

# Automation Engine

## Pilot Views and Tools

03 - 2022

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# 1. Concepts and Overview

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## Concept

The Pilot's **Views** offer different functionality or a specific mode to work in. Find an overview below with a short description.

At the end of this chapter, we also describe the [Tools](#). Tools are views or dialogs that you can open in a separate window, next to your Pilot. Most of these are also available as a View.

## Automatic Hiding of Views

Depending on the **View Mode** you are using (**Containers**, **Job Overview** or **Last used Job**), you will have access to different views.

Depending on your [access rights](#), you may not be able to see some of the views.

## Manually Selecting Views

Right-click a view and choose **Remove from Views bar**. To enable that view again later, right-click anywhere in the Views panel, choose **Select Views...** and select the one(s) you want. This selection is saved per user and remembered the next time you log in to the Pilot.

## Overview per Category

### • General

- The **Files** view offers a view on the files in your Containers or Jobs. You typically use it to open or view them and to launch workflows on them. Learn more in [The Files View](#) on page 8.
- The **Jobs** view is only visible in **Job Overview** mode. It lists all or a filtered list of your Automation Engine Jobs database. Learn more in [The Jobs Views](#).
- The **Inactive Jobs** view shows Jobs that were moved to a cheaper storage solution. It is only available customers of a SaaS setup and requires an Esko Cloud account. Learn more in the chapter about [AE SaaS](#).
- The **To Do List** view lists all actions that need user intervention. Learn more in [The To Do List View](#).
- The **Products** view shows the items in your Products database. This concept is useful when you manage re-prints. Products represent production data that you temporarily link to a Job order. It is the Job order that has the specifications how to output the product this time, possibly together with many other Product items.

Products are what you keep long term, until you are sure you will not have to produce them again. Jobs however are 'WIP' (Work In Progress), temporary by definition. A Job should be removed when it is finished. Learn more in the dedicated chapter [Products](#).



**Note:** The view is 'Products on Esko Cloud' is only available for AE SaaS setups.

- The **WebCenter** view enables Pilot users to see what documents are inside a WebCenter project without having to open a browser. Learn more in the chapter on [Integrating with WebCenter](#), in its section [The WebCenter View in Automation Engine Pilot](#).
- The **Tasks** view shows all or a filtered list of tasks. It shows their status and offers easy access to log files or input or output files. You can here also relaunch them, with or without opening and changing settings first. You have to clean up this list. Learn more in [The Tasks View](#) on page 17.
- The **Milestones** view shows the milestones of the selected Job (in **Last used job** mode), or those of all Jobs (in **Job Overview** mode). Learn more in [Milestones: Tracking Job Status](#).
- The **SmartNames** view allows to manage SmartNames. Learn more in [The SmartNames View](#).
- The **Tickets** view allows to manage tickets. Learn more in [The Tickets View](#) on page 22.
- **Commercial Print**

These views only serve page imposition workflows:

  - The **Pages** view shows a page list and details about the page status in its impositions.
  - The **Proofs** view shows the sets of imposition proofs and their status.
  - The **Plates** view shows details about all (offset) plates required for that Job.

Learn more in the dedicated document on "Commercial Print (Imposition) workflows in Automation Engine". Find it next to the "Complete Manual" of version AE **18.1** on <https://www.esko.com/en/Support/Product?id=Automation%20Engine&ver=18.1>.
- **Sign and Display**

These views are described in the dedicated chapter on [Sign, Display, Large Format Workflow](#).

  - The **Orders** view shows an overview of what was ordered to be printed on (flat bed or roll fed) digital printers. Learn more in [The Orders View](#).
  - The **Gang Run Printing** view shows the substrate queues where submitted graphics wait to be nested on your available sheet or roll substrates. Learn more in [The Gang Run Printing View](#).
- **Flexo CTP**

These views are described in the dedicated chapter on [Flexo CTP Workflow](#). Find their short description in [Introducing Flexo CTP Device related Views and Tasks](#).

  - **Press Plate Sets.**
  - **Press Plates.**
  - **Plate Merger.**
  - **Merged Plates.**
  - **CTP Queues.**
- **Cutting Tables**

These views are described in [Kongsberg related Views](#), a section of the dedicated chapter on [using Automation Engine to cut jobs on a Kongsberg table](#).

- **Sheets.**
- **Table Queues.**

- **Smart Views**

Smart Views are custom filters that you saved as a View. Learn more in [Smart Views](#) on page 31.

- **Setup**

These views serve to set up your configuration.

- The **Devices** view lists all output devices connected to your Automation Engine server. You can see their status and workload. These devices can be [CDI Imagers](#) or [Kongsberg Tables](#).
- The **FlexRips** view gives an overview of the "Esko Link" queues to your FlexRip Dispatchers. Learn more [here](#).
- The [Queue Monitor](#) view.
- The [Containers](#) view.
- The [Access Points](#) view.
- The [Customers](#) view.
- The [Order Materials](#) view.

- **Accounts**

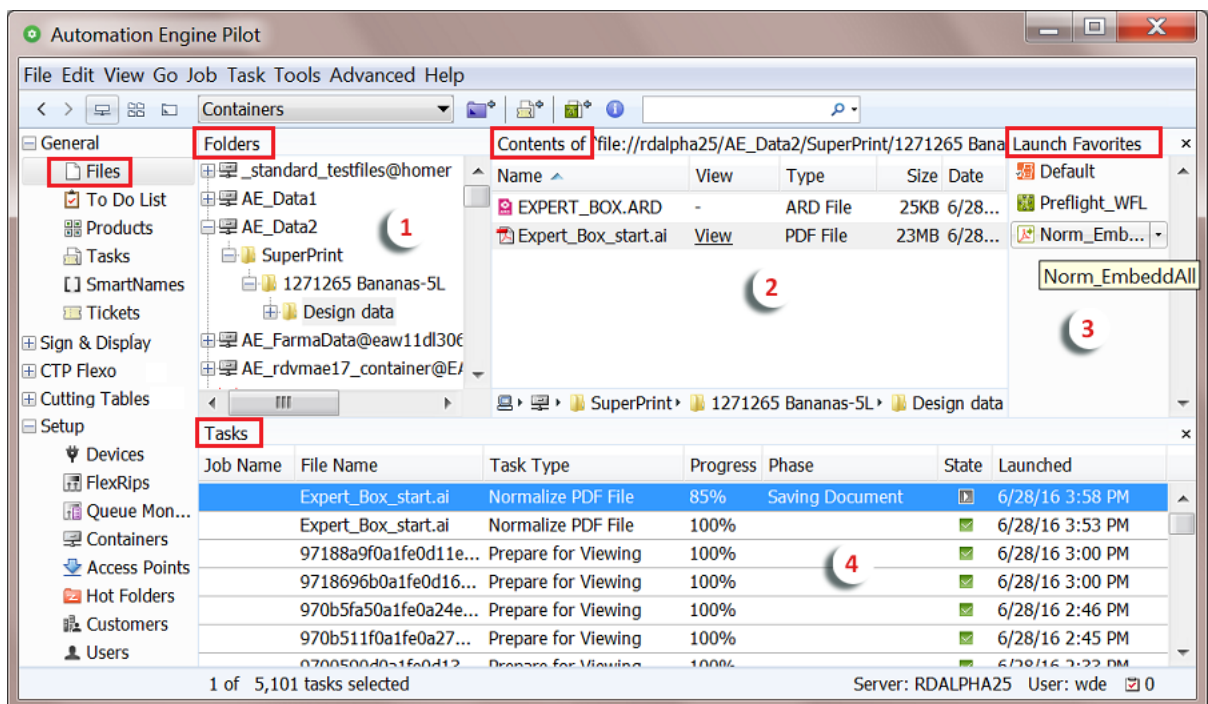
- The [Users](#) view.
- The [Groups](#) view.
- The [Roles](#) view.

## 2. General Views

The views in this category can be used in most types of work.

### 2.1. The Files View

This view is available in **Containers** and in **Last used Job** mode.



1. The **Folders** pane shows your *Containers*, folders and job folders (in **Containers** mode) or a job folder and its subfolders (in **Job** mode).

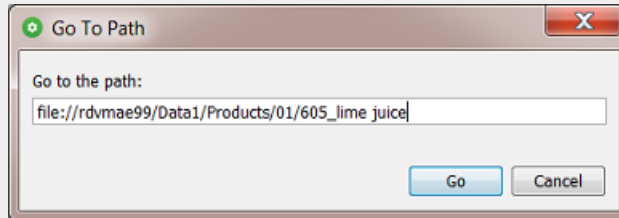


**Note:** When working with Automation Engine Jobs, you typically don't use this view but use the **Last used Job** mode to see only the data of the Job you are working on.





**Tip:** Instead of browsing to a folder, you can also choose the function **Go To Path** (find it in the **Go** menu). This is useful to paste a URL or UNC path that you copied from somewhere. You can type the path manually as well. You can even use the function ('Shift-')Tab' to be presented a next folder.



Examples of supported paths:

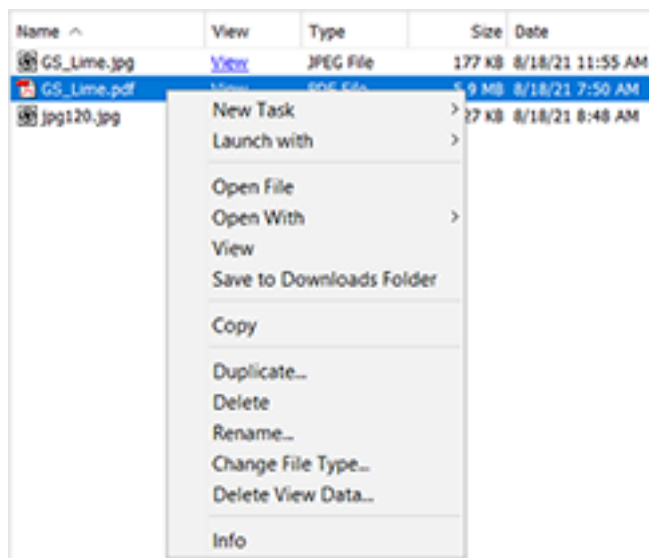
- file:///BigServer/Data1/Products/BeerVille/Devil\_33.ap
- \\BigServer\Data1\Products\BeerVille\120381 Proof.pdf
- smb:///BigServer/Data1/Products/BeerVille/4545\_report.pdf

2. The **Contents** pane shows the contents of the folder you selected in the **Folders** pane.



**Note:** Every time the Pilot shows you the contents of a folder, it automatically checks the file types of all files in that folder and shows the result in the column "**Type**". This means that the file's extension is less important here. For example a file with an extension .AI initially shows as an "Adobe Illustrator" file but when the file type detection found that it is PDF compatible, it will show as type "PDF File".

After having selected one or multiple files or folders, a lot of typical file management is possible via the **File** menu or via a right-click. Functionality on a multiple selection can be more limited. Classic shortcuts for cut/copy/paste are also present.



- **New Task** and **Launch with**: Learn more in [First Steps in Launching Tasks](#).

- **Open File:** This has the same result as if you double click the file on your local client: it will open in the default application for that file type (according your local OS).
- **Open With:** Opens a dialog where you can register local applications. The next time you select 'Open with', you will then be offered a list of the registered applications for that file type.
- **View:** Opens your file in the Automation Engine Viewer. Learn more in [Automation Engine Viewer](#).
- **Save to Downloads Folder:** Saves a copy of the selected file(s) in the 'Downloads' folder of your local client (Windows or Mac OS). This feature was designed for users of an AE SaaS setup but can be used by others as well.
- **Copy:** Adds a copy of your selection to your clipboard.
- **Duplicate...:** Makes a duplicate of your selection in that same folder. You will be asked how the new data should be named. This function is not enabled when you selected multiple folders.
- **Delete:** Deletes the selected files or folders. You will be asked to confirm. There is no 'undo' possible afterwards.
- **Rename...:** Opens a dialog asking you to define the new name (for every selected item).
- **Change File Type...:** Use this when you want to overrule the file type that was *discovered automatically*. Changing the file type will make the Pilot offer different task types to be launched on that file.
- **Delete View Data...:** Learn about prepared View Data in [Automation Engine Viewer](#).
- **Info:** Opens the **Info** dialog that shows the metadata of your selection. Learn more in [PDF+ File's Info Dialog](#).
- **Summary:** When you selected more than one file, you can choose between **Info** and **Summary**. Summary will open only one dialog. Info will open a dialog for each selected file.



**Tip:** When you selected many files, you can also start with a Summary and from within that dialog ask more **Info...** on a specific item.

3. The **Launch Favorites** pane allows you to add your favorite tickets and allows to launch them with one click. Learn more in [Creating Favorite Tickets](#).
4. The **Tasks** pane shows all launched tasks (in **Job** mode, only those for that job). Right-clicking a task offers functionality to delete, open, relaunch etc... Learn more on the page on the separate [Tasks View](#).

## 2.2. The Shared Files View

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This view shows the files of the selected job that were uploaded to its shared job folder to Esko Cloud.


Learn more in the chapter [Collaborating via Esko Cloud](#). Find a direct link [here](#).

## 2.3. The To Do List View

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The **To Do List** is where you manage all actions that need user intervention. A user intervention is typically a step in an automated workflow where you require a human decision or action.

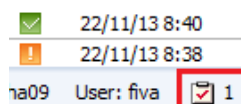
This view shows several types of actions:

- **Message:** When created in this view, via . Learn more [here](#).
- **Checkpoint:** When created by a [Wait for Action \(Checkpoint\) task](#).
- **Milestone Action:** When created by [the Manage Milestone task](#).

Use the **To Do List** to view, modify, forward or delete these actions.

This view can also be opened as a separate window:

- Go to **Tools > To Do List**.
- In the Pilot's bottom **Status bar**, click on the **To Do List** icon:



### Seeing To-Dos in your Mac 'Notification Center'

To-dos can also appear in the macOS X notification center. You can there click on 'show' to open that item in the Pilot.

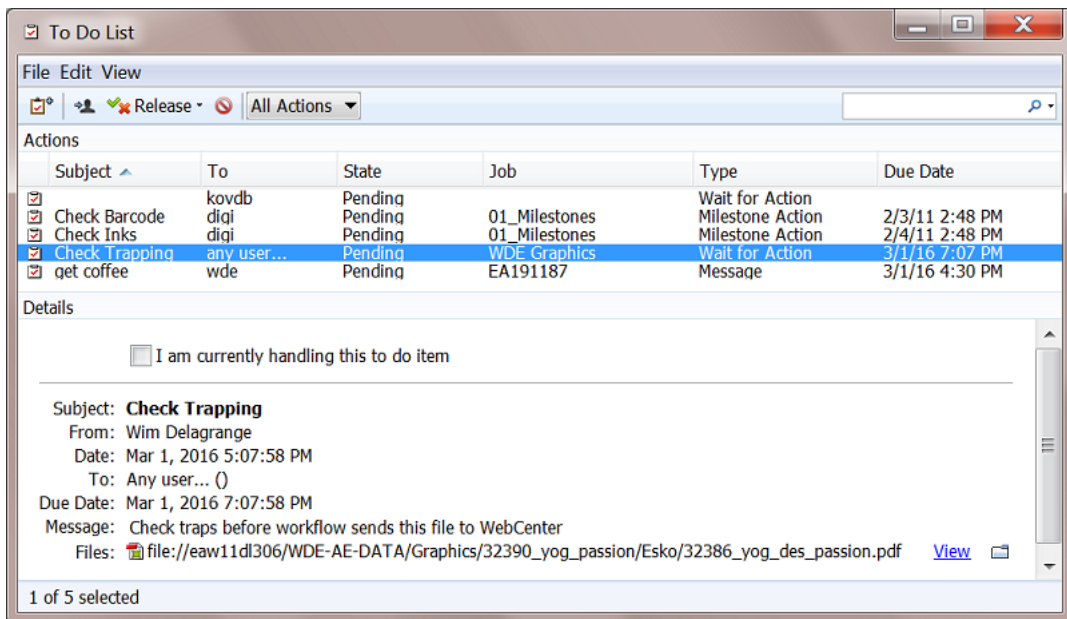
To enable or disable this, go to 'Apple' menu > *System Preferences*, then click *Notifications*. You may there see 2 Pilots: an Oracle version and a 1.6 java version. Of the Pilot app that shows the number of to-do items, switch that 'numbers' icon on or off.



**Note:** Mind these requirements:c

- You will only see those on your Mac when the Pilot is not the front-most application on that computer.
- You need to be logged in to that Pilot.

### 2.3.1. Checking To-Dos



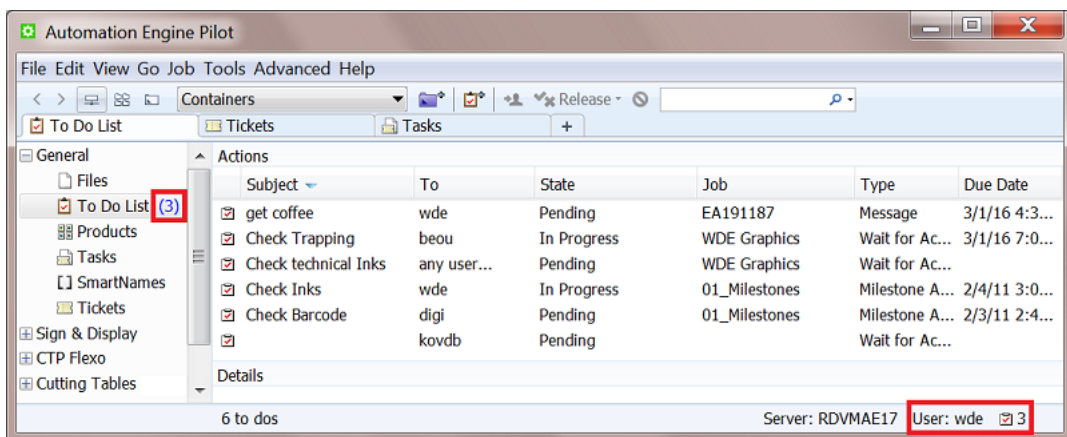
As in all views, click the header of a column to sort or show / hide columns.

### Filtering

The **Actions** panel shows all actions when in Container mode or only those of the selected Job.

You can filter the list by using the search field. Learn more in [Using Filters and Creating Smart Views](#) on page 32. When you opened the To Do List as a separate window, the filters you saved also appear in the drop-down menu.

When using the To Do List as a View, a number is shown to illustrate how many of the actions are assigned to the user logged in and also those assigned to 'any user . . .'. In Job view, this is limited to the actions in that Job.



### Details

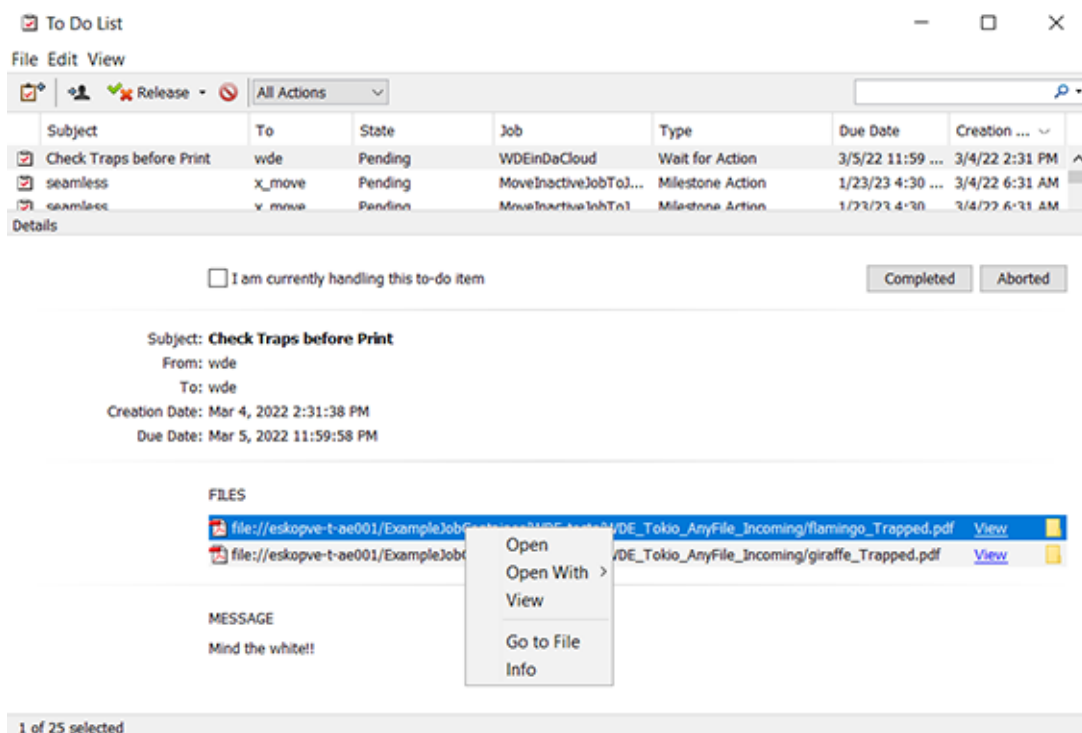
Select an action to see all its **Details** shown in the panel below.

Double click the action to open it and also see when and which user created it.




### 2.3.2. Handling a To-Do

To handle a to-do (any type of action in the To Do List), select it in the list and use the available menu or buttons or right-click to discover the functionality.

The **Details** pane shows the details of the selected action. Alternatively, double click the action in the above list to open it in a separate dialog.



Possible actions in the list itself:

- To forward one or more actions to another user, select them, click  and select the other user. Before confirming you can change the **Subject**, **Due Date**, **State** or **Message**.
- In the list, right-click an action and choose **Go to Job** to open the Job this action relates to. Alternatively, use **Ctrl/Cmd + Alt + O**.
- To release the action to one of the output states offered by the **Wait for Action (Checkpoint)** task that created it, right-click or click  **Release** and choose the wanted output state (by default **Completed** or **Aborted**). Learn more in [The Wait for Action \(Checkpoint\) Task](#).
- To delete actions from the To Do list, select them and click  or press **Delete**. You will be asked to confirm.


Possible actions in an action's **Details** pane:

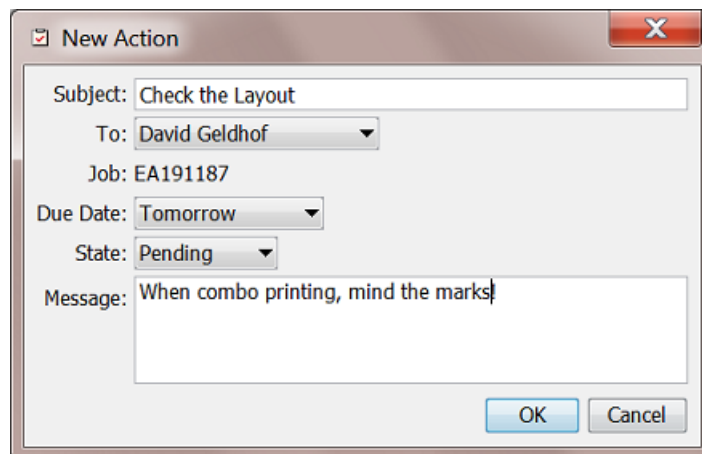
- Select **I am currently handling this to-do item** to change its state to **In Progress** and, when not already so, assign the item to yourself.

- **Completed - Aborted:** In the same way as described above, you can also decide the output state here
- Next fields are information only: **Subject, From, To, Creation Date** and **Due Date**. Learn more in [Creating a To-Do Message](#) on page 14.
- **FILES:** Find a link to each input file of the [Checkpoint task](#) that created this action. Right-click one or multiple links to see the possible actions:
  - **Open:** Opens the file in the local application associated with this file type. Alternatively, double click the link.
  - **Open With:** Select a local application that you registered for this file type.
  - **View:** This opens the file in the [Viewer](#). Alternatively, click **View** next to the file path..
  - **Go to File:** This opens the file's folder in your local 'Explore' application. Alternatively, click on the folder icon next to the file path.
  - **Info:** Opens the file's Info dialog.
- **MESSAGE:** The optional message that was added in the [Checkpoint task](#) (or by a previous user that forwarded the action).

### 2.3.3. Creating a To-Do Message

To create a to-do action of the type **Message**:

1. Click  in the tool bar.
2. In the **New Action** dialog that opens:
  - a) Enter a **Subject**.
  - b) Choose who to assign the action **To**. (mandatory field)
  - c) Relate this action to a **Job** if needed.
  - d) Choose a **Due Date**.
  - e) Choose the to-do **State**.
  - f) Enter a **Message** if you want.



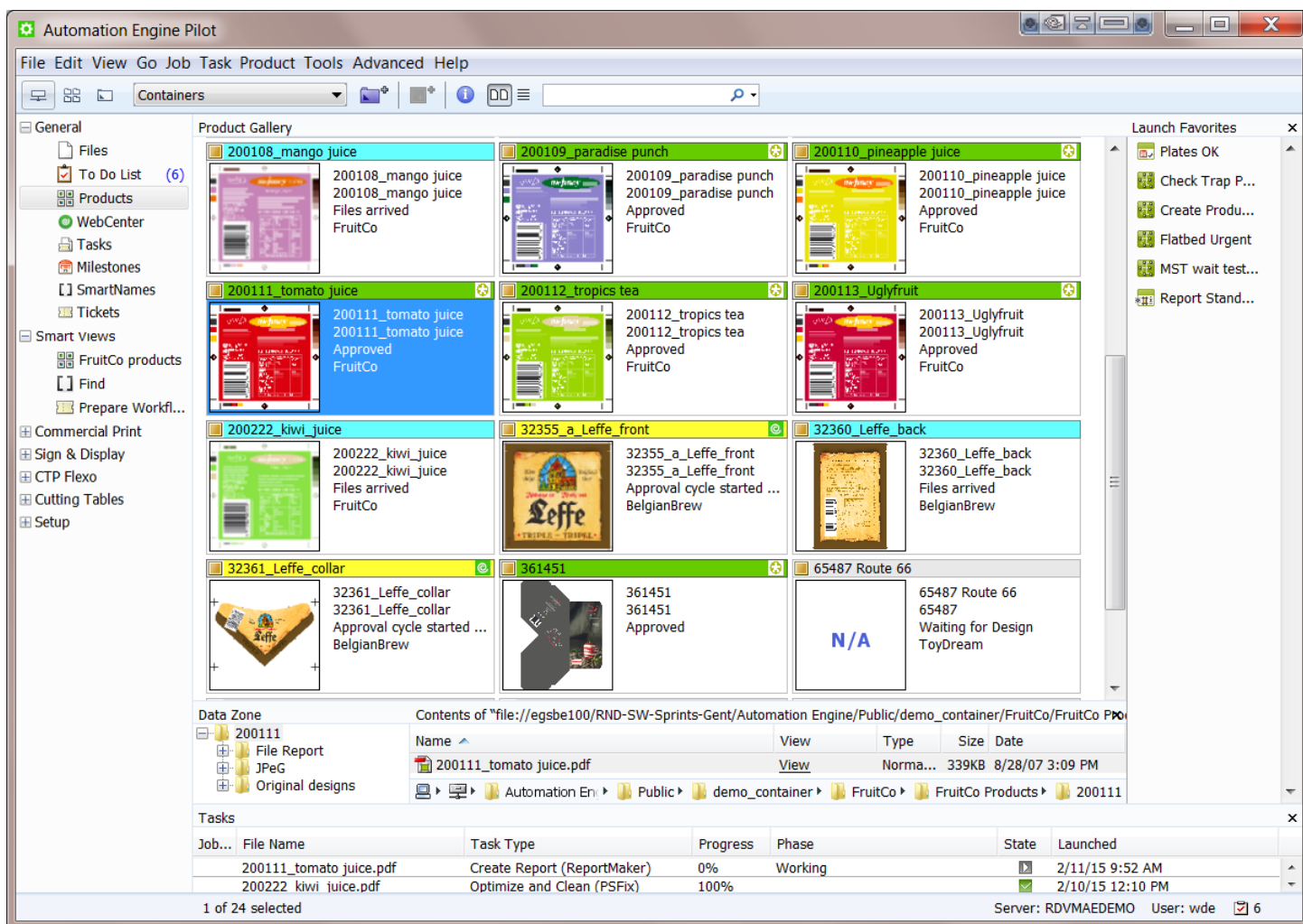
3. Click **OK** to confirm.

## 2.4. The Products View

This view is available in **Containers** and in **Job** mode.

The **Products** view is a user friendly, searchable view on the Products database. You can use it to create new Products, search them and link them to Jobs.

You can see the Products in a thumbnail view  or a list view .



Working with Products is documented in the dedicated chapter [Products](#).

### 2.4.1. The Products on Esko Cloud View (SaaS only)

This view is only available for [AE SaaS server setups](#).

Learn more in [Storing Products on Esko Cloud](#).

## 2.5. The WebCenter View

This view is only available in **Last used Job** mode.

Files that have been published on WebCenter (with the *Publish on Web* task or the *Publish imposition on WebCenter Chain* task) will appear in the WebCenter View. Pilot users can so, without having to open a browser, see which documents are inside a WebCenter project and what their status is.

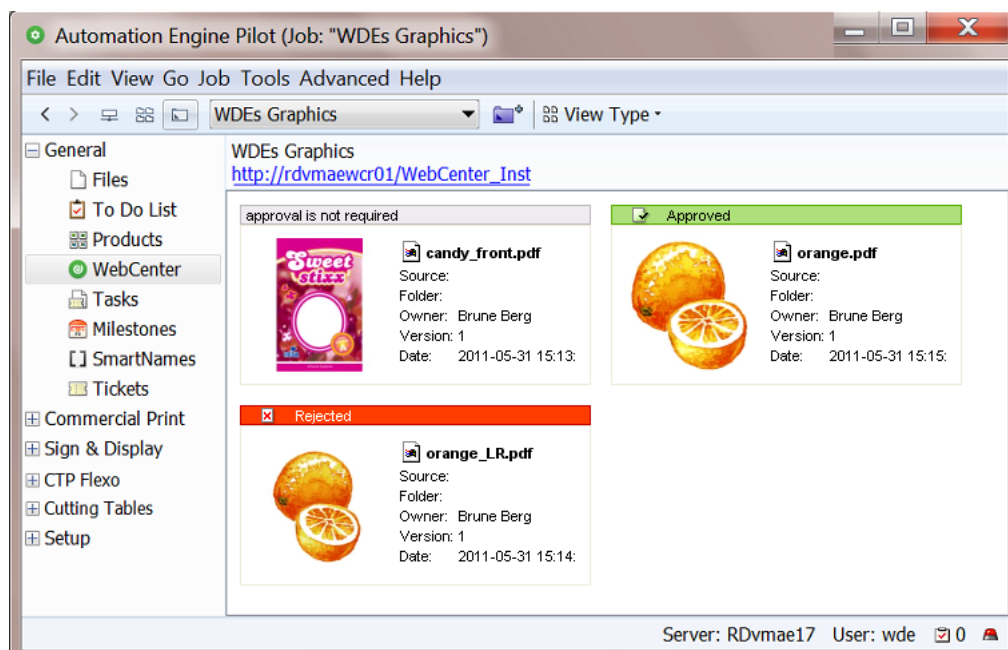


**Attention:**

- First you need to configure connections to WebCenter sites that you want to use in tasks, for example in the *Publish on WebCenter* task. Learn more in *Configuring WebCenter sites*.
- Then, when accessing this WebCenter View for the first time, the View will request you to fill in a default configuration for this View (similar as one of those you added in the Configure tool). Click **Save to Configuration** and click **Show Documents** to check if the connection works.
- When you want to change this configuration later, right-click in an empty area of this view and choose **Configure**.

The View also shows the status of the WebCenter documents.

- When a file arrives on the WebCenter site and approval is required, its status will be **pending**.
- Files that do not require approval are marked with **approval is not required**.
- After a file is approved or rejected in WebCenter, its status automatically updates in this WebCenter View.







**Tip:**

- Press F5 to update the WebCenter view to the latest information.
- Click the blue hyper-link in the top-left corner to open WebCenter in a browser window.

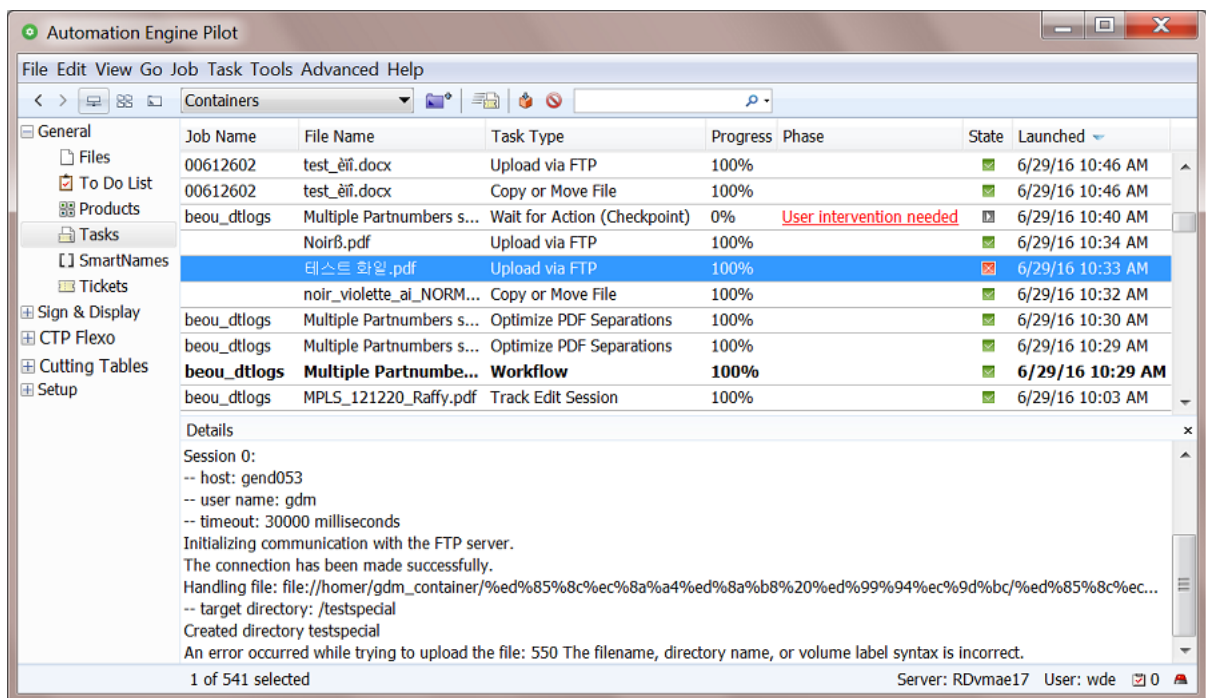
Learn more in the dedicated document on "Commercial Print (Imposition) workflows in Automation Engine". Find it next to the "Complete Manual" of version AE **18.1** on <https://www.esko.com/en/Support/Product?id=Automation%20Engine&ver=18.1>.

## 2.6. The Tasks View

### Concept

The Tasks View allows you to monitor, inspect and relaunch all Automation Engine tasks. Each list entry is a separate task or one step of workflow.

- In **Containers** mode, this view shows all launched tasks and workflows.
- In **Last used Job** mode, this view only shows the tasks and workflows for that job.



**Note:** Several other views also show a list of tasks in a **Tasks** pane at the bottom.

**Don't forget to clean up!**

These launched tasks and their options are kept in a database. Although you can keep many thousands of tasks in this view, when you do not clean up this list, the size of this database will eventually cause slow response and even cause the server software to slow down.

There are manual and automatic tools to clean up this list:

- (Filter), select and press **Delete**.
- Set up a set of automatic [Task Cleanup Rules](#) in the Configure tool.
- Set up a set of automatic rules to **Move Tasks to History**. The **Task History** tool is basically another dedicated database, where you can also search and even relaunch old tasks. Learn more [here](#).
- (Filter), select and press **Move to History**.

Learn more details in [Functionality on items in Tasks View](#) on page 19.

### Sorting, Filtering and Managing Columns

As many other views, this view allows to

- Sort, by clicking on the header of the column you want to sort by.
- Show, hide or change the order of columns by going to **View > Select Columns in 'Tasks'...**



**Note:** To easily hide a column, right-click its header and choose **Hide**.

- Filter, by typing in the search field in the tool bar or by specifying a filter. Learn more in [Using Filters and Creating Smart Views](#) on page 32.

### Details


Select an entry in the **Tasks** list to show its **Details** below. This offers you a summary of the log file with information meant for the user. It is also translated.

It can also contain links to related files. See this example of the details of the 'preflight' task that offers a direct link to the preflight report file:

File Name	Task Type	Progress	Phase	State	Launched
banana.pdf	Trap with PowerTrapper	100%			12/2/14 2:19 PM
banana.pdf	Preflight with PitStop	100%			12/2/14 2:19 PM
banana.pdf	Workflow	100%			12/2/14 2:18 PM

Details x

Task Type: **Preflight with PitStop**

Started on Server: rdvmaedemo 

Started at: 12/2/14 2:19 PM

Finished at: 12/2/14 2:19 PM

Process Time: 0:00:04

---

Input file: file:///rdvmaedemo/ExampleJobContainer/6789/banana.pdf

Number of errors: 6

Error: PDF/A-2u : PDF/A Output Intent is missing

Error: PDF/A-2u : Non- PDF/A-2 compliant compression filters have been found

Error: PDF/A-2u : PDF/A version is not PDF/A-2u


Error: PDF/A-2u : CMYK is used while Output Intent is not defined (106x on page 1)

Error: PDF/A-2u : Halftone is not PDF/X compliant (498x on page 1)

Error: PDF/A-2u : 132 XMP schema descriptions are wrong or not embedded in the metadata streams

Number of warnings: 0

Number of fixed issues: 0

Report of the PitStop engine check (PDF) [report](#) 



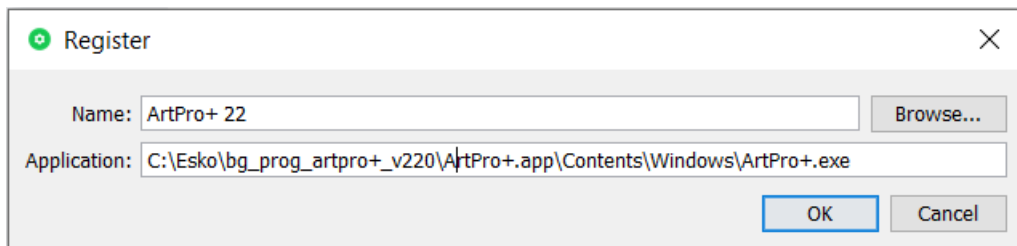
**Note:** In the Tasks View, you see the **Details** in a separate pane. In other views that also show a list of tasks, you can request to see the **Details** in a separate dialog (right-click on a task item and select **Details**).

### 2.6.1. Functionality on items in Tasks View



**Tip:** Most of these functions offer a keyboard shortcut. They are mentioned in their **Task** menu item.

- **Go to Job:** When this task was launched in the context of an Automation Engine Job, this will open that Job in the **Last used Job** mode. Learn more about working with Jobs in the chapter [Jobs](#).
- **Open Task:** This opens the task's dialog so you can check the used parameters. You can also relaunch the task, with or without first changing parameters.
- **Open Output File:** This opens the output file in the default application for that file type on your computer. For example: Adobe Acrobat Reader can be assigned to open PDF files.  
If the task created multiple files, you will be shown a list of files to choose from.
- **Open Output File With:** This allows to choose from applications that you registered by browsing to the locally installed application (on Windows to its `.exe` file). For example, this is how you register an ArtPro+ 22.03 from a Pilot on that same client computer:



Select **Other...** when you want to register a new or a first application.

- **Go to:** This opens the **Files** or **Last used Job** view and there selects the (chosen) **Output** or **Input File**.
- **Hold:** To put a **pending** task on hold.
- **Hold until...:** To put a **pending** task on hold till a specified time.
- **Release:** To release a task that was on **hold**.
- **Cancel:** To cancel a running task. Depending on the task type and its **Phase**, this happens instantly or can take several seconds.



**Note:** When it takes longer (for example a minute), right-click the task again and check if the system now offers you the option to **Force Quit**.

Once the task is successfully cancelled, it will show its new state: ■.

- **Priority:** To change the priority of a **pending** task.
- **Relaunch:** To relaunch the task with the same options. When you want to change any task option, first choose **Open**, make the changes and then click **Launch** in that dialog.
- **Delete:** To delete the selected task(s) from this view. You will be asked to confirm.

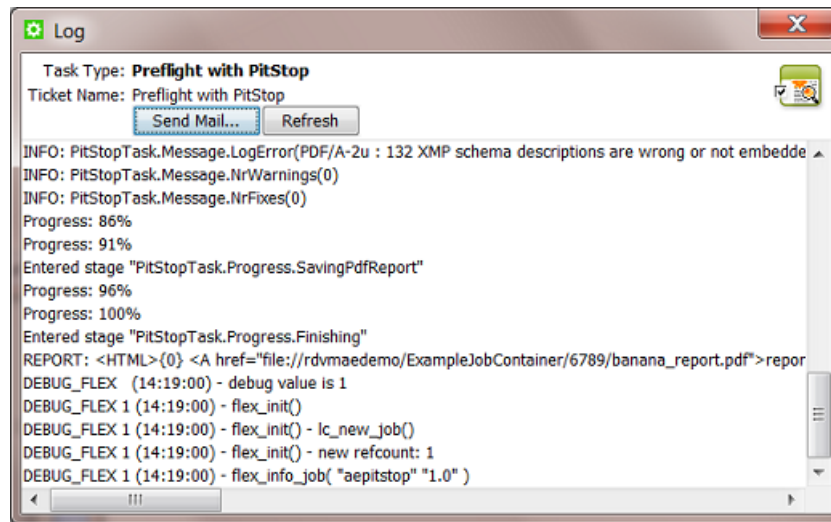
- **Move to History:** To move the selected tasks to the [Task History](#) database. This also deletes it from this **Tasks** view.
- **Annotation:** To see the annotation that was added when launching this task. Or to change or add an annotation even after the task is finished. You can for example use this to explain your colleagues why you used specific parameters or that you already contacted Esko regarding an error in the task.



**Tip:** To easily see if tasks have annotations, switch on the column '**Annotations**'.

- **Log Info:** The **Log** file not only contains the task's **Details** (see also below) but also a lot of detailed technical information. This level of detail can be interesting when searching for the cause of errors. It is mainly meant for Esko support people.
- **Open...** This shows the log information of the selected task in the **Log** dialog. When the task is still running, click **Refresh** to see the latest content.

You can send an E-mail containing this log file and attachments.



- **Open with:** To open the log file in a text editor installed on your client computer. **Register** that application in the same way as you can do for the option '**Open Output File With**'.



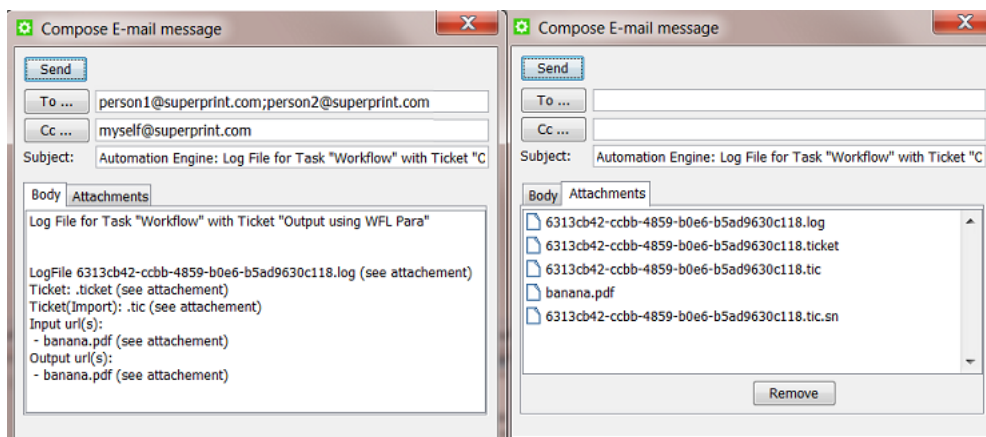
**Note:** This requires the Automation Engine client to have access to the network share 'AutomationEngineLogging' on the Automation Engine server.

- **E-mail...:** The **Compose E-mail message** dialog allows to send this log info in an E-mail, using the E-mail configuration as set up in [Tools -> Configure](#). Fill in the E-mail address(es) and change the **Body** message as you wish. By default all relevant files are already attached (remove any if you want to).



**Note:**

- Multiple addresses in one field need to be separated by a semicolon ( ; ).
- When you here use SmartNames, make sure they resolve to a valid E-mail address.



**Note:** Files with extension `.ticket`, `.tic` and `.sn` are file types that Esko support can read.

- **Group by Workflow:** In a view ordered by the time that the tasks were launched, this function groups all steps of a workflow together, even when other tasks happened in the meantime. The first step of the workflow is then shown in bold. Open the bold item to open the whole workflow in stead of only the selected step.



**Note:** This view is overruled when you click on the header of the column '**Launched**'.

- **Display Related Tasks:** Select this to only see the tasks that are part of the same workflow. To go back to your previous tasks view, click the button '**All Tasks**' or '**Tasks**' that appeared on top of the list.



**Note:** This is useful when you are already using a **Filter** that only shows the tasks where "**Task Level = Main Task**" (only showing the single tasks and the bold initial steps of workflows). You can then for example select the workflow with an 'error' status and ask to see its related tasks.

- **Display All Tasks.** When viewing only the related tasks, use this to see all tasks.

## 2.7. The Milestones View

The *Milestones View* is documented in the dedicated chapter on [Jobs](#).

## 2.8. The SmartNames View

The **SmartNames** View and Tool is documented in the dedicated chapter [SmartNames](#). Find a direct link [here](#).

## 2.9. The Tickets View

### Concept

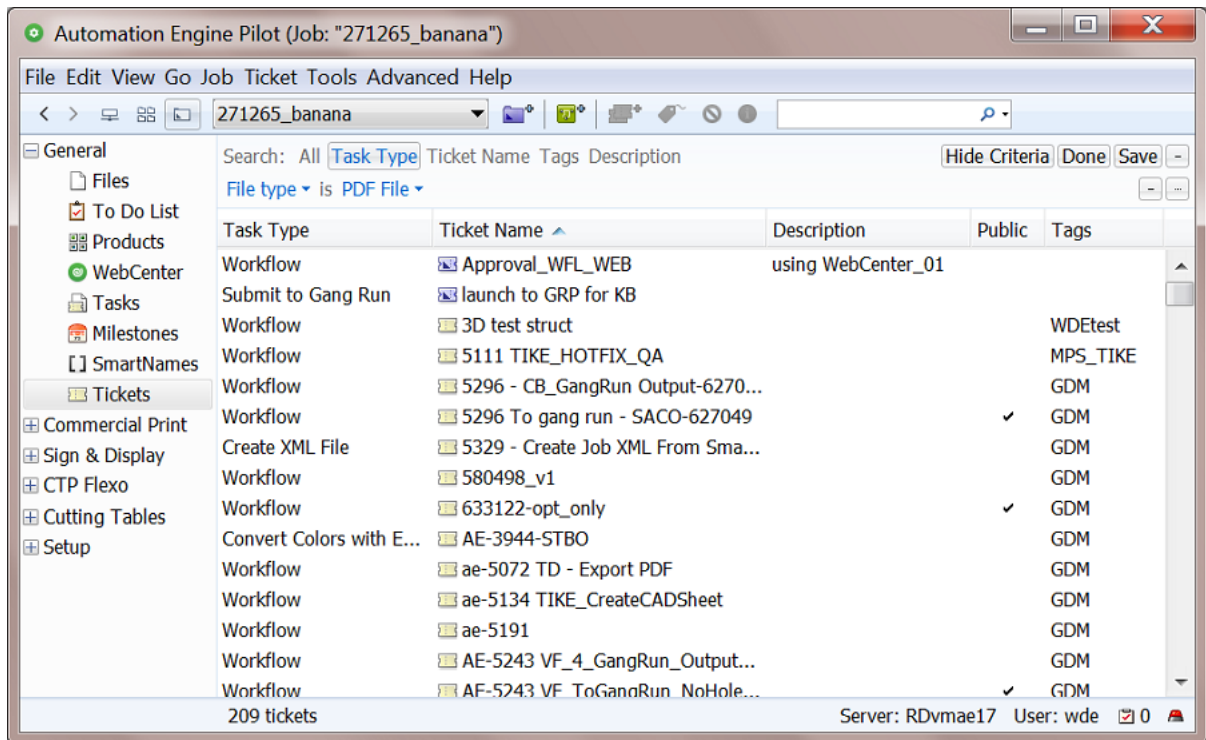
A **Ticket** is a set of **Task** parameters. In this view, you can create, delete, export or import tickets (single tickets or workflow tickets). You can make them **Public** or add **Tags**. Learn more below in [Functionality in Tickets View](#).

- In **Containers** mode, this view shows all **Global Tickets** (yellow icon).
- In **Last used Job** mode, this view shows all **Global** and **Job Tickets** (blue icon) of the selected **Job**.



**Note:** Viewing tickets is also one of the [Access Rights](#) a user needs to have.

An example (filtered to all tickets that support PDF files as input file type):



Task Type	Ticket Name	Description	Public	Tags
Workflow	Approval_WFL_WEB	using WebCenter_01		
Submit to Gang Run	launch to GRP for KB			
Workflow	3D test struct			WDEtest
Workflow	5111 TIKE_HOTFIX_QA			MPS_TIKE
Workflow	5296 - CB_GangRun Output-6270...			GDM
Workflow	5296 To gang run - SACO-627049		✓	GDM
Create XML File	5329 - Create Job XML From Sma...			GDM
Workflow	580498_v1			GDM
Workflow	633122-opt_only		✓	GDM
Convert Colors with E...	AE-3944-STBO			GDM
Workflow	ae-5072 TD - Export PDF			GDM
Workflow	ae-5134 TIKE_CreateCADSheet			GDM
Workflow	ae-5191			GDM
Workflow	AE-5243 VF_4_GangRun_Output...			GDM
Workflow	AF-5243 VF_ToGangRun_NoHole...		✓	GDM

209 tickets Server: RDvmae17 User: wde 0




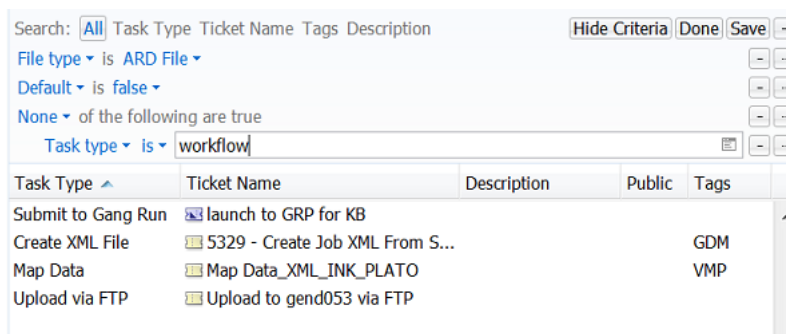
**Note:** Creating tickets and using them to launch tasks is described in [Creating Task Tickets](#).

### Sorting, Filtering and Managing Columns in this View

As many other views, this view allows to

- Sort, by clicking on the header of the column you want to sort by.
- Show, hide or change the order of columns by going to **View > Select Columns in 'Tickets'...**

- Filter, by typing in the search field in the tool bar or by clicking on the arrow in  and specifying a filter. An example:



Learn more in [Using Filters and Creating Smart Views](#) on page 32.

### Locked Tickets

These tickets will show the icon that they are 'locked': 

These tickets are delivered by Esko. They are either

- default tickets: The initial default tickets of every type of task.
- proposed workflow tickets, typically default workflows for a specific kind of production.
  - These also have tags and a description to illustrate what they are for.
  - When you open them, a yellow sticky note in the background reminds you that this is a workflow ticket delivered by Esko.

What does the lock do?

- Locked tickets can not be changed, renamed, overwritten. exported nor deleted.
- Locked tickets can be opened and added to favorites.
- Locked tickets can be duplicated by users that have the access right **"Tickets: create/modify/delete (Job tickets only)"**



**Note:** The filter and search fields also allow to search for tickets where the attribute 'Locked' is 'true' or 'false'.

### Tags

You can add multiple **Tags** to a ticket. This allows to sort and filter based on those tags.

### Preferences on Viewing Tickets

Go to the Pilot's **Edit > Preferences** for [specific options on viewing Tickets](#).

### About the attributes 'Modification Date' and 'Modified By'

When a ticket is opened and saved, the attributes 'Modification Date' and 'Modified By' are updated.

The 'Modification Date' and 'Modified By' attributes stay the same when

- updating the Tags,
- updating the Description,
- making the ticket Public/Private,
- renaming a ticket.

When importing a ticket, the attribute 'Modification Date' is taken from the imported ticket. The attribute 'Modified By' is updated to set the user who imported the ticket.

### 2.9.1. Functionality on items in Tickets View







**Note:** Creating tickets and using them to launch tasks is described in [Creating Task Tickets](#).

#### Tool bar functions



**Note:** Depending on your [access rights](#), you may not be able to create, edit or delete tickets.

- : To create a new workflow ticket. Learn more in the chapter [Workflows](#).
- : To duplicate the selected ticket. Learn more [here](#).
- : To delete the selected ticket(s). You will be asked to confirm.
- : To add a **Tag** or a **Description**, or to make the ticket [Public](#).

#### Functionality via 'Ticket' Menu or via Right-Click

- **Copy from other Job...** (only via the 'Ticket' menu):  
This enables copying a (blue) **Job Ticket** from another **Job** to the current **Job**.
- **Export Ticket(s)...**  
Use this to export tickets so that they can be imported on **another** Automation Engine server.  
Select the ticket(s), click **Export Ticket(s)...** and choose the location and file name of the exported data (a ZIP file). Then transfer that ZIP to the other server and there choose the 'Import Tickets...' function.





**Note:** The resulting ZIP file not only contains the selected ticket(s) but also the following resource files that these tickets refer to and require:

- **SmartNames**
- **Referred** global tickets. Learn more in [The Difference between a Subworkflow and a Referenced Workflow](#).
- **ArtPro Action Lists**
- **PitStop Profiles** and **Action Lists**
- **SmartMark** sets (as .paf files)
- **ReportMaker** templates (as .paf files)
- Tiling templates used in a **Create Tiles (Classic)** ticket
- Templates used in a **Step & Repeat Template based** ticket
- CAD files used in a **Prepare Station (Classic)** ticket
- "Compare with" files used in a **Compare PDF (Classic)** ticket
- Scripts used in a **Run Script** ticket
- Templates used in a **Create Imposition from RunList** ticket
- XML files used in a **Create Design (DesignWizard) (Classic)** ticket
- Rule sets used in a **Check Print Rules (PRC) (Classic)** ticket
- ppd files.



**Attention:** Exporting tickets with these tools has these limitations:

- Some "resource" information is not included, such as **DGC** files and **CMS** related files like **Color Strategies**.
- Workflows that include (blue) **Job Tickets** by reference can not be exported. An error message will appear.
- Plate templates used in a **Import JDF Stripping** ticket are not included.
- The template used in a **Create IMP File (Classic)** ticket is not included.
- In a **Expand Variable Data to PPML File (Classic)** ticket, XML or CSV database files that define a grid are not included.



**Attention:** The Automation Engine software version on the server that imports the ZIP may not be on an older version than the Automation Engine server that created the ZIP.

- **Import Tickets...** (only via the 'Ticket' menu):

Use this to import tickets that were exported from **another** Automation Engine (by using the **Export Ticket(s)...** function on that other server).

Click **Import Tickets...** and select the ZIP file that contains the ticket(s) and their dependant files and click **Import**. The newly imported tickets will show up selected in the Tickets view (when not hidden by filters).



**Note:** Tickets are imported as **Global Tickets** and by default keep their original name.





**Warning:** When dependant files came from a central resources folder (for example SmartMarks sets), they will be written on the central resources folder of the current server.

Other files (for example **ReportMaker** templates or ArtPro mark files referred from an **ArtPro Action List**) will be written in the root of the "ExampleJobContainer", in a folder named after the folder they originally came from. This is why, when importing tickets, the "ExampleJobContainer" must exist and allow writing.



**Note:** If the import would overwrite any files, you will be asked to confirm. Click **OK** to accept that the imported files overwrite the old ones.

- **Open:** To open the ticket. Alternatively, double click the ticket.
- **Make Public:** A public ticket is visible to all users. Alternatively, set this attribute the moment you save a ticket. Learn more in [Public Tickets](#).
- **Duplicate...** (or ): To copy a ticket and save it with a different name, without opening the ticket.
- **Delete** (or ): To delete selected tickets. You will be asked to confirm.



**Warning:** Make sure that the ticket is not used in an Access Point or somewhere in the Configure tool or as a referred ticket in a workflow ticket.



**Note:** Default tickets (any locked ticket) can not be deleted.

- **Rename:** To change the name of the selected ticket.
- **Tags...:** To assign one or multiple tags to the selected tickets. In the dialog, click in the input field to see a drop-down list with existing tags to choose from. Type in the input field to add new ones.
- **Add to Favorites:** To add the selected tickets to the list of **Favorite Tickets** of this user. Learn more in [Creating Favorite Tickets](#).

## 2.10. The Jobs View

The [Jobs View](#) shows a list of Jobs. It is documented in the dedicated chapter on [Jobs](#).



**Note:** The view '**Inactive Jobs**' is only available for AE SaaS setups. Learn more in [AE SaaS: When your AE is in a Data Center](#).

## 3. Commercial Print Views

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These views serve a workflow dedicated to page workflows (approval, imposition, output).



**Note:** These views are only visible in **Last used Job** mode.

Learn more in the dedicated document on "Commercial Print (Imposition) workflows in Automation Engine". Find it next to the "Complete Manual" of version AE **18.1** on <https://www.esko.com/en/Support/Product?id=Automation%20Engine&ver=18.1>.

## 4. Sign & Display Views

---

These views serve an output workflow that is typically used at signage or display or large format printers.

### 4.1. The Gang Run Printing View

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The [The Gang Run Printing View](#) is documented in the chapter dedicated to [Sign, Display, Large Format Workflow](#).

### 4.2. The Orders View

---

The [Orders View](#) is documented in the chapter dedicated to [Sign, Display, Large Format Workflow](#).

It is used to track production orders that come out of a Gang Run Substrate Queue and are then cut on a Kongsberg table.

## 5. Flexo Views

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These views are described in the dedicated chapter *Flexo CTP Device Workflow*. Find a direct link [here](#).

## 6. Cutting Tables Views

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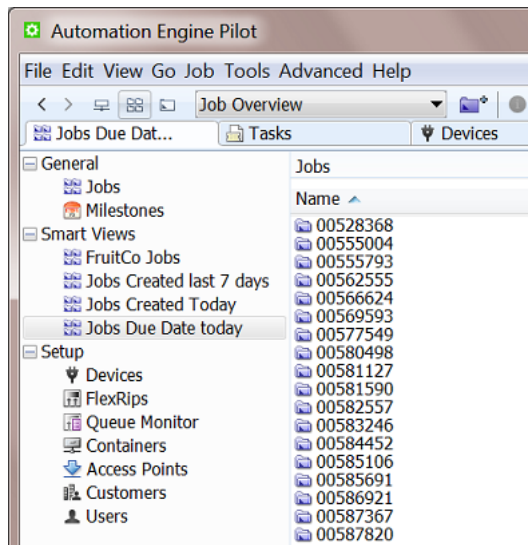
These views are all described in the dedicated chapter [Kongsberg Production Workflow](#). Find a direct link [here](#).

# 7. Smart Views

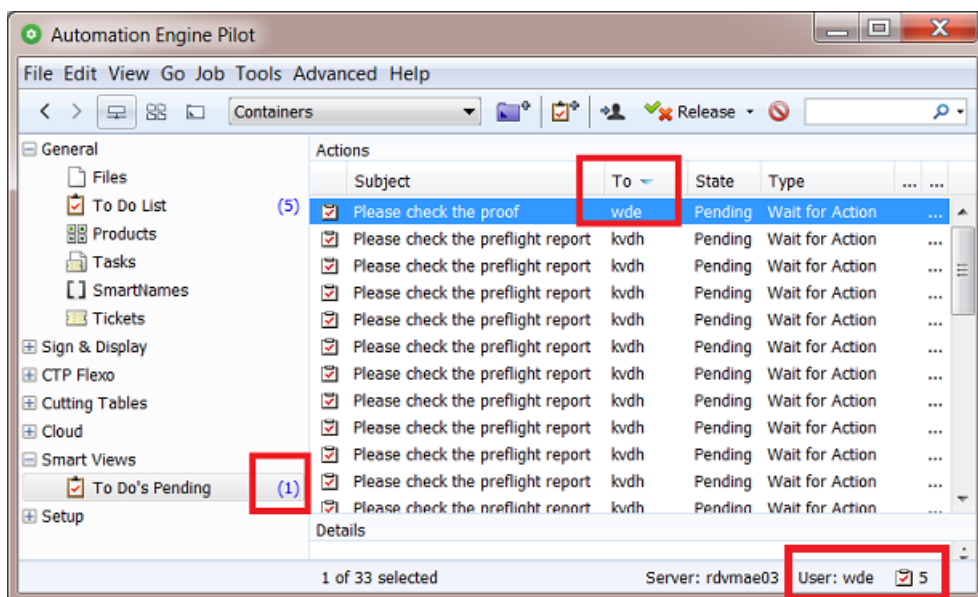
**Smart Views** are custom views based on a filter that you saved.

You can create Smart Views for all View types: lists of Tickets, Tasks, Jobs, Products, To-Dos, Milestones, etc. Smart Views also make it easier to navigate between views.

Here's an example in Job Overview mode:



Below example shows a Smart View that only shows the To-Dos that are 'pending'. The number indicates how many items are for this user. Below right we see which user is logged in and we see the total of To-Dos for this user (not just the ones that are pending):





**Tip:** Double click the name of a Smart View to see or (temporarily) change it's filter settings.

How to create a Smart View is explained below.


To remove a Smart View, right-click it and choose **Remove from Views Bar**.

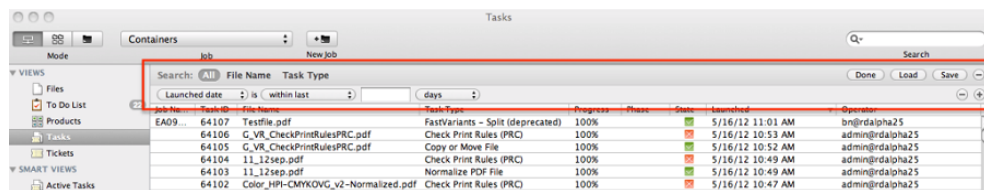
## 7.1. Using Filters and Creating Smart Views

A Smart View is filter that you save as a custom view.


We will use an example to illustrate this. Follow these steps to create a Smart View that will filter all tasks based on these criteria:

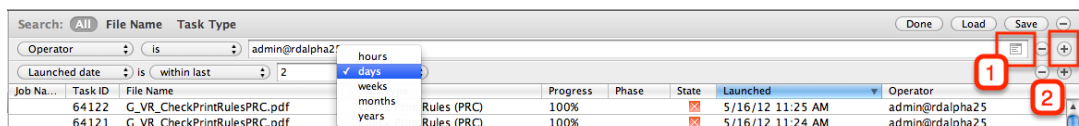
- Launched by a specific operator,
- During the past two days,
- and ended with a status **Failed**.

1. In the Pilot, choose the **Containers** mode and go to the **Tasks** View.
2. Click on the arrow in  or press **Ctrl/Cmd + F** to open the **Search** bar and see the extra filter options that can help you to refine your search:



3. Add these filters:

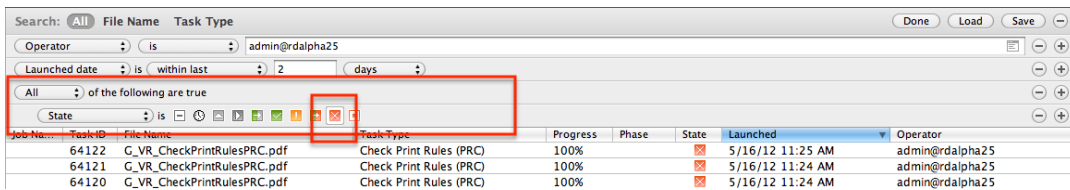
- Set the first filter to **Operator + is +**<the operator whose tasks you want to see>. You can click  to browse a list of operators (see (1) in the image below).
- Open a second filter line by clicking the **+** button in the first filter line (see (2) in below image).
- Set these parameters for this second filter: **"Launched date is "within last" 2 "days"**.



4. Click the **+** sign in the second filter line while holding down the **Alt** key. It changes into a **...** sign and allows you to add more criteria to that *same* filter line.
5. Add these extra filters:

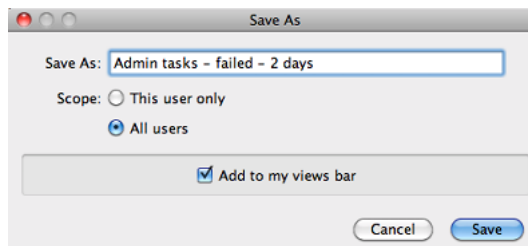
- **"All" of the following are true**
- **"State" is "Failed"**.





6. Click **Save** to save this filter with an appropriate name.

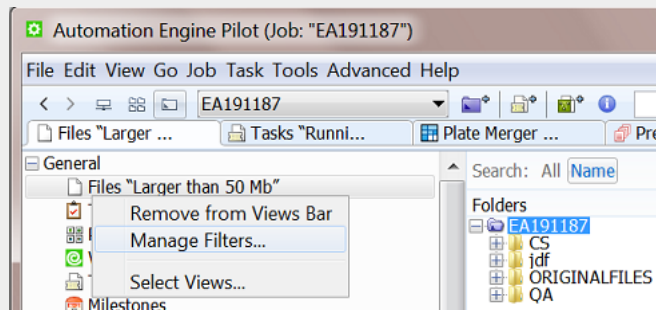
- **Scope:** Choose if this filter will be visible to **All users** or to **This user only**.
- Select "**Add to my views bar**" to add this filtered view to the **Views** pane, in the category **Smart Views**.



**Note:** If you don't select this, you only save it as a filter that will be available to **Load** again later.



**Note:** Right click a **View** and choose **Manage Filters...** to add or change saved filters.



## 8. Setup Views

These views offer tools to set up your Automation Engine server.

### 8.1. Devices

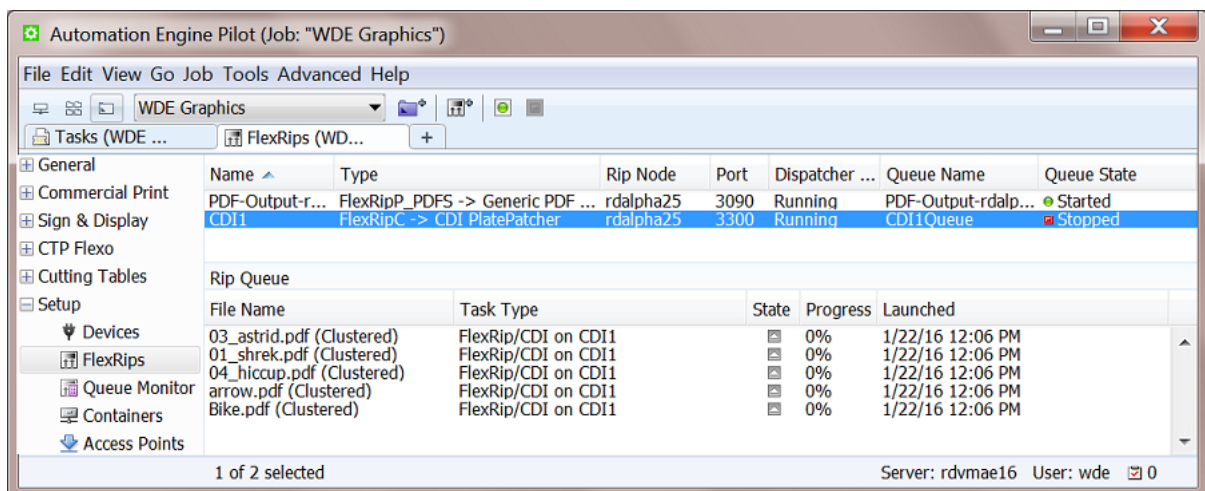
The **Devices** view shows configured output devices, their status and their workload. You can add these device types:

- **CDI Imagers.**  
Learn more in the chapter [Flexo CTP Workflow](#). Find a direct link to the page on CDI devices [here](#).
- **Kongsberg Cutting tables.**  
Learn more in the chapter [Kongsberg Production Workflow](#). Find a direct link to the page on Kongsberg devices [here](#).
- **Esko DFE and HP Production Pro.** Learn more in [Devices \(Digital Presses\)](#).

### 8.2. FlexRips

The **FlexRips** view and tool gives an overview of the activity on your Esko FlexRips.

It shows the FlexRip's **Name**, **Type**, **Rip Node** (PC) name, its **Port** and the state of the **Dispatcher**. The **Queue Name** is the channel within Automation Engine that communicates with the Dispatcher (this name is part of how you configured this FlexRip in the [Configure tool](#)).



The **RIP Queue** pane shows the queued RIP'ing jobs of the above selected RIP. Go to **View > Select Columns in 'Rip queue'...** to select the information that you want to see here.

When you stop a **RIP Queue** (⊞), you can still send files to that FlexRip but the communication will be queued up within Automation Engine. This can for example be useful when the Dispatcher is located

on another computer that you need to shutdown or reboot. To avoid any communication problems between Automation Engine and that Dispatcher, you can stop this queue, do the intervention on the Dispatcher's computer, and then start the queue again (🟢) when you are sure that the Dispatcher is back up and running.

Click 🛠️ for quick access to the [Configure tool](#) to manage your FlexRip configurations.

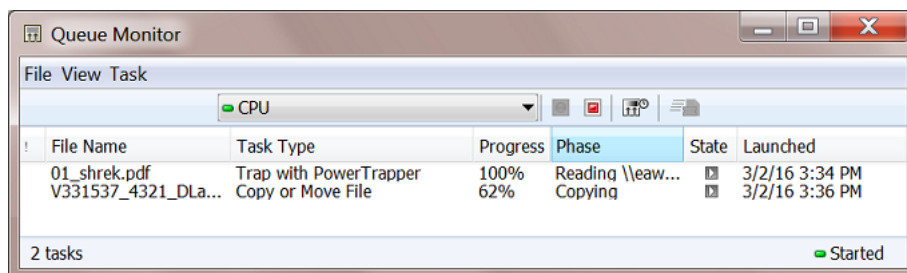
## 8.3. Queue Monitor

### Concept

The **Queue Monitor** shows Automation Engine's processing queues and their content. All tasks are executed within one of these queues.

Automation Engine uses many different queues to process its tasks and can grant priority to some types of activity. For example lighter tasks, that only take a few seconds, always get priority over heavy calculations that typically take many minutes. This is for example why a **Manage Milestone** task will not have to wait for a **Trapping** task to finish.

Which types of tasks are executed on which processing queue is defined internally within the Automation Engine software. Most tasks are executed on the **'CPU'** queue. As a user you can not choose in which queue your task will be executed, but you can choose its priority within that queue (a standard option when launching the task).



### Queue Types

- **ADMIN** queue. Used for tasks triggered by events, for example the automatic actions [configured in the Plate Merger's configuration](#).
- **Archive & Restore** queue. Used for such tasks.
- **CPU** queue. The main queue, used for most tasks. It offers the amount of [processing channels](#) as referred to in the [AE Server Admin web pages](#). The more processing channels your Automation Engine server is licensed for, the more tasks it can simultaneously process on this queue ("concurrent running tasks").
- **CPU\_GV** queue. Used to run the [GlobalVision Inspection tasks](#).
- **CPU\_HEAVY** queue. Rarely used. If so, for heavy calculations and pre-RIP'ing processes.



**Note:** Since v16.1, this queue is no longer shown in the [AE Server Admin web pages](#).




- **CPU\_LIGHT** queue. Used for tasks that are light to process.

- For example these tasks: **Manage Milestone, Link Product to Job, Run Script, Wait for Action (Checkpoint), Track Edit Session, Apply Creep, Change Imposition Layout, Create RunList, Create PDF File from RunList, Add Marks to Imposition, Submit to CDI**, etc.
- Also the **FlexRip** pre-RIP tasks where the option **'Resolve Transparencies'** was not selected.
- **FTP** queue. Used for *upload tasks to (S)FTP or cloud storage sites*.
- **FlexRip** queues. These are named after the FlexRip and can also be controlled using the *FlexRips View or Tool*.
- **VDP** queue. Used for expansion tasks in VDP workflows.
- **VIEW\_ACC** queue. In older versions, this one was used to prepare view data



**Warning:** When you open several **Queue Monitors** as a Tool (to monitor multiple queues), you might reach your maximum of licenses for client connections to the server and so get related "Exception" errors. As an alternative, consider opening several tab's in the same Pilot.

### Main Functionality

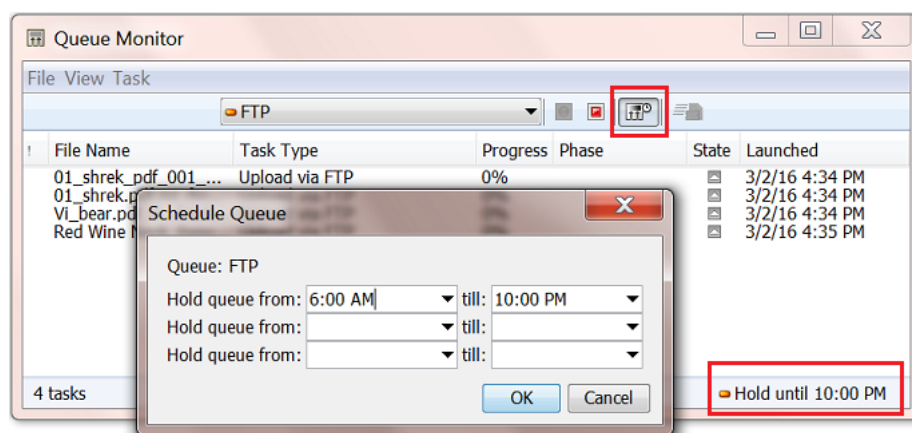
Use   to start or stop a queue. Use  to schedule when a queue can be active (see an example below).

A queue's task entries can be opened, relaunched, etc. Right-click to discover options identical to those in a regular Tasks view.

### When is this Tool Useful?

This tool is mostly used by Esko support staff to diagnose CPU load issues. But there are cases where it can also be useful for you:

- The main practical reason to stop one or multiple queues is to help with a controlled shutdown of the server. When queues are stopped, the tasks that would still be launched right before your server intervention then do not risk to fail but stay in this queue "waiting". When you then start the queue again after the intervention, the tasks in that queue will start.
- Some customers only want to start the FTP tasks at night for example. In stead of having to set these "hold-until" times when launching the task, you could for example schedule the FTP queue to be active between 8 PM and 6 AM:



## 8.4. Containers

A **Container** is a network share that contains data that Automation Engine can work with. These containers can be located on your Automation Engine server or on another computer in the same LAN.

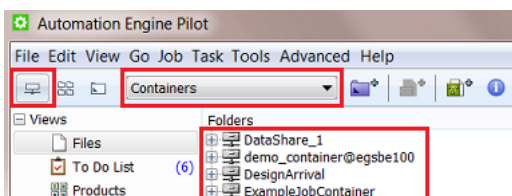


**Attention:** Also when your Automation Engine server is a SaaS setup, its Containers also need to be in the network of that hosting company. Learn more in the chapter [AE SaaS: When your AE is in a Data Center](#).

You can create a container by using (part of) an existing network share or you can have Automation Engine itself create the network share while it creates the container.

The installation of Automation Engine by default creates an **ExampleJobContainer** on the disk drive where you installed the server software.

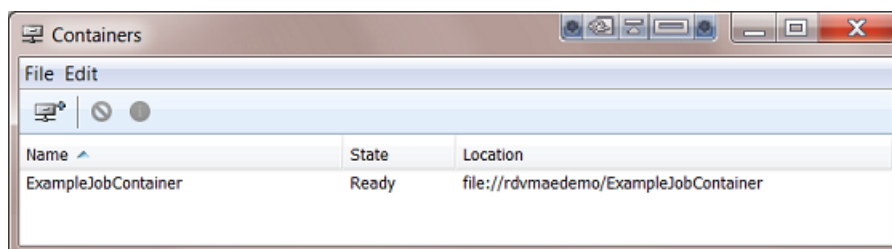
You can add many more containers. You can see and browse through them in the Pilot's **Containers** mode. An example:



### 8.4.1. Creating a Container

Follow these steps to create a container:

1. Open the **Containers** view or go to **Tools > Containers** to open it as a separate window.



2. Click or go to **File > New**.
3. In the **Create Container Wizard**, click **Next** and select either:
  - **Local Folder on the Server** to create a container on your Automation Engine server.
  - **Existing Shared Folder** to use an existing network share.
4. Click **Next**.

5. If you selected **Local Folder on the Server**:
  - a) Select the wanted disk drive and click **Next**.



**Tip:** Select a drive to see which containers are already in there.

- b) Enter a name for your new container and click **Next**.
  - c) Click **Next** to create another container, or **Finish** to leave the wizard.
6. If you selected **Existing Shared Folder**:
  - a) Enter the **Computer Name** of the computer where the shared folder is located, or use the **Browse...** button to select that computer in your network. Then click **Next**.
  - b) The wizard now shows a list of all available shares on that computer. Select the share you want to use as a container and click **Next**.




**Attention:** Shared folders are not shown when their computer does not recognize the user that was chosen to be the **System Account** for Automation Engine. By default this is the local user **BGSYSTEM**, but you might have changed this (using the [System Account page in the Server Admin web pages](#)).

Your container is now created.

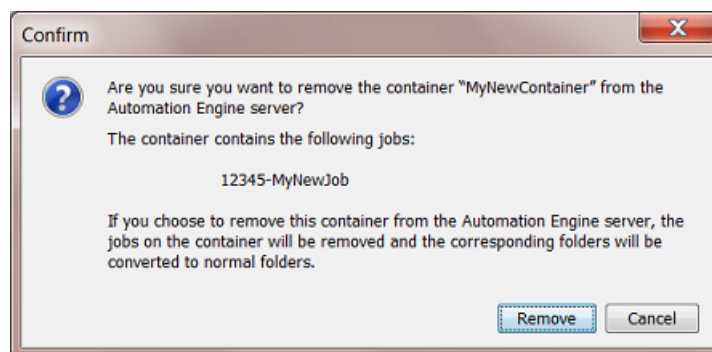
- c) Click **Next** to create another container, or **Finish** to leave the wizard.

## 8.4.2. Removing a Container

Removing a container makes its contents invisible to your Automation Engine server. This does not delete any data inside that share.

To remove a container, select it and click  or press 'Delete' or use **File > Remove**. You will be asked to confirm.

- If there are active [Jobs](#) in that container, they will be listed in the confirmation dialog. If you remove the container anyway, the Jobs are removed from the database and their blue **Job Folders** will become normal yellow folders.



Learn more about removing Jobs [here](#).

- If there are active *Products* in the container, you can not remove that container.

### 8.4.3. Relocating a Container

When a container goes offline, this will be shown in the Pilot's **Container** mode and in the **Containers** View and Tool:

Name	State	Location
AutomationEngineTmpFolder@rdvmaed...	Ready	file://rdvmaedemo/AutomationEngineTmpFolder
DataShare_1	Offline	file://rdvmaedemo/DataShare_1
DesignArrival	Ready	file://rdvmaedemo/DesignArrival

Here are some possible reasons:

- (Temporary) network problems.
- The **Location** is no longer valid because the name of the computer or the share changed. For example the disk was filling up and you decided to move the data to another computer with another name and then remove the old share.
- The disk that hosts this container crashed. When you have a backup of that disk, you can put that data back on another disk or computer.

For whatever reason you need to move data to another network place, you can use the **Relocate** feature to inform Automation Engine that the container data is now on another **Location**.



**Attention:** Relocating does not move any data. It only adapts the Automation Engine database by informing it on the new location.

Follow these steps to relocate a container:

1. Select the offline container and right-click or go to **Edit > Relocate**.
2. Enter the name of the computer that you want to relocate your container on, or browse to it.
3. In the **Select the share** dialog, select the share you want to relocate your container on. Click **OK**.  
Your container is now relocated on the share you selected (and has the name of the share).

### 8.4.4. Refreshing the Containers' List

By default, each container's availability is automatically checked every 5 minutes. Sometimes, you want to check it manually, for example after you solved a network problem. Then choose one of these methods to refresh the connection:

- Go to **Edit > Rescan**.
- Press **Cmd + R** (Mac) or **Ctrl + R** (Windows).

- In the Pilot's **Files** view, when using the **Container** mode, press **F5** (Windows).

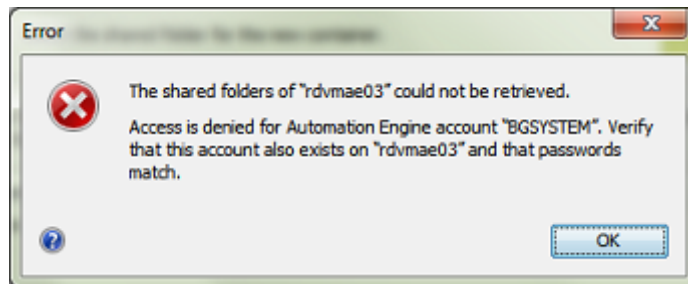
### 8.4.5. Troubleshooting Containers

These messages explain what is wrong with (the creation of) the container:

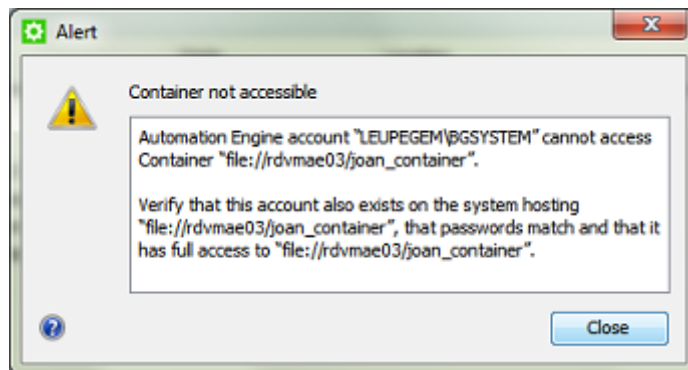


**Note:** In below examples, the **System Account** for Automation Engine is still the default user BGSYSTEM. This can be a different one if you changed it [here](#).

- Creating a new container fails because the passwords for the user BGSYSTEM don't match:



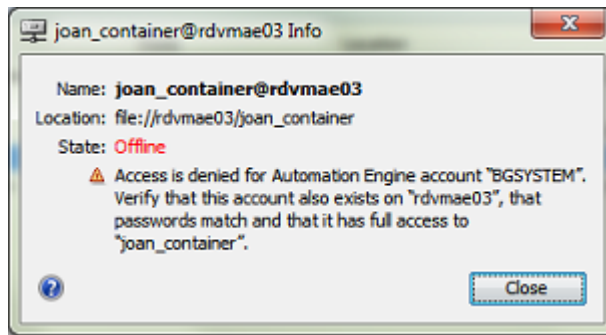
- An **Alert** pops up: A container is no longer accessible. It could be off-line or, as in below example, because the user BGSYSTEM doesn't have full access anymore:



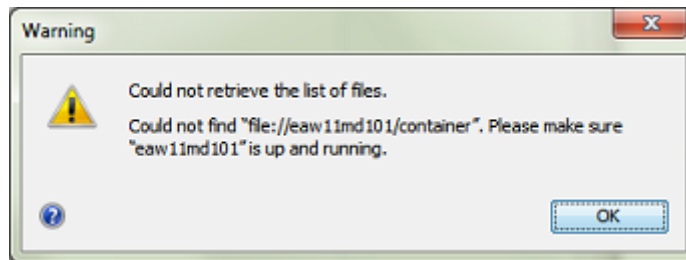
**Note:** When you close this message, the alert is still present in the list of Alerts. This list opens when you click the 🚨 icon in the bottom bar of the Pilot. Learn more in [Alerts](#).

- A container is offline. Select it, right-click and choose **Info** to learn why it is offline:





- In the Pilot **Files** view, when the host of the container is down, the warning "Could not retrieve the list of files" appears:



## 8.5. Access Points

---

The **Access Points** View and tool is described in the chapter *Integrating with External Systems*. Find a direct link [here](#).

## 8.6. Customers

---

### Concept

This tool allows you to manage the list of customers on Automation Engine.

A customer minimally has an **ID** and a **Name**. You can define many more fields. Go to **View > Columns** to also show those fields as columns.

ID	Customer Name	Contact 1	Job Folder	Product Folder
001	HappyMeds	Dr. Pill	file://eaw11dl306/WDE-AE-Pharma-Data/[Order ID]	
0010	GlossyWorld	Fred Fabulous		
0012	BelgianBrew	Barry Beard		
0013	Esko	Demo Center Esko Gent, BE		
0014	TraffSign	Theresa Signalski		
004	SuperPrint	Sergio Perfecto		

Ideally, you do not type in this customer data but get it automatically via an integration with your business system. Learn more about such integrations in [Integrating with External Systems](#).

### Fields

Many of these fields are used [when you create a Job, in its tab 'Customers'](#).

Most fields can be used as a SmartName. Learn more in the chapter on [SmartNames](#).

- **Contacts, E-mail** and **Address** fields.
- **Job Folder**. This field can help to automatically create job folders for that customer under the folder that you specify here. Learn more in [Smart Job Location](#).



**Note:** Make sure the path you specify here ends with a SmartName already.

- **Product Folder**. When new Products are created automatically for this customer, their Data Zone will be created under this folder and a dummy Product file can also be created there. Learn more in [Smart Product Location](#).
- **Upload Folder** is useful to help instruct Access Points where to upload the data to. Learn more, for example, in [upload options of an FTP Access Point](#).

## 8.7. Order Materials

An **Order Material** is the material that your customer wants a **Product** to be printed on. It's the name of the material as your customer understands it and probably also the name he used when he was ordering the production job. This name is the name of that material as it is mentioned on the job order.



**Note:** It is possible that you internally use another name for this material, but in Automation Engine (the browser client used in the QuickStart deployment), we refer to that one as the (real) 'Print Material'.

This view shows the database of order materials on this Automation Engine. It shows you their **Name**, **Thickness**, **Weight** and **Description**.

This list shows the order materials that you can add as an attribute to a 'Product'.

In some [MIS integrations](#), where Products are created automatically, also these order materials can be created automatically and so also show up in this view. Learn more in [The Add to Products task](#).



**Note:** Users of the Automation Engine browser client (QuickStart deployment) also manage this same database of order materials. They do this through their browser interface.



**Note:** In this view, the filter can not be saved as a Smart View.



**Note:** This view only shows up when you have the license to use the 'Products' tool.

## 9. Accounts Views

---

These views serve to manage the user accounts that can sign in to Automation Engine.

First some important background info on [Authentication and Authorization within AE](#).

### 9.1. Authentication and Authorization within AE

---

#### Authentication

- **Concept**

- Authentication is about **validating users** to be who they claim they are, at the time when they attempt to sign in to a system.
- The typical primary authentication factor is checking the combination of a user (account) name and a password.
- Some systems require two- or even multi-factor authentication (MFA), involving more technologies to further verify the identity of the user (for example one-time PINs, phone ring-back, authentication apps, biometric checks).
- Systems can validate their own internal users or can delegate this authentication to an external application. These dedicated applications are called Identity Providers (IdP).

- **Within Automation Engine**

- When Automation Engine is first installed, authentication comes with checking user name and password, a basic internal authentication.
- Automation Engine can be configured to delegate this authentication to third party services, which in their turn could be configured to use one or more (other) authentication factors.

Learn more in [Users View](#) on page 45.



**Note:** Learn more technical details in the chapter [Pre Install IT Requirements](#), in the section on [Users and Groups](#).

#### Authorization

- **Concept**

- Authorization is about **granting permissions** to access specific functions or resources. Once signed in, what is this user allowed to do?

- **Within Automation Engine**

- To a user of Automation Engine, authorization means receiving the permission to
  - qualify as an administrative user or not
  - have specific **User Access Rights** (typically relating to functionality within the Pilot).

## 9.2. Users View

### Concept

Everything that happens in Automation Engine is done by a specific user. This user can be a person or a service.

Automation Engine does not come with default users.

At the initial installation of Automation Engine, you are asked to create an administrative user to sign in for the first time, after which you can use that one to create others.

### View

Only Automation Engine Administrator users can see this view.

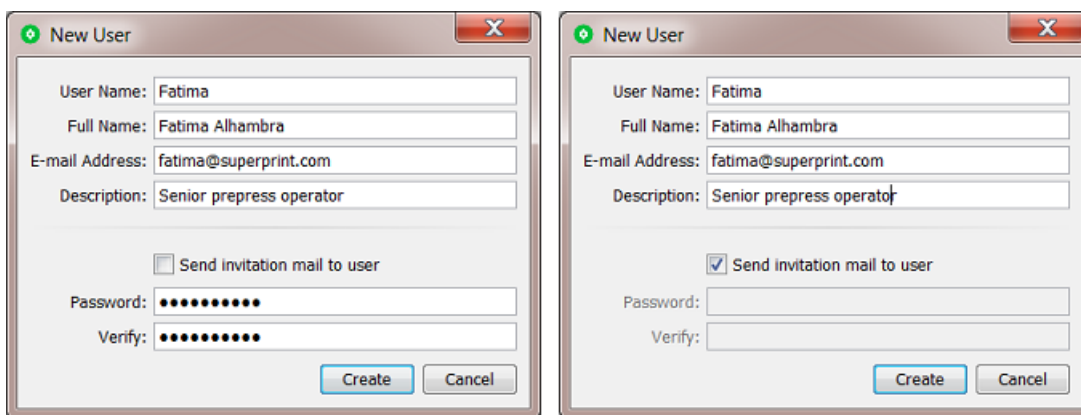
Automation Engine supports both **Internal** users and users from **external Providers**. Learn more details in the chapter *IT Requirements*, on the page *Old and New User Model - Before and Since v20*.

### Creating a New Internal User

After an initial install of Automation Engine server software, the system asks to create an initial administrative user. Using that one, you can then start creating others.

Right-click anywhere in the view and select **New User** (or click  in the top bar).

This tool creates an **Automation Engine internal user**.



- **User Name:** (required). The name is not case sensitive.
- **Full Name:** This full name can be changed later, which is not possible for the actual user name.
- **E-mail Address:** Specify this user's e-mail address.



**Note:** When editing an LDAP user, you cannot change his e-mail address.

- **Description:** You can add some details, like the user's function, working hours, phone number, etc.
- **Send invitation e-mail to user:**
  - When **selected**, the new user will receive an e-mail with a link to set his own password.



**Note:** Make sure your AE server already has been *configured* to use your e-mail server.

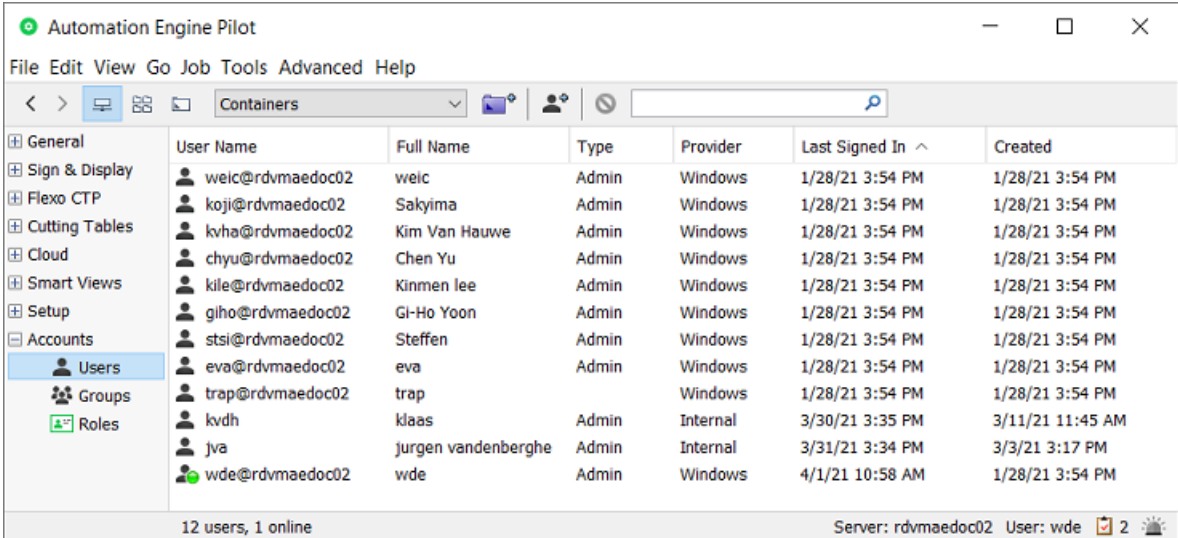
- When **not selected**, you, as admin user, need to set this user's password here.
- **Password:** Type the password this new user must use to sign in.



**Important:** In the *AE Server CONFIG web page*, your IT staff can choose to enforce a standard set of password complexity rules. When your password does not comply with these rules, you will get a specific error message.

- **Verify:** If you specified a password above, type it again here.

### Columns in the View



User Name	Full Name	Type	Provider	Last Signed In	Created
weic@rdvmaedoc02	weic	Admin	Windows	1/28/21 3:54 PM	1/28/21 3:54 PM
koji@rdvmaedoc02	Sakyima	Admin	Windows	1/28/21 3:54 PM	1/28/21 3:54 PM
kvha@rdvmaedoc02	Kim Van Hauwe	Admin	Windows	1/28/21 3:54 PM	1/28/21 3:54 PM
chyu@rdvmaedoc02	Chen Yu	Admin	Windows	1/28/21 3:54 PM	1/28/21 3:54 PM
kile@rdvmaedoc02	Kinmen lee	Admin	Windows	1/28/21 3:54 PM	1/28/21 3:54 PM
giho@rdvmaedoc02	Gi-Ho Yoon	Admin	Windows	1/28/21 3:54 PM	1/28/21 3:54 PM
stsi@rdvmaedoc02	Steffen	Admin	Windows	1/28/21 3:54 PM	1/28/21 3:54 PM
eva@rdvmaedoc02	eva	Admin	Windows	1/28/21 3:54 PM	1/28/21 3:54 PM
trap@rdvmaedoc02	trap	Admin	Windows	1/28/21 3:54 PM	1/28/21 3:54 PM
kvdh	klaas	Admin	Internal	3/30/21 3:35 PM	3/11/21 11:45 AM
jva	Jurgen vandenbergh	Admin	Internal	3/31/21 3:34 PM	3/3/21 3:17 PM
wde@rdvmaedoc02	wde	Admin	Windows	4/1/21 10:58 AM	1/28/21 3:54 PM



**Note:** The search field filters on name, full name, e-mail and description.

- **User Name:** Name used to sign in.
- **Full Name:** Descriptive name.
- **Type:** Admin or not (empty).
- **Provider:**
  - **Internal:** User is provided by Automation Engine (created via this Users view in Automation Engine v20.0 or later).
  - **LDAP:** User is provided by LDAP. Since v21,07, it is possible to define an external LDAP identity provider, which can take over the granting of access for Windows domain users.



**Important:** An LDAP user only appears in this list after its first successful sign-in.



**Important:** LDAP user accounts are not supported for an Automation Engine server in a SaaS setup.

Automation Engine group membership and role attribution can be controlled by this type of provider (typically a Windows domain controller), without the need to adapt local Windows groups on the Automation Engine system.

Existing users, based on domain Windows users, can be migrated to LDAP users too.

- **Windows:** A user from before v20.0 that was converted when upgrading to v20.0.

You can migrate users to other providers. Learn more in [Users and Groups](#).

- **Last Signed In:** When this user last signed in.
- **Description:** Description of this user.
- **E-mail:** The e-mail address for this user.
- **Created:** When this user was created.

### Other Functionality

Right-click anywhere in the Users view, or first select one or multiple users and choose from below functionality. A few functions are also available via buttons in the top bar.

- **Edit Views...:** Define which Views the selected user will see when he signs in to the Pilot.

When editing the views of an other administrator user, be aware that any administrator user is always allowed to see all views. So he can overrule your settings and switch any of them on again.

- **Edit Access Rights...:**

You can assign specific **access rights** to a user or to a group.


A typical example is to reserve configuration features only for selected users. You can for example fine-tune roles by allowing some users to only *use* tickets but not being able to *change* them. Learn more on the page about the [Roles View](#).

Administrator users always have all user access rights. You can not take any rights away.

Only Administrator users can change access rights of normal users.

Learn more in [Access Rights](#) on page 48.

- **Edit Red Alerts...:**

When an important event is detected by the Automation Engine server, a **Red Alert** is broadcast to the users. This can pop up as message box and these alerts are indicated in the bottom right corner of the Pilot with the  icon.

When you are logged in as an administrator user, you can choose which type of alerts you yourself or another user should be informed about.

Learn more in [Alerts](#).

- **Show Connections...:** This shows from where and with what application the selected user is currently connected with (signed in to) the server. A user can have several connections.

Possible connections are not only from connected client software (Pilot, Shuttle, browser client), but also from Esko editors (ArtPro, ArtPro+, PackEdge, Plato, DeskPack, etc.)


This dialog is not live. Use the **Refresh** button to manually refresh this list of connections.

The list is empty when the user is not signed in.

- **Show All Connections...:** This shows the connections from all users. A search field helps to filter the list.

- **Copy / Paste:** This tool enables to copy / paste attributes from one user to another: their Favorites, Views, Smart Views, or Red Alerts.

First select the source user and choose **Copy**, then select the target user(s) and, at the moment of **Paste**, select which type of attributes you want to paste to the currently selected user(s). Select **Other** to indicate multiple types.

- **Delete** . You need the proper access right and you will be asked to confirm.
- **Migrate Users...**: You can migrate users of the Provider 'Windows' to either the provider **Internal** or **LDAP**. Learn more in [Migrating Users](#).
- **Change Password...**:

An internal user can change his own password. Internal administrator users can change the password of any other internal user.

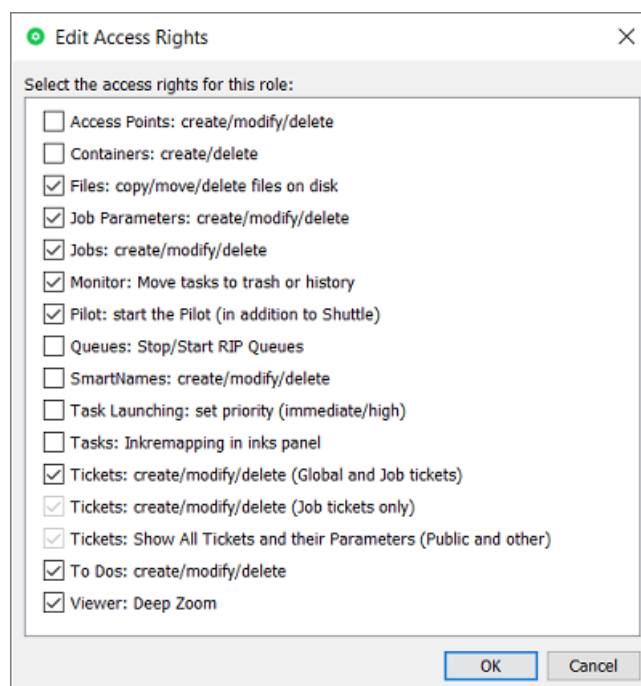


- **Edit User...**: In the view, double click a user to see or change his attributes.

## 9.2.1. Access Rights

### Concept

You can assign specific **Access Rights** to a specific User or to Role..





In this dialog, when access rights were granted to the user by being part of a role or a group, they will be selected but disabled.

In above screenshot, an administrator added some extra rights.

**Remove All** (enabled when dialog is opened from users list) will remove all access rights that were given specifically to this user but not those that were granted by being part of a role or a group.



**Note:** Managing these roles will be easier when you do this per user group. A user automatically gets all rights from the group he belongs to.

Some general rules:

- Administrator users always have all user access rights.
- Only Administrator users can change access rights of normal users.

This access right:	is about ...
<b>Access Points: create / modify / delete</b>	managing <a href="#">Access Points</a> .
<b>Containers: create / delete</b>	<a href="#">creation</a> and <a href="#">deletion</a> of containers.
<b>Files: copy / move / delete files on disk</b>	what you can do with files using the Pilot. Note that these users can still use the <a href="#">Copy or Move File</a> and <a href="#">Delete File</a> tasks.
<b>Job Parameters: create / modify / delete</b>	managing the tab 'Parameters' in a Job setup. Learn more in <a href="#">Creating and Modifying a Custom Job Parameter</a> .
<b>Jobs: create / modify / delete</b>	managing Jobs. Learn more in <a href="#">Creating a Job</a> and <a href="#">deleting Jobs</a> .
<b>Monitor: move tasks to trash or history</b>	removing tasks from the Tasks list. See <a href="#">Tasks list</a> and <a href="#">Task History</a> on page 55.
<b>Pilot : Start the Pilot (in addition to Shuttle)</b>	being able to sign in to a Pilot.
<b>Queues: stop / start device queues</b>	managing queues in the <a href="#">Queue Monitor</a> and the <a href="#">FlexRip Queues</a> .
<b>SmartNames</b>	managing <a href="#">SmartNames</a> .
<b>Task launching: set priority (immediate / high)</b>	setting a higher priority to the tasks this user launches.
<b>Tasks: Ink remapping in inks panel</b>	changing ink attributes in FlexRip or Imaging Engine tickets (LPI, angle, dot, remap, merge).
<b>Tickets: create / modify / delete (Global and Job tickets)</b>	managing Global and Job tickets. See <a href="#">Tickets</a> and <a href="#">Tickets View</a> .

This access right:	is about ...
	 <b>Note:</b> This Access Right automatically grants the two below mentioned rights.
<b>Tickets: create / modify / delete (Job tickets only)</b>	managing Job tickets. See <a href="#">Tickets View</a> .
<b>Tickets: Show All Tickets and their Parameters (Public and other)</b>	<p>which tickets and parameters you can see in the Pilot (in the <b>Tickets</b> View, when launching a task or workflow in the <b>Files</b> View, or when opening a task ticket from the <b>Tasks</b> list).</p> <p>When this is deselected, the user can only use:</p> <ul style="list-style-type: none"> <li>• public tickets (see <a href="#">Tickets</a>)</li> <li>• public parameters in those public tickets (see <a href="#">Using Public Parameters in Automation Engine</a>)</li> <li>• the <b>Launch with</b> option on files (not the <b>New Task</b> option) (see <a href="#">Launching a Task on a File</a> and <a href="#">Launching a Workflow on a File</a>).</li> </ul> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;">  <b>Note:</b> <ul style="list-style-type: none"> <li>• Without this access right, a user can not create any ticket.</li> <li>• In the Pilot's <a href="#">Tickets Preferences</a>, you can use the 'Show only ...' options to simulate how the Pilot looks without this access right.</li> </ul> <p>This is useful for an administrator to check which tickets and parameters a user still can see when he takes away this access right from that user.</p> </div>
<b>To-dos: create / modify / delete</b>	forwarding to-do actions to other users. Learn more in <a href="#">To Do List</a> .
<b>Viewer: Deep Zoom</b>	using a deep zoom, both when viewing unprepared files and prepared files (when zoom is deeper than prepared for).

### 9.3. Groups View

#### Concept

A **Group** is a set of users (the group members).

In Automation Engine, **Groups** make it easy to organize and manage users.

When a group receives certain properties (for example the right to administer the server and/or a combination of **roles**), then those properties implicitly get propagated to all of its members.

When Automation Engine is initially installed on a new system (so not when upgrading),

- a default group **Administrators** is created. Its members are by default granted the right to administer Automation Engine.
- a 'getting started' administrative user is created and automatically added to this group.



**Note:** User groups in Automation Engine have, since v20, no correlation with Windows groups.

### About Groups in the Old User model (BGADMIN, BGUSERS, ...)

When an Automation Engine upgraded to v20, this view will also show 2 new AE groups BGADMIN and BGUSERS. Their name corresponds to the local Windows groups that were always used before v20.



**Note:** If, before v20, you also created other custom groups (via the UI of Windows), then the upgrade will also have created them here as roles, not as groups, because they were just a collection of user access rights.

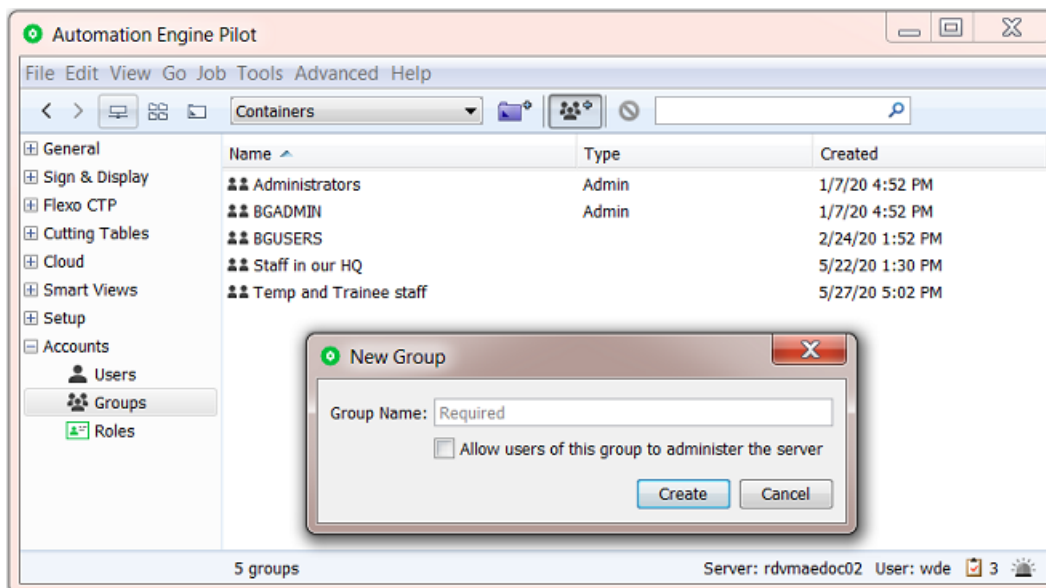
You can continue to use these groups. You can also choose to remove them and start creating other ones yourself.



**Note:** Automation Engine will not remove these pre-v20 BG\* groups from Windows, even when they no longer have group members. You decide when to do this yourself.

### Functionality

This functionality is available either through the top bar buttons or via a right-click after selecting one or multiple groups:



- Create a **New Group**.
  - Use the button or right-click anywhere in the view to get this option. Enter a **Group Name**.
  - **Allow users of this group to administer the server:** Select this to enable members of this group to
    - create other **Users**

- manage their access rights



**Note:** When a user is a member of several groups, its access rights are a sum of the access rights assigned to those groups.

- create **Groups**
- create **Roles**
- enable them to see the 3 Views in the Pilot of the category **Accounts**.

In the Groups view, the column **Type** will show this group as the type **Admin**.

- **Edit Group**

Double click the group to see or change its attributes:

- Allowing its members to administer the server or not
- Add/Remove **Members**
- Add/remove *Roles* to all members of this group.

- **Delete** a group.

You will be asked to confirm.

This does not remove any user accounts. It only removes the 'group' tag from users who were member of this group.

As an admin, you're responsible to keep the users, groups and roles in a healthy, meaningful state: This includes that at least one group with admin rights should remain.

## 9.4. Roles View

---

### Concept

In Automation Engine, **Roles** serve to organize and manage permissions regarding using the tools in Automation Engine.

In this version, these permissions are still limited to a set of *Access Rights*.

A role can be attributed to an individual user but also to a group. You do that in their respective views.

Automation Engine does not come with default roles. After initial installation, this view is empty.

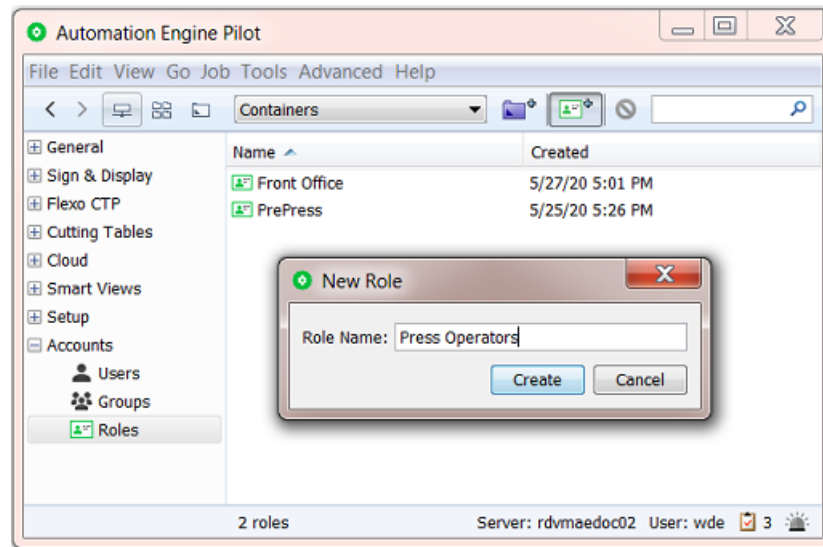
An example of different roles of AE users could be the roles `Prepress` and `Front-office` because users with these roles will most likely have different access rights to AE tools.



**Note:** Only Automation Engine Administrator users can see this or any view of the category **Accounts**.

### Creating a New Role

1. Click the icon in the top bar, fill in the role's name and click **Create**.



2. Don't forget to define the access rights for this role. By default none are selected. See below.

### Functionality

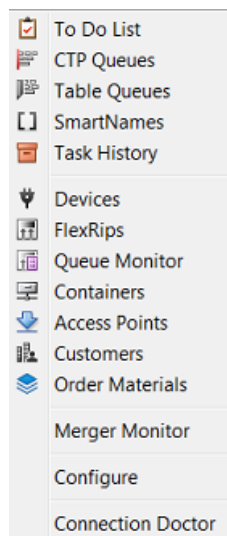
This functionality is available via a right-click after selecting one or multiple roles:

- **Edit Access Rights...:** This is where you select access rights for users with this role. Learn about the various access rights in [Access Rights](#) on page 48.
- **Rename:** To rename a role.
- **Delete:** To delete the selected role(s). You will be asked to confirm. This does not remove any user accounts. It only removes this tag from users who had this role attributed.

## 10. Tools Menu

---

**Tools** are views and dialogs that you can open in a separate window, next to your Pilot. Many of these are also available as a View, in the left pane of the Pilot.



Closing the Pilot also closes all other open Tools.



**Note:** Mind that every open tool counts as a client-server connection. Depending on your licenses, you might reach the maximum.

### 10.1. To Do List

---

The **To Do List** Tool is also a View, in the category **General**. It is described [here](#).

### 10.2. CTP Queues

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The Tool **CTP Queues** is also a View in the category [Flexo Views](#) on page 29. It is described in the chapter [Flexo CTP Device Workflow](#). Find a direct link [here](#).

### 10.3. Table Queues

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The Tool **Table Queues** is also a View in the category Cutting Tables.

Learn more in the chapter [Kongsberg Production Workflow](#). Find a direct link [here](#).

## 10.4. SmartNames

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The **SmartNames** View and Tool is documented in the dedicated chapter [SmartNames](#). Find a direct link [here](#).

## 10.5. Task History

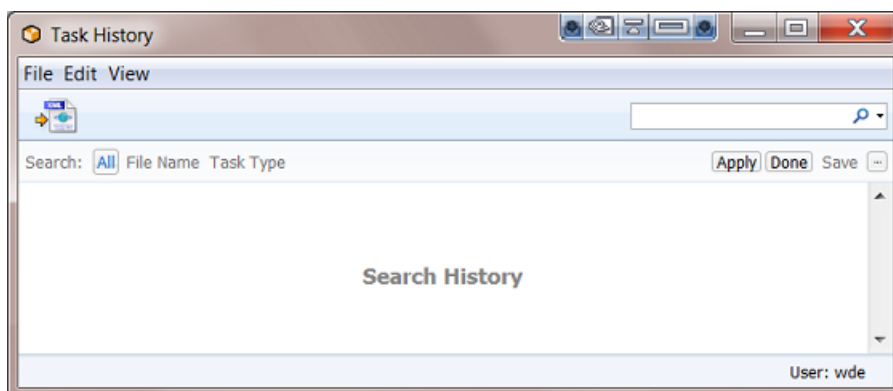
---

To keep your Tasks view manageable, you might have to clean the list of tasks. If you do not want to keep some tasks, you can delete them. If you want to keep certain tasks or tickets for later use, you can add them to the **Task History**.

There are 2 ways to have finished tasks move to the Task History:

- In the Pilot, select one or multiple tasks (maybe after first setting a filter) and can click on  to move it to Task History.
- Tasks can also automatically move to this tool by using the **Task Cleanup Rules** (in the **Configure panel > AE Database > Tasks**). You can there define which ones should automatically move to Task History. Learn more in [Task Cleanup Rules](#) on page 69.

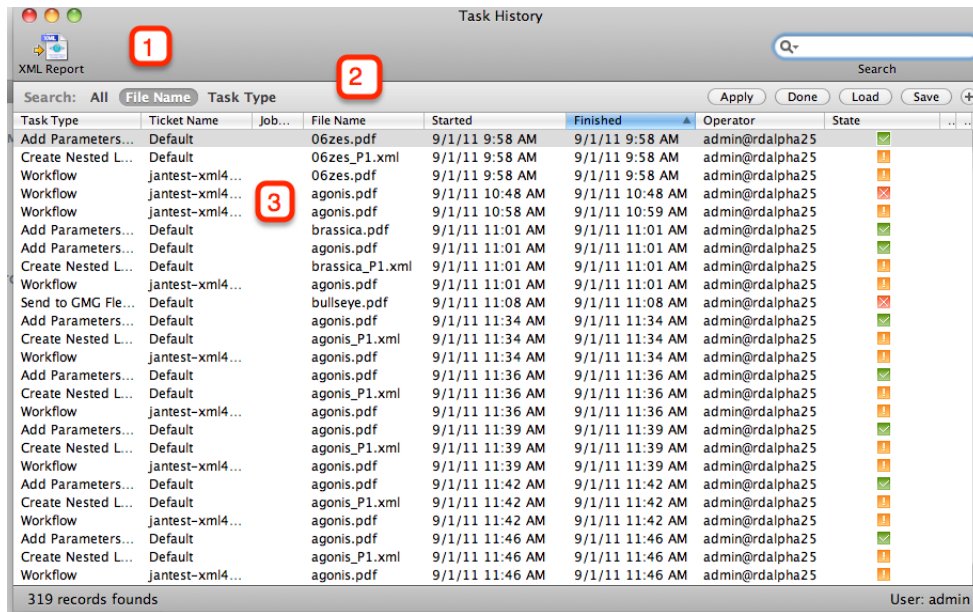
To view the history, choose **Tools > Task History**. Initially none are shown. You only see tasks after clicking **Apply** on a chosen **Search** filter (or press **Enter**)



The Task History has a lot in common with the Tasks View. It lists all 'moved' tasks which you can relaunch, view and save.

You can archive entries in the Task History which you can restore later (learn more in [Why and How To Archive parts of this History](#) on page 59). You can make XML reports of the tasks and use them to bill your customers.


The Task History panel has three parts:



1. Task History XML Report
2. Task History Search options
3. Task History List

## 10.5.1. Task History Menus

### File Menu


- **Open Task:** opens the ticket used for the selected task.
- **Export XML Report...**  Writes a report of the current selection. This XML report contains task name, ticket name (whether or not the ticket was modified), the Operator, when it started, when the task ended, Status, Priority, job folder...
- **Archive...** It is possible to archive the data in the database to an XML file. This allows you to put the file on CD or store it somewhere else.
- **Import Archive...** Restores the data in the selected XML file in the database. A browse window pops up, browse to the archive.XML and click OK. The archive will be restored.
- **Restart History Server** This will shut down the History Server and reboot it.
- **Close Window** [Ctrl + W] Closes the window. If only one window is left, this is disabled (use Exit, to close the last window).

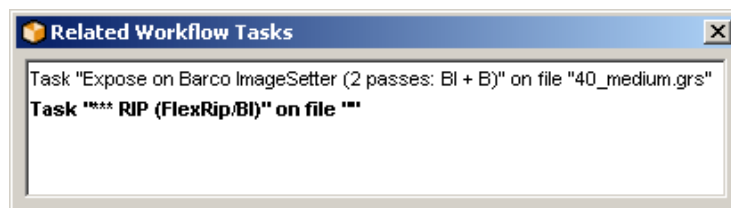
### Edit Menu

- **Select All** [Ctrl+ A] Selects all entries in the table.







### View Menu

- **Columns:** define which columns you want to see, for more information, please refer to the section on [Columns](#).
- **Customize Current Filter:** Please see [filtering](#).
-  **Manage Views** [Ctrl + Shift + F] Here you can save the View Settings or select a previously created view.
- **Related Workflow Tasks:** Some tasks are part of a workflow, use this function to get a list of related tasks.



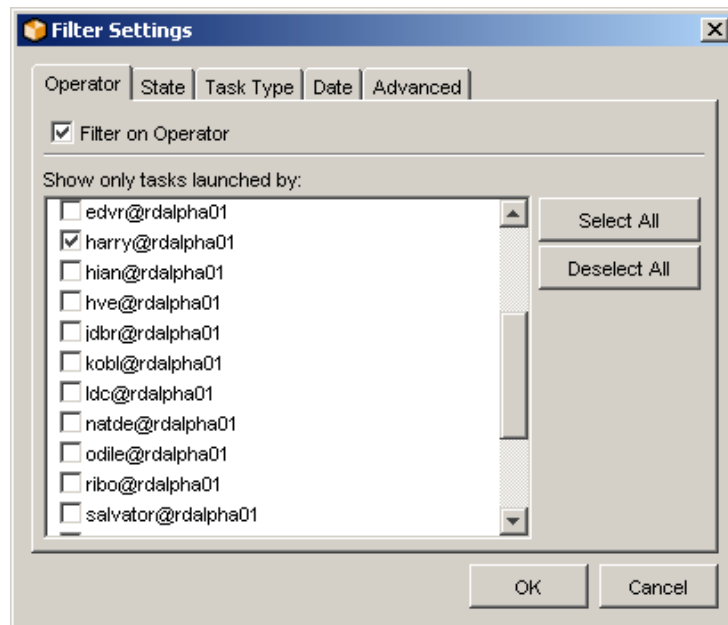
- **Stop** [Escape] This cancels the current database query and lets you set up a different specification.
- **Refresh** [F5] Perform another database query with the current settings.

## 10.5.2. Task History Toolbar

-  Open Task: opens the selected task.
-  XML Report... Writes a report of the current selection. This XML report contains task name, ticket name (whether or not the ticket was modified), the Operator, when it started, when the task ended, Status, Priority, Job folder...
-  ... Opens the Filter Settings dialog. Please see [filtering](#).
-  Views: use the drop-down list to select 'Manage Views...' or an already defined view.

### Filter

Filter Settings allow specific modification of the way the Tasks View is filtered. There are five tabs.



- **Operator:** Define the filter according to the Operator. Tick the ones you want to monitor.
- **State:** Define the filter according to the Status of the task. Just tick the ones you'd like to view.
- **Task Type:** By default, the Tasks View will show all tasks launched, but you can modify the filter in such a way that the Tasks View shows nothing but the type of tasks you are interested in.
- **Date:** Define the Filter according to date and time.
  - in a given time window (between [ date and time ] and [ date and time ])
  - during the previous X hour(s)
  - during the previous X day(s)
  - during the previous X month(s)
- **Advanced:**

The Advanced Filter settings allow for precise queries.

Click '**New**' to define a rule. The setup is easy. You define a rule that shows X containing a certain string.

### 10.5.3. Task History List

The Task History list looks a lot like the [Tasks View task list](#).

The list lists all tasks that have been moved from the Tasks View to Task History. You define what you want to see. You can define the number of columns (see [View Menu > Columns](#)), you can click the head of a column to get the list to sort the way you like it, and you can filter the entries (see [View Menu > Filter](#)).

Task Type	Ticket N...	Job Name	File Name	Started	Finished	Opera...	State	Order ID	Subor...
Export to PDF ...	PDFX-3*	TFW_Out...	Sanity_2...	12/23/05 ...	12/23/05...	tfw_out...	✓	TFW_O...	
Export to PDF ...	PDFX-1*	TFW_Out...	Sanity_3...	12/23/05 ...	12/23/05...	tfw_out...	✓	TFW_O...	
Create Report...	TFW_rep_...		EG_exter...	12/23/05 ...	12/23/05...	TFW_Br...	!		
Export to PDF ...	PDFX-3*	TFW_Out...	Sanity_2...	12/23/05 ...	12/23/05...	tfw_out...	✓	TFW_O...	
Normalize Pos...	Default	TFW_Illus...	Symbols...	12/23/05 ...	12/23/05...	kobl@r...	✓	TFW_Illu...	
Create Report...	taskinput_...	TFW_Re...	taskinput...	12/23/05 ...	12/23/05...	madl@r...	✓	TFW_R...	
Create Report...	TFW_rep_...		70004_s...	12/23/05 ...	12/23/05...	TFW_Br...	✓		
Export to PDF ...	PDFX-3*	TFW_Out...	Sanity_1...	12/23/05 ...	12/23/05...	tfw_out...	✓	TFW_O...	
Normalize Pos...	Default	TFW_Illus...	ScopeBo...	12/23/05 ...	12/23/05...	kobl@r...	✓	TFW_Illu...	
Create Report...	taskinput_...	TFW_Re...	taskinput...	12/23/05 ...	12/23/05...	madl@r...	✓	TFW_R...	
Export to PDF ...	PDFX-3*	TFW_Out...	Sanity_1...	12/23/05 ...	12/23/05...	tfw_out...	✓	TFW_O...	
Create Report...	taskinput_...	TFW_Re...	taskinput...	12/23/05 ...	12/23/05...	madl@r...	✓	TFW_R...	
Normalize Pos...	Default	TFW_Illus...	rgb_eps.ai	12/23/05 ...	12/23/05...	kobl@r...	✓	TFW_Illu...	
Create Report...	TFW_rep_...		70003_tu...	12/23/05 ...	12/23/05...	TFW_Br...	✓		
Create Report...	taskinput_...	TFW_Re...	taskinput...	12/23/05 ...	12/23/05...	madl@r...	✓	TFW_R...	
Normalize Pos...	Default	TFW_Illus...	OpacityM...	12/23/05 ...	12/23/05...	kobl@r...	✓	TFW_Illu...	

View: <all>      22 Records found.      User: admin

### 10.5.4. Why and How To Archive parts of this History

Archiving serves two purposes:

- The Task History is used to make the Tasks View quicker, more user-friendly. All tasks stored in the Task History can be relaunched, it is a so called 'living archive'. As time goes by, you will end up with a Task History containing a lot of tasks that you may never want to relaunch. You can delete these tasks, but if you think that's not a good idea, you can use the Archive function. so archiving can be a part of the Task History database maintenance.
- Archiving can be used to make a backup of the Task History data for safety reasons. You archive your data frequently, not because you need the space, but because you want to store your XML archive safely elsewhere, so you can easily restore it when problems should arise.

Archiving will store all information of certain tasks in an XML file. This adds the possibility of restoring those XML archives into the Task History. So your information will never be lost.



**Note:**

Archiving only works on selected tasks.  
 Archiving doesn't delete the archived tasks from the Task History.

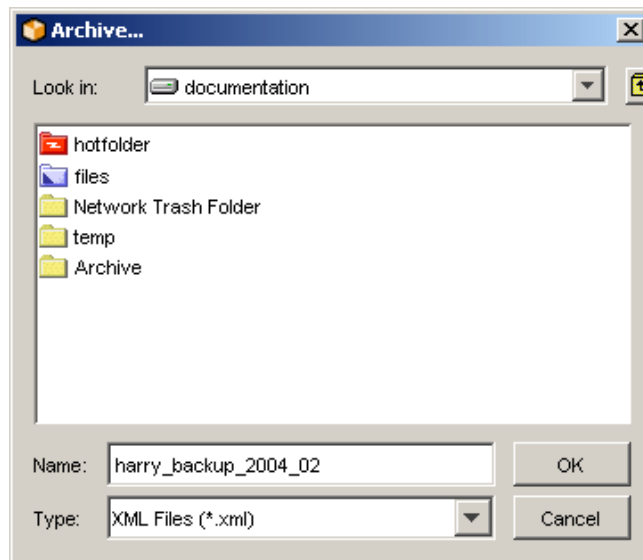
1. Select the tasks you want to archive.

If you want to archive all tasks, press CTRL + A. If you want to make a sub selection, the Task History reacts to the known shortcuts such as CTRL + click and SHIFT + click.

If you want to make an intelligent selection, and you don't want to lose time, you'd better use the [Filter](#) . You define what you want to see in the Task History (for example all tasks originating

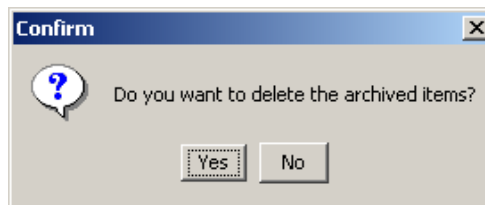
from one particular job, or handled by one particular operator, ...), click CTRL + A and you're ready to archive.

2. Click Archive (File Menu > Archive).
3. A dialog pops up, allowing you to browse to the place where you want the archive XML to be stored. Make sure to give the archive XML a meaningful name in order to avoid confusion later on. Confusion might arise if you bear in mind that the Task History also uses the XML language to write an XML report.



Click OK.

4. A 'Confirm' dialog pops up and asks you whether or not you want to delete the archived items:



## 10.6. Devices

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The View **Devices** is also available as a Tool in a separate window. Both are documented in the dedicated chapter [Flexo CTP Device Workflow](#). Find a direct link [here](#).

## 10.7. FlexRips

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The **FlexRips** tool is also a View, in the category **Setup**. It is described [here](#).

## 10.8. Queue Monitor

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The **Queue Monitor** tool is also a View, in the category **Setup**. It is described [here](#).

## 10.9. Containers

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The **Containers** tool is also a View, in the category **Setup**. It is described [here](#).

## 10.10. Access Points

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The **Access Points** View and tool is described in the chapter *Integrating with External Systems*. Find a direct link [here](#).

## 10.11. Customers

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The **Customers** tool is also a View, in the category **Setup**. It is described [here](#).

## 10.12. Order Materials

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The tool **Order Materials** is also a View in the category Setup.

Learn more [here](#).

## 10.13. Merger Monitor

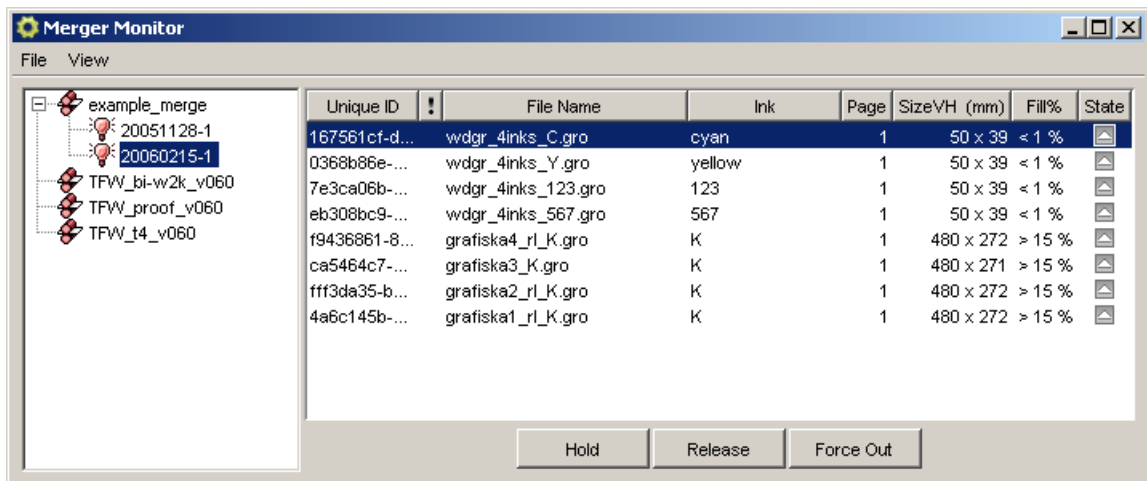
---

If you use a "RIP to ..." FlexRip-ticket to output on a device that has been configured to work with merge queues, you can monitor the merging activities.




**Note:** This merge tool was mainly used for Computer To Film devices.

Start the **Merger Monitor** by selecting 'Merger Monitor' from the **Tools** menu.





The Merger Monitor consists of two panes.

The **left pane** lists all devices  on which files have been merged or are currently waiting to be merged. In the example above there's one device listed **example\_merge**. Every device on which something has been merged stays listed until the server is rebooted.

Select a device to see what is in its **merge queue**. Files that are to be merged are assembled in **pools**.


A **pool** is a group of files with the same characteristics (same plate size, negative or positive, ...). These characteristics are defined by "**extract restrictions**" (in more recent features this is named 'Grouping Keys'). For example: jobs with a different Dot Gain Compensation setting will not be merged together. They will not belong to the same pool.

Some of these restrictions depend on the setting in the **General tab** of the ticket you use.

1. **VDistortion** and **HDistortion**: Files must have the same vertical and horizontal distortion before they can be in the same pool.
2. **Reverse** : Files have to be reversed in the same way before they can be in the same pool.
3. **Mirror** : Files have to be mirrored in the same way before they can be in the same pool.
4. **Dot Gain Compensation**: Only files with the same Dot Gain Compensation belong in the same pool.

The other restrictions are defined in the **Output** tab of the ticket you use.

1. **Conf**: Files need to have the same plate size before they can be in the same pool.
2. **Output path** and **Output File Name**: Files with different Output paths or Output File names will end up in different merge pools.
3. **Resolution**: Files need to have the same resolution before they can be in the same pool.
4. **Compression**: Files need to have the same compression before they can be in the same pool.

Notice that **example\_merge** has two pools : 20051128-1 and 20060215-1. When you select the device, but not a pool, you get an overview of all files waiting to be merged. In order to visually indicate that files belong to different pools they have a different background color. White and gray are used consecutively.

The **right hand panel** provides detailed information on files in the merge queue.

- The **Task ID**
- **Priority**: this is the priority you defined in the Expose On ticket, not the priority of the task.
- The **Name** of the Job/File
- The **Inks** you are exposing, you defined them in the **Expose On ...** ticket.



**Note:** There are two ways in which the inks are listed. C&M&Y&K or C+M+Y+K. They can be merged on separate films or on the same film.

- The **Page** number
- The **Size VH (mm)**






**Note:** The symbols used to indicate the size tell you whether or not the file can be rotated in the merger. <> (**154<>191**) indicate that the file can be rotated, an **x (154x191)** indicates that it cannot.

**Rotation** is an option you can set in the **Transformations** part of **General** tab of the used task ticket.

- **Fill %**: This is (Job size / Plate size)

These percentages are relative, the overall fill depends on the margins and gap as they are currently defined in your ticket. You cannot simply add the percentages to get a correct idea of the overall fill. There are all kinds of reasons why files cannot be merged together and why the fill percentage is -as a result- not yet reached.

- The **State** of the file in this **Merger** queue

A file can be **on hold**  (it's an option you can choose in the 'Expose On ticket'). A file can be **released** , but that does not mean that it will be merged, it still has to wait till the fill percentage is reached. You can **Force** a file **out**  of the Merger queue. The forced out file will take as many files possible with it, if they have a 'release' status.

## 10.14. Configure

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### 10.14.1. Overview and main functionality

Use the Configure tool to connect to a variety of devices and applications, and define general Automation Engine server settings preferences.

To start, sign in to a Pilot and go to **Tools > Configure**.

#### To Define Settings in Configure

1. Select the category in the left pane.
2. Go to **File > New**.
3. Click on the default name that appears for that new item and wait a moment till the cursor allows you to change the name.
4. Define your settings on the right.
5. Go to **File > Save**.

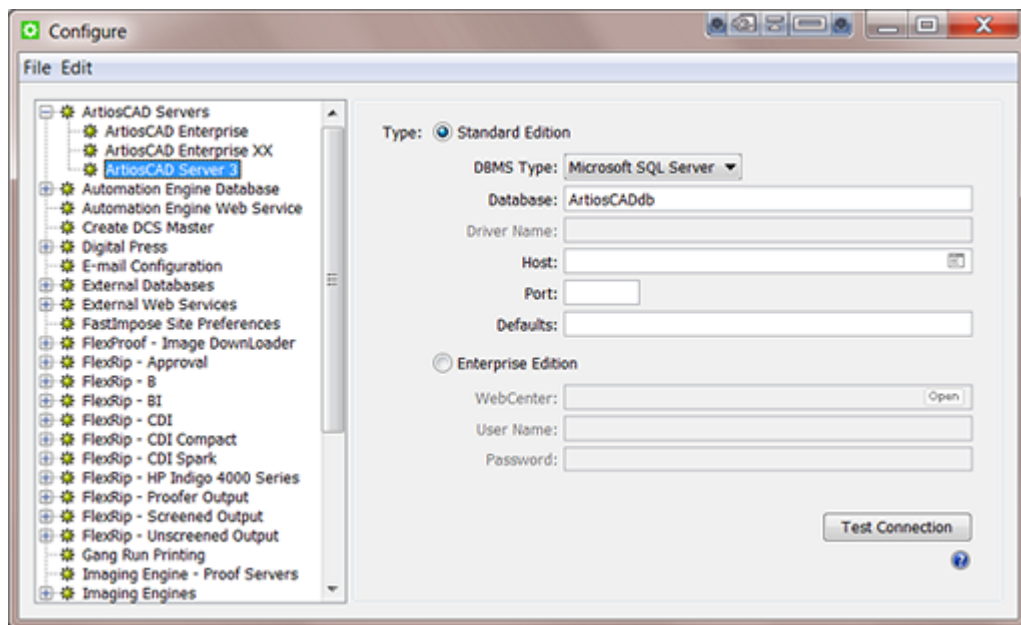


**Note:** (Windows) shortcuts:

- 'Insert': to add an item.
- 'Delete': to delete the selected item.
- 'F2': to rename the selected item.

### 10.14.2. ArtiosCAD Servers

To configure a new ArtiosCAD Server in Automation Engine, go to **Tools > Configure > ArtiosCAD Servers**.



**Note:** When the database is of the **DBMS Type** "Microsoft SQL Server", you can press to select the **Host** and Instance from a list.

#### How to configure a Standard Edition ArtiosCAD Server

1. Set up the ArtiosCAD Database Settings
  - a) When the ArtiosCAD database is installed on a **Microsoft SQL Server** database engine:
    1. **DBMS Type:** Select **Microsoft SQL Server**.
    2. **Database:** Enter the **Name** of the ArtiosCAD database. Default is `ArtiosCADdb`.
    3. **Host:** Select or enter the name of the database host. When the name of the SQL Server Instance for ArtiosCAD was not deployed with the default unnamed instance, then also add the name (typically `<ArtiosCAD Server>\Esko`).
    4. **Port:** When not using the default port, enter the port number.



b) When the ArtiosCAD database is installed on an **Oracle** database engine:



**Important:** The **Oracle Client Software** (*ODBC: Additional libraries for enabling ODBC applications*) needs to be installed on the Automation Engine Master and its Assistants. When not installed, the [Create CAD Report from XML task](#) will not be able to connect to the Oracle ArtiosCAD database.

1. **DBMS Type:** Select **Oracle**.
2. **Service name:** Enter the name of the Oracle TNS, for example `Oracle X.E`.
3. **Driver name:** Enter the name of the Oracle database driver.



**Note:** This name can be found in the Drivers tab of the ODBC Control Panel (`%systemdrive%\Windows\SysWoW64\Odbcad32.exe`) after installation of the Oracle Client Software.

4. **Host:** Enter the name of the database host computer.
  5. **Port:** Enter the port number when you are not using the default one.
2. **Defaults:** Enter the location of the ArtiosCAD Defaults.

This path should be a **file:** URL, pointing to the ArtiosCAD Defaults. For example: `file://MyMachine/ArtiosCAD`.

Leave this Defaults field blank to use the ArtiosCAD Defaults installed on the Automation Engine Master or on an Assistant.

The Automation Engine server should be able to reach this folder, and the service account of the BGMD Service should have read access to the folder. This account by default is the System Account "BGSYSTEM" (but can be changed in [the System Account page](#)).



**Note:** ArtiosCAD Defaults are **version specific**. The version of ArtiosCAD hosting the Defaults must match with the version of CADX installed on the Automation Engine computer (Master and its Assistants).

When no ArtiosCAD Defaults location is specified, the [Create CAD Report from XML task](#) will use the ArtiosCAD Defaults installed on the Automation Engine computer (Master and its Assistants).

3. Click **File > Save**.
4. Click the **Test Connection** button to test the connection to the ArtiosCAD Database and the ArtiosCAD Defaults.

When all is well, you will get a message stating "Connection to the database OK".

Otherwise, you will get an error message:

- when the Automation Engine server can't connect to the database.
- when the Automation Engine server can't get info about the Defaults location. If so, check if the location exists, and if it can be reached from the server.
- when the Defaults location is not a folder.

## How to configure an Enterprise Edition ArtiosCAD Server

1. Select **Enterprise Edition**.
2. **WebCenter:** Enter the WebCenter site location, typically `http://<WebCenterServerName>/WebCenter_Inst`.

3. Click **Open** to open the specified site in your default browser.
4. Enter the **User Name** and **Password**.
5. Test the connection by clicking the **Test Connection** button.

You will get a message stating "Connection to the database OK", or get an error message when the Automation Engine can't connect to WebCenter.

### 10.14.3. Automation Engine Database

These databases are set up automatically when the Automation Engine server software is installed (and their license is present). In this item of the configure panel, you can see their settings, make changes and test their connection.



**Attention:** In the [AE Server Admin web page](#), in the section [Databases](#), you can also manage databases, but there to make changes after an installation and without the use of a Pilot.

#### Standard and Alternative Database Server Choices for Automation Engine

Before going in more detail, we here summarize the choices you have:

- **Standard installation with the standard database server (type).**
  - A standard installation of Automation Engine will install and use an **SQL Server Express** version.
- **In case you need a (much) more powerful database server.**
  - In case you have reached the limits of the **SQL Server Express** version, you can make Automation Engine work with a full **SQL Server** version. Learn more in [Databases](#).
  - Commercial printers with heavy loaded page workflows, can also choose to use an **Oracle** database, but only for their Application Server database.
- **Or use a small test database server for other special cases.** You can use an **"Embedded"** database:
  - In exceptional cases on advise of Esko Support, for example to help solve a database problem.
  - When first installing Automation Engine, to avoid that the installation installs the default SQL Server Express, of which you know you will not use it anyway (because you already decided you will use a full SQL Server). This avoids having to uninstall that SQL Server Express version and other peripheral software.



**Important:** For more information on your options when installing Automation Engine, check the dedicated [Installation Guide](#).

#### Generic setting (Setup tab): DBMS Type

We here describe the general settings of the **Setup** tab in the configuration of the various databases. See their own pages for any specific settings.

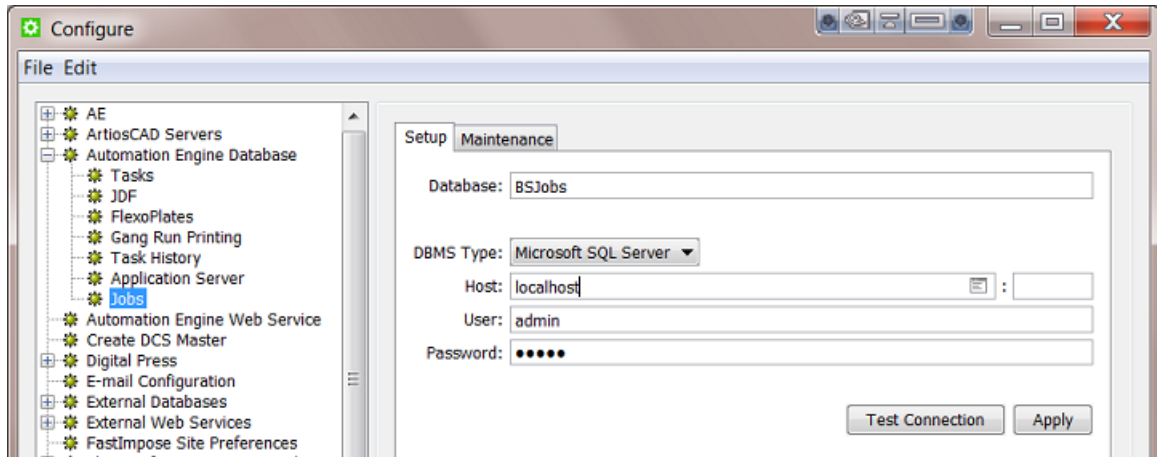


**Note:** DBMS stands for "Database Management System".

#### DBMS Type "Microsoft SQL Server"

These settings will be filled out correctly after installation of the server software. You can however change these settings.

Here is an example of the **Jobs** database:

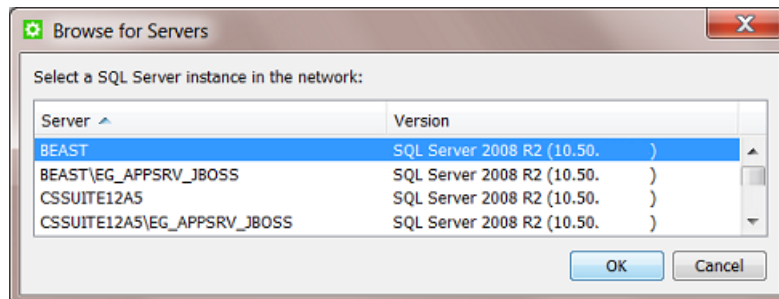


- **Database:** Keep the default name or, before initial use of this database, enter a different name.
- **DBMS Type:** Select the driver type **Microsoft SQL Server**.



**Important:** This type is valid both for an MS SQL Server Express as for a full MS SQL Server.

- You can press  to select the **Host** and **Instance** from a list. Here is an example of such a list:



- Enter a correct **User** name and **Password** to access that database.

### DBMS Type "Embedded" (only for test purposes)

This **Embedded** database engine is built into Automation Engine's installation kit.



**Attention:** This **Embedded** database type is not suitable for production use! Embedded databases can only be used in very low volume and low load (test) circumstances. Production level performance and stability may not be expected with this configuration. For production use, choose a Microsoft SQL Server (or, in case of the Application Server database, Oracle). Failure to do so may, in a worst case, result in data loss or data corruption.

- When the DBMS type is **Embedded**, set the **Folder** to point to the location where the embedded database will be kept on disk (for example "C:\Esko\bg\_data\_database\APPSRV" for the Application Server database).

- Enter a correct **User** name and **Password** for the database user to create or access this database. Enter a blank user name and password when the database or the database user has not yet been created, except for the Application Server database, in which case you need to use the user name "sa".

### DBMS Type "Oracle"

Learn more about using Oracle as engine for the **Application Server** database in the chapter [Pre-Install IT Requirements](#), in the page [Oracle as Database Server for the Application Server component](#).

## Generic setting (Setup tab): Testing the Connection and Applying the Config

Each database configuration has in its **Setup** tab two buttons: **Test Connection** and **Apply**.

### Testing the Connection

Click the **Test Connection** button to perform these checks:

- **Is the database management system running?** These are possible error messages:
  - When the instance is not running or accessible, you get `Could not connect to the SQL Server instance.`
  - When the user name / password is wrong or when there is no permission to connect, you get `Trying to log in failed.`
  - When the host is not running or not reachable (wrong name), you get `Unknown database host.`
  - When wrong information was typed in, you get `No such instance.`
- **What is the database system version?**
  - An error is shown when `The database system version is not supported (anymore).` For example: you selected an SQL Server 2000.
  - A warning is shown when `The database system version will soon be outdated.` For example, in version 14.1, an SQL Server 2005.
- **Is the database online?**
  - In case of a wrong user name / password or wrong database privileges, you get `Trying to open database failed.`
  - When the database doesn't exist, you get `Could not find database.`
- **What are the database user roles?**
  - When the user is not a member of required database roles, you get `Insufficient roles.`
- **What about the database system memory?**
  - `The maximum server memory does not meet the recommendations.` This is about the memory of the (SQL) database server. For example, in version 14.1, a server minimally needs +- 4 GB.
  - `The total physical memory does not meet the recommendations.` This is about the memory of the computer. For example, in version 14.1, a server minimally needs +- 4 GB.

- **Is the database system speed sufficient?**

- You get a warning when `The connection is rather slow`. For example, in version 14.1, on average, connecting to the database system and getting version info takes more than 100 ms.



**Note:** You can find updated and detailed minimal requirements on <https://www.esko.com/en/systemrequirements>.

When all checks return an OK result, an info dialog will tell you that the **Database is online and accessible**.

### Applying the Changed Configuration

After you tested the connection, and solved any errors, click **Apply** to save and apply this setup.

When you click **Apply**, Automation Engine restarts parts of its software and then starts accessing the database using the new settings.



**Important:** When you do not click **Apply**, but only **Save** these (and other) changes in the Configure tool, then the changed settings will only be applied the next time the (full) Automation Engine server software is restarted.

### Tasks database

Launched tasks are stored in a database with a default name `FastLane_TM`.

The settings in the **Setup** tab are generic and described in the [DBMS Type](#) and [Testing and Applying the Configuration](#).

### Task Cleanup Rules

In the Pilot, you can not keep all your finished tasks in the Tasks view forever ; this would slow down Automation Engine and eventually fill up the tasks database.

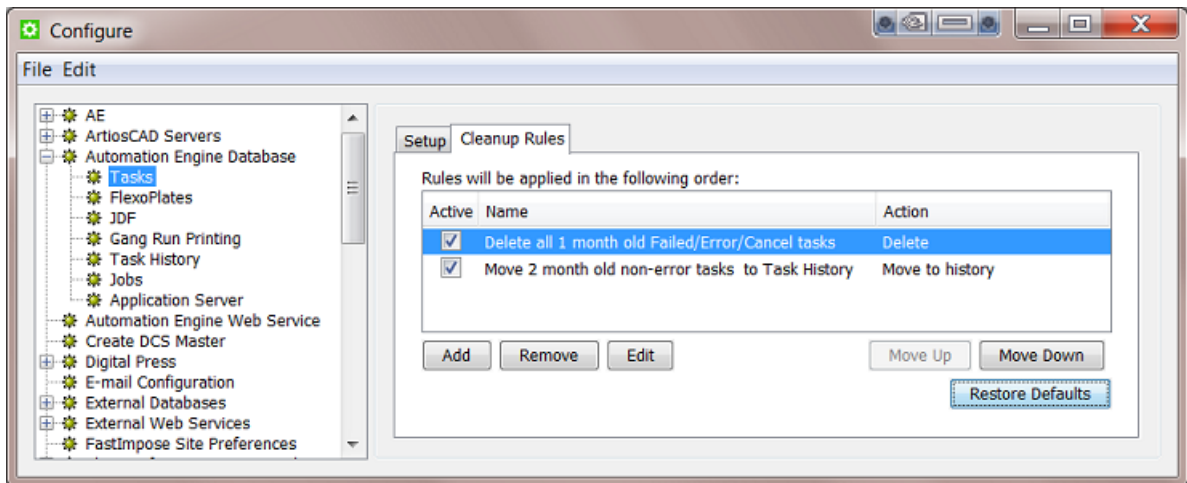
You have the choice to

- **remove** them. In the Pilot tasks view, make a selection, press the **Delete** button and confirm.
- or **move them to** the [Task History](#) on page 55 tool. You can define **Cleanup Rules** to automate this cleanup.



**Attention:** Only finished tasks (those in the state `Successfully done`, `Done with warning`, `Workflow failed`, `Failed`, or `Cancelled`) can be either moved to Task History or be deleted. The cleanup rules mechanism will ignore tasks that are still running or waiting. Finished tasks that are part of a workflow that is still running or waiting will be ignored too.

An example of **Task Cleanup Rules**:



The way to create these rules is very similar to making filters in many Pilot Views. You can learn how to do this from a similar example used in [Job View Filters](#).



**Attention:** The rules are executed from top to bottom, so their order is very important. You can use the **Move Up / Move Down** buttons to make sure they are executed in the most productive order. For example: you typically first want to delete tasks and then start moving the rest to history.

## Devices database

This database stores all the information that is shown in the Devices view, both for [Flexo devices](#) and [Cutting Tables](#).

By default, this database uses the same database as for **Jobs**.

- **Tab Setup:**

Learn about these generic settings in the above pages on [DBMS Type](#) and [Testing and Applying the Configuration](#).

- **Tab Maintenance:**

Define after how many days you want to **Automatically delete records** in all the device-related databases. This deletes

- records in databases that are used in these Pilot Views:
  - (CDI workflow): [Press Plates](#), [Press Plate Sets](#), [Merged Plates](#).
  - (Kongsberg workflow): [Sheets](#) view and (Sign & Display) [Orders](#) view.

The time you specified is calculated after the item's **Finished** date.

- It also deletes the files in the Media Root Folder (see below) older than that specified time.

- **Tab Advanced:** Browse to specify the **Media Root Folder**.

When a job is finished on a Kongsberg table, a new item is added to the Kongsberg [Sheets view](#). The JDF and cut file that this (database) item refers to are stored in a unique subfolder of this Media Root Folder.



**Note:** Files related to the CDI Plate Merger are stored in the folder specified in [the Configure item "Plate Merger"](#).

### JDF database

This database is used when Automation Engine sends or receives JDF commands. For example when jobs are created via JDF or when WebCenter sends workflows to Automation Engine (via JDF).

By default, this database uses the same database as for **Jobs**.

The settings in the **Setup** tab are as described in [Generic setting \(Setup tab\): DBMS Type](#) on page 66 and [Generic setting \(Setup tab\): Testing the Connection and Applying the Config](#) on page 68.

### Gang Run Printing database

This database is used by the [Gang Run Printing mode](#).

By default, this database uses the same database as for **Jobs**.

The settings in the **Setup** tab are as described in [Generic setting \(Setup tab\): DBMS Type](#) on page 66 and [Generic setting \(Setup tab\): Testing the Connection and Applying the Config](#) on page 68.

### Task History database

The **Task History** is a tool that stores old tasks. You keep them there because you may want to look up the settings they used or to relaunch them on same or other files. Learn more in [Task History](#) on page 55.

The settings in the **Setup** tab are as described in [Generic setting \(Setup tab\): DBMS Type](#) on page 66 and in [Generic setting \(Setup tab\): Testing the Connection and Applying the Config](#) on page 68.

### Maintenance

In case this database is filling up or when you experienced that you do not need tasks of a certain age, it is advised to clean up.

- **Automatically delete tasks older than X days.** Choose this for an automatic partial cleanup.
- **Clear All Tasks in History.** This deletes everything in this database. You will be asked to confirm.

### Printing Conditions database

This database is related to the **Print Control Wizard**.

#### What is the Print Control Wizard?

The Print Control Wizard is a tool that helps you optimize your print quality.

Based on your **exact printing setup**, your current print quality and the **standard** you want to print towards, the Print Control Wizard will calculate the **best possible screens and curves** that you can use to achieve great results on press.

This will help you avoid common problems, for example a lack of smoothness in the transition from shadows to solids, or from highlights to paper, and will make getting good printing quality time after time **easier**.

### What is a Printing Condition?

The Print Control Wizard will guide you in creating a printing condition. This printing condition will:

- describe your exact printing setup (press, substrate, inks, plate, etc.) and the way it prints,
- include the standard you want to print towards (an ISO standard, linear printing...),
- result in the best possible screens and curves to achieve the quality of that standard with your printing setup.

Learn more about this tool and its installation in [the documentation of Print Control Wizard](#).



**Note:** This tool is present on the installation DVD of **Imaging Engine**.

## Jobs database

### Setup

By default the database used for jobs is named BSJobs.



**Note:** The BS in the name BSJobs refers to an old Esko server software application.

The settings in the **Setup** tab are as described in [Generic setting \(Setup tab\): DBMS Type](#) on page 66 and in [Generic setting \(Setup tab\): Testing the Connection and Applying the Config](#) on page 68.

### Maintenance

**Dangling Jobs** are active Automation Engine **Jobs** that have a link to a job folder that is not there, probably because the folder was (re)moved or renamed.

Normally, each active **Job** relates to one job folder on disk. But it does happen that a user moves or deletes a job folder, for example via Windows Explorer or Macintosh Finder. This causes discrepancies between the information of that Job in the **Jobs** database and the actual situation on disk. Removing such dangling Jobs brings the database back in sync with the reality on disk.

Click **Remove** to make the database check, for each Job, whether or not their job folder still exists. You will be asked to confirm. When that folder does not exist, the Job will be removed from the Automation Engine database.



**Note:** This implies that instead of deleting jobs via the Pilot, you are able to delete Jobs by deleting the corresponding folder and then manually cleaning up the dangling Jobs here.

## Application Server database

This database is used when you use the Pilot Views that are valid for page workflows: **Pages**, **Proofs** and **Plates** (category **Commercial Print**).



By default, this database uses a database named `fasttrack`.

The settings in the **Setup** tab are as described in [Generic setting \(Setup tab\): DBMS Type](#) on page 66 and [Generic setting \(Setup tab\): Testing the Connection and Applying the Config](#) on page 68.

This database can also use the DBMS Type **Oracle**. Learn more about using Oracle as engine for the **Application Server** database in the chapter [Pre-Install IT Requirements](#), in the page [Oracle as Database Server for the Application Server component](#).

### 10.14.4. Automation Engine Web Service

This setup is documented in the chapter [Integrating with External Systems.](#), as part of the setup of a [Web Service Access Point](#).

### 10.14.5. Cloud Storage Services

This is where you configure cloud storage destinations that the [Upload to Cloud Storage](#) task can upload files to and where a [Cloud Storage Access Point](#) can download files from.



**Note:** Any form of SSO (as supported by some Cloud Storage services), is here not supported. Access Points run as user 'BGSystem' on the master Automation Engine server.

#### Configuring Box, Google Drive or OneDrive



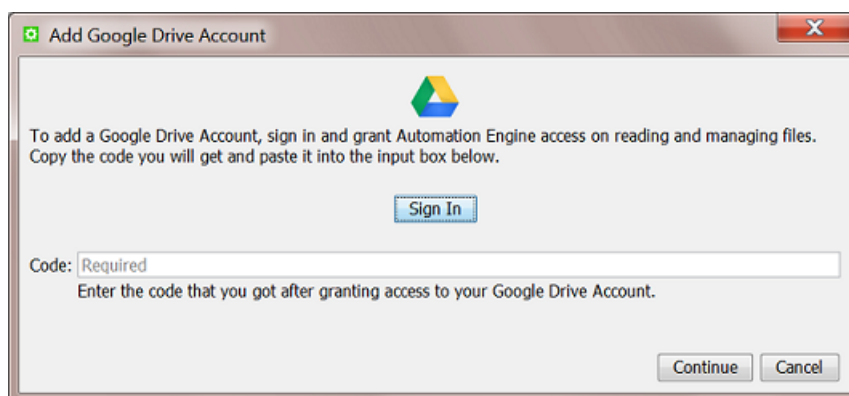
**Note:** For Amazon S3, see the separate page [Configuring Amazon S3](#) on page 75.

Follow these steps to create an account:

1. In **Tools > Configure > Cloud Storage Services**, click **Add** and select the provider (Box, Google Drive or OneDrive).
2. The **Add ... Account** dialog of the selected provider dialog informs you on the process and asks to sign in to that provider.

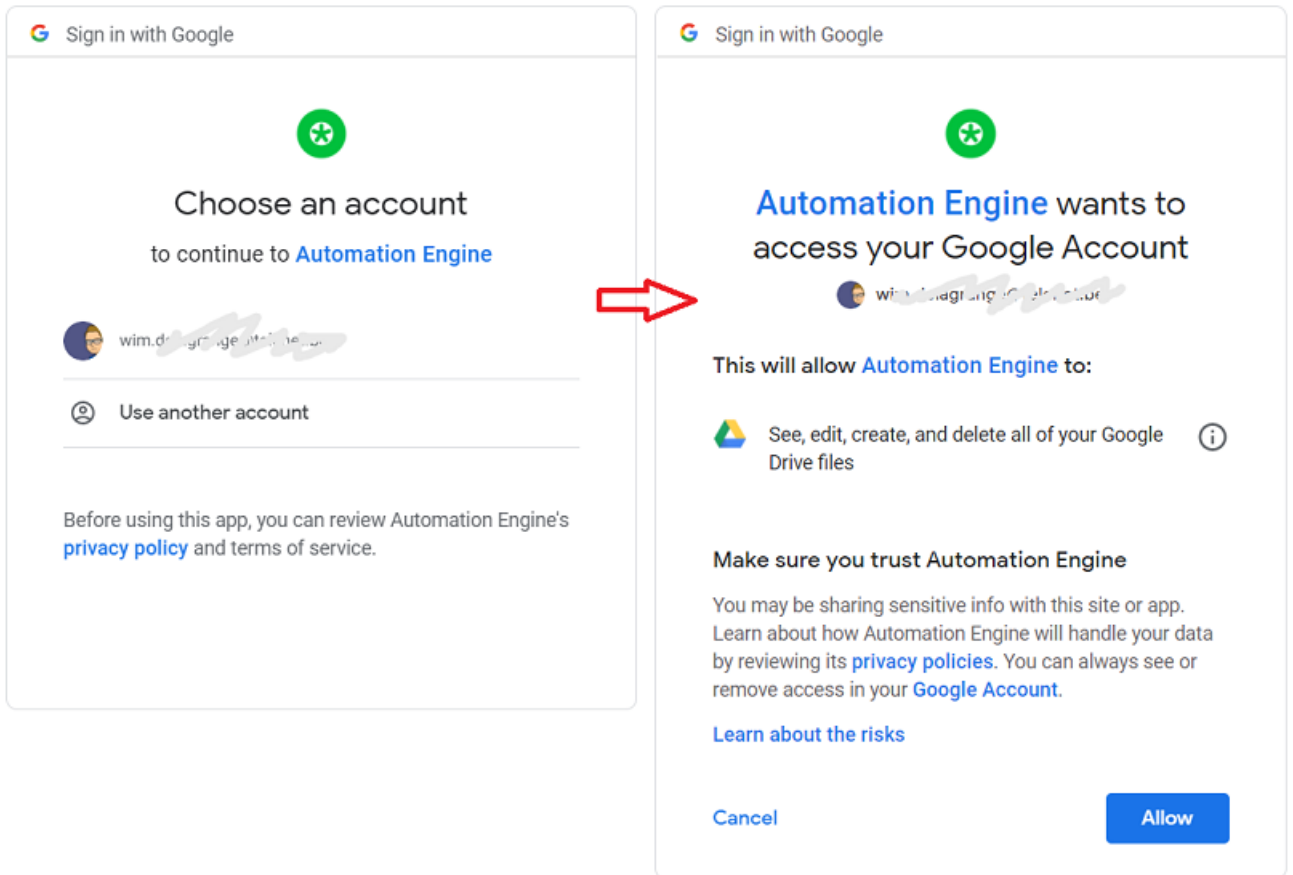


**Attention:** When your internet browser is already open, an account could already be logged in to that service. To make sure you log in with the right account, close your browser first.

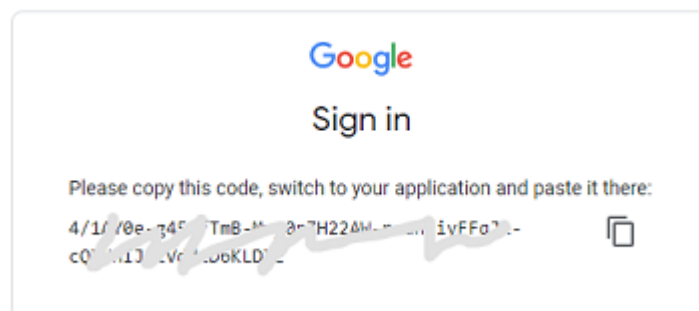


3. Click **Sign In**. Your browser opens a page asking permission for Automation Engine to view and manage files on that storage. When your browser does not auto-remember your credentials, it will first ask you to log in to that provider.

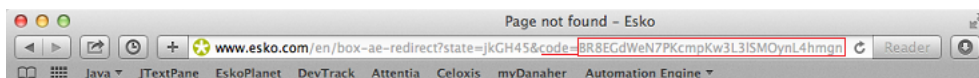
Here's an example using Google Drive ; your browser might remember an account or propose the one that you are already signed in with:



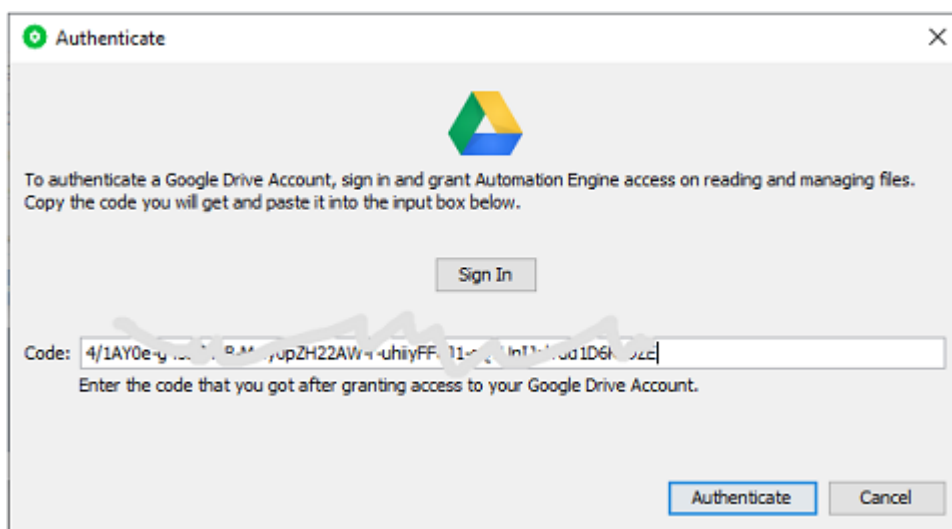
4. Click **Allow** to continue. The provider now grants access to the account and calculates a unique code.
  - Google Drive shows this code in a dedicated web page and offers a button to copy it. An example:



- Box and OneDrive display the code as part of the URL that the browser is redirected to. An example:



5. For Google Drive: Use the copy-button or manually select the code and copy it (Ctrl-c / Cmd-c) to your clipboard.
  - For Box and OneDrive: Select the full URL (or only the characters in the URL after the 'code=') and copy it (Ctrl-c / Cmd-c) to your clipboard.
6. Go back to the **Add <provider> Account** dialog and paste the code or full URL in the **Code** field (Ctrl-v / Cmd-V):



7. Click **Continue** and add an **Account Name** and **Description**.
8. Click **Create**.

This account is now ready to be used in the tools that use cloud storage services.



**Note:** You can reset the authorization for an account. This is needed when the authorisation token became invalid (it is broken, the administrator of the cloud storage deleted the site, ...). Follow these steps:

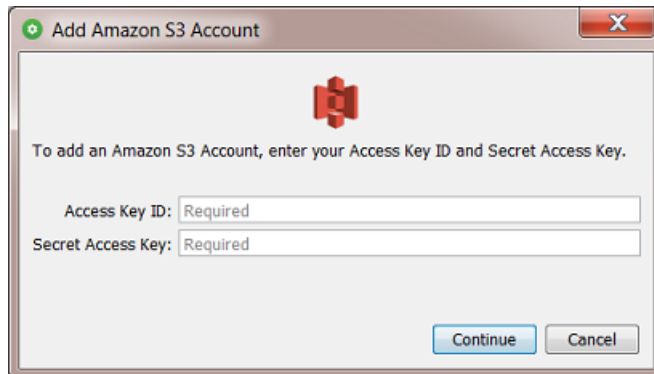
- Select the account for which you want to reset the authorization.
- Click **Authenticate**.
- In the dialog that pops up, fill in the required key(s) and press **Authenticate**.

## Configuring Amazon S3

Follow these steps to create an account for Amazon S3:

1. In **Tools > Configure > Cloud Storage Services**, click **Add**, select **Amazon S3** and click **OK**.

- In the **Add Amazon S3 Account** dialog, fill in the **Access Key ID** and **Secret Access Key** as generated in the IAM module for the user linked to this account. Contact your administrator for more details.



These keys allow Automation Engine the following actions on the **buckets** (root folders) that are linked to this account:

- download, upload and remove files
- create new folders.



**Note:** The IAM-defined user must have sufficient permissions to access the required **S3** buckets. Also consider limiting this user's access to one or more specific **S3** buckets. Learn more about IAM policies and access to S3 buckets in [this online article](#).



**Attention:** When your internet browser is already open, an account could already be logged in to that service. To make sure you log in with the right account, close your browser first.

- Click **Continue** and add an **Account Name** and **Description**.
- Click **Create** to confirm and close the dialog.



**Note:** You can reset the authorization for an account. This is needed when the authorisation token became invalid (it is broken, the administrator of the cloud storage deleted the site, ...). Follow these steps:

- Select the account for which you want to reset the authorization.
- Click **Authenticate**.
- In the dialog that pops up, fill in the required key(s) and press **Authenticate**.

## 10.14.6. Esko Cloud

### Concept

Esko Cloud has a growing number of purposes:

- It is the backbone framework of the solution [Share & Approve](#).
- It can be used to collaborate between locations that have an Automation Engine server on-premises. Learn more in the chapter [Collaborating via Esko Cloud](#).

- Automation Engine SaaS server customers can use Esko Cloud as a cheaper storage solution than keeping Jobs and Products related data in the data center. Learn more in the chapter [AE SaaS: When your AE is in a Data Center](#).

**Settings**

- Account:** For all of the above cases you here **first** have to set up your Esko Cloud **Account**. Learn more about the initial configuration of Esko Cloud on [Initial Configuration](#). Setting up this Account is described in its [Step 3](#).
- Job Sharing:**
  - Create Job:** Select the Create Job task ticket that will be used when a shared job is downloaded for collaboration.
  - When a shared job is created:** Select this to also automatically import the customer of that job.
  - When a shared job is removed:** Select this to also delete the files and folders of that job.
- Job Storage:** (AE SaaS only)
  - Enable storage of inactive jobs:** Select this when you (also) want to use your Esko Cloud account to store jobs and their data.  
Learn more in [Storing Inactive Jobs on Esko Cloud](#).
  - Site:** Select the Esko Cloud site you want to use for this purpose.
- Product Storage:** (AE SaaS only)
  - Enable storage of products:** Select this when you (also) want to use your Esko Cloud account to store products and their data.  
Learn more in [Storing Products on Esko Cloud](#).
  - Site:** Select the Esko Cloud site you want to use for this purpose.

**10.14.7. Create DCS Master**

Short Name	Full Name
k	Black
y	Yellow
m	Magenta
c	Cyan

When you use the task [Create Master DCS File \(Classic\)](#), you might want to map short names used in plates (that might not mean anything) to full ink names. This is handy for example for plates with international ink definitions. By default, C,M,Y and K are mapped to Cyan, Magenta, Yellow and Black.

To add an ink definition, double-click an input field and start typing. Press 'TAB' to switch fields.

### 10.14.8. Digital Press

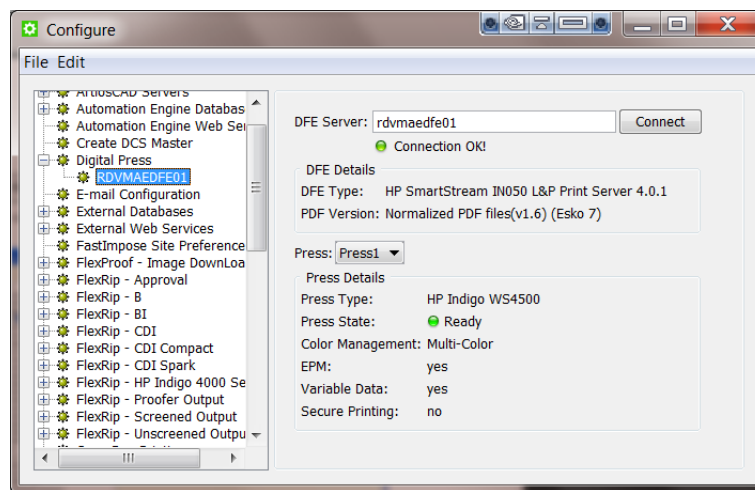
Use this to connect Automation Engine to the DFE (Digital Front End) of a digital press.

1. Select **Digital Press** and use **File > New** to create a new digital press connection.
2. Enter the name of your **DFE Server** and click **Connect**.



**Note:** Make sure the DFE server is running and reachable over the network.

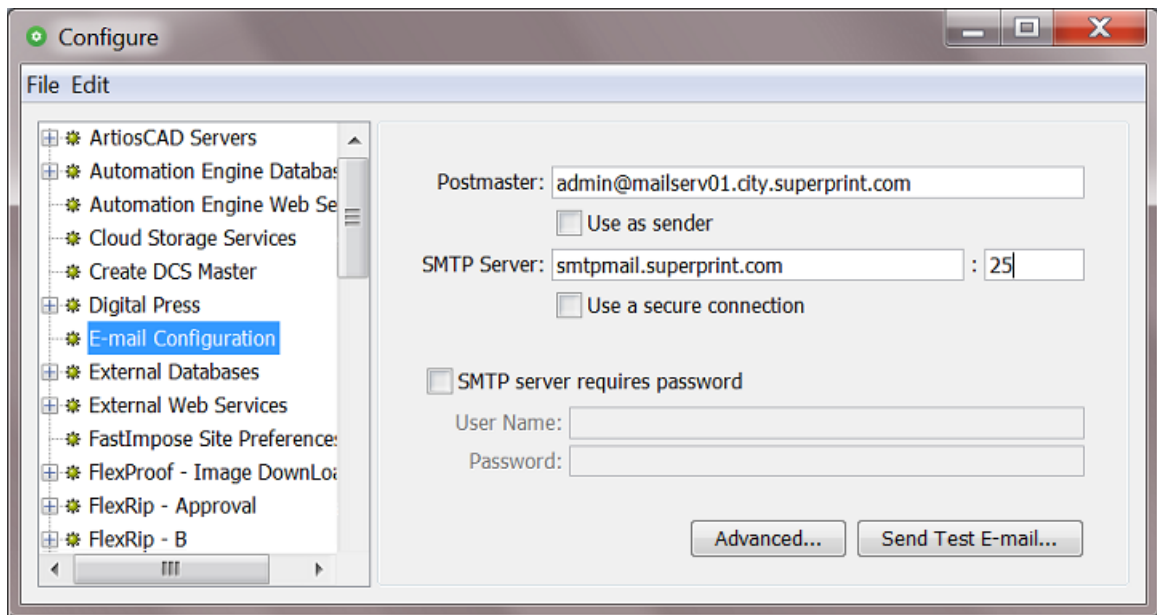
If your connection is successful, you will see **Connection OK!** and details about the DFE server.



3. If your DFE server drives several presses, select the **Press** you want to connect to. You will see details about the digital press.
4. Use **File > Save** to save your connection.

### 10.14.9. E-Mail Configuration

Automation Engine can use your E-mail server to send E-mails. These E-mails can be sent by a task **Notification**, by a dedicated [Send E-mail task](#) or as an extra tool when you opened a log file.



- **Postmaster** is the E-mail address that will receive a warning mail when an E-mail could not be delivered.
  - **Use as sender:** Select this to include a "**Sender**" SMTP header.  
The purpose of such a header is to indicate that the actual sender of the E-mail is different from the person in the '**From**' field of the E-mail. Some E-mail servers refuse to send this E-mail unless this field is specified. Certain E-mail clients will visualise the **sender** info as "sent by <postmaster> on behalf of <from>".



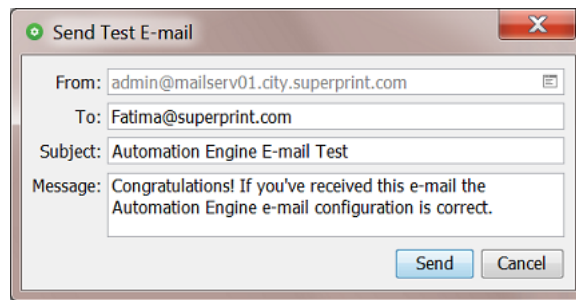
**Note:** All *Red Alerts* are also sent as e-mail to this Postmaster.

- **SMTP Server:** Check with your IT department for the correct settings of the **SMTP Server** and its **Port**.
  - **Use a secure connection:** Select this option if you want to use a secure instead of an unrestricted connection.
  - **SMTP server requires password authentication:** When this is the case, select this and fill out the **User Name** and **Password** fields.



**Note:** The following authentication schemes are supported by the Automation Engine mail component: **PLAIN**, **LOGIN** and **DIGEST-MD5**.

- **Advanced:** Use this to add generic properties for outgoing SMTP E-mail. Some examples:
  - To use office365 as SMTP server for outgoing E-mail, add the **Key** "mail.smtp.starttls.enable" with **Value** "true".
  - To get some debug information when there are problems with outgoing E-mails, add the **Key** "mail.debug" with **Value** "true".
- **Send Test E-mail...:** Click the button to send a test E-mail. An example:



- **From:** Indicates the address you're using to send the test E-mail. If no address is filled in, the postmaster address is used. You can choose a different sender to test if the mail server allows you to send e-mails on behalf of others. The **Send E-Mail** task relies on this behavior as it tries to send E-mails on behalf of the user that launches the task.
- **To:** Fill in a valid E-mail address that will receive the test mail.
- **Subject:** Fill in a subject line.
- **Message:** You can enter a personal message or leave the default text.
- When finished, click **Send** to see whether the configuration is working properly. When the E-mail could be sent, an Info message will appear. When it failed, you will get a detailed warning message.

### 10.14.10. External Databases

**External Databases** are databases from external systems (not part of Automation Engine).

Automation Engine uses links to such databases in

- a **Database Query SmartName**. Learn more [here](#).
- a **Database Access Point**. Learn more [here](#).
- the **Interact with Database** task. Learn more [here](#).



**Attention:** When integrating Automation Engine with an external database, make sure you are compliant with the license agreements of that database manufacturer.



**Note:** Configuring these links requires knowledge about database setups. If necessary, contact your IT database administrator to figure out the correct settings.

### Configuring External Databases

1. Go to **Tools > Configure > External Databases**.
2. Click **File > New** to configure a new link to a database.  
A new database name is created with the name **db\_number** (the number is the chronological number of the database).
3. In the left pane, click to select the new database and then click again to enable renaming that new database link. Type the name you want and press **Enter** to confirm.



4. Choose the appropriate **DBMS Type**.

These Database Management Systems (DBMS) are supported:

- **Microsoft SQL Server**
- **Oracle**
- **Other** (using a JDBC driver).



**Attention:** Esko provides the drivers for both SQL and Oracle DBMS types. Not all database drivers can be freely distributed by Esko, and not all drivers have been tested. If you need to connect to **Other** types, you need to connect using a JDBC driver.

5. Enter the connection details. These are different per type of DBMS. See examples in [Specifics per DBMS](#) on page 81.
6. If required for the DBMS, enter the name of the **Host**. This is the database server (computer) name.
7. If required for the DBMS, enter the **Port** number.
8. If required for the DBMS, enter the **User** name and **Password** that will be used to access the database.
9. Click '**Test Connection**' to test if your setup is valid. If it is not valid, the error message might contain details about the problem.
10. **Disclaimer:** Be aware of the risks of direct database queries and of the fact that Esko takes no liability for them. You need to agree before this configuration can be saved.
11. Click **File > Save** to save the configuration.

See the next section for some [specifics per DBMS](#).

## Specifics per DBMS

### Connecting to a Microsoft SQL Server

When choosing this DBMS type, the supported databases will be restricted to the supported versions of SQL Server that is used for the Automation Engine databases. Please check the [system requirements](#) page to see which SQL Server versions are supported.

When the External Microsoft SQL Server version is running a different version, please check Esko Knowledge Base article [KB205229874](#) for possible workarounds.

### Connecting to an Oracle Server

### Connecting an "Other" DBMS

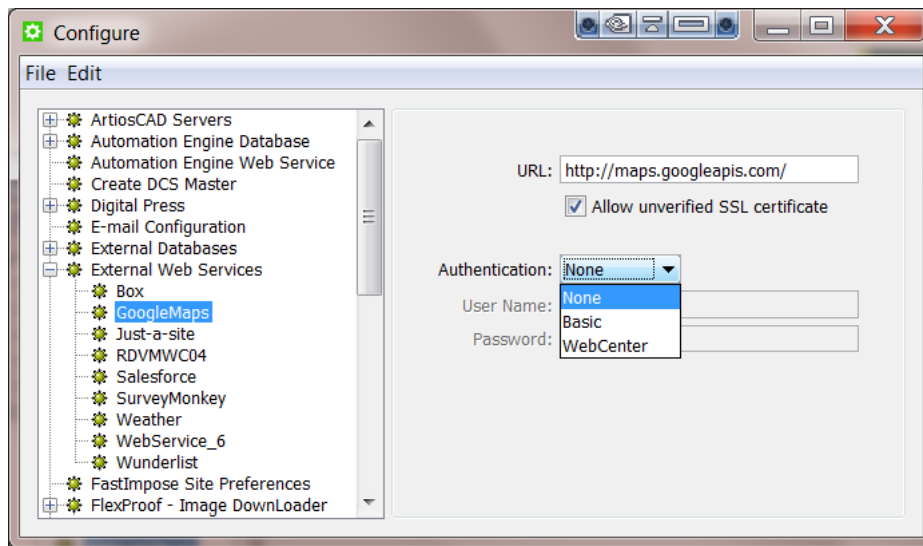
**Other** DBMS can be accessed if you can get the necessary drivers and information on how to access the DBMS via standard JDBC technology.

- Download the JDBC driver (a jar file) from the manufacturer’s website into a **Container** that is accessible to the Automation Engine (Master) server.
- Enter the required configuration fields. See an example:

- Check your JDBC driver manual for more details.

### 10.14.11. External Web Services

Using the [Interact with Web Service](#), Automation Engine can communicate with web services from external systems.



To configure such a web service,

1. Go to **Tools > Configure**.
2. In the **Configure** window, select **External Web Services**.
3. Press the **Insert** key or go to **File > New**. Specify a name for the new **External Web Service**.
4. Specify **URL**.

You can use a secure connection via SSL (a URL starting with `https://`) with or without a valid SSL certificate signed by a "Certificate Authority" (CA).

When using a secure connection without a valid certificate, import the certificate into the server **java KeyStore**. Use the following command on the Automation Engine server:

```
keytool -import -alias mydomain -file myfile.crt -keystore C:\Esko
\bg_prog_fastserver_v40\jre\lib\security\cacerts
```

Check the **Allow unverified SSL Certificate** option to do this.



**Warning:** This setting is not secure.

If you need to pass via a proxy, configure the proxy settings via **Tools > Configure > Web Proxy**.

5. Select the **Authentication** mode from the drop-down options: **None**, **Basic** or **WebCenter**.



**Attention:** Please make sure the external web service is supporting the selected authentication method. Not all web services allow this.



**Attention:** About the "WebCenter" type authentication: if you try to connect to a WebCenter 14 or more recent, you do not need to configure the WebCenter server, you can indicate it in the task. If you try to connect to an older WebCenter server, you have to configure the WebCenter server here and use the **Interact with Web Service** task instead of the **Interact with WebCenter** task.

6. Provide **User Name** and **Password**.

7. Click **File > Save**.

### 10.14.12. FastImpose Site Preferences

The FastImpose site preferences serve to map ink names to custom names. For example if you want to map 'C' to the French 'bleu' on your plates.

#### Ink Names

Click **Add** to add two initial values to the list: **key** and **value**. Double click the words to edit them.



**Tip:** A black rectangle around the field indicates that you can edit it.

If you want to change 'C' to 'Bleu', then enter C in the **Name** column, and 'Bleu' in the **Customized Name** column:

Ink Names	
Name	Customized Name
C	Bleu

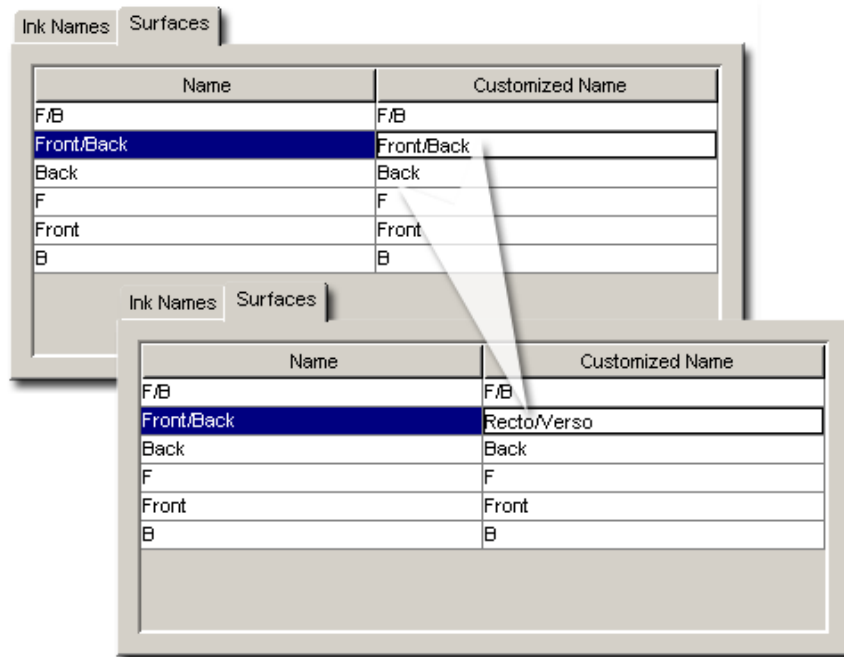
Add Remove

This does not change your file, but if you used marks that would output 'C' on plate, they will now mention that ink as 'Bleu'.

#### Surfaces

When the values that describe front - back printing modes, like F/B, Front/Back, Back, F, Front, B are not conform your language or your way of working, you can here change them.

An example: changing Front/Back to read Recto/Verso:



### 10.14.13. FlexProof - Image Downloader

Select the item **FlexProof - Image Downloader** and go to **File > New**.



**Note:** Don't forget to save your settings. Use **File > Save**.

#### Tab "General"

- **Type:** The type will appear after having synchronized. First fill in the other settings.
- **Proofer Node:** Enter the FlexProof computer name.



**Attention:** The name of the Image Downloader Proof Node is case sensitive. This is not the case for the other devices.

- **Synchronize with Proof Node.** This may take a few seconds, the system will fill out the **'Type'** field.

#### Tab "Queue"

- **Queue:** A default name is proposed. This field automatically updates when you rename the device.
- **Queue Job Limit:** A FlexRip's Dispatcher EskoLink queue can handle the expose command of 2 jobs at the same time. If you want the Automation Engine queue to allow sending 2 expose commands at the same time, then set the job limit of the Automation Engine queue on 2.

Putting this job limit on 1 will result in each expose command to that EskoLink queue being handled one by one: the second job will be ripped after the first one is completely finished ("First In First Out" principle).



**Note:** Having jobs RIP'ed earlier on the FlexRip does not mean that your output device can output them any earlier.

**Tab "Merge"**

- **Merge:** Define if you want merge jobs on output.
- **Unit.** Select a unit for the below fields.
- **Margin:** Define an extra margin around the output.
- **Gap:** When merging, a gap adds an extra zone of empty pixels around each job.
- **Minimum Fill:** When merging, enter what percentage of minimum fill you want in the output. No output is generated before this fill percentage is reached.

### 10.14.14. FlexRip - Approval

Select the item **FlexProof - Approval** and go to **File > New**.



**Note:** Don't forget to save your settings. Use **File > Save**.

**Tab "General"**

- **Type:** The type will appear after having synchronized. First fill in the other settings.
- **Rip Node:** Enter the FlexRip/FlexProof computer name.
- **EskoLink Portnr.:** Enter the port number of the Dispatcher's EskoLink queue.
- Fill out these fields before you click **Synchronize with Rip**. This may take a few seconds.

**Tab "Queue"**

- **Queue:** A default name is proposed. This field automatically updates when you rename the device.
- **Queue Job Limit:** A FlexRip's Dispatcher EskoLink queue can handle the expose command of 2 jobs at the same time. If you want the Automation Engine queue to allow sending 2 expose commands at the same time, then set the job limit of the Automation Engine queue on 2.

Putting this job limit on 1 will result in each expose command to that EskoLink queue being handled one by one: the second job will be ripped after the first one is completely finished ("First In First Out" principle).



**Note:** Having jobs RIP'ed earlier on the FlexRip does not mean that your output device can output them any earlier.

**Tab "Merge"**

- **Merge:** Define if you want merge jobs on output.
- **Unit.** Select a unit for the below fields.
- **Margin:** Define an extra margin around the output.
- **Gap:** When merging, a gap adds an extra zone of empty pixels around each job.
- **Minimum Fill:** When merging, enter what percentage of minimum fill you want in the output. No output is generated before this fill percentage is reached.

### 10.14.15. FlexRip - B

Select the item **FlexRip - B** and go to **File > New**.



**Note:** Don't forget to save your settings. Use **File > Save**.

**Tab "General"**

- **Type:** The type will appear after having synchronized. First fill in the other settings.
- **Rip Node:** Enter the FlexRip computer name.
- **EskoLink Portnr.:** Enter the port number of the Dispatcher's EskoLink queue.
- Fill out these fields before you click **Synchronize with Rip**. This may take a few seconds.

**Tab "Queue"**

- **Queue:** A default name is proposed. This field automatically updates when you rename the device.
- **Queue Job Limit:** A FlexRip's Dispatcher EskoLink queue can handle the expose command of 2 jobs at the same time. If you want the Automation Engine Queue to allow sending 2 expose commands at the same time, then set the job limit of the Automation Engine queue on 2.  
  
Putting this job limit on 1 will result in each expose command to that EskoLink queue being handled one by one: the second job will be ripped after the first one is completely finished ("First In First Out" principle).



**Note:** Having jobs RIP'ed faster on the FlexRip does not mean that your output device can output them any earlier.

- **Optimize Expose Sequence:** Select this to have all separations RIP'ed in one pass, which normally leads to faster output. For some jobs however, this way of working results in memory problems, when this happens, deselect this option so that all separations will be RIP'ed separately (the RIP will be restarted after every separation).

**Tab "Merge"**

- **Merge:** We advise to set this to **No** as merging will then happen after this pass on the way to the Imagesetter and this gives a higher flexibility in merging (positive and negative can be merged on one film).
- **Unit.** Select a unit for the below fields.
- **Margin:** Define an extra margin around the separations.
- **Gap:** When merging, a gap adds an extra zone of empty pixels around each separation.
- **Minimum Fill:** When merging, enter what percentage of minimum fill you want in the output. No output is generated before this fill percentage is reached.

### 10.14.16. FlexRip - BI (Barco Imagesetter)

Select the item **FlexRip - BI (Barco Imagesetter)** and go to **File > New**.



**Note:** Don't forget to save your settings. Use **File > Save**.

**Tab "General"**

- **Type:** The type will appear after having synchronized. First fill in the other settings.
- **Rip Node:** Enter the FlexRip computer name.
- **EskoLink Portnr.:** Enter the port number of the Dispatcher's EskoLink queue.
- Fill out these fields before you click **Synchronize with Rip**. This may take a few seconds.

**Tab "Queue"**

- **Queue:** A default name is proposed. This field automatically updates when you rename the device.
- **Queue Job Limit:** A FlexRip's Dispatcher EskoLink queue can handle the expose command of 2 jobs at the same time. If you want the Automation Engine Queue to allow sending 2 expose commands at the same time, then set the job limit of the Automation Engine queue on 2.  
  
Putting this job limit on 1 will result in each expose command to that EskoLink queue being handled one by one: the second job will be ripped after the first one is completely finished ("First In First Out" principle).





**Note:** Having jobs RIP'ed faster on the FlexRip does not mean that your output device can output them any earlier.

- **Optimize Expose Sequence:** Select this to have all separations RIP'ed in one pass, which normally leads to faster output. For some jobs however, this way of working results in memory problems, when this happens, deselect this option so that all separations will be RIP'ed separately (the RIP will be restarted after every separation).

**Tab "Merge"**

- **Merge:** because this device type cannot merge, this settings is always on 'No'
- Select a **Unit** for the below field.
- **Margin:** Define an extra margin around the separations.

### 10.14.17. FlexRip CDI, CDI Spark and CDI Compact

These three types of devices can be configured in the same way. Select the matching item and go to **File > New**.



**Note:** Don't forget to save your settings. Use **File > Save**.

**Tab "General"**

- **Type:** The type will appear after having synchronized. First fill in the other settings.
- **Rip Node:** Enter the FlexRip computer name.
- **EskoLink Portnr.:** Enter the port number of the Dispatcher's EskoLink queue.
- Fill out these fields before you click **Synchronize with Rip**. This may take a few seconds.

**Tab "Queue"**

- **Queue:** A default name is proposed. This field automatically updates when you rename the device.
- **Queue Job Limit:** A FlexRip's Dispatcher EskoLink queue can handle the expose command of 2 jobs at the same time. If you want the Automation Engine Queue to allow sending 2 expose commands at the same time, then set the job limit of the Automation Engine queue on 2.

Putting this job limit on 1 will result in each expose command to that EskoLink queue being handled one by one: the second job will be ripped after the first one is completely finished ("First In First Out" principle).



**Note:** Having jobs RIP'ed faster on the FlexRip does not mean that your output device can output them any earlier.

- **Optimize Expose Sequence:** Select this to have all separations RIP'ed in one pass, which normally leads to faster output. For some jobs however, this way of working results in memory problems, when this happens, deselect this option so that all separations will be RIP'ed separately (the RIP will be restarted after every separation).

**Tab "Merge"**

- **Merge:** Define if you want merge jobs on output.
- **Unit.** Select a unit for the below fields.
- **Margin:** Define an extra margin around the output.
- **Gap:** When merging, a gap adds an extra zone of empty pixels around each job.
- **Minimum Fill:** When merging, enter what percentage of minimum fill you want in the output. No output is generated before this fill percentage is reached.

**Tab "CDI"**

When the CDI has a recent version of Grapholas software, the **Pixelclock** will here be shown as **'Automatic'**.

Older versions ask you to define the values here:

- **Pixelclock** is set to 360.000.
- **Perimeter:** Define the perimeter of the drum, in the selected unit.

### 10.14.18. FlexRip - HP Indigo 4000 Series

Select the item **FlexRip - HP Indigo 4000 Series** and go to **File > New**.



**Note:** Don't forget to save your settings. Use **File > Save**.

**Tab "General"**

- **Type:** The type will appear after having synchronized. First fill in the other settings.
- **Rip Node:** Enter the FlexRip computer name.
- **EskoLink Portnr.:** Enter the port number of the Dispatcher's EskoLink queue.
- Fill out these fields before you click **Synchronize with Rip**. This may take a few seconds.

**Tab "Queue"**

- **Queue:** A default name is proposed. This field automatically updates when you rename the device.

- **Queue Job Limit:** A FlexRip's Dispatcher EskoLink queue can handle the expose command of 2 jobs at the same time. If you want the Automation Engine Queue to allow sending 2 expose commands at the same time, then set the job limit of the Automation Engine queue on 2.

Putting this job limit on 1 will result in each expose command to that EskoLink queue being handled one by one: the second job will be ripped after the first one is completely finished ("First In First Out" principle).



**Note:** Having jobs RIP'ed faster on the FlexRip does not mean that your output device can output them any earlier.

- **Optimize Expose Sequence:** Select this to have all separations RIP'ed in one pass, which normally leads to faster output. For some jobs however, this way of working results in memory problems, when this happens, deselect this option so that all separations will be RIP'ed separately (the RIP will be restarted after every separation).

## 10.14.19. FlexRip - Proofer Output

Select the item **FlexRip - Proofer Output** and go to **File > New**.



**Note:** Don't forget to save your settings. Use **File > Save**.

### Tab "General"

- **Type:** The type will appear after having synchronized. First fill in the other settings.
- **Rip Node:** Enter the FlexRip computer name.
- **EskoLink Portnr.:** Enter the port number of the Dispatcher's EskoLink queue.
- Fill out these fields before you click **Synchronize with Rip**. This may take a few seconds.

### Tab "Queue"

- **Queue:** A default name is proposed. This field automatically updates when you rename the device.
- **Queue Job Limit:** A FlexRip's Dispatcher EskoLink queue can handle the expose command of 2 jobs at the same time. If you want the Automation Engine Queue to allow sending 2 expose commands at the same time, then set the job limit of the Automation Engine queue on 2.

Putting this job limit on 1 will result in each expose command to that EskoLink queue being handled one by one: the second job will be ripped after the first one is completely finished ("First In First Out" principle).



**Note:** Having jobs RIP'ed faster on the FlexRip does not mean that your output device can output them any earlier.

### Tab "Proof"

**Recombine Separations:**

You can define this workflow choice: or you choose to let the FlexRip recombine the separations or you choose to add a 'Proof (FlexProof)' task.

- **On the FlexRip**, you can add a margin, no merging is possible.
- **By Sequencing A 'Proof (Image Downloader)' Task:** You then need to select the '[FlexProof - Image Downloader](#)' device from the list.



**Note:** The list only shows those devices that are configured for the same node ; the RIP and Proof node must be identical.

### 10.14.20. FlexRip – Screened Output

**Shared Settings for all FlexRip flavors of Screened and Unscreened Output**

- **Tab "General"**
  - **Type:** The type will appear after having synchronized. First fill in the other settings.
  - **Rip Node:** Enter the FlexRip computer name.
  - **EskoLink Portnr.:** Enter the port number of the Dispatcher's EskoLink queue.
  - Fill out these fields before you click **Synchronize with Rip**. This may take a few seconds.
- **Tab "Queue"**
  - **Queue:** A default name is proposed. This field automatically updates when you rename the device.
  - **Queue Job Limit:** A FlexRip's Dispatcher EskoLink queue can handle the expose command of 2 jobs at the same time. If you want the Automation Engine Queue to allow sending 2 expose commands at the same time, then set the job limit of the Automation Engine queue on 2.  
 Putting this job limit on 1 will result in each expose command to that EskoLink queue being handled one by one: the second job will be ripped after the first one is completely finished ("First In First Out" principle).
- **Note:** Having jobs RIP'ed faster on the FlexRip does not mean that your output device can output them any earlier.
- **Tab "Merge"**
  - **Merge:** Define if you want merge jobs on output.
  - **Unit.** Select a unit for the below fields.
  - **Margin:** Define an extra margin around the output.
  - **Gap:** When merging, a gap adds an extra zone of empty pixels around each job.

- **Minimum Fill:** When merging, enter what percentage of minimum fill you want in the output. No output is generated before this fill percentage is reached.

## DCS

Select the item **DCS** below the item **FlexRip - Screened Output** and go to **File > New**.



**Note:** Don't forget to save your settings. Use **File > Save**.

All options in the menu tabs are equal to those for other flavors. They are described in the page [FlexRip - Screened Output](#) on page 92.

## TIFF

Select the item **TIFF** below the item **FlexRip - Screened Output** and go to **File > New**.



**Note:** Don't forget to save your settings. Use **File > Save**.

All options in the menu tabs are equal to those for other flavors. They are described in the page [FlexRip - Screened Output](#) on page 92.

There is one exception for the TIFF flavor: The tab "Queue" offers this extra option:

- **Optimize Expose Sequence:** Select this to have all separations RIP'ed in one pass, which normally leads to faster output. For some jobs however, this way of working results in memory problems, when this happens, deselect this option so that all separations will be RIP'ed separately (the RIP will be restarted after every separation).

## PDF

Select the item **PDF** below the item **FlexRip - Screened Output** and go to **File > New**.



**Note:** Don't forget to save your settings. Use **File > Save**.

All options in the menu tabs are equal to those for other flavors. They are described in the page [FlexRip - Screened Output](#) on page 92.

## PS

Select the item **PS** below the item **FlexRip - Screened Output** and go to **File > New**.



**Note:** Don't forget to save your settings. Use **File > Save**.

All options in the menu tabs are equal to those for other flavors. They are described in the page [FlexRip - Screened Output](#) on page 92.

## 10.14.21. FlexRip - Unscreened Output

### DCS

Select the item **DCS** below the item **FlexRip - Unscreened Output** and go to **File > New**.



**Note:** Don't forget to save your settings. Use **File > Save**.

All options in the menu tabs are equal to those for other flavors. They are described in the page [FlexRip - Screened Output](#) on page 92.

### TIFF

Select the item **TIFF** below the item **FlexRip - Unscreened Output** and go to **File > New**.



**Note:** Don't forget to save your settings. Use **File > Save**.

All options in the menu tabs are equal to those for other flavors. They are described in the page [FlexRip - Screened Output](#) on page 92.

There is one exception for the TIFF flavor: The tab "Queue" offers this extra option:

- **Optimize Expose Sequence:** Select this to have all separations RIP'ed in one pass, which normally leads to faster output. For some jobs however, this way of working results in memory problems, when this happens, deselect this option so that all separations will be RIP'ed separately (the RIP will be restarted after every separation).

### PDF

Select the item **PDF** below the item **FlexRip - Unscreened Output** and go to **File > New**.



**Note:** Don't forget to save your settings. Use **File > Save**.

All options in the menu tabs are equal to those for other flavors. They are described in the page [FlexRip - Screened Output](#) on page 92.

### PS

Select the item **PS** below the item **FlexRip - Unscreened Output** and go to **File > New**.



**Note:** Don't forget to save your settings. Use **File > Save**.

All options in the menu tabs are equal to those for other flavors. They are described in the page [FlexRip - Screened Output](#) on page 92.

## 10.14.22. Gang Run Printing

These fields are relevant when you work with the Pilot's **Gang Run Printing** view.

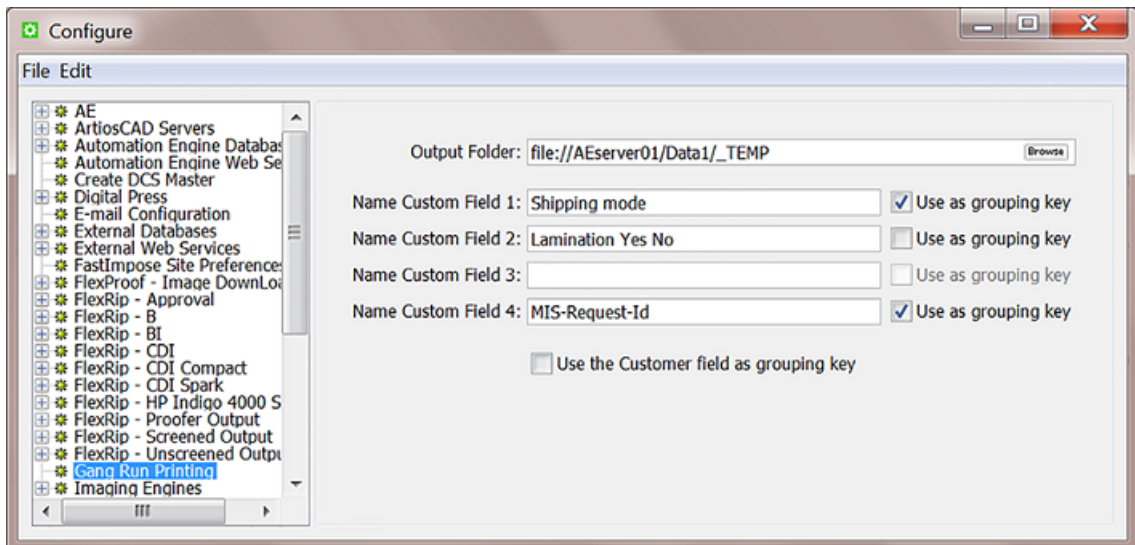
- **Output Folder:** Define the folder where the substrate queues write their nested layout files. These files are picked up from here as input files for the output workflow (specifically the [Export Gang Run Layouts task](#)). Normal use of the Gang Run Printing mode does not require you to access these files.



**Note:** We advise to clean up these temp data. This can easily done in your output workflow ticket: See this example:



- The **Custom Fields** can be given specific names so that they can be used in the *'Extra' tab of the Submit to Gang Run task*. They then show up as extra columns in the Gang Run printing view of a specific Substrate Queue.
- If you also confirm that a **Custom Field** can be **Used as grouping key**, the value of this field will so help control which files are nested together. Typical attributes to base nesting groups on are Customer, Printing Method, Finishing Method. Learn more about grouping keys in [Grouping Certain Graphics Together](#).
- Select **Use the Customer field as grouping key** if you want a system-wide setting for this feature, instead of having to control it per ticket of the [Submit to Gang Run task](#).



### 10.14.23. GlobalVision

#### Concept

Following Automation Engine tasks use technology from the company [GlobalVision: Inspect Artwork, Inspect Barcodes, Inspect Braille, Inspect Spelling and Inspect Text](#).

These tasks require a software license created by GlobalVision. You can purchase various subscription packages directly from GlobalVision or choose to purchase one via Esko.

### Enter and Test your GlobalVision License Key

In this field, enter the license key you received from GlobalVision, followed by a colon ( : ), and your Company ID (as customer of GlobalVision).

Don't forget to save (**File > Save**).



**Important:** The license key is not validated here in the Configure tool. You will only see that the license key is invalid or expired when you run one of the GlobalVision inspection tasks. This also implies that you need an internet connection to run these tasks.

## 10.14.24. Imaging Engines

This is where you configure any Imaging Engine RIPs.

Learn more in the chapter [RIP'ing with Imaging Engine](#), in the page [Imaging Engine Configuration](#).

## 10.14.25. Jobs



**Tip:** Working with Automation Engine Jobs is documented in the dedicated chapter [Jobs](#).

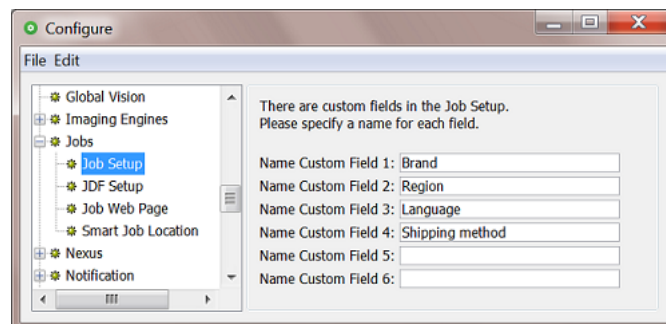
### Job Setup

You can here define the name of several **Custom Fields**.

When you enter names in custom fields 3 to 6, an extra tab **Categorization** will appear in the **Job Setup** dialog box.



**Note:** Think carefully about these names because changing their names later creates confusing lists of values for these fields in existing Jobs.





## JDF Setup

This item allows to define default settings that are used when (new) Jobs are created via JDF/JMF.

- Tab "**Settings for JDF job creation**"
  - **Job Name** and **Job Folder**: Use SmartNames to define the name and folder of the resulting Job.
  - **Apply Job Setup**: This option allows to create a same job folder structure for each new Job created via JDF. Select the option and click **Select** the Job of which you want to take over its job folder structure.

You can also indicate what other items should be copied from that Job, apart from the **Folders**. Select **Tickets** to also copy any (blue) Job tickets into the new Job. Select **Parameters** to also copy those defined in the Job's setup tab 'Parameters'.

- Tab "**Custom Fields**"

This is where you can define how the data in the "Comment" JDF elements is used to populate the custom fields (**Categories**) that appear in the Job Setup dialog.

To do this, type an XPath expression into the field corresponding to the category you want to fill in automatically. To get some help, click **Edit** to open the [XPath builder](#).



**Note:**

- The JDF that was loaded in the XPath builder is remembered while the **Configure** dialog is open.
- When editing the next XPath, the same JDF will be automatically used as the example XML in the XPath builder.

Settings for JDF job creation
Custom Fields

During job creation from JDF, the 2 job custom fields are set to values found under the Comment elements with names equal to Description2 and Description3 respectively. This can be overruled by specifying an XPath expression.

XPath Custom Field 1:  Edit

XPath Custom Field 2:  Edit

To map values from the JDF file onto the extra Custom Fields during job creation from JDF, specify an XPath expression for each Custom Field that should be filled.

XPath Custom Field 3:  Edit

XPath Custom Field 4:  Edit

XPath Custom Field 5:  Edit

XPath Custom Field 6:  Edit

## XPath Builder

### Concept

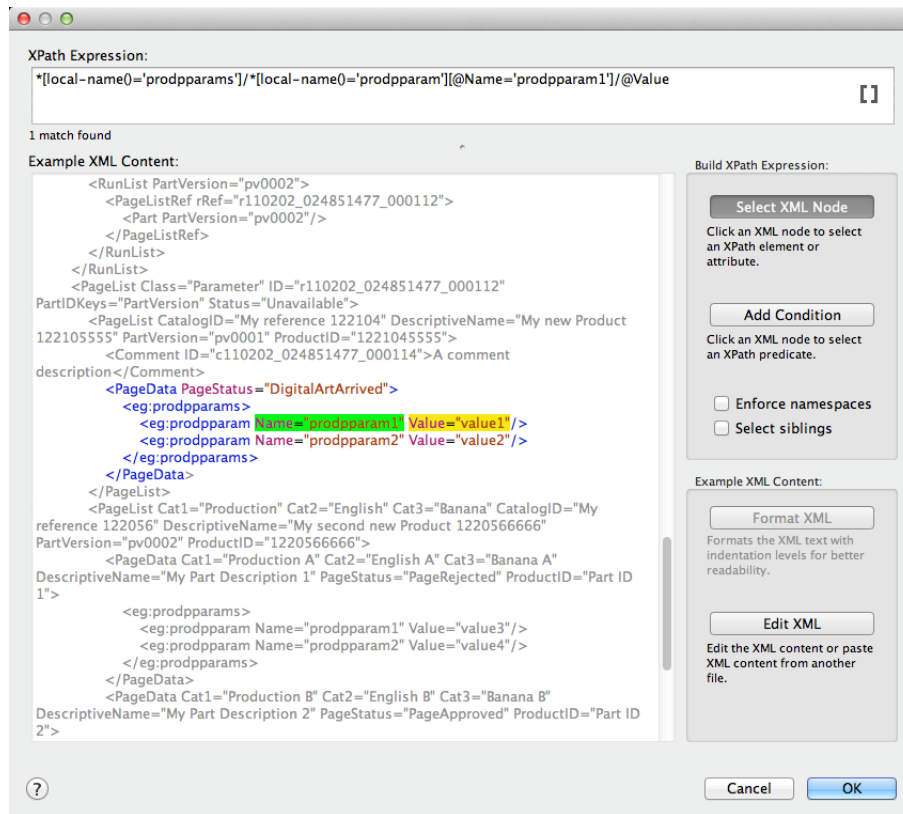
When you click **Edit** in any field that allows XPath Expressions, the **XPath Builder** opens.

The XPath Builder offers alternative starting points:

- The XPath is not resolved relative to the root node of the XML document, but from another XML element.
- When a proper JDF is used as the example XML, a list of possible starting points is generated.
- While the XPath builder automatically selects the appropriate starting point, it is still possible to manually change the starting point by clicking on another node while holding down **Command** (Mac) or **CTRL** (Windows).

### Example

See an example where the XPath builder is used to create an XPath for a product part attribute:



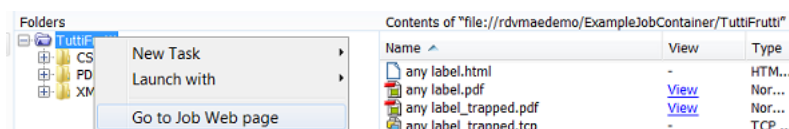
- The XPath builder automatically uses the first PageData node as starting point. This is visualised by showing the content outside the PageData node in grey.
- It is still possible to select nodes outside the PageData node as result node or as predicate node.
- When selecting nodes outside the PageData node, the XPath builder will create absolute XPaths.
- When you want, you can modify these absolute paths by making them relative to the PageData node using . . /

## Job Web Page

### Concept

In the Pilot, you can right-click a job folder and select **Go to Job Web Page**. This opens an internet browser and loads a predefined path (URL).

This is typically used to navigate from within an Automation Engine Job to its related WebCenter project.

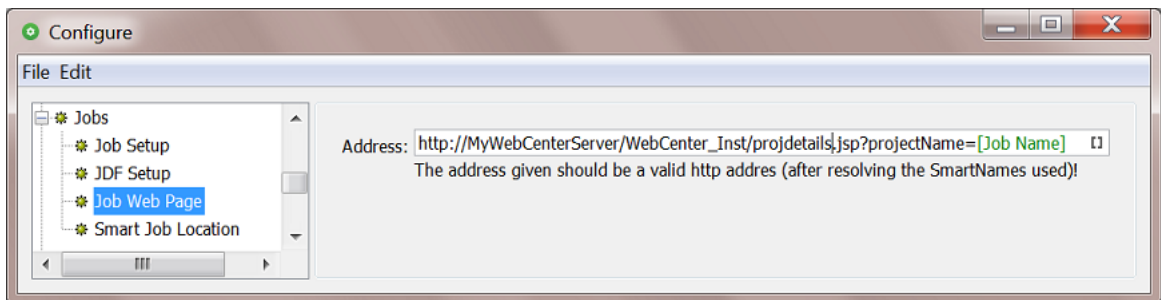


### Configuration

This is where you define the web **Address** for the **Job Web Page**. Obviously, it needs to be a valid URL, so if you use SmartNames, make sure they resolve correctly.

This is the typical structure of such a URL to a WebCenter project:

- The first part of the URL is typically the name of your WebCenter web site. For example `http://MyWebCenterServer/WebCenter_Inst`
- This is followed by `/projdetails.jsp?projectName=`
- You end with a SmartName that resolves as the name of the WebCenter project for that job. For example: when the WebCenter project has the same name as the Job on Automation Engine, then use `[Job Name]`.



## Smart Job Location

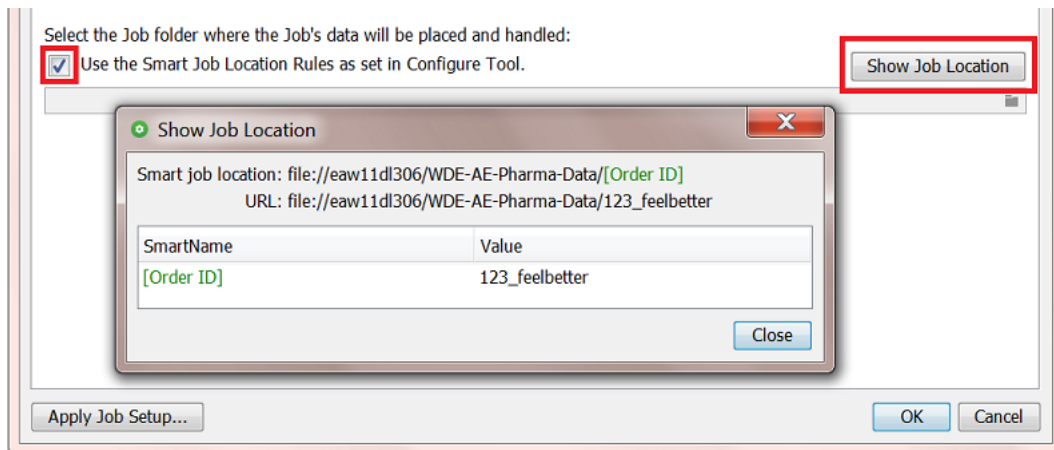
### Concept

A **Smart Job Location** uses rules and SmartNames to define the location of a Job's job folder. This avoids having to enter this path manually when creating Jobs.

There are three types of specifications that you can use to set up the Smart Job Location. You can base the location on the **Customer** of that job, or on a custom **Rule** or you can specify (only) the **Container**.

These three methods are checked in a specific order: If no path is found based on the **Customer**, the set of custom rules will be checked. If there is still no valid path found for the job folder, then the **Container** setting will be checked.

The dialogs **'New Job'** and **'Job Setup'** offer the option to **Use the Smart Job Location Rules**. To see a preview of what the folder path will be, click on the button **"Show Job Location"** to see how the current rules create the path for this job. An example:



### Configuration

We now have a closer look at the types of specifications:

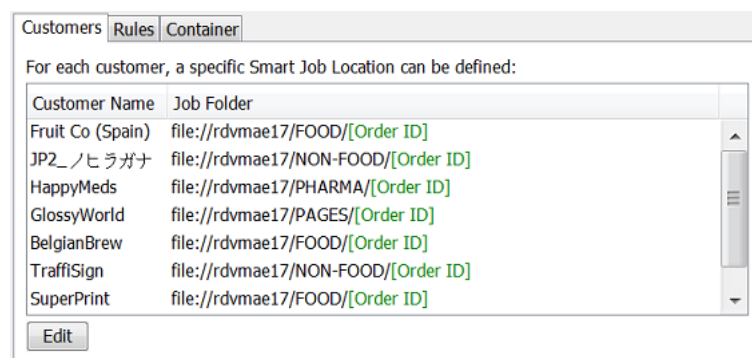
- [Customers](#)
- [Rules](#)
- [Container](#)



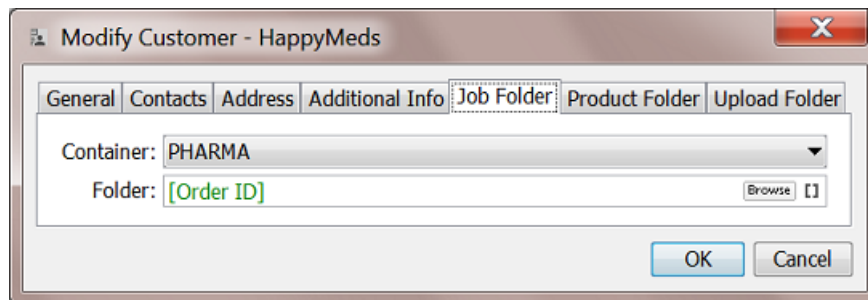
**Tip:** Also when using JDF to create Jobs, it is possible to use the concept of Smart Job Location as a SmartName for the indication of the folder for the Job in JDF: use <S<sub>JL</sub>>.

### Customers

You can here define a root location for all jobs of a specific customer. An example:



These settings also become part of the customer definition in **Tools > Customers**. An example:

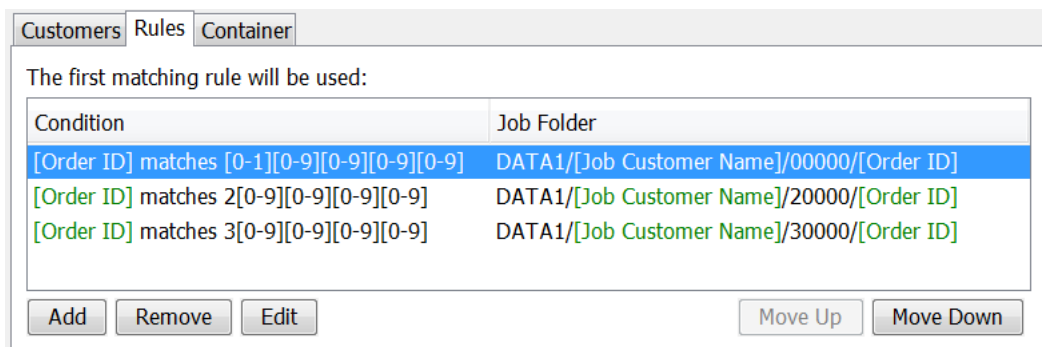
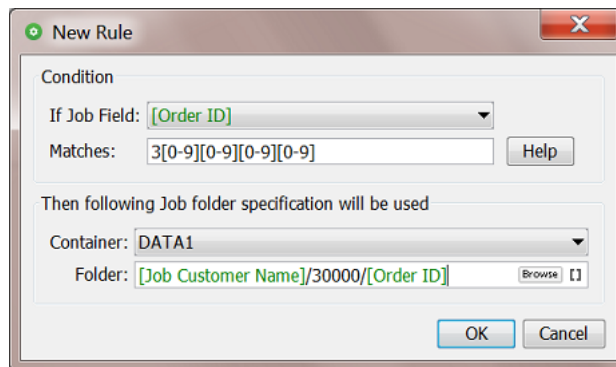


**Rules**

When no customer based setting was specified (or no valid location could be found), the systems checks if you did set any custom **Rules**.

These rules are based on conditions that use *Regular Expressions*. Click the **Help** button for a brief tutorial.

Here is an example where job folders are created in a specific root folder based on the number in their job's Order ID:



**Container**

When the checks on **Customers** and **Rules** did not return a valid path for a job folder, then the folder will be created in the here defined **Container**.

Here are two main use cases for this setting:

- Use it as a "Default Job Location". When you request a Smart Job Location, we always advise to at least here fill in a Container based location. This way, when none of the categories **Customers** or **Rules** result in a location, the system will use this setting, and not use a location that you can not control.
- This setting is useful when you have a system where you have all jobs created within one Container (a share on a hard disk) until that share has no more free space. You then create a next Container, change this setting to the new Container and you so use that one until it also fills up, etc.

### 10.14.26. Nexus

Learn more in [Integrating with Nexus \(outdated\)](#).

### 10.14.27. Notification

Notifications are messages sent by Automation Engine (E-mail, .XML or .TXT files).



**Note:** For E-mail notifications, please check if the [Send E-mail task](#) is a better alternative.

The two tabs in this Configure item offer more advanced ways:

- [Rules](#).
- [Via File](#).

You can also use notification **Templates** to customize their content. Learn more in [Notification Templates](#).

#### Notification Rules

Instead of defining notifications per ticket, you can define general notification **Rules**. You can set a notification rule for all or specific tasks or devices (queues).

You can define such rules for **Tasks** and for **Devices**.

For example:

- Writing an XML file every time a [Milestone task](#) ends.
- Writing an XML file of all actions on your CDI Compact device. Or have each notification added to the main XML for that CDI.



**Note:** Note that, for [CDI](#) and [Kongsberg](#) devices, the specific tools as described in their dedicated chapters may be a better alternative.

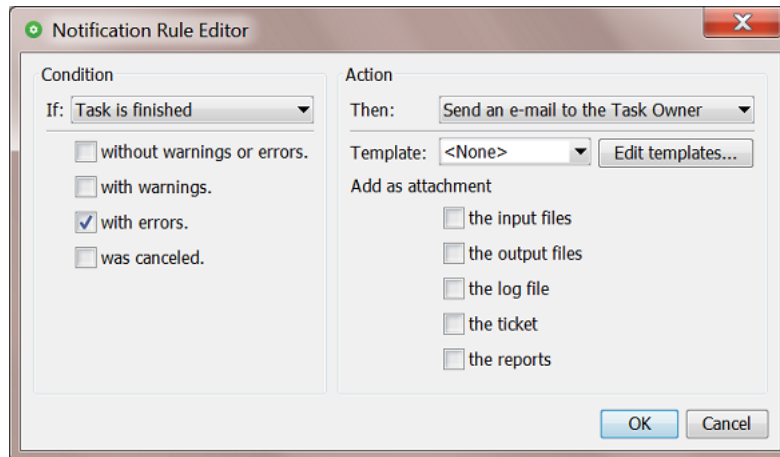


**Attention:** When you set a notification for both a device and for a task using that device, then only the one on task level will be executed.

### Creating a Notification Rule

1. Click **Add**.

The **Notification Rule Editor** opens.



2. Define the rule:

- **Condition**

- Select one or multiple of the task statuses and select if this is the status of this single task type or of the whole workflow that this task belongs to as a step.

- **Action**

- **Then:** Choose the type of notification.



**Tip:** If you want multiple types, create multiple notification rules.

- **E-mail:** Choose if you send it to the one who launched the task or type in E-mail address (when multiple, use a semicolon as separator). Select any attachments to the E-mail.



**Tip:** This is a good place to use SmartNames that pick up the E-mail address of the job's Customer Service Representative (Job setup) or any Customer contacts.

- **XML file:** Choose if you want a file per notification or if you want to add the information to an already existing XML file. For example: Adding all notification info related to a TIFF output device to one XML for each day (use SmartName [date] in the name of the XML file).

In the output field, minimally enter a name (use SmartNames). You can also define or browse to a specific folder to write the XML files into or you can leave this field empty and make the system use the default place for these files as defined in the next configuration item "[Via File](#)".



- **TXT file:** Same options as for XML files, but now you can also use templates to add custom text.
- **Template:** Templates add custom made texts. Learn more in [Notification Templates](#) on page 105.



**Note:** The "Templates" list and the "Edit Templates" button are only shown when at least one template was created before.

3. Click **OK** to confirm and close.

Add more if you want to.

### Via File

When setting up a notification rule that creates XML or TXT file, you can choose to not enter any output folder for these files, but only specify their name (learn more [here](#)). In that case, these files are written in the default place that you define in these tabs.

- **Tab "Text"**
  - **Append the message in a Log File:** When you choose to add the notification information to a same file. Browse to change its location and there create/select an empty file.
  - **Create a new file per message in a folder:** Define the folder where these notification text files will be created.

- **Tab "XML"**

Same as for TEXT files, but you can also choose to include the tasks messages (that appear in the task's "details") and the ticket parameters it used.

## Notification Templates

A notification template can add custom text to the notification.

To create, modify or delete templates, click '**Edit Templates...**' in the **Notification Rule Editor**. Alternatively, go to **Pilot > Advanced > Edit Notification Templates...**

Learn more below in [Edit Notification Templates](#).

### Edit Notification Templates

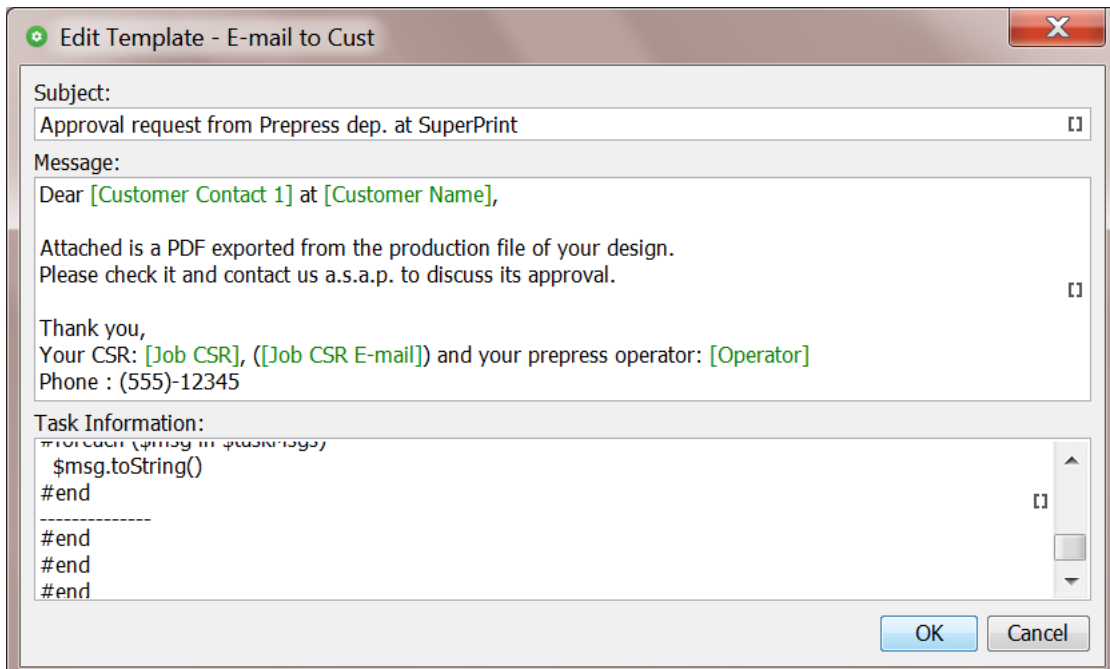
#### Creating a template

1. Click **Add**.
2. The **Add** dialog pops up. Enter a name for the template. Click **OK**.
3. The **Edit Template** dialog pops up.

It has dedicated fields for **Subject** and **Message**, SmartName enabled.

The field for **Task Information** is best only changed on advise of Esko support. It includes code-based conditional information that can include the attachments you requested while [creating the notification rule](#).

Here is an example:



**Tip:** You can also **Edit Notification Templates** in the **Configure** tool, provided that you already have templates available: go to **Configure > Notification > Rules > Task/Device > Add...**

### 10.14.28. Odystar

Learn more in [Integrating with Odystar \(outdated\)](#).

### 10.14.29. Proof Servers

This configuration is used to connect the Esko Proof Server which his required for

- the **Proof for Contract Approval** task (part of the Pack Proof product) . Learn more in the [user guide of Pack Proof](#), in the page on 'Pack Proof Configuration'.

- the [Proof for Content Approval task](#) (part of the Imaging Engine product). Learn more in [Imaging Engine Configuration](#).

### 10.14.30. Plate Merger

This item is documented in the chapter [Flexo CTP Device Workflow](#). Find a direct link [here](#).

### 10.14.31. Preflight Tools



**Important:** This item served to link Automation Engine to external preflight server software that you can then use in the [Preflight via External Application](#) task. However, in AE v16, this task was declared to become 'Soon Outdated'. Learn more about this concept and your alternative in [Concept of \(Soon\) Outdated Tasks](#).



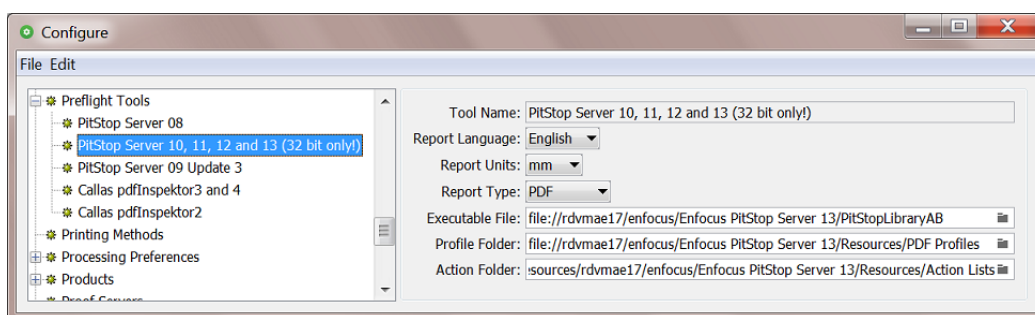
**Important:** When you want to use Enfocus PitStop, we advise to use the version that is built into Automation Engine. This is done when you use the task [Preflight with PitStop](#).

Below is valid when you have a reason to still work with that separate install of PitStop Server:



**Important:**

- This external preflight server software (for example a separate install of PitStop Server) has to run on your Automation Engine server.
- You must share the folder containing the profiles (for example PitStop's C:\Program Files\Enfocus\Enfocus PitStop Server 13) to be able to access it from the Preflight ticket.



**Tool Name:** Select one of the supported preflight applications.

**Report Language:** Select the language you want the report to be in. For Enfocus PitStop Server, you can set this in the PitStop Server preferences.

**Report Units:** Select the units to be used in the preflight report.

**Report Type:** Select the type of report: PDF, XML or both.

**Executable File:** Enter (browse to) the path to the preflight application's executable file.

**Profile Folder:** Enter (browse to) the path to the folder where the default profiles for the selected preflight tool are stored.

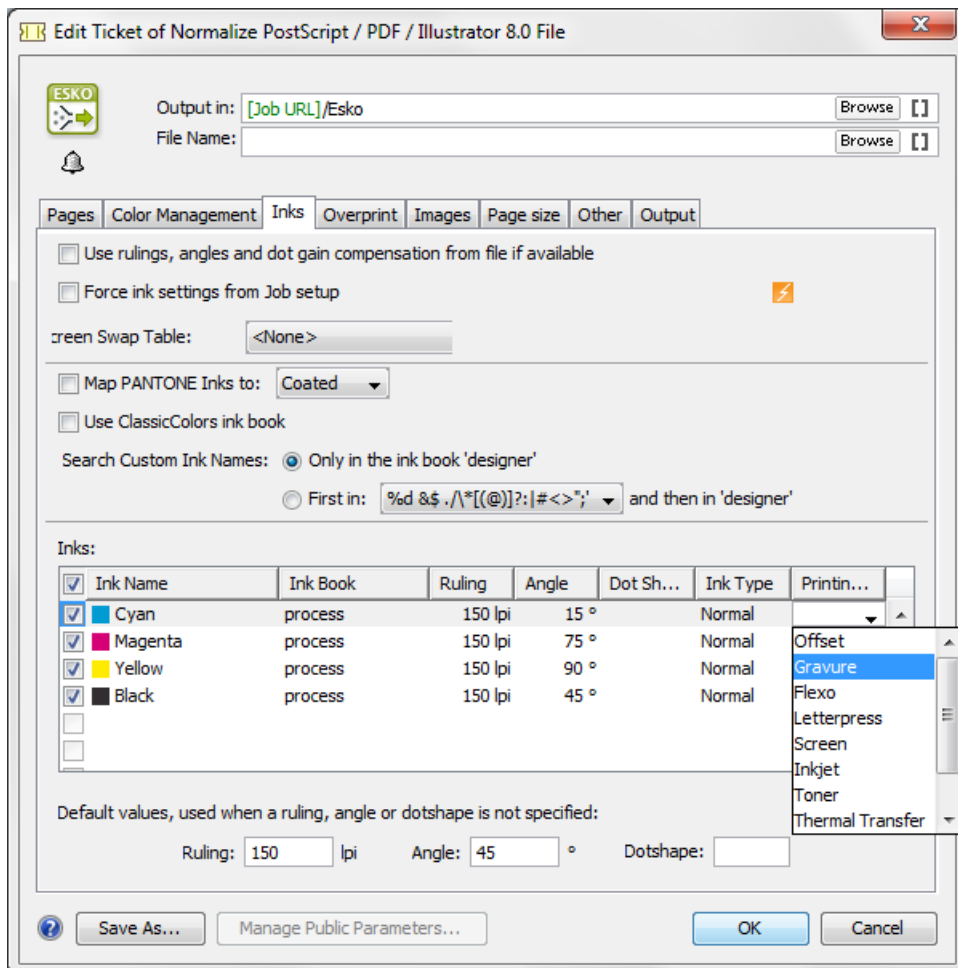
**Action Folder:** Enter (browse to) the path to the folder where the action lists for the selected preflight tool are stored. The Preflight task will allow you to select multiple actions from this folder.

### 10.14.32. Printing Methods

**Printing Methods** are defined here in the Configure tool. You get a list of standard names. You can add custom ones.

You can set an ink to a specific printing method by using the Job setup's *Inks tab* or by using a one of these 'Classic' tasks: [Adjust PDF Screening](#), [Extract Inks](#), [Normalize PDF File](#), [Normalize PS / PDF / AI 8.0 File](#), [Optimize PDF Separations](#), [Trap with PowerTrapper](#) and when *RIP'ing with Imaging Engine*.

For example:



These are typical examples of how to make use of a **Printing Method**:

- In your **Imaging Engine** (RIP) task for a flexo device, you select only the inks of printing method 'flexo'.

- You make a special ReportMaker PDF that focusses on the 'ink' used for embossing. In your workflow, you use the [Extract Inks \(Classic\)](#) task to select the wanted ink type before you start the ReportMaker (Classic) task.

### 10.14.33. Processing Preferences

- **PDF+ Processing**

All PDF+ files require to have a document profile.



**Note:** Learn about PDF+ files in [PDF+ in Automation Engine](#).

- **Default Document Profile:**

When Automation Engine runs a task on a PDF+ file (one that uses the PDF Action List Processor, see below), it will set the PDF+ file's document profile to the one selected here.

When the PDF+ file did not have a profile yet, it will be set to the one defined here.

When the PDF+ file already had another a profile, it will be changed to the one defined here.



**Note:** In Automation Engine, this is the only place where you can define this default document profile for PDF+ files.



**Note:** Tasks that set this document profile are those using the PDF Action List Processor (PAL):

- The tasks [Optimize PDF](#), [Apply PDF Action List](#) and [Trap](#).
- The Step & Repeat tasks (excluding the 'Classic' ones) set this profile if there is no profile in the one-ups. If any input file has a profile, the first one is used.
- Any VDP expansion also adds this profile to the expanded data.

Learn more in [Which AE task Uses which Technology?](#).

- **Automatic Normalization**

Tasks that [require Normalized PDF files](#) as input will automatically normalize any native PDF you launch them on. This hidden and automatic normalization is using the here defined task ticket.

By default, Automation Engine uses the [Normalize PostScript/PDF/Illustrator 8.0 File \(Classic\)](#) task ticket named "**OnDemand**".

From this ticket only the settings in the **Color Management** tab are taken into account.

All other settings of the automatic normalization are forced to fixed default settings. For example, automatic normalization will always embed all images.

- **Embedded Images**

Normalized PDF files have the ability to save all their images internally, but this may result in oversized files. You can define the maximum size for internal images here.

Images exceeding the defined size will be saved externally.

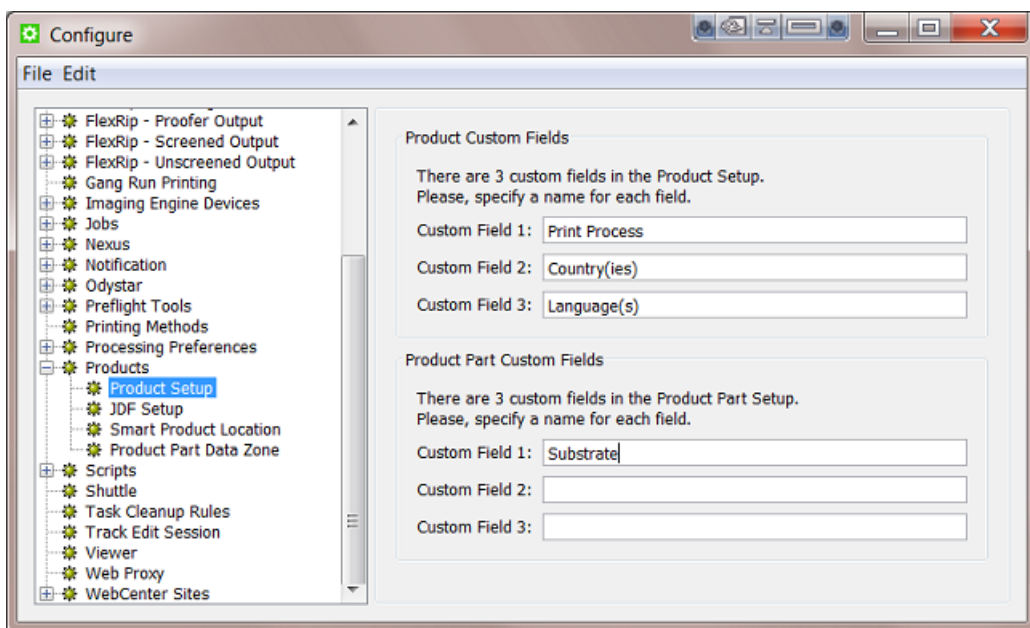
### 10.14.34. Products



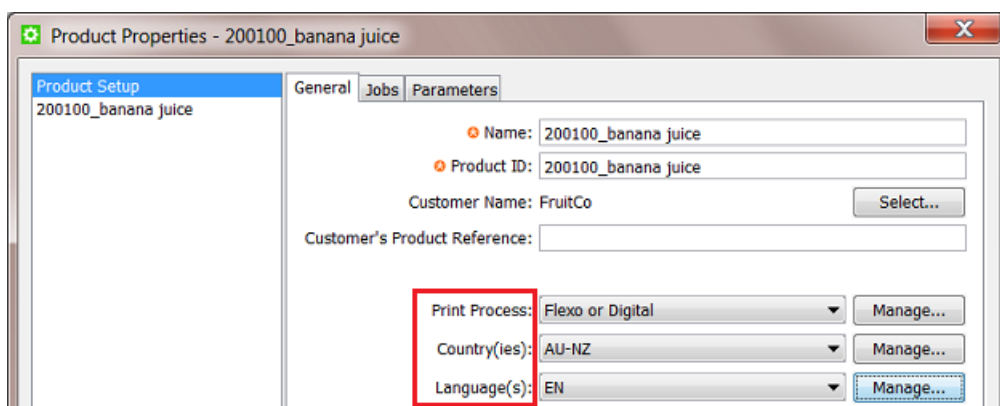
**Tip:** Automation Engine Products are documented in the dedicated chapter [Products](#).

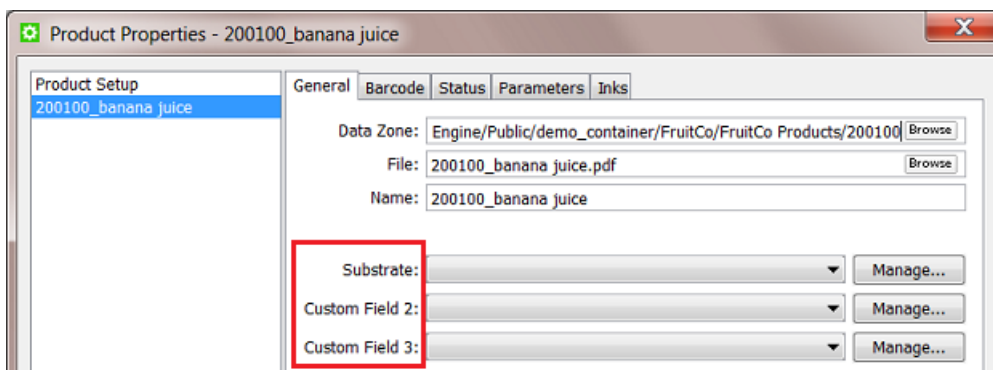
#### Product Setup

In the item **Product Setup**, you can name the custom fields that appear in the [Product Setup](#) and in the [Product Part Setup](#).



Above example configuration results in this:





### JDF Setup



**Note:** JDF workflows are not documented in this user manual. Learn more about the basics of JDF in the chapter [Integrating with External Systems](#). For more information, contact Esko Solution Services.

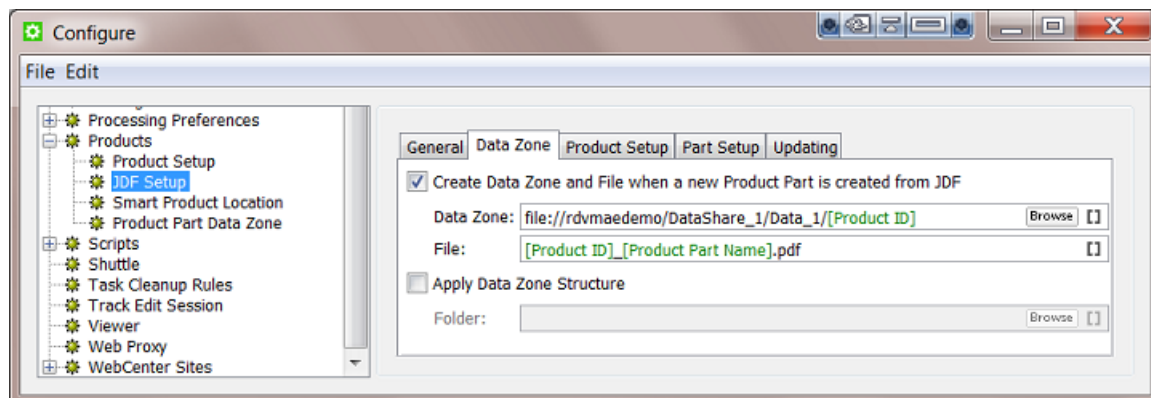
#### General

When you work with JDF, decide here if you want to **Enable automatic product creation via JDF**.

#### Data Zone



**Note:** The **Data Zone** concept is documented in [Products Data Structure](#).



- **Create Data Zone and File when a new Product Part is created from JDF:**

- **Data Zone:** When the JDF references a non-existing product part, define here where to create the data zone for that product part (the physical folder containing the part's file).
- **File:** When the JDF references a non-existing product part, define here where to create the subfolder and/or file in the data zone.
- **Apply Data Zone Structure:** Use this option when you want to add a specific substructure to the data zone. Browse to an example data zone (folder with subfolders).

### Product (Part) Setup

In the **Product Setup** and **Part Setup** tabs, you can add rules to map values from the JDF onto the attributes of the products that the JDF creates.

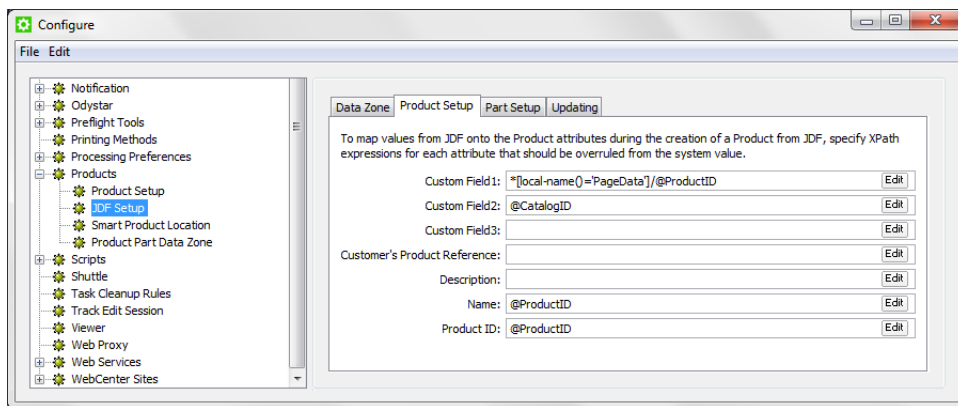
To do this, type an XPath expression into the field for each attribute that should be overruled by the system value, or click **Edit** to open the XPath builder.



**Note:**

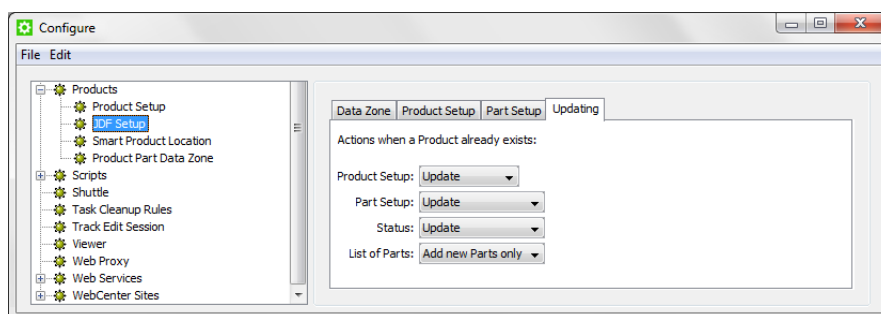
- The JDF that was loaded in the XPath builder is remembered while the Configure dialog is open.
- When editing the next XPath, the same JDF will automatically be used as the example XML in the XPath builder.

Learn more about using XPath in [XPath Builder](#) on page 98.



### Updating

In the **Updating** tab, indicate what should happen when an existing product is updated over JDF.



Learn more about updating products in [The Add to Products task](#).

### XPath Builder

#### Concept



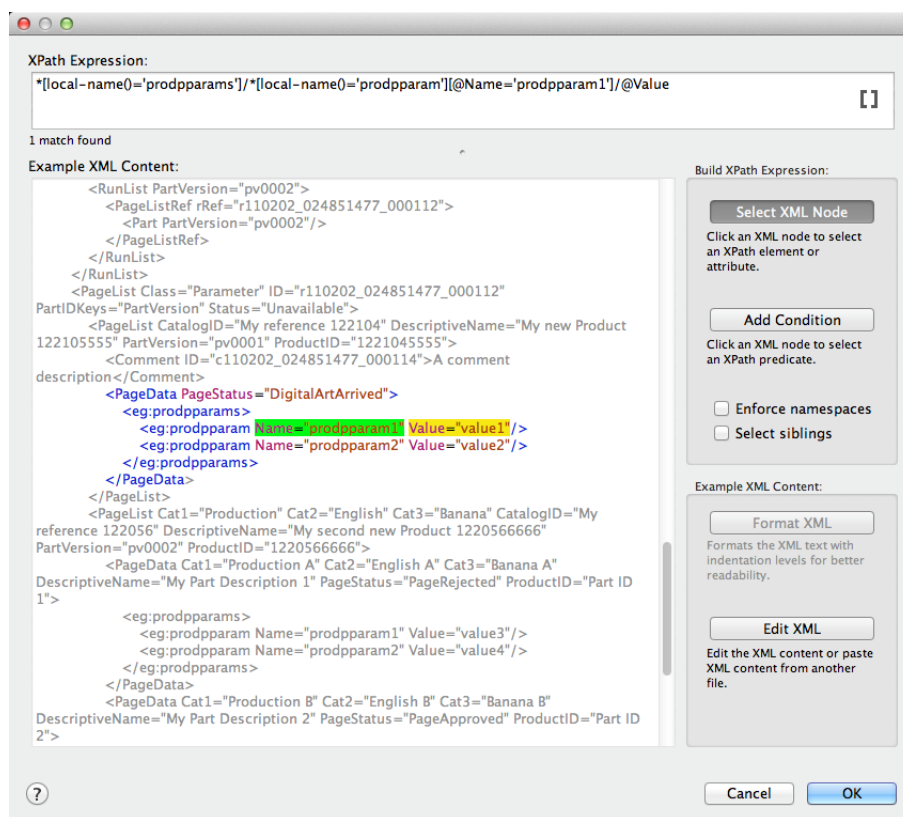
When you click **Edit** in any field that allows XPath Expressions, the **XPath Builder** opens.

The XPath Builder offers alternative starting points:

- The XPath is not resolved relative to the root node of the XML document, but from another XML element.
- When a proper JDF is used as the example XML, a list of possible starting points is generated.
- While the XPath builder automatically selects the appropriate starting point, it is still possible to manually change the starting point by clicking on another node while holding down **Command** (Mac) or **CTRL** (Windows).

### Example

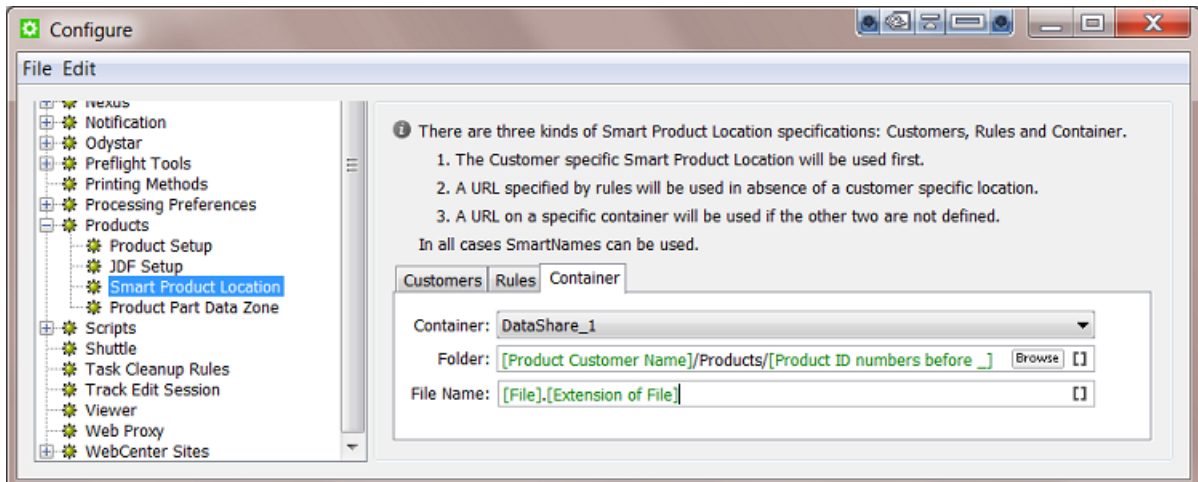
See an example where the XPath builder is used to create an XPath for a product part attribute:



- The XPath builder automatically uses the first `PageData` node as starting point. This is visualised by showing the content outside the `PageData` node in grey.
- It is still possible to select nodes outside the `PageData` node as result node or as predicate node.
- When selecting nodes outside the `PageData` node, the XPath builder will create absolute XPaths.
- When you want, you can modify these absolute paths by making them relative to the `PageData` node using `../`

### Smart Product Location

Smart Product Location allows to automatically decide the location for a new product based on a set of rules defined in **Configure > Products > Smart Product Location**.



Learn more about creating products in [Creating Products](#) and about their file location settings in [Product \(Part\) Properties](#).



**Important:** You do not need this tool when your file is already in the right place when you make it a product part.

### Three Ways to Decide the Location

You can use three kinds of specifications to set up the Smart Product Location: based on **Customers**, on custom **Rules** and on a chosen **Container**.

These three ways are checked in a specific order: if the **Customers** check does not return a valid path, then **Rules** will be checked. If this still does not return a valid path, then the **Container** rule will be used.

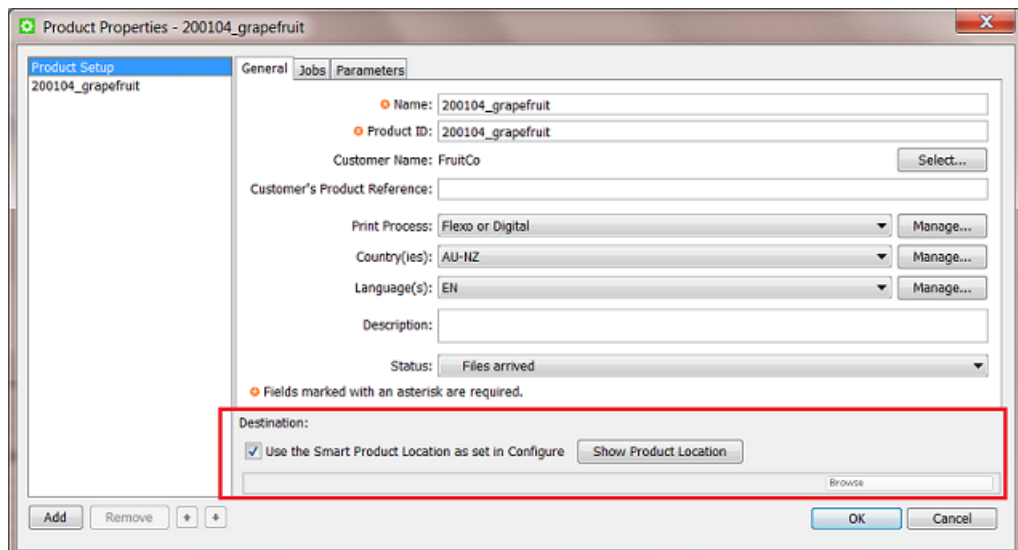
- **Customers:** This rule allows to specify per customer a SmartName based path where all its products will be created.
- **Rules:** This tab allows to set extensive conditional rules. For example you could create all the products in a structure based on their [custom field 1]. You can create several rules and they will be checked from top to bottom.
- **Container:** This tab allows to set a smart path in a fixed Container where all products will be created (from now on). For example: All products are created in Container `Data1` and when the disk of that Container is full, you change the configuration so that from now all new products will be created in Container `Data2`.

### Using the Smart Product Location

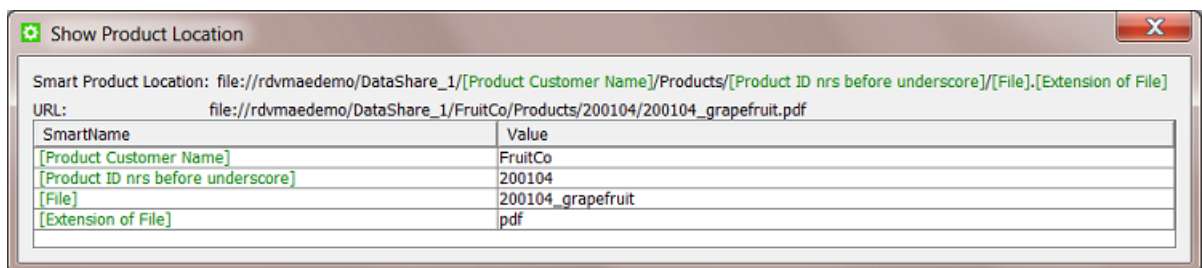
Smart Product Location is used in these cases:

- When choosing [Uploading As a New Product](#). This feature is used for example when your product data is still on a CD or on your desktop.
- When creating products via JDF or when placing products via JDF (a product part URL is already decided but 'empty' and the JDF then delivers the file to the URL that expects the file).

When [Uploading a File as a Product](#), the panel shows the extra Smart Product Location tool at the bottom:



Click **Show Product Location** to see a preview of where the uploaded file will be placed. An example:



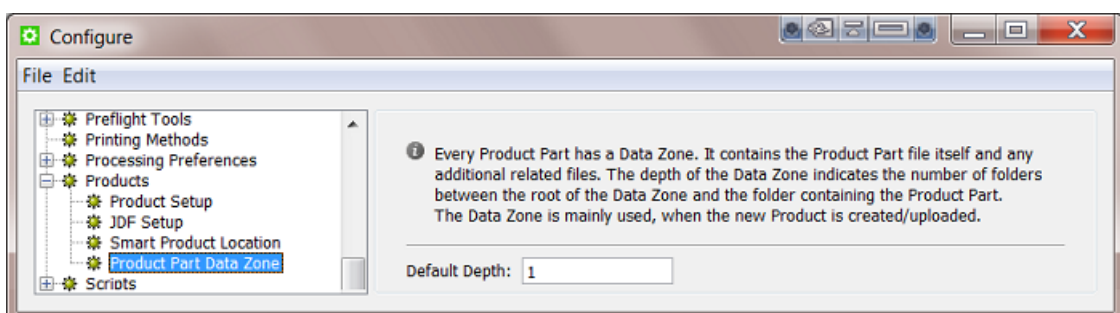
## Product Part Data Zone



**Note:** Learn about the concept of **Data Zone** and see some examples in [Products Data Structure](#).

Every product part has a data zone. It contains the product part file itself and any additional related files.

When you look at a product's data zone in the Pilot, the depth of the data zone indicates the number of folders that you will see between the root of the data zone and the folder containing the actual product part file.



The **Default Depth** value that you enter here is used when you create or change the product part properties.

### 10.14.35. SAP Servers

Configuring an SAP server is required when integrating with such a system. Learn more in [Interact with SAP](#).

### 10.14.36. SFTP sites

SFTP sites are used in the [Upload via SFTP task](#) and also by an [SFTP Access Point](#). Learn more about SFTP in the documentation pages of those tools or in this [online article describing the difference between FTPS and SFTP](#).

To configure an SFTP site (an SSH server), open the Configure tool, select the topic **SFTP Sites** and choose **File > New**. A default name appears, click and wait to change it. It is good practice to add both the host server and the user in the name.

#### Settings

- **Server:** The name of the SFTP server.
- **User Name:** The name of the user logging in to that SFTP server.
- Authenticating with an SFTP server requires a valid SSH account (`username@host`) and one or both of these authentication methods:
  - a valid password
  - a pair of public-private key files, as generated by an SSH-keygen tool.

An SSH private key authentication enables a higher level of security (it for example avoids bots trying out all user/passwords). These keys come in pairs, a public and a private key.



**Note:** In the rare case where the SFTP server was set to accept both types of authentication, you can enter both a password and a private key. The system then first checks the password method, and when that fails, it tries the keys.

- When using a **password**, enter the password.
- When (also) using a **Private Key**, use **Select...** to upload the private SSH key file into the Automation Engine database. Optionally, fill in the **Passphrase** (to be able to unlock the key).



**Note:** When the public-private key pair authentication is used, the public key must be added to the authorized keys of the SFTP server and the private key must be selected in this configure tool.

**Clear** serves to remove a prior selected key from the Automation Engine database.

- **Test Connection.** Always test before saving this configuration.

### 10.14.37. Secure Web Proxy

Learn about using web proxy settings in [the page on the item Web Proxy](#).

This item is where you add proxy settings when the communication is https (not http).

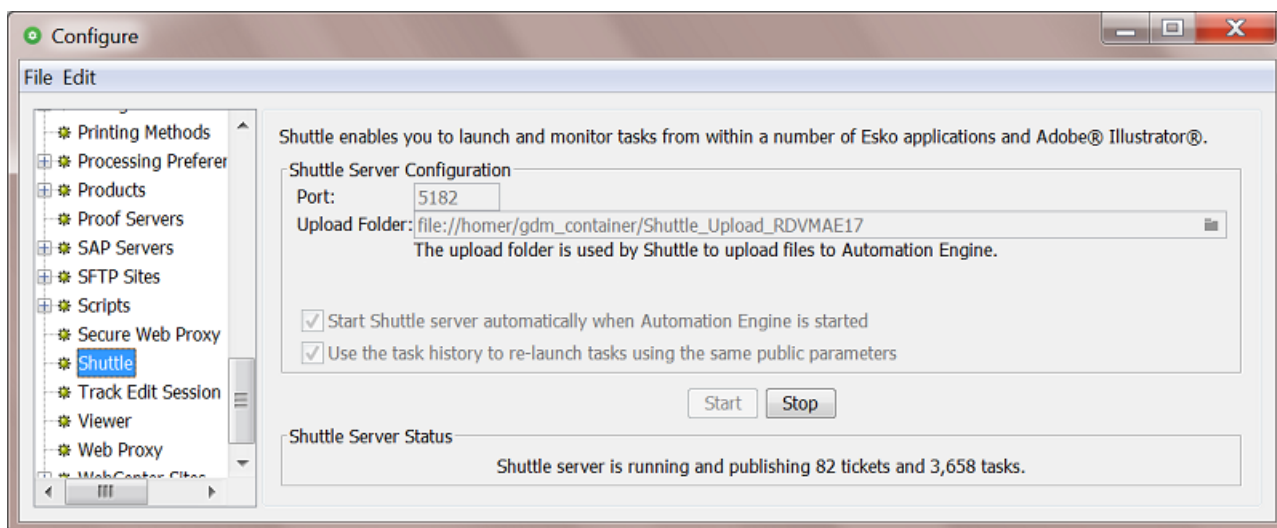
### 10.14.38. Scripts

[This dedicated chapter about Scripting](#) explains how Automation Engine can run custom scripts and so help automate desktop applications.

Learn more about its configuration in [this page on configuring the Script Runner tool](#).

### 10.14.39. Shuttle


Working with Shuttle is described in [its dedicated chapter](#).



Enter the **Port** to use for communication between your Automation Engine server and the Shuttle clients.



**Note:** By default this is port 5182, but if this port is already used by other processes, you should enter the next available port.

Click  to define the **Upload Folder**. This is where Shuttle clients will upload files that are not located in a Container.



**Attention:** However you use Shuttle, it is **mandatory** to specify an upload folder! If not you might get this error:

```
The spool folder does not exist on the server.
```



**Note:** The upload folder must be located in a Container.

- Select **Start Shuttle server automatically when Automation Engine is started** if you plan to make frequent use of the Shuttle technology.
- Select **Use the task history to re-launch tasks using the same public parameters** if you want Shuttle to remember the public parameter values that were used when submitting a file. If you then re-submit that file, these values will be automatically filled out.

Click the **Start** button to start Shuttle server. This is not required to use the Shuttle application. However, starting the server is required to use Shuttle via 'Classic' applications like ArtPro, PackEdge and Adobe Illustrator. Shuttle server makes Automation Engine's workflows, tasks and files accessible to the Shuttle clients.

Save the settings by clicking **File > Save**.

### Shuttle Server Status

This shows whether the Shuttle server is running and how many tasks it manages.

## 10.14.40. Track Edit Session

When you open a file that resides in an active Job (folder) in an Esko editor, the [Track Edit Session](#) task can automatically start logging times and several editing actions. This tracking stops when the file is closed.

You can here select for which editors you want to (automatically) run this task.

Learn more in the page about the [Track Edit Session task](#).



**Note:** When changing this configuration, restart the editor to activate this behavior.

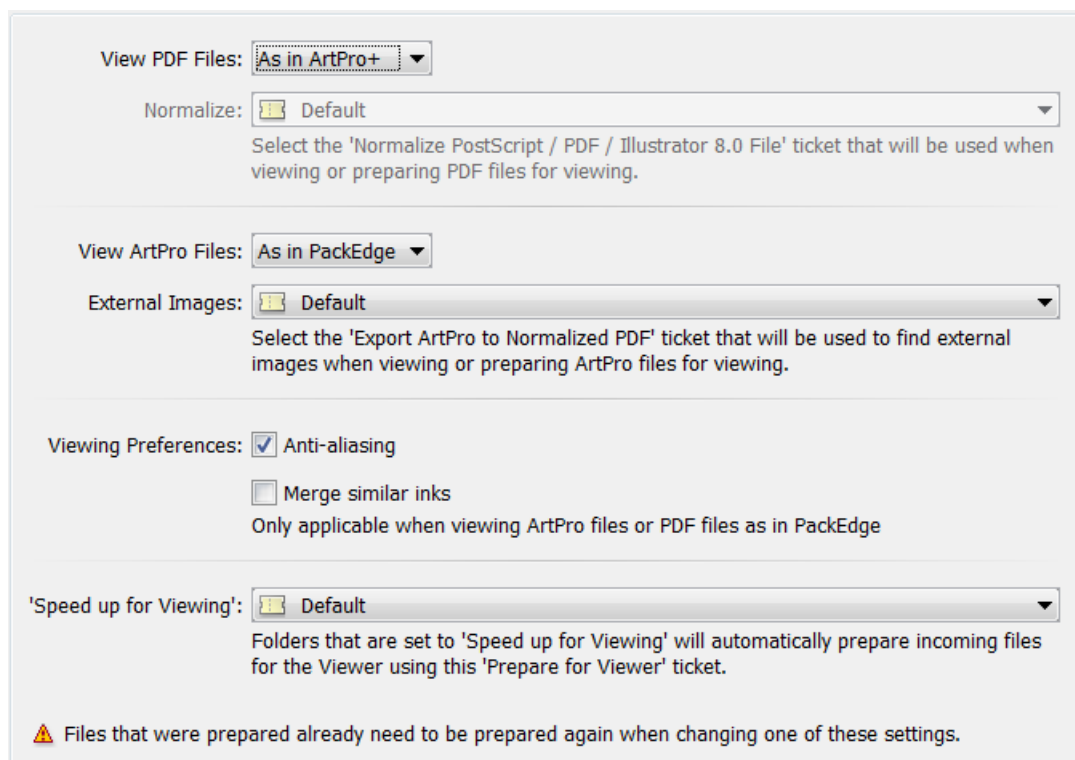
## 10.14.41. Viewer



**Note:** Learn about the Viewer in [Automation Engine Viewer](#).

The Viewer can view many different file formats. It can also use different graphic engines to interpret these files. The use of a different graphic engine may lead to small differences in color. You here define which graphic engine the viewer should use and some other preferences.

Learn more about graphic engines in the chapter [PDF Formats and Metadata](#).



• **View PDF Files**

- **As in ArtPro+:** By default, PDF files are shown as they are shown in ArtPro+. This means that the graphic engine of ArtPro+ interprets the PDF and defines the view data.

This view mode can be used for native PDF (which includes PDF+), normalized PDF, Plato Step & Repeat PDF and Plato Station files.



**Attention:** When a PDF file is opened in the Viewer, and when the Viewer is configured to view PDF Files "As in ArtPro+", then this file will be locked ; it can then not be renamed or deleted until it is closed in the Viewer.

- **As in PackEdge:** Select this mode when you want the Viewer to show the data as you are used to seeing them in PackEdge, where the default file format is normalized PDF.

Then also define which normalization ticket will be used when you open non-normalized files like native PDF(+), AI or (E)PS files.



**Note:** When this was your choice before upgrading to a new version, it will of course be kept.

• **View ArtPro Files**

- **As in ArtPro:** The graphic engine of ArtPro is used. This mode is advised for ArtPro users who do not work with normalized PDF files in their workflow.
- **As in PackEdge:** The graphic engine BRIX is used. This mode adds a normalization step before the view data is created. It is advised when you want to compare ArtPro files with normalized PDF files. Some users will prefer this mode because it was used in earlier versions. Before version 14.1 of Automation Engine, this was the default mode.



**Note:** The **WebCenter Viewer** and the [Publish to WebCenter](#) task always use this mode for ArtPro files.

**External Images:** Select the ticket of the task Export ArtPro to Normalized PDF that has the correct settings so that the Viewer finds the external images in that ArtPro file.

- **Viewing Preferences**

- **Anti-aliasing:** Select this to smooth the staircase effect that you can get when pixels represent line art objects.
- **Merge similar inks:** Select this to merge inks with the same name that have a different ruling or angle. They then appear as one same channel in the Viewer.



**Attention:** We strongly advise to enable this option when viewing ArtPro files or Normalized PDF files generated by ArtPro.

- **Speed up for Viewing:**

Choose the ticket that the "**Speed up for Viewing**" folders should use. Learn more in [Speed Up For Viewing](#).

## 10.14.42. Web Proxy

For tools where Automation Engine uses http communication, you can here configure details of the Web Proxy to use.

- **Web Proxy Server:** Specify the computer name or IP address and port of the proxy server.
- **Proxy server requires a password:** When the proxy server requires authentication, specify the **User Name** and **Password** to use to authenticate.
- **Bypass proxy settings:** Specify a list of patterns separated by '|', The patterns may start or end with a '\*' for wildcards.



**Attention:** You need to restart Automation Engine before its tools start to use the web proxy for http communication.

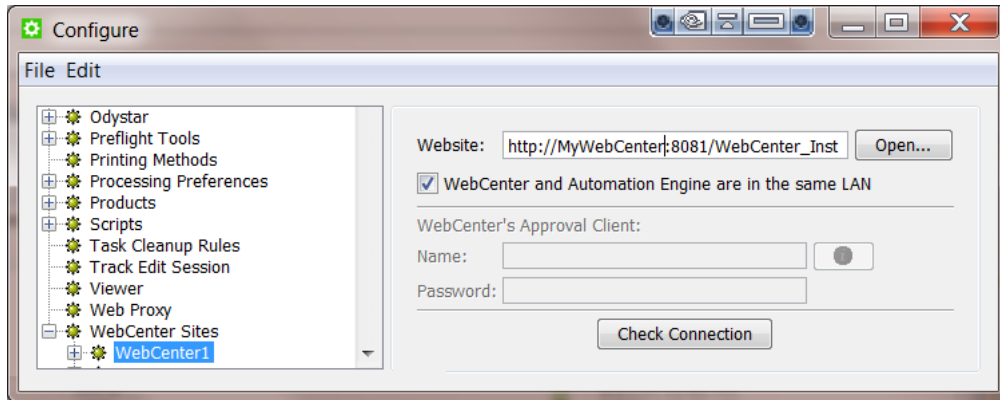
These Automation Engine tools use web proxy settings for http communication:

- Tasks: [Create or Modify WebCenter Project](#), [Download WebCenter Document](#), [Integrate with WebCenter](#), [Publish on WebCenter](#), [Interact with Web Service](#).
- Cloud applications and storage tools, configured in [External Web Services](#) on page 82.
- [Connection Doctor](#), to troubleshoot the server.
- In the [Server Web page - Server Admin - Server Checks - Network](#), the **Online help** check and the **WebCenter Sites** check.
- Automation Engine's JDF Server (JMF), used to communicate with devices and external systems.

## 10.14.43. 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 Admin 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.

## 10.15. Connection Doctor

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The [Connection Doctor](#) allows you to troubleshoot the Pilot. This is documented in the dedicated chapter [Troubleshooting](#).