **Viewer - View \* Files As in \***. For new installations of v20 or later, the default setting is to view PDF files as in ArtPro+.

**Note:** This option can not be selected on when WebCenter and Automation Engine are not in the same LAN.

**Note:** When this option is not selected, WebCenter itself will then need to create this raster data for viewing.

The **Resolution for non-images** (linework, text, ...) will be the maximum resolution you will have in the WebCenter Viewer. You can choose between:

- **Optimal:** The best resolution is used, mainly based on the size of the file. It is **recommended** to select this option. For small files, it will rasterize with a high resolution. For large files, it will be a lower resolution. This balance is to ensure you always have a fast viewing experience in the Viewer, both when you first open the file and when you start zooming in.
- **Custom:** Allows you to specify a resolution yourself. When you set a high resolution, it will create large rasterized files. Set a low resolution for a lower quality view of the document in the WebCenter Viewer.

**Important:** For images, the maximum available resolution is used.

**Anti-aliasing:** This is relevant for the linework objects that need pre-processing and for which extra images are generated (CTs). Anti-aliasing smooth-ens the staircase effect you get in these CTs. Text will be more readable, also when zooming in.

**Automatic grouping of input file into digital film sets:** In a workflow, the publish task can be used right after a RIP task that creates digital films (for example LEN or TIFF files). In such cases, you may want to publish these files as one document. Enable this option to bundle that set of digital film files and publish them as one document to WebCenter. Each digital film will make up one separation of the document.

**Note:** When digital film files were rasterized as one group, the Viewer tool will also recognize them as 1 set of separations.

## Allow Downloading in WebCenter

### Make available for download:

- When this option is **off**, the **Publish on WebCenter** task will not publish the task's input file to WebCenter but only the 'prepared' rasterized files. Choose this option when you do not want any form of your production files to be downloaded by WebCenter users.
- When this option is **on**, you can choose which files you will make available for download on WebCenter (if the user has such permissions):

- **Input files.** For example: your task input file is a production PDF, and that is the PDF you want the WebCenter users to have access to. Or you already had made low resolution PDFs, and you choose to publish those instead.
- **PDF files for proofing.** In this case, you choose not to publish the input file but a **PDF file for proofing** that does not exist yet. Select from the list of PDF export tickets which kind of PDF you wish to create and then publish to the WebCenter user. This way, you offer the outside world a 'PDF proxy' file instead of your real input production file.



**Attention:** Always choose this option when the task input files are not self-contained. For example when your PDF refers to artwork, fonts or other PDFs.

**Note:** If you select **PDF files for proofing** the viewing quality will be limited to the resolution of the PDF files for viewing.

When disabling both **Prepare for viewing and annotating** and **Make available for download**, a warning box is displayed indicating that no data will be published. You need to select at least one type of data to publish.

### 4.2.3. Approval

The Approval tab allows you to select if and when an approval cycle should be started on WebCenter.

**Important:** Make sure you already have an approval cycle set up in WebCenter! This approval cycle setup will indicate who to invite, what their role is and more. Mind that the approval cycle can be part of a Project template that you here selected.

**Start the Approval Cycle and wait for approval.** Select this if you want the approval cycle to start automatically as soon as the file is uploaded to WebCenter. For this, you need to have an approval rule specified in the Project or Project folder where you upload the document to. By default, WebCenter will apply the folder approval setup if it exists. If not, the Project approval setup will be applied.

**Due Date:** If the WebCenter user that you use to log in with ('Destination' tab) has the **Change Approval Setup** permission in WebCenter, you can also set the approval due date.

**Note:** The due date specified here will take priority over the due date specified in WebCenter.

You can choose one of the following:

| Choice    | Explanation  |
|-----------|--|
| Immediate | This will set the due date to the time that the task was launched. |

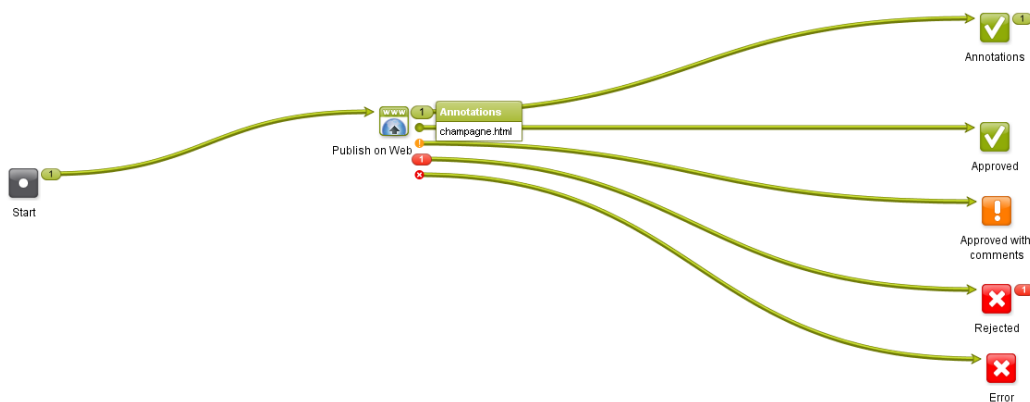
| Choice                     | Explanation  |
|----------------------------|--|
| <b>Today</b>               | This will set the due date to today, at a user specified time.   |
| <b>Tomorrow</b>            | This will set the due date to tomorrow at a user specified time.   |
| <b>In ... hours</b>        | This will set the due date to a specified number hours from the time the task was launched.  |
| <b>In ... days</b>         | This will set the due date to a specified number of days from the time the task was launched and at a specified time. A SmartName can be used to set the number of days.<br><br>For example "in 2 days at 5:43 PM" is the same as "the day after tomorrow at 5:43 PM". |
| <b>On</b>                  | Use the calendar to set the due date and time.   |
| <b>Job due date</b>        | This will set the due date to the one specified in the Job setup.  |
| <b>Select SmartName...</b> | If you use a SmartName, it will also be added to the above menu items.   |

**Note:** The SmartName should be conform to the ISO 8601 date string format. For example 2014-12-27T11:30:00+02:00

**Annotations:**

If any annotations were made during the WebCenter approval cycle, the **Publish on WebCenter** task generates a annotations summary. At the end of the approval cycle, an HTML file will be generated. This HTML file redirects the Automation Engine user directly to the WebCenter annotations page in a browser. He will be asked to login to WebCenter.

You can here decide the folder and name where this 'shortcut' HTML will be written.



**What if you get conditional approvals?**

Documents that are approved conditionally in WebCenter will go through the **Approved with a Condition** output of the **Publish on Web** task (standard of the type 'warning').



It is good practice to use a **Wait for Action (Checkpoint)** task for those documents, so the Automation Engine operator can fix them manually. For more details about conditional approval, see the WebCenter documentation.

**What if you have multiple input files?**

When your **Publish on WebCenter** task has multiple input files, and your ticket requests an approval cycle, then an approval cycle will be started for each of those input files. When the **Publish on WebCenter** task has received an answer for all files, it will then show their specific status in the task's output pins: which one was approved or rejected etc...

When you use the **Split** task in front of the **Publish on WebCenter** task, then Automation Engine will start up a Publish task **per** input file.

**Troubleshooting tip**

If you get errors in this publish task and the log file does not give you an indication on what went wrong, then try to do the same steps interactively inside WebCenter, using the user account that you had used in your Publish ticket. If the error is due to permissions, you will quickly figure out what goes wrong.

**4.2.4. Publishing Automation Engine Products to WebCenter**



**Attention:** This page addresses customers who use the Automation Engine **Products** tool. Learn more about this tool in the chapter [Products](#).

When you publish an Automation Engine **Product** to WebCenter, the Product Properties and **Product (Part) Parameters** will be taken as **WebCenter Attributes**. If there are existing WebCenter attributes with corresponding names, their values will be updated during publishing.



**Attention:** For this to work, WebCenter needs to be enabled to work with **BOM - Bill Of Materials**. This is a setting in WebCenter -> Admin -> General Preferences.

The following Product (Part) properties and Product (Part) Parameters are synchronized with WebCenter Attributes (see further how to rename these internal names to more readable ones):

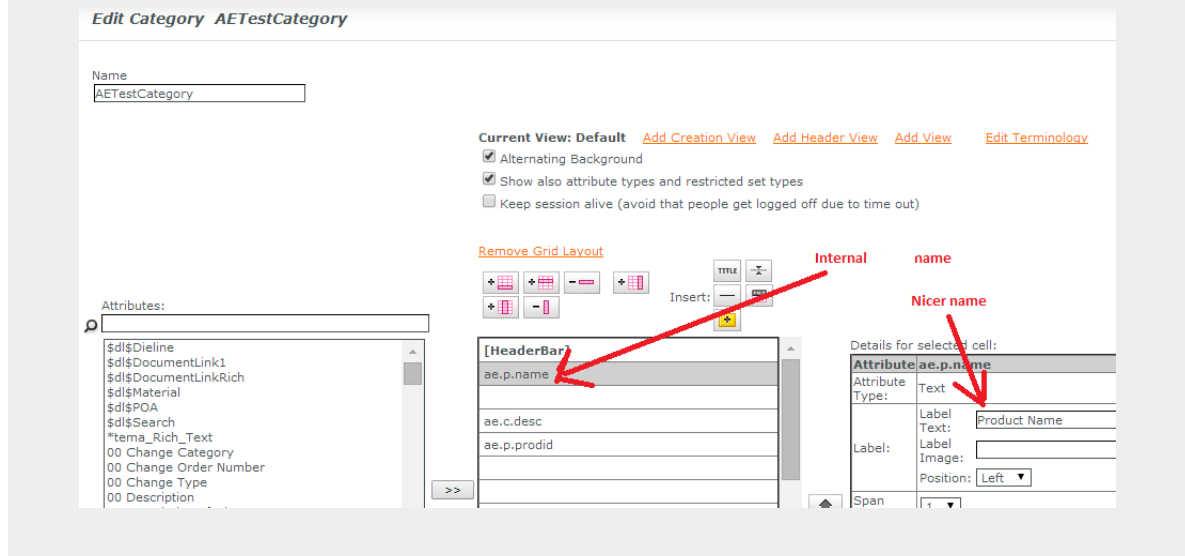
| Automation Engine Properties/Parameter | WebCenter Attribute (Internal name) |
|--|-------------------------------------|
| Product Customer Reference             | ae.p.cusref                         |
| Product Custom Field 1                 | ae.p.category1                      |
| Product Custom Field 2                 | ae.p.category2                      |



| Automation Engine Properties/Parameter | WebCenter Attribute (Internal name) |
|--|-------------------------------------|
| Product Custom Field 3                 | ae.p.category3                      |
| Product Internal ID                    | ae.p.id                             |
| Product ID                             | ae.p.prodid                         |
| Product Name                           | ae.p.name                           |
| Product Description                    | ae.p.desc                           |
| Product Part Internal ID               | ae.ppid                             |
| Part Default Angle                     | ae.pp.defaultangle                  |
| Part Default Dotshape                  | ae.pp.defaultdotshape               |
| Part URL                               | ae.pp.url                           |
| Part Default Ruling                    | ae.pp.defaultruling                 |
| Part Preferred InkBook                 | ae.pp.preferredinkbook              |
| Part Preferred InkBook UI              | ae.pp.preferredinkbookui            |
| Part Internal ID                       | ae.pp.id                            |
| Part Custom Field 3                    | ae.pp.category3                     |
| Part Custom Field 2                    | ae.pp.category2                     |
| Part File                              | ae.pp.file                          |
| Part Status                            | ae.pp.status                        |
| Part Status Nickname                   | ae.pp.status_nickname               |
| Part Status User                       | ae.pp.status_user                   |
| Part Status Notes                      | ae.pp.status_notes                  |
| Part Status Date                       | ae.pp.status_date                   |
| Part Folder                            | ae.pp.folder                        |
| Part Custom Field 1                    | ae.pp.category1                     |
| Part Name                              | ae.pp.name                          |
| Part Inks                              | ae.pp.inks                          |
| Part Barcodes                          | ae.pp.barcodes                      |
| Product Customer Name                  | ae.c.name                           |
| Product Customer Description           | ae.c.desc                           |
| Product Customer ID                    | ae.c.id                             |
| MyProductParameter1                    | ae.p.par.MyProductParameter1        |
| MyProductPartParameter2                | ae.pp.par.MyProductPartParameter1   |

When a **Product** or **Product Part** is published, the corresponding WebCenter Documents are automatically added to the **Bill Of Materials** of the WebCenter Project. The **Product Amount** for the Job (if given) is updated as the **Count** property of the **Bill of Materials**.

**Tip:** You can rename the internal name of WebCenter Attributes to a more readable name by first adding it to a **Category**:



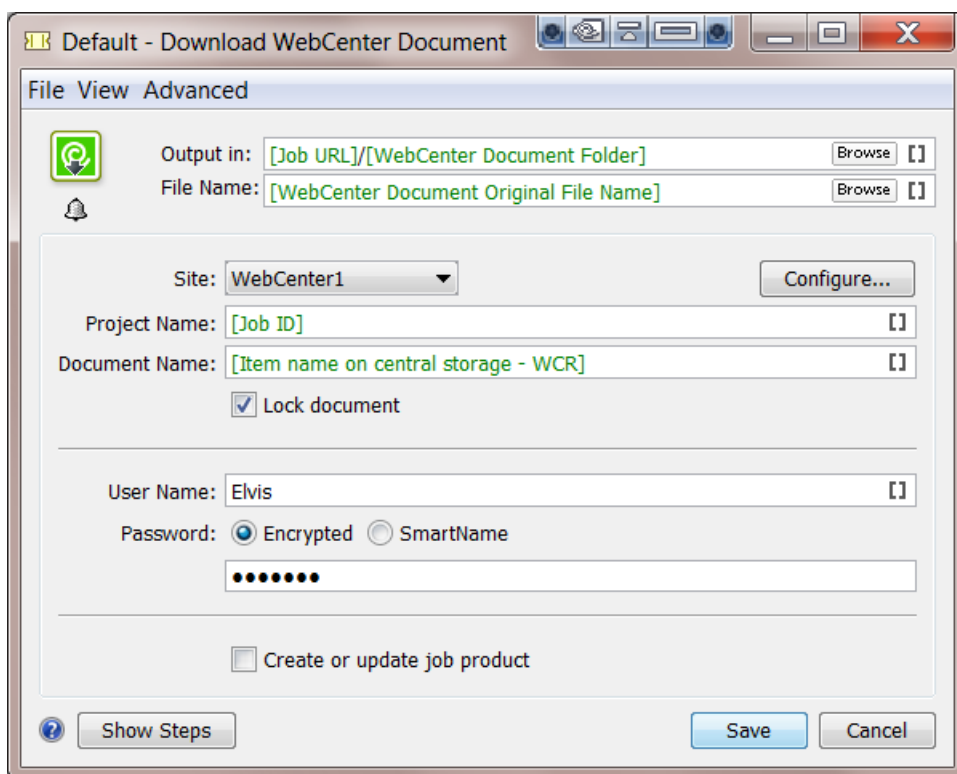
Learn more about this in the PDF named **Connection between Automation Engine and WebCenter 14** that you can download from <https://www.esko.com/en/support/product?id=WebCenter>.

### 4.3. Download WebCenter Document task

This task allows to download documents from WebCenter into an Automation Engine Container (or Job Folder). Optionally, downloaded documents including their document attributes can be immediately added to the Products database.

The following **SmartNames** are useful in a **Download WebCenter Document** task:

- **WebCenter Document Folder:** The folder in the WebCenter project that holds the document that you are downloading.
- **WebCenter Document Name:** The name of the WebCenter document that you are downloading.
- **WebCenter Document Original File name:** The original name of the file that was uploaded to WebCenter and there made a document.



- **Output in** and **File name** The above screen-shot shows how the default ticket proposes you a logic place and name for the file you are downloading.
- **Site:** The WebCenter site to download the document from. Click **Configure...** to add or change WebCenter site configurations (enabled only for administrator users). Learn more in '[WebCenter Sites](#) on page 5'.
- **Project Name:** The name of the WebCenter Project that you want to download a document from.
- **Document Name:** The name of the WebCenter document that you want to download.
- **Lock document:** Check this option if you want to lock the document in WebCenter. When the document is locked, other WebCenter users will not be allowed to upload new versions. Only the WebCenter user that locked the document can publish a new version and/or unlock the document.
- **User Name** and **Password:** of the WebCenter user that downloads and/or locks the document.
- **Create or update Job Product:** Check this option if you want to add the downloaded document as an Automation Engine Product for the Job you are working in. If the file is already a Product, the WebCenter document attributes are merged with the existing Product (Part) parameters. If the attribute already exists as Product (Part) parameter, that Product (Part) parameter's value is *updated*. If the attribute was not a Product (Part) parameter yet, it is *added* as a Product parameter.

**Important:** In order to use the option **Create or update Job Product**, the task must run in a Job context!

# 5. Advanced WebCenter Integration

## 5.1. Integrate with WebCenter task

### Concept

WebCenter can be used

- interactively, in a browser, by a WebCenter user
- by an external system, through a special connection setup
- by Automation Engine, by using the **Integrate with WebCenter** task.

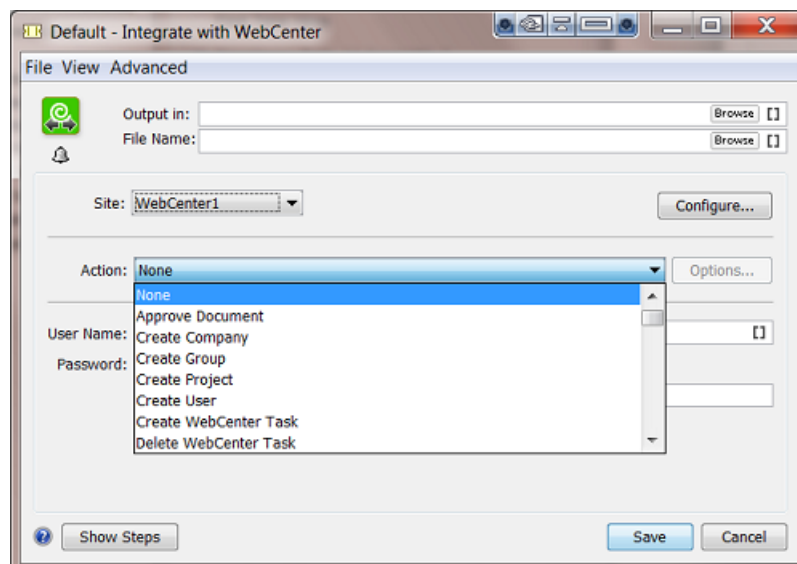
This Automation Engine task goes a lot further than the ones we documented earlier that only focus on exchanging files and creating projects in WebCenter. This **Integrate with WebCenter** task enables Automation Engine to perform more than 50 different types of actions on WebCenter. Some of these actions are very elaborate commands or requests for information and some even change configurations.

**Note:** The technology behind this task has historically often been referred to as the "WebCenter SDK"



**Attention:** This task requires advanced knowledge of both WebCenter and Automation Engine.

### Task Options

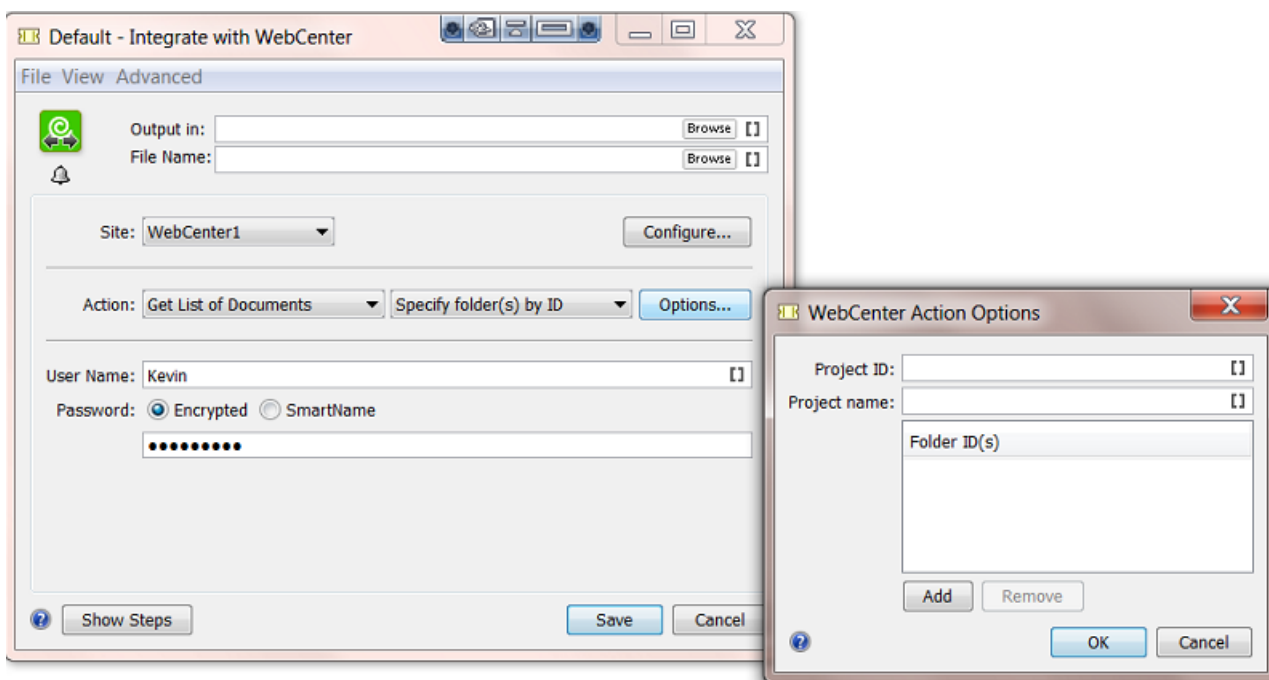


- **Output in** and **File name:** Depending on the **Action** chosen below, these fields might be relevant or not. If the action triggers this task to have an output file, then you can here define their folder and name.

- **Site:** Select the WebCenter site from the list. Click **Configure...** to add or change WebCenter site configurations (enabled only for administrator users). Learn more in '[WebCenter Sites](#) on page 5'.

**Note:** A connection will be made with the WebCenter that you select. It will not just test the connection but will also get the list of possible commands from that specific WebCenter server. That list then becomes the list of **Actions** (for this WebCenter).

- **Action:** Select the action. When the selected action offers options, the **Options...** button will become active. The options dialog is specific per action. Here is an example:



See how selecting the action "Get List of Documents" automatically offers a sub-type of action to choose, here "Specify folder(s) by ID" (or "by Name"). The button **Options...** offers another specific dialog with more options for this Action.



**Attention:** Most option fields offer **Tool Tips** which extra information, conditions and general tips. Tool tips appear when you hold your mouse-cursor over the field.

- **User Name** and **Password.** Define which WebCenter user will execute the selected action on WebCenter. Make sure this user has the required privileges.

**More info**

More detailed technical info is available in the "**WebCenter SDK documentation**". Learn more about this document in this Esko Knowledge Base article: [KB 92180925](#).

**Modifying workflow parameters using this task**

As mentioned in [Modifying Workflow Parameters During a Workflow](#), this task can also be used to modify **Workflow Parameters**.

The **Integrate with WebCenter** task allows you to modify the value of a specific Workflow Parameter with the result of the action executed by the task.

For example (as shown in below screen shot): When you select the action "Get Document History", you can update the value of a specific Workflow Parameter with the value of the approval status of the document. First you need to define to which Workflow Parameter a specific Output Parameter needs to be mapped to. You can do this using the Map Output Parameters Dialog.

