

# Automation Engine 23

AE Getting Started

03 - 2024

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# 1. Installing Server and Clients

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This needs to be done first before you can use Automation Engine from any client (application or browser):

1. Install the Automation Engine server software, on a central powerful computer.



**Important:** Before installing the server software, make sure your IT specialists checked its [system requirements](#) and have read the chapter [Pre-Install IT Requirements](#).

2. Install the Automation Engine client application Pilot and/or Shuttle. Unless you prefer to use the browser client (see step 3), you typically install these on each computer from where users will want access to Automation Engine. You can install as many as you want, but your licenses decide how many users can be signed in to the server at the same time.



**Note:** These client applications and other tools can be downloaded from the browser client (go to <http://<AEServerName>:9000/#/downloads> ).

3. Daily users may use the browser client. This does not require to install a separate application. The [browser client](#) can offer these 2 workspaces:
  - **My Workspace:** A default, generic interface to launching workflows. Learn more in [Workspace 'My Workspace'](#).
  - **Roll-Fed Labels:** Formerly known as the QuickStart deployment for roll label production. Learn more in [Workspace 'Roll-Fed Labels'](#).

All steps are documented in detail in the chapter [Installation Guide](#).

## 2. Changing the Language used in the Pilot, Shuttle or browser client

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The client applications Pilot and Shuttle are available in several languages (aka "Localization"). [This online KB article](#) describes how you can specify that language.

In the browser client, changing the interface language is a simple choice in the preferences menu.

## 3. Signing In to the Pilot or Shuttle



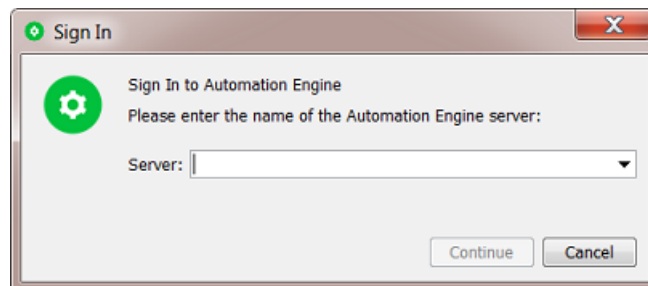
**Note:** Learn about managing users on the page about [the Users view](#). Learn more technical details in the chapter [Pre-Install IT Requirements](#), on the pages about [Users and Groups](#).



**Note:** The Pilot, browser client and Shuttle are available in several languages. Learn more in [Changing the Language used in the Pilot, Shuttle or browser client](#) on page 5.

On the computer where you installed a Pilot or Shuttle:

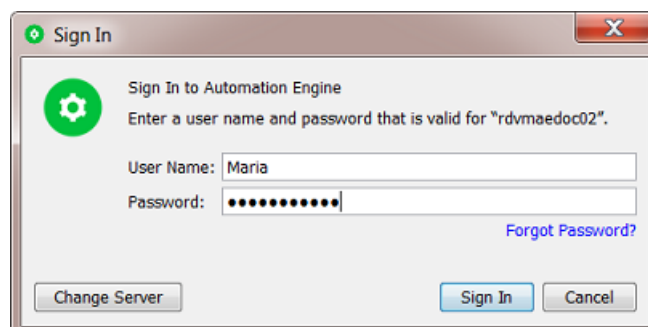
1. Double-click the application shortcut.
  - On macOS: in the folder **Applications** or in your **Dock**.
  - On Windows: on the desktop or in the task bar. Alternatively, find it under **Start > All Programs > Esko**.
2. The **Sign In** dialog looks different, depending on whether you already used it on this computer or whether it was already used to sign in to a different Automation Engine server.
  - When this is the first time, you will be asked to first enter the name or the IP address of your Automation Engine server. Do so and press **Continue**.



From then on, the drop-down list will list other servers that were signed in to from this client.

- When someone already signed in from this computer, the dialog already assumes the same Automation Engine server and also fills in the name of that previous user.

You then only need to type the password and click **Sign In** (or you use another user name and password).



- Click **Forgot Password?** to get an e-mail with a link to reset your password. The e-mail is sent to the e-mail address defined for that user. Learn more in [Users View](#).



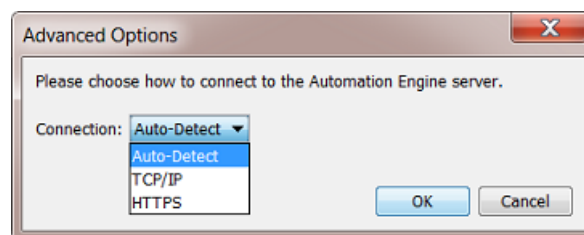
**Important:** Make sure the e-mail configuration is set up in your [Configure tool](#). This dialog does not show any error messages when the sending of this e-mail fails.

- Click **Change Server** if you want to sign in to another Automation Engine server. You then get the dialog as shown here above.



**Note:** Every time you select another server, the dialog also checks whether this client version matches the version of that server.

- The **Advanced...** button appears when choosing a server. It allows to define **Advanced Options**.

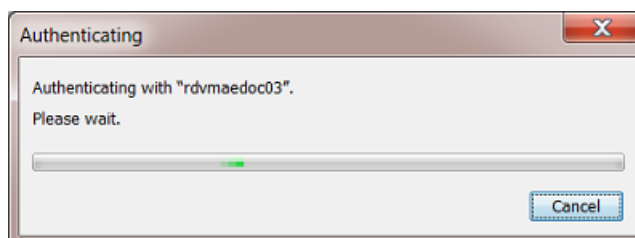


- **Connection:**

- By default, when connecting to an Automation Engine server, the Pilot automatically chooses the connection mode (**Auto-Detect**).
- When the Automation Engine server has a site-local address (e.g. 10.\*.\*.\* or 192.\*.\*.\* or the range 172.16.0.0.0 - 172.31.255.255) the connection will use **TCP/IP**, otherwise **HTTPS** is used.
- The default behavior assumes that an [AE SaaS server](#) has a public IP address and that an AE server on-premises has a private IP address. The latter will not always be true. So in that case a Pilot user can manually set the connection mode to TCP/IP. This forces the Pilot to use a TCP/IP connection even when the IP address of the server is not a site-local address.
- This setting is remembered for future sign-ins.

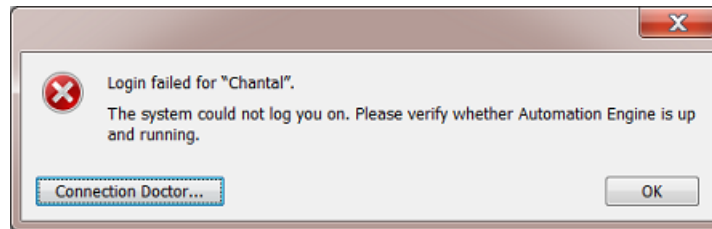
**3.** Possible messages or problems when signing in:

- When the attempt to sign in does not succeed immediately, you will see an extra dialog with a **Cancel** button. This button is useful when you noticed that you for example mistyped the server name, or when you just now remember that this client computer or the server is offline.



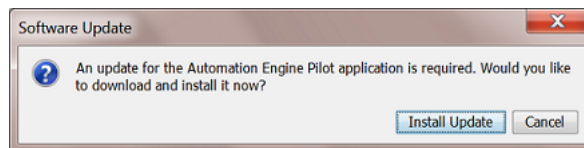
So when you know there is no point in waiting, click **Cancel** to stop the authentication attempt immediately.

- When a sign-in fails, you will be told if the problem is a wrong combo of the user name and password you entered. In other cases, the message will, for security reasons, not add too many details on the cause. It could be that you just mistyped the server name or any other type of problem (network, server software not running, etc.)



When you are sure that your user name and password were correct, click **Connection Doctor...** to start a first analysis of the problem. Learn more in the chapter [Troubleshooting](#).

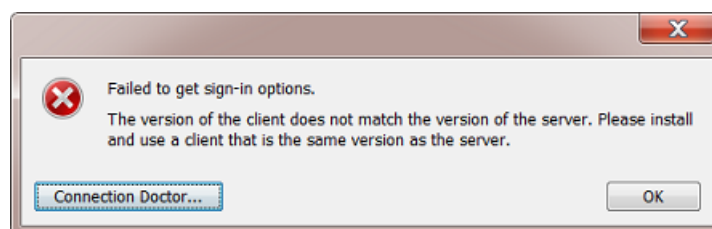
- When the version of the client software (the build nr.) is different from the one on the Automation Engine server (typically the case right after the server software was updated), this dialog will pop up:



Click **Install Update** to download the update. At the end of the download, the message "Ready to install" appears. Then click **Install and Relaunch** to install the update on this client. When finished, the Sign In dialog will be shown again.

On Mac, you need to enter the credentials of an administrator user to update the Pilot application.

- When the system can't even find the sign-in options to offer to the client, then the version of the server software is probably an older major version number. For example: The client software is v20 but the server is still on v18.1.



**Note:** It is possible to sign in to multiple Automation Engine (master) servers. Administrators may need this functionality in special cases, like server migrations. To do this, sign in to the Pilot of server 1, and in the resulting Pilot's File menu, ask a **New Connection**. This will open an extra sign-in dialog where you can sign in to an other AE master server.



## 4. The Pilot's Main Window



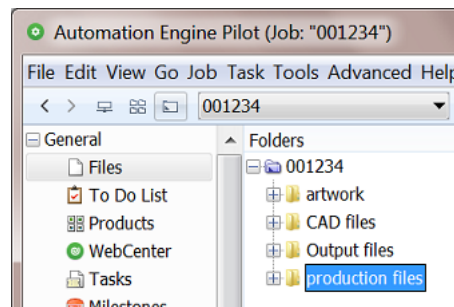
**Note:** The Pilot's user interface and its View modes are introduced in some of the "eLearning Modules" that you can follow on the [Esko Blended Learning platform](#).

Name	View	Type	Size	Date	Default
EXPERT_BOX.ARD	-	ARD File	25KB	6/28...	Default
Expert_Box_start.ai	View	PDF File	23MB	6/28...	Norm_Emb...





Job Name	File Name	Task Type	Progress	Phase	State	Launched
	Expert_Box_start.ai	Normalize PDF File	85%	Saving Document	▶	6/28/16 3:58 PM
	Expert_Box_start.ai	Normalize PDF File	100%		✓	6/28/16 3:53 PM
	97188a9f0a1fe0d11e...	Prepare for Viewing	100%		✓	6/28/16 3:00 PM
	9718696b0a1fe0d16...	Prepare for Viewing	100%		✓	6/28/16 3:00 PM
	970b5fa50a1fe0a24e...	Prepare for Viewing	100%		✓	6/28/16 2:46 PM
	970b511f0a1fe0a27...	Prepare for Viewing	100%		✓	6/28/16 2:45 PM

### 1. The Pilot offers three **View modes**:

- Containers:** This mode allows to access all **Containers**, which contain the network data that Automation Engine is allowed to work with. Learn more in [Containers](#).
- Job Overview:** This mode lists all **Jobs** existing in the Automation Engine Jobs database. Learn more in the dedicated chapter on [Jobs](#).
- Last used Job:** This mode shows the last Job you opened, and the data in its **Job Folder**.





2. The top tool bar:

-  **Create Job** allows you to create a **Job** in the Jobs database. Learn more in the chapter [Jobs](#).
-  **New Task** allows to launch a new task on the current selection.
-  **New Workflow** opens the workflow editor to create a new Workflow ticket. Learn more in the chapter on [Workflows](#).
-  shows information about the selected **Job** or file.
- A search field that also allows to create filters.

3. The **Views** pane allows to focus on specific functionality of Automation Engine. Certain Views are only shown in specific view modes. Learn more in [Pilot Views and Tools](#).

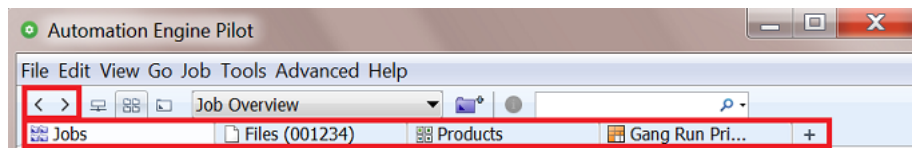
4. The bottom bar offers this information:

- Left side: info on your current selection (could be files, tasks, jobs, etc.)
- Right side:
  - Name of the **Location** of this server setup. A Location name is used (and here visible) when several Automation Engines collaborate via Esko Cloud.
  - Name of the **Server** computer.
  - Name of the current **User** that logged on to this Pilot.
  - Amount of **to-do** items for this user. Click  to open the 'To Do List' tool and see all to-dos.
  - Amount of **Alerts**. Click  to open the list of alerts. Learn more in [Alerts](#).


The contents of the central panes depends on the selected view **Mode** and **View**.

### Using Tabs to enable Multiple Views

Tabs allow you to have multiple Views open in your Pilot.



In any view, use any of these methods to create a new tab:

- Choose **File > New Tab** or use the shortcut **Ctrl-T** (Windows) or **Cmd-T** (Mac).
- Once a tab bar is visible, you can also create a new tab
  - by clicking .
  - by right-clicking on the tab bar and choosing **New Tab**.

You can close tabs by using similar tools.



**Note:** To close all other tabs but the current one, choose **File > Close Other Tabs**.

### Smart Views

You can use the filter tool to create filters for specific views. When you save such a filter, they are listed in the **Views** pane, in the category "**Smart Views**". so you can easily re-select them from there. Learn more in [Smart Views](#).

## 5. Concepts of Tasks, Tickets and Workflows

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### 5.1. Tasks

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#### What is a Task?

A task is a background action executed on one or multiple files, folders or items in an Automation Engine database. A task can be started by a user, by an external system or be triggered automatically by Automation Engine itself.

There are many types of tasks:

- **Conversion** tasks such as **Export to PDF, Export to PostScript...**
- **File Creation** tasks such as **Step & Repeat, Create 3D file...**
- **File Editing** tasks such as **Optimize PDF, Split Pages, Trap...**
- **Verification** tasks such as **Preflight, Inspect Braille...**
- **Administration** tasks such as **Copy or Move, Upload via FTP, ZIP...**
- **RIP** tasks.
- **Device Output** tasks, communicating with CDI imagers, Digital presses or Kongsberg cutting tables.

#### Task Settings

A task are defined by many settings: these are

- the attributes of the task itself (for example its priority and the user who launched it),
- its parameters, usually saved as a task *Ticket*. These decide the specifics of what is executed in background (for example a chosen resolution).

#### Task Progress

When a task is launched, you can monitor its progress and end status. Learn more in [Checking the Status of a Task](#) on page 18.

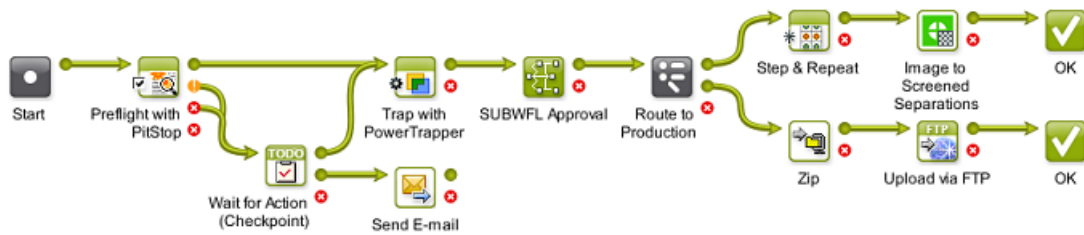
### 5.2. Workflows

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A **workflow** ticket contains multiple **steps**. Launching a workflow results in multiple tasks. A workflow step can be

- a single task ticket
- a **workflow control**
- a **subworkflow** (included or referenced).

An example:



Just like single task tickets,

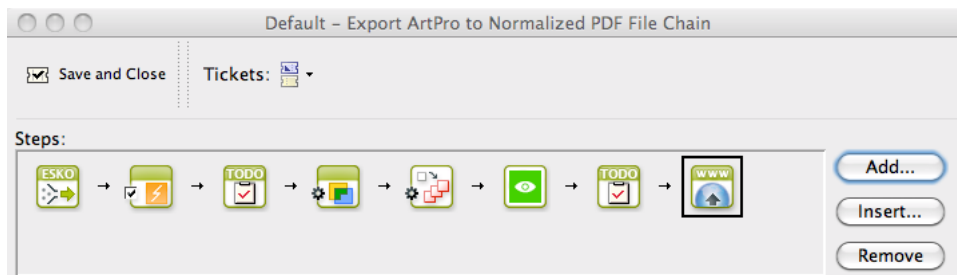
- you can launch workflow tickets from the **Pilot**, from the *Shuttle* or from within most Esko editors
- workflows can also be launched automatically, triggered by external signals (files arriving on access points, commands from external systems, etc.).

You can build and launch **workflows** in the *Workflow Editor*. Learn more in the dedicated chapter on *Workflows*.

### 5.2.1. Task Chains (old workflows)

**Task Chains** are old workflows from Esko's former workflow server BackStage . They are still supported in Automation Engine but will need to be migrated.

A **Task Chain** is a linear succession of tasks, linked together in a Task Chain ticket.



You can build new **Workflows** from these old Task Chains, while keeping all your tickets settings. Learn more in *Migrating Old Task Chains*, a page in the chapter *Workflows*.

## 5.3. Tickets

### What is a Ticket?

A **Ticket** is a collection of parameters of a specific **Task** type. When a user (or system) selects files and launches a Ticket, a **Task** is executed on the server.

### Default and Custom Tickets



There is a default ticket for each task type. You can also create custom tickets. You cannot overwrite or delete default tickets.

The [Tickets View](#) shows all available tickets (default and custom).

### Workflow Tickets

A **Workflow Ticket** contains the steps and parameters of several tasks. Its is also referred to as "a Workflow".

### Global and Job Tickets

- **Global Tickets** (  ) can be used on any file inside a **Container** (network areas that you allow Automation Engine to work with).
- **Job Tickets** (  ) can only be used on data inside the **Job Folder** of the **Job** you saved them for. Learn about Jobs in the chapter [Jobs](#).

### Public Tickets

Public Tickets are tickets that all Pilot users can see and use. These are also the ones you can launch from a browser client, from [Shuttle](#) or directly [from within Esko editors](#).

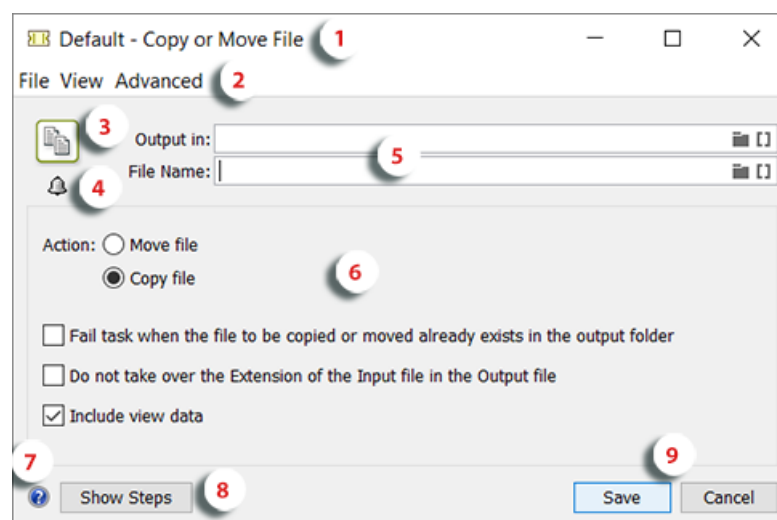




**Note:** Depending on your [User Access Rights](#), you may only see public tickets, and **Public Parameters** inside these tickets.




Learn about making tickets public [here](#).

## 5.3.1. General Ticket Functions

### A Ticket opened from the Tickets View



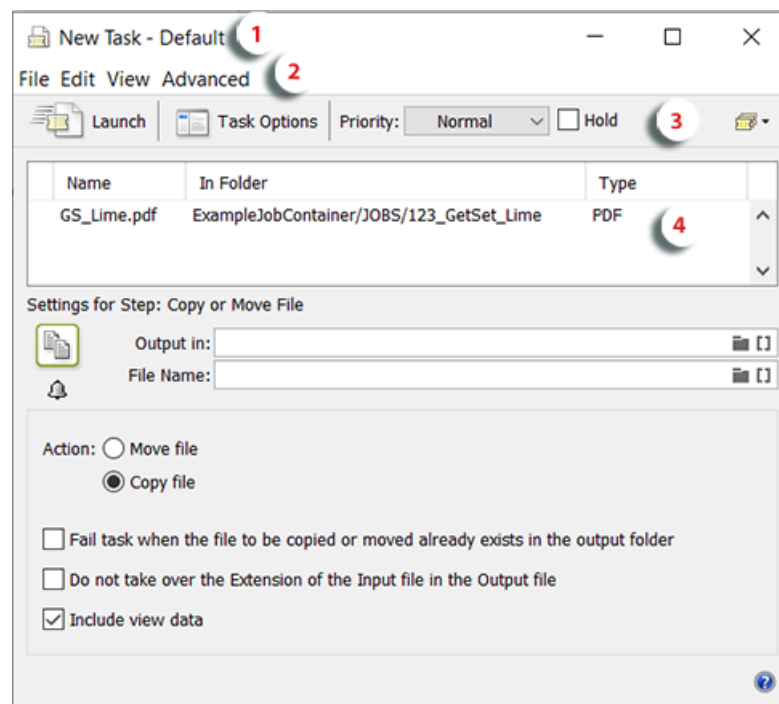
1. The top bar of the dialog shows an icon indicating the type of ticket (  = Global ticket,  = Job ticket), followed by the name of the ticket and the type of task.
2. Menu items
  - **File** menu (standard functions).

- The **View** menu is only relevant when having selected input files first (see below section of this page).
  - The **Advanced** menu is where you can **Manage Public Parameters**. Learn more in [Using Public Parameters in Automation Engine](#) on page 30.
3. An icon of the task type.
  4. Click  to add **Notifications** that will be executed when the task is launched (or finished). When a ticket includes notifications, the icon changes to . Learn more in [Task Notifications](#) on page 29.
  5. Fields to specify the name and place of the files that this ticket creates. Typically, SmartNames are used. Learn more in [SmartNames](#).
  6. The Parameters for this ticket.
  7. Click  to see the online help page for this task type.
  8. "**Show Steps**" is only relevant when you still have old "**Task Chains**" (a technology used before "Workflow Tickets". Learn more in [Old Task Chains](#).
  9. Click **Save** to save the ticket and all its parameters. When you opened a default ticket, you will be asked to **Save As** another name. Click **Cancel** to close the ticket without saving.

### A Ticket opened after first making a File Selection

When you first selected an input file for a task ticket, the dialog actually shows more than a ticket: You now see a ticket + input files + all settings to launch it.

This is why the dialog looks slightly different:



1. The title of the dialog now mentions the way this dialog was opened + the name of the selected ticket.

In above example, a user first selected a file in the Files view, then chose 'New Task' and then selected the default ticket of the task 'Copy or Move File'.

2. Two extra topics in the menu bar:

- **Edit:** When you are viewing the list of input files (see below item 4), you here find the two possible actions. Learn more below.
- **View**
  - **Show Files:** To show or hide the pane that shows the input files. Learn more in below item 4.
  - **Task Options...:** See below item 3.

3. An extra Task related menu bar:

- **Launch:** Launches this ticket on the selected input files and closes this dialog.
- **Task Options:** Learn more in the chapter explaining workflow tickets, which mainly offer the same options: [General Workflow Task Options](#).
- **Priority:** Choose the general priority with which you want to launch this task. The default is **Normal**.



**Note:** To choose **High** or **Immediate**, you need a special [User Access Right](#).



**Attention:** Depending on the current load on Automation Engine's workflow engine, the request to start immediately and so bypass all other tasks is best only used occasionally.

- **Hold:** Check this when you want to hold the task when you launch it. The task will start but will immediately go into 'pause' mode. You can then later decide when to release it, i.e. start it for real. Learn more in [Functionality on items in Tasks View](#).
- A ticket selector: Exceptionally, you can still select a different ticket for this dialog.

4. The input files. You can still

- Select and delete files from this list (use the delete shortcut or **Edit > Clear**).
- Add extra input files to this list. Right-click in this pane to **Select File...**



**Important:** In this dialog, using the **Save Ticket (as...)** function will still only save the ticket parameters, just like in the first example on this page. A saved ticket never contains information on input files or on task related options.



## 6. First Steps in Launching Tasks

### 6.1. Launching a Task on a File

There are several ways to launch a tasks: from the Pilot, from Shuttle (plug-in), via Access Points or via JDF/JMF.

We here describe how to launch a task from the Pilot's **Files** view.



**Note:** Before you can launch **RIP** or **Proofing** tasks, you need to configure the matching RIP. Learn more [here](#).

1. In the Pilot, choose the **Containers** mode and select the **Files** view in the **Views** pane.



**Note:** If you don't have any custom **Containers** yet, simply drag a file from outside the Pilot onto a folder in your **ExampleJobContainer**. Learn more in [Uploading files using the Pilot](#) and in [Creating a Container](#).

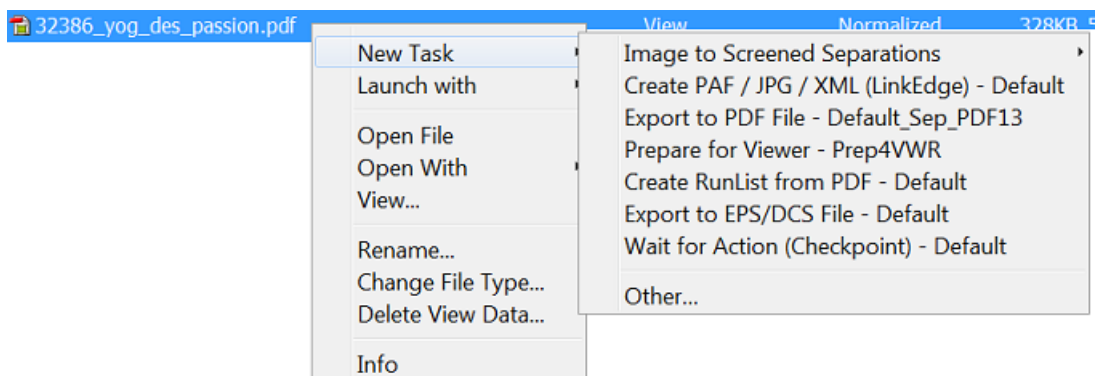
2. Browse to your chosen file. Right-click it, and select either
  - **New Task** if you want to open the ticket that you will select and check or change some of its settings before launching the task.
  - **Launch with** to immediately launch the task without opening the selected ticket.



**Note:** If you don't have the [access right](#) **Tickets: Show All Tickets and their Parameters (Public and other)**, you will only see **'Launch with'**. In this case, you can only select **Public** tickets, and only fill in [Public Parameters](#) in the ticket.

3. Select the ticket to use.

- If you have launched tasks previously, the most recent task tickets you used are listed. One ticket is shown per task type. A small arrow indicates there were several tickets launched of this task type.




- If you didn't launch tickets yet, or if you need a different ticket, select **Other**. Then select the ticket you want to use and click **OK**.



**Note:** This list only shows the tickets of task types that can be launched on the file type that you selected. You can either choose a **Default** ticket or a custom ticket that was [created earlier](#).

4. Now choose one of these launching methods:



- If you chose **New Task**, the selected ticket opens. Fill in the settings you want to use and click  **Launch**.
- If you chose **Launch with** and you have the access right **Tickets: Show All Tickets and their Parameters (Public and other)**, the task is launched on the file as soon as you select the ticket. You don't need to fill in any settings.
- If you chose **Launch with** and you don't have the access right **Tickets: Show All Tickets and their Parameters (Public and other)**, the task is launched on the file
  - as soon as you select the ticket if the ticket has no [Public Parameters](#).
  - If the ticket contains **Public Parameters**, it will first open for you to fill them in (you will only see the public parameters). Click **Launch** when you are done.












**Note:** For a description of all of the ticket's parameters for each task type, see the chapter [Tasks and Workflow Controls](#).

## 6.2. Checking the Status of a Task

After launching a task on one or several file(s), you can check its processing status in the Pilot's **Tasks** pane (present in many Views).

File Name	Task Type	Ticket Name	Progress	Phase	State	Launched	Operator
Bike_report.pdf	Delete File	Default	100%			3/7/16 11:19 AM	lola@rdvmae17
BigBox.pdf	Wait for Action (Checkpoint)	Default	0%	<a href="#">User intervention needed</a>		3/3/16 2:53 PM	wde@rdvmae17

You can see the **Progress** (in percentage) and the processing **State**. The state can be:


-  on hold
-  on hold until
-  running (for a Checkpoint task: waiting to be handled)
-  waiting (in the queue)
-  successfully done
-  part of workflow successfully done
-  done with warning
-  failed
-  cancelled

You can also double-click the task's entry in the **Tasks** pane to open your task ticket and check its parameters.

## 6.3. Relaunching a Task

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You can easily relaunch tasks, even when they are not finished yet.

- To relaunch one or multiple tasks without changing its settings:
  - a) Select the task(s) in **Tasks** view or the **Tasks** pane in another view.
  - b) Click CTRL-L (CMD-L) or go to **Task > Relaunch**.
- To first change its settings and then relaunch a task:
  - a) Select the task to relaunch.
  - b) Double click the task or go to **Task > Open Task**.
  - c) Change the task settings as necessary.
  - d) Click  **Launch**.

## 6.4. Launching Workflows

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How to create and launch workflows is described in the separate chapter [Workflows](#).

## 6.5. Creating Task Tickets

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### 6.5.1. Creating a Custom Ticket from the Tickets View

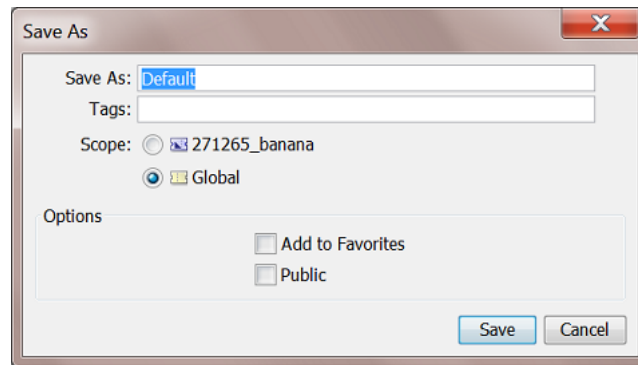
To create a custom ticket:

1. Open the **Default** ticket of that task type.



**Note:** To create a custom **Workflow** ticket, see the chapter [Workflows](#).

2. Select the wanted ticket parameters.
3. Go to **File > Save As...** or use the keyboard shortcut.
4. In the **Save As** dialog:



- a) Enter the name of your new ticket. You can not overwrite a default ticket.



**Attention:** Ticket names are case-sensitive.


- b) Add one or more **Tags**. This will help to sort and filter tickets.
- c) Decide the **Scope** of the ticket: only to be seen and used in the (currently selected) **Job** or set them **Global** (possible to use in all Jobs).
- d) Select if you want to add the ticket to your **Favorites**.
- e) Select **Public** if you want to show this ticket to all Pilot users and/or if you want to use it from a browser client, from [Shuttle](#) or [from Esko editors](#).



**Note:**

- **Default** tickets and **Job** tickets can not be made **Public**.
- In the [Tickets view](#), Public tickets have a mark in the column '**Public**'.



**Note:** Alternatively, when you do not want to change any ticket parameters (yet), select the ticket and click on  to **duplicate** it (and fill in a new name).

## 6.5.2. Creating a Custom Ticket after Selecting a File

You can also create a custom ticket while you prepare to launch a task on a file:

1. Right-click your file(s), select **New Task** then **Other...**
2. In the **Select Ticket** dialog, select the **Default** ticket for the task you want to use.



**Note:** If you do not see any **Default** tickets, check your [Pilot Preferences](#).

3. Fill in the settings you want to use in the ticket.
4. Go to **File > Save As...** or use **Ctrl + Shift + S** (Windows) / **Shift + Command + S** (Mac).
5. In the **Save As** dialog:
  - a) Enter a name for this custom ticket.
  - b) Select if you want to add the ticket to your **Favorites**.

- c) Select **Public** if you want to show this ticket to all Pilot users and/or if you want to use it from a browser client, from [Shuttle](#) or [from Esko editors](#).

**Note:**

- **Default** tickets and **Job** tickets can not be made **Public**.
- In the [Tickets view](#), Public tickets have a mark in the column '**Public**'.

## 7. Performing Basic Configuration

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### 7.1. Creating Favorite Tickets

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Tickets that you use a lot can be added to a list of **Favorites**. It then becomes easier to launch them, even with only one click.

Favorite tickets are linked to:

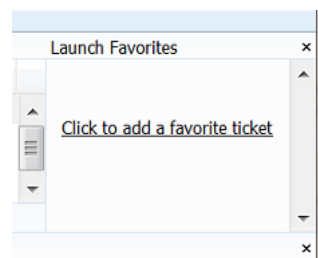
- the **User** logged into the Pilot. **Favorites** are personal.
- the file type. The favorite tickets you see or add are only those that match the file type you selected.

#### 7.1.1. Creating a Favorite Ticket in the Files View

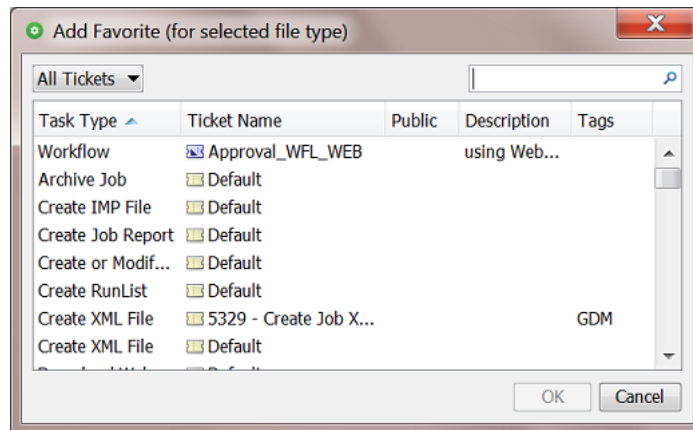
In the Files view, follow these steps to create a favorite ticket:

1. In the **Containers** or **Last used Job** mode, select a file (remember that you make favorites per file type).
2. Right-click in the **Launch Favorites** pane and choose **Add Favorite...**

When you have no favorites yet, click this dedicated link:



3. In the **Add Favorite** dialog, select the ticket you want to add as a favorite and click **OK**.



The drop-down list top-left offers to filter the list of tickets based on filters that you saved in the Tickets View. Learn about creating filters in [Smart Views](#).

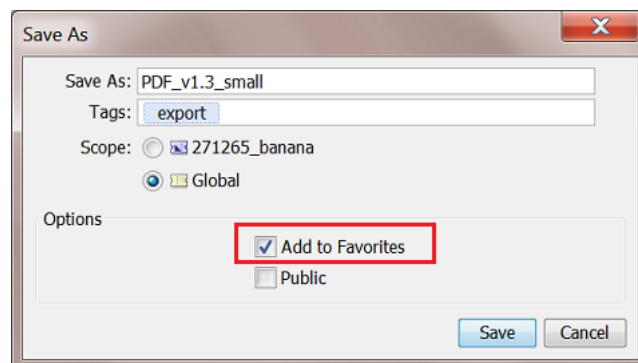


**Note:** This dialog only shows the (single and workflow) tickets suitable for the file type that you selected.

### 7.1.2. Creating a Favorite Ticket in the Tickets View

In the Tickets view, you can either:

- Right-click your chosen ticket, select **Add to Favorites** and choose the group.
- When creating a ticket, select **Add to Favorites** in the **Save As** dialog.



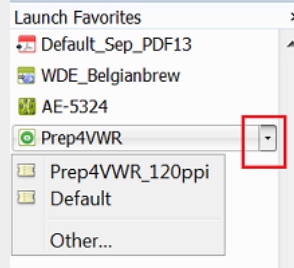
### 7.1.3. Using a Favorite Ticket

In any Pilot view where you can make a selection, follow these steps to launch a task by using a favorite ticket:

1. Select the file(s) you want to launch a task on.  
The **Launch Favorites** pane shows all the favorite tickets for this file type.
2. Click the favorite ticket you want to use.



**Note:** If you want to use another ticket of the same task type (for example another **prepare for Viewer** ticket that is not a favorite), click the small arrow on the right side of the favorite ticket and select one from the list. This helps to avoid making too many favorites.



Mind that a ticket only appears in this list when it has already been launched at least once.

3. The ticket opens. If necessary, review or edit its parameters.
4. Click **Launch**.



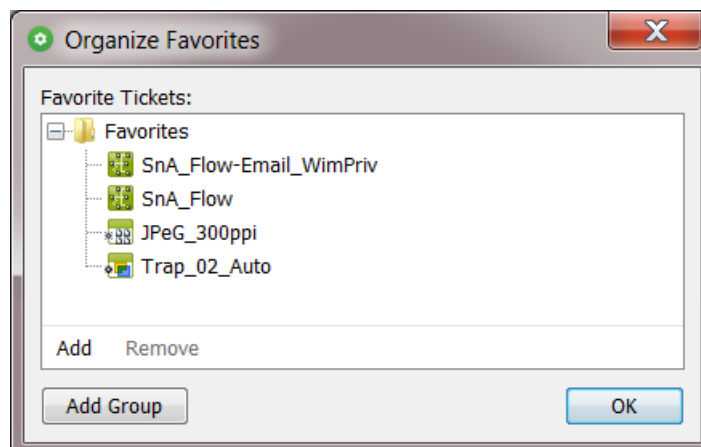
**Attention:** If you do not want to open the ticket, but launch the task immediately, just press **Alt** when clicking the ticket.

Learn more in the chapter on [Workflows](#), where we describe extra features in the page [Organizing and Using Favorite Workflow Tickets](#).

## 7.1.4. Organizing Favorites (Sorting and Grouping)

### Sorting

In your Files view, right-click the **Favorites** pane and select **Organize Favorites....** The resulting dialog shows the default group named '**Favorites**' and the tickets you already added.



In this dialog, you can

- Sort them. Just make a selection and use drag-and-drop to define the order in which they appear.
- **Add** or **Remove** any favorites from this group.



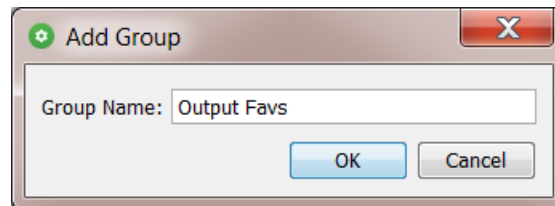
You can even use SmartNames to define their name. Learn more in [Adding a Favorite based on a SmartName](#).

## Grouping

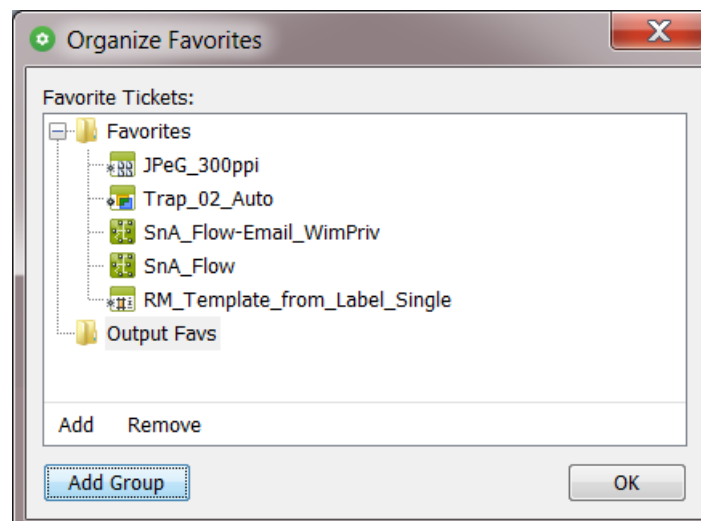
Next the default group named 'Favorites', you can create your own groups.

Follow these steps:

1. In the **Organize Favorites** dialog: click **Add Group**, type in its name and click **OK**.



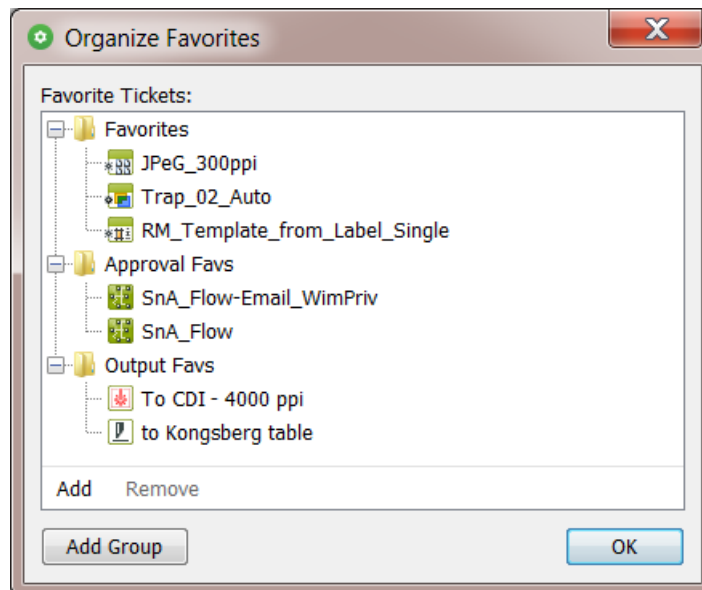
2. The new group appears in the **Organize Favorites** dialog.



3. Select the group name and click **Add** to start adding favorite tickets.



**Attention:** If you do not do this right now, you will create an empty group when clicking **OK**. This will make the group disappear again.



**Note:** You can also add a group by first making a selecting tickets:

- In the **Organize Favorites** dialog, select one or multiple tickets.
- Right-click and choose '**New group from selection**'.
- An '**Untitled Group**' appears. Rename it at wish.

4. Click **OK** to close.

You can drag-and-drop groups.

You can fold or un-fold groups.

You can drag-and-drop tickets from one group to another.

You can not create sub-groups.

Right-click the name of a group to **Rename** it or to **Remove** it (no confirmation is asked).



**Note:** All changes are immediately visualized in your Pilot. This includes whether the group's content is folded out or not.

Check the result in the Pilot's 'Favorites' pane. Don't forget that what you see there depends on your selection.

## 7.2. Creating Users (Introduction)

Managing Automation Engine **Users** is described in detail on the page about the [Users view](#) (part of the chapter [Pilot Views and Tools](#)).

## 7.3. Configuring RIPs or Proofer

To start making output for devices, you need to configure the related RIPs or proofers.

Automation Engine is optimized to work with Esko Imaging Engine and Esko FlexRip/Proof.

To configure an Imaging Engine RIP, learn more in [this page of the chapter "RIP'ing with Imaging Engine"](#). For FlexRip or FlexProof, see their item in the tool "[Configure](#)".

## 7.4. Pilot Preferences

Go to **Edit > Preferences** to define some Pilot preferences.

Pilot preferences are saved for the current user.

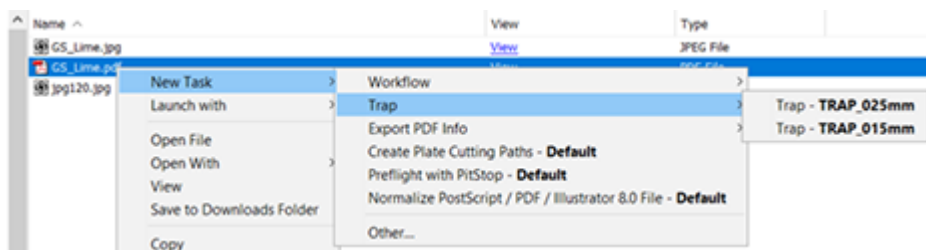
### 7.4.1. Tickets

- **Show default tickets:** Deselect this option to hide the default tickets in all lists that show tickets.



**Note:** This preference is only available if you have the [Access Right](#) 'Tickets: Show All Tickets and their Parameters (Public and other)'.

- **Use bold ticket names in task launching menu:** When choosing **New Task** or **Launch with**, select this if you want to see the ticket names for each shown task type in bold.



- **Open public parameter dialog:** When selected, opening a ticket will not open the full ticket dialog but show a dialog that only contains the ticket's [public parameters](#).

This is also (one of) the effect(s) when you do not have the [Access Right](#) 'Tickets: Show All Tickets and their Parameters (Public and other)'.

When administrators are building simplified ticket dialogs, being able to select and deselect this preference allows them to preview how the dialog will look for users who do not have that access right.



**Note:** This preference is only available if you have the [Access Right](#) 'Tickets: Show All Tickets and their Parameters (Public and other)'.



**Note:** Before v21, this option was named 'Show only Public Parameters in Tickets'.

- **When launching, do not open empty public parameter dialog:**

Select this when, at the moment you launch the ticket, you do not want to see a public parameter dialog when there are no public parameters.

- **When launching a favorite ticket:** These 2 shortcuts are always available but one of them changes its function depending on an above selected preference:
  - **Alt-click: Launches task:** Holding the Alt key while clicking on a *favorite ticket* is the standard shortcut to launch that ticket without opening it.
  - **Ctrl-click / Cmd-click:**
    - When the preference **Open public parameter dialog** is selected, this shortcut opens the task launch dialog with all ticket options ("**Opens task launch dialog**").
    - When the preference **Open public parameter dialog** is not selected, this shortcut opens the public parameter dialog ("**Opens public parameter dialog**"). This shortcut then overrules that preference.

This also serves the use case of an administrator that is preparing a set of tickets and their public parameters. This shortcut prevents that he even has to come back to this Preferences dialog and (de)select a preference just to check how the dialog will look to the regular user (who is only using public parameters).

## 7.4.2. Units

- **Units:** Select the units you want to work with for **Dimension** (mm, cm, mil, inch, point), **Resolution** (ppi, ppm, ppcm) and **Ruling** (lpi, lpmm, lpcm).
- Enter the number of **Decimals** you want the system to display.



**Note:** Changes that you make here are automatically adopted in the **Shuttle** and vice versa.

## 7.4.3. Files

- **Preview Size (Info):** This defines the size of the preview in the **Info** (XMP) dialog (in pixels).
- **Open Normalized PDF files with:** This defines which application should become the default application when opening **Normalized PDF** files from within the Pilot. Learn about 'Normalization' in [Normalized PDF and XMP in Automation Engine](#).

Normalized PDF files have a .PDF extension. The OS of your client computer will not make a distinction between Normalized PDF files and regular PDF files.

By default, PDF files will be opened by the OS with Adobe Acrobat Reader (when installed). However, when working with the Pilot, you may want to open Normalized PDF files in an Esko editor. Because making this distinction is not possible on OS level, you here have to specify which application you prefer to use. To do this, choose **Other** and **Browse** to the application's program file.

An example effect is that, if you double-click a PDF file in the Pilot, and it happens to be a Normalized PDF file, the application that you defined here will open that PDF.

This preference will be taken into account:

- in the **Files** view, when double-clicking the file or selecting **Open** from the pop-up menu
- in the **Tasks** view, when selecting **Open Output File** from the pop-up menu
- in the **To Do List**, when clicking a URL link to a PDF.



**Tip:** The Pilot also offers 'Open with', which allows you to select a non-default choice.

#### 7.4.4. Pilot

- **Number of recently used jobs in the job selector:**

Indicate how many jobs you want to see in these drop-down lists (10 by default). Changes are applied when you sign back in to the Pilot.

- **When switching views, keep search criteria:**

Select this option when you want to keep the search criteria when switching to another View tab (of the same type of View).

#### 7.4.5. Jobs

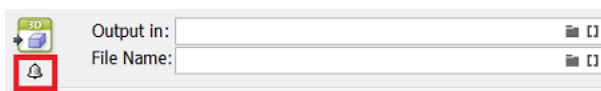
##### Multi-Job Removal

Select your preferences when you remove multiple Jobs at once:

- **Remove Jobs even when they are in use by other users.**
- **Remove Jobs even when they contain unfinished tasks.**

### 7.5. Task Notifications

Each task ticket can trigger a **Notification**. The system will so notify someone by sending an E-mail when that task finishes in a specified state. A notification can also notify an external system by feeding it an XML or a TXT file with the same type of content.




**Note:** In workflows, when your goal is to send an E-mail, consider using the separate task "[Send E-mail](#)" instead.

Learn more in the pages on [setting up Notifications in the Configure tool](#).

## 8. Using Public Parameters in Automation Engine

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### Concept

Users often do not want or need to see all the parameters of a selected task ticket. You can make them see and define only the parameters that you decided to make **Public**. Seeing less options makes it simpler and helps reduce mistakes.

Ticket parameters that are made **Public** will be the only parameters visible to users when they want to launch tasks from:

- Automation Engine client applications: Pilot, Shuttle and browser client workspaces.
- Esko Editors connected to the Automation Engine server: ArtPro+, DeskPack (Adobe Illustrator) and the legacy editors ArtPro, PackEdge, Plato, FastImpose.



**Note:** Only *Public Tickets* can be launched from these client applications or editors.

For each **Public Parameter**, you can decide if the user can either:

- select a value from a list,
- enter a value himself.

### 8.1. Making a Parameter Public

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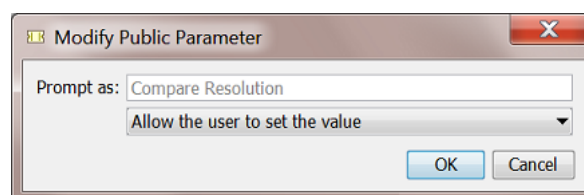


**Note:**

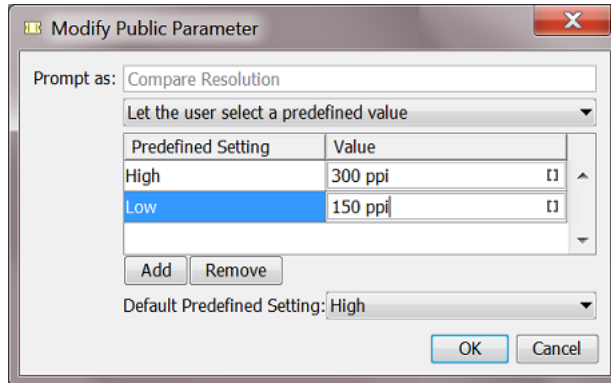
- Not all ticket parameters can be made public.
- Parameters need to be made public before you start the workflow that their ticket is part of.

Open the ticket and follow these steps:

1. Right-click the parameter and select **Make Parameter Public**.
2. Right-click it again and select **Modify Public Parameter...**
3. In the **Modify Public Parameter** dialog that opens:
  - a) **Prompt as:** If you want, change the way the parameter will be called in the client application.
  - b) Choose either:
    - **Allow the user to set the value:** Select this if you want users to be able to freely enter a value.

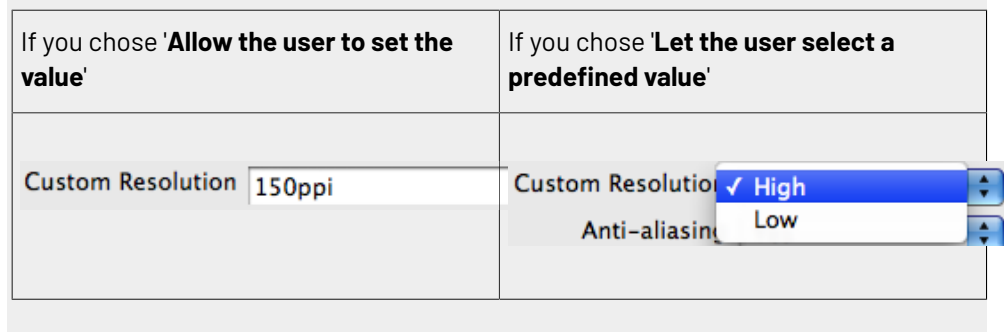


- **Let the user select a predefined value:** Select this if you want users to choose from a list of values that you define.



**Note:** Users will only see (and choose from) the **Predefined Settings**. They will not see the associated **Values**. So if they need to be aware of the value, just add it to the name of the setting.

In the above example, this is how the public parameter will look like to the users of the client application:



If, in the ticket, that parameter already offers a list of values to choose from, they will be displayed here.

**Default Predefined Setting:** You can here define the setting that will be used when the user didn't select another one.

4. Click **OK**.



**Important:** Settings related to public parameters are saved when you save the ticket.

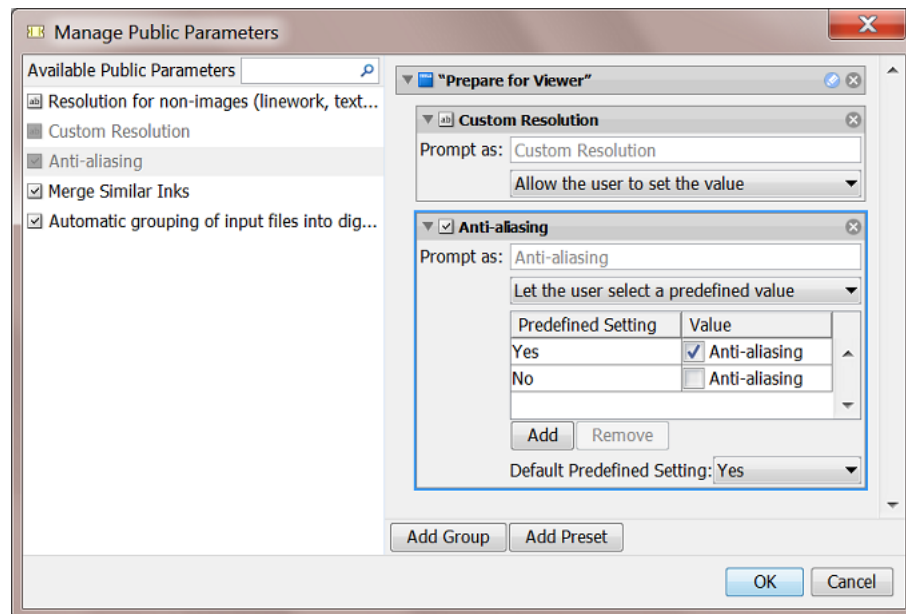


**Important:** Don't forget to save the ticket itself as 'Public' as well.

## 8.2. Managing Public Parameters in a task Ticket



The **Manage Public Parameters...** dialog of a ticket is where you overview and manage its public parameters. In this dialog, your goal is to make it as simple as possible for the user that is asked to set these parameters.

1. In your ticket, go to **Advanced > Manage Public Parameters...**

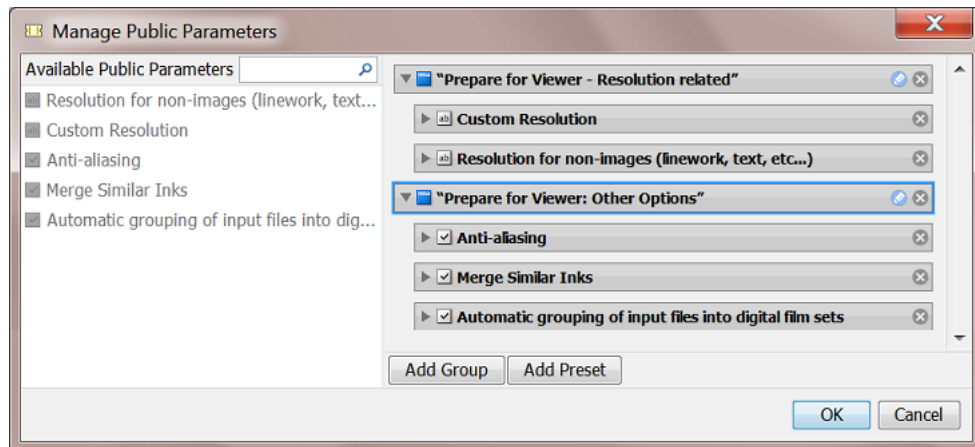


The left pane shows all the parameters in this ticket that can be made public. The ones that were already made public are greyed out.

The right pane shows the public parameters and their settings.

2. You can:
  - drag parameters from left to right to make them public
  - click  if you don't want it to be public anymore
  - drag them up or down to rearrange the order that they will be shown to the user.
  - change public parameters' settings (**Prompt as**, **Predefined Settings**, etc.)
  - group public parameters under a custom header (click **Add Group**, click  to edit the header and drag parameters from the left). An example:





- use **Presets** to further simplify the users' choices (see [Making Presets to Simplify the Users' Choices](#) on page 33).

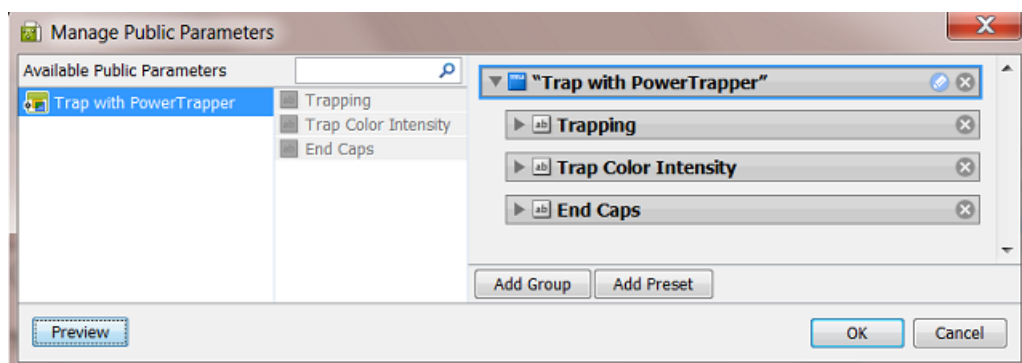
## 8.2.1. Making Presets to Simplify the Users' Choices




**Presets** are customized combinations of parameters. They limit the amount of decisions that users have to make.

### Example

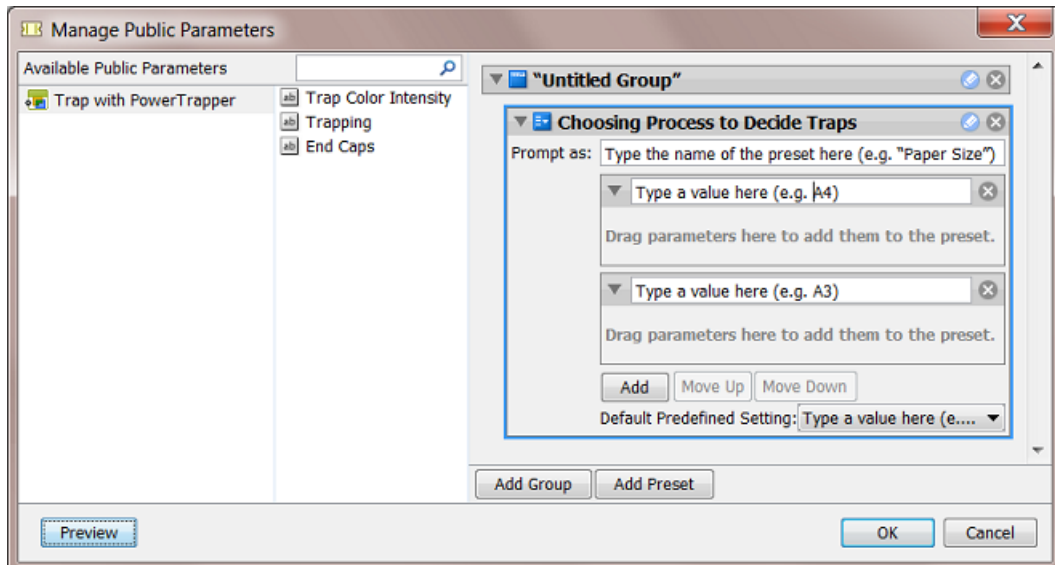
Let's assume you want users to use different trapping settings when printing offset versus dry offset. You can collect those trapping settings in a **Preset**, so that users will only have to choose between 'offset' and 'dry offset'.

We start from a dialog of a workflow ticket where the trapping step has 3 public parameters:



1. Click  to remove the (default) **Group** named "Trap with PowerTrapper"
2. Click **Add Group**.  
A new "Untitled Group" is created. Click  to change its name.
3. Click **Add Preset**.  
A new "Preset" is created. Click  to change its name.

By default, two example values will appear. The preset was renamed to 'Choosing Process to Decide Traps' to 'Decide Traps':

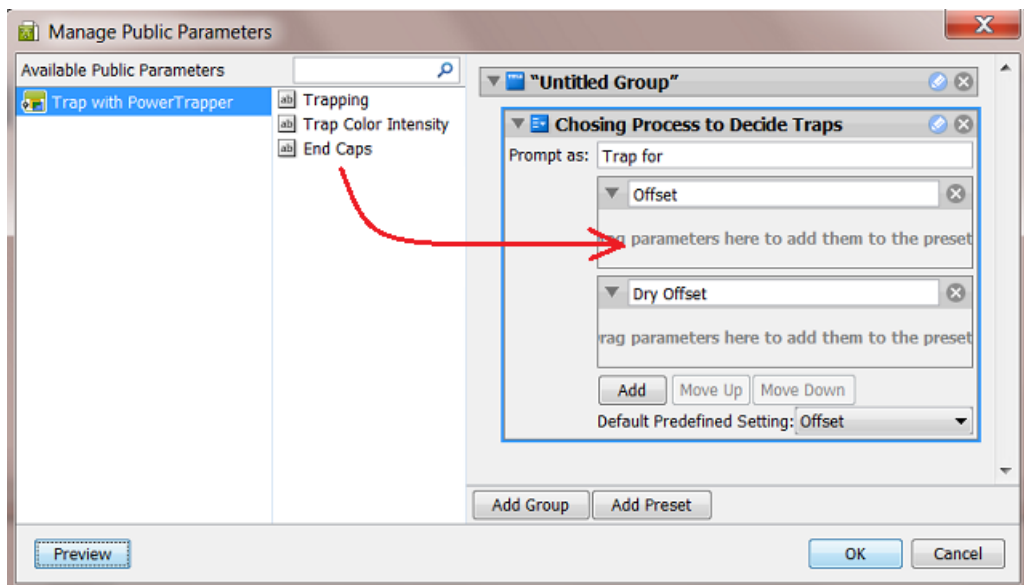


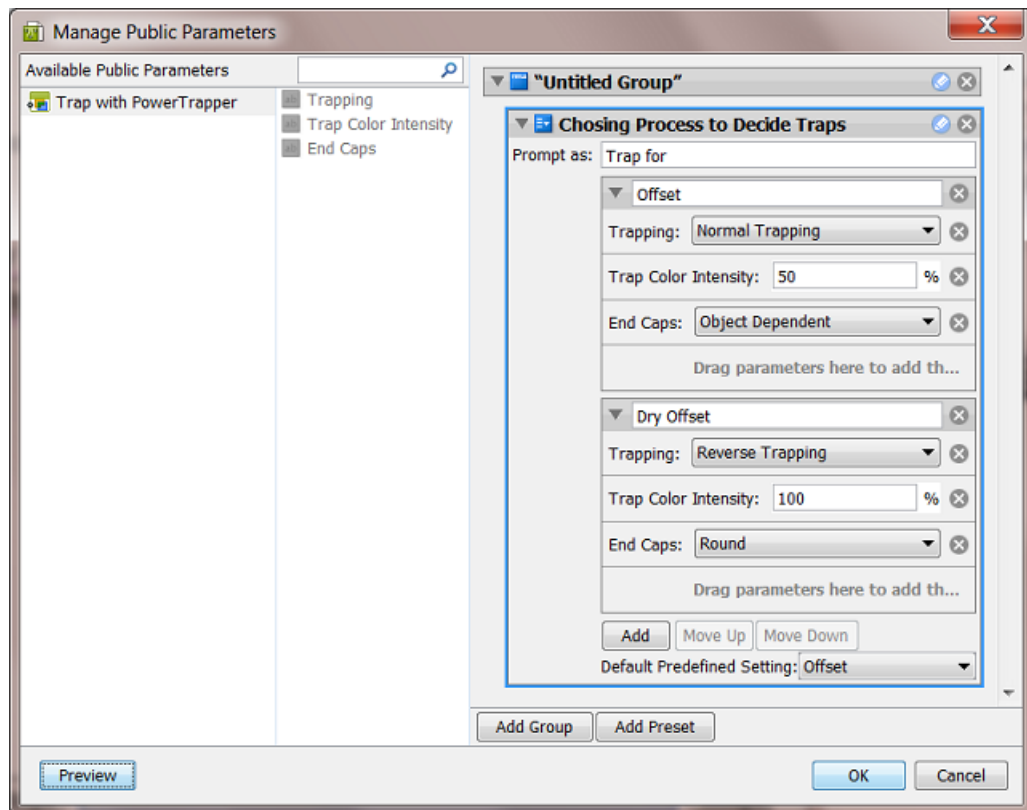
4. Define what the users will see:

- a) in **Prompt as**, enter the text that users will see (replacing 'Type the name of the preset here (e.g. "Paper Size")')
- b) enter the values that the users will choose from (replacing 'Type a value here (e.g. A4)'). In our example, we add 'Offset' and 'Dry Offset'.

Click **Add** if you want to add extra values (not the case in our example).

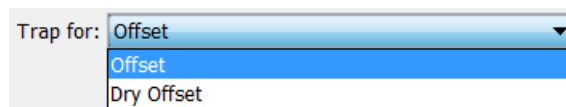
5. Drag the parameters from the dialog's middle pane onto one preset item. This will make them automatically appear under each preset item (here both under *Offset* and *Dry Offset*).





6. Define the parameters values for each preset item.  
See the above screenshot for a good example.
7. Use the buttons **Move Up / Down** to define the order of the **Presets** in the panel that the end-user will see.
8. Click **OK** to confirm and close the dialog.
9. Save your ticket to also save these public parameters.

This is how the resulting dialog will look like to the users of the client applications:



## 9. Uploading Files to Automation Engine

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You can work with files that are already stored in your **Containers**, or with files that you (first) upload to Automation Engine.

Read below about several techniques to upload files. Some of those also immediately launch a workflow on the uploaded files.

### 9.1. Uploading Files using the Pilot

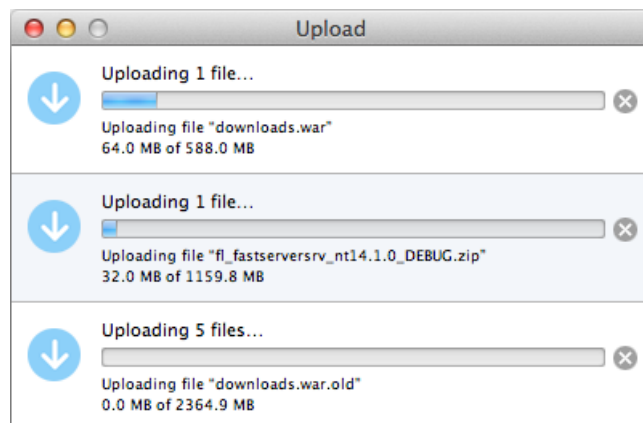
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In the Pilot, in the **Container** mode or in the **Last used Job** mode, there are two ways to manually upload files:

- Drag and drop files or folders from outside the Pilot onto a folder in the Pilot. Or use copy/paste shortcuts.
- Right-click your destination folder or go to **File > Upload Files....** In the dialog that opens, browse to your files or folders and click **Upload**.

#### About multiple uploads and cancelling uploads

When the upload is not immediately finished, an **Upload** window appears and you can continue working with the Pilot. You can upload multiple sets of files. When other files are still uploading, they will be added to this **Upload** window.



All uploads can be canceled individually. Click  to stop the upload immediately. Any partially uploaded files will be deleted.

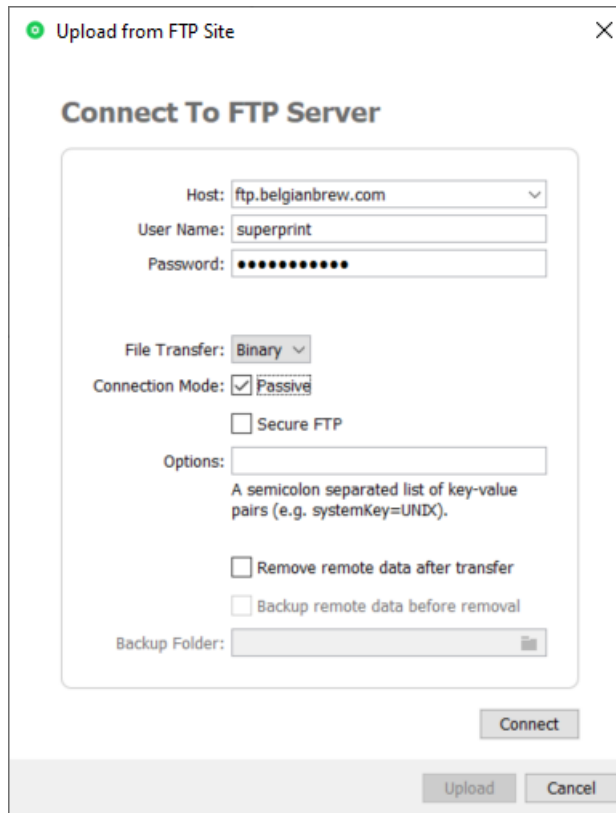
When all uploads are done, the **Upload** window automatically closes.

### 9.2. Uploading Files from an FTP Server

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1. In **Containers** mode or in **Last used Job** mode, right-click the folder in which you want to upload your file, and select **Upload Files from FTP Site....**

This opens the **Upload from FTP Site** dialog, where you first need to enter the settings for the FTP connection:



2. In **Host**, enter the name of the FTP server that hosts your files.



**Tip:** To use a port other than the default port, add ' : ' and the port number after the host name. For example: `myftpserver:1085`

3. Enter a **User Name** and **Password** that corresponds to an account on the FTP server.
4. In **File Transfer**, choose between **Binary** and **ASCII**.  
**Binary** will always work, but if you have an ASCII file, the transfer will go a bit faster when selecting **ASCII**.
5. By default, the transfer uses Active **Connection Mode** (where the FTP server opens the data connection).

If your system is behind a firewall that blocks incoming FTP server connections, select **Passive** to use Passive Connection Mode (where the client initiates the connection).

6. Select **Secure FTP** if you are connecting to a secure FTP server (over FTPS, not SSL or SSH).



**Tip:** If you are experiencing problems using secure FTP, try connecting over regular FTP, and ask your IT administrator to check the security settings of your FTP server.

7. **Options:** A field for one or more exceptional options, formatted as key-value pairs. For example: When you experience problems when interfacing to a Rumpus FTP Server, add `systemKey=UNIX` in this field and try again.

8. Select '**Remove remote data after transfer**' if you want to delete the files from the FTP site once they are uploaded to Automation Engine.

This enables the option to '**Backup remote data before removal**'. When selected, indicate the **Backup Folder** where the files should be copied.

9. When you are done, click **Connect** to establish the connection.
10. Click **Upload** to start the file transfer.

### 9.3. Using Access Points to Upload Files

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**Access Points** are documented [here](#) in the dedicated chapter *Integrating with External Systems*.

### 9.4. Using Shuttle to Upload and Process Files

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You can upload and immediately process files from any Mac or Windows client computer using the **Shuttle** tool.

Learn more in the chapter *Working with Shuttle*.

## 10. Launching Tasks from Editors

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### 10.1. Setup Requirements

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For Esco editors and DeskPack (Adobe Illustrator) to be able to connect to an Automation Engine server, the "**Shuttle Server**" component needs to be running. Learn more on [this page of the Configuration tool](#).

In the **Preferences** menu of the editor, you also need to define which Automation Engine server you want to connect to.

### 10.2. Launching Tasks from ArtPro+

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Launch a task from ArtPro+ is described in the chapter [Workflows](#), in the page on [Launching a Workflow with Public Parameters](#).

### 10.3. Launching Tasks from Adobe Illustrator (the Shuttle Plug-in)

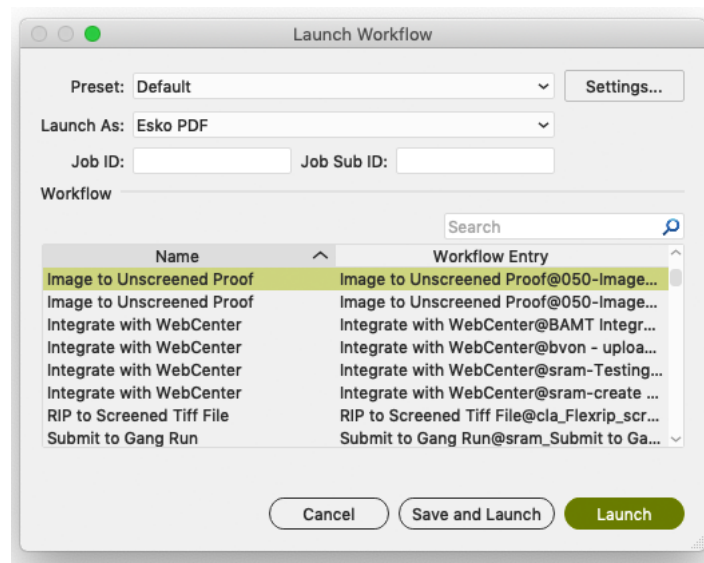
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**Note:** To launch tasks from Adobe Illustrator, you need to install the **Shuttle Plug-in**. Download it from <https://mysoftware.esko.com/>.

Follow these steps to launch a task or workflow on the file that you have open in Illustrator (and in front of any other open files):

1. Go to **File > Launch Workflow...** or use **Option + CMD + Z**.




2. In **Launch As**, choose **Esko PDF** to copy a Normalized PDF or PDF+ version of your file onto the **DeskPack Container**. Choose **Adobe PDF** to copy the Adobe Illustrator PDF version.
    - **'Esko PDF'** uses the 'PDF Export' plug-in to convert your Illustrator file to either Normalized PDF or PDF+, depending on the setting in Ink Manager. To refine the conversion, you can select one of the PDF Export **Presets**, or click **Settings...** and edit the **PDF Export Settings**. These changes are not saved.
    - **'Adobe PDF'** uses the Adobe PDF preset 'Illustrator Default'.
-  **Note:** 'Color Conversion' and 'Profile Inclusion Policy' are not part of the preset 'Illustrator Default', but **Launch Workflow** will apply color conversion with the last settings used.
3. If you want to link your file to an existing Automation Engine Job, fill in an existing **Job ID** and/or **Job Sub ID**. The task on the Normalized PDF will then run in that Job context, which means it can use the **Job Setup parameters** when SmartNames refer to them in the selected workflow..
 

 **Note:** If your open file is already saved in an Automation Engine Job folder, the **Job ID** and/or **Job Sub ID** will be filled automatically.
  4. Select the task or workflow you want. If it has public parameters, fill them in.
  5. Click **Launch**. If your file was changed since the last save, you can click **Save and Launch** to first save your document and then launch the task.

## 10.4. Launching Tasks from ArtPro

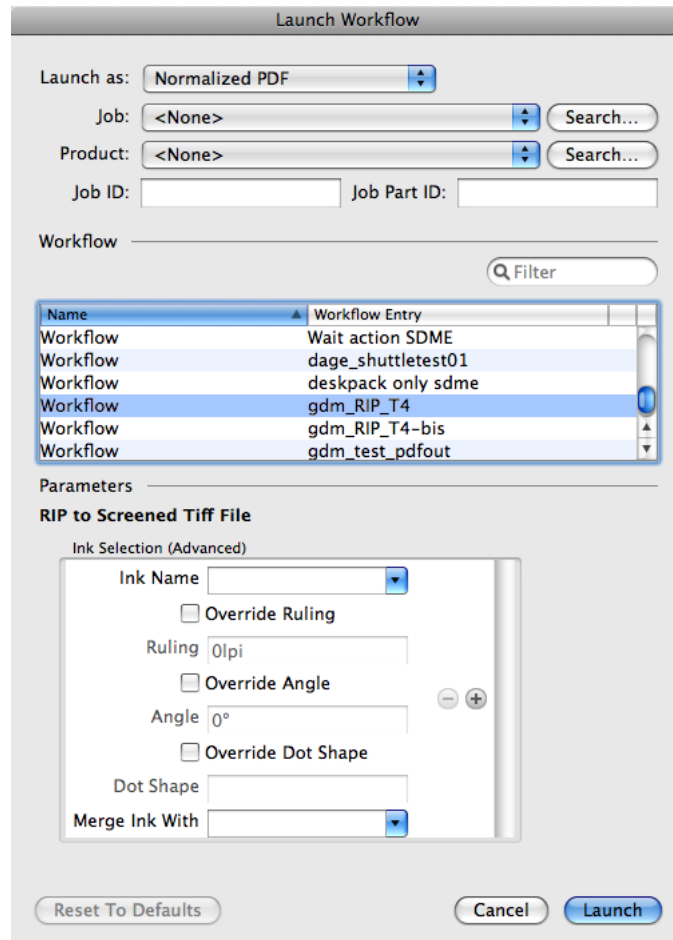
In **Preferences > Servers > Shuttle**, add the name of your Automation Engine server.

 **Note:** In that same dialog, the tab **Automation Engine** serves to define other preferences related to that server. You do not need to fill that one in when you only need this connection to the "Shuttle Server".



1. To launch a workflow on the currently open file, go to **File > Launch Workflow...**

This opens the **Launch Workflow** dialog.



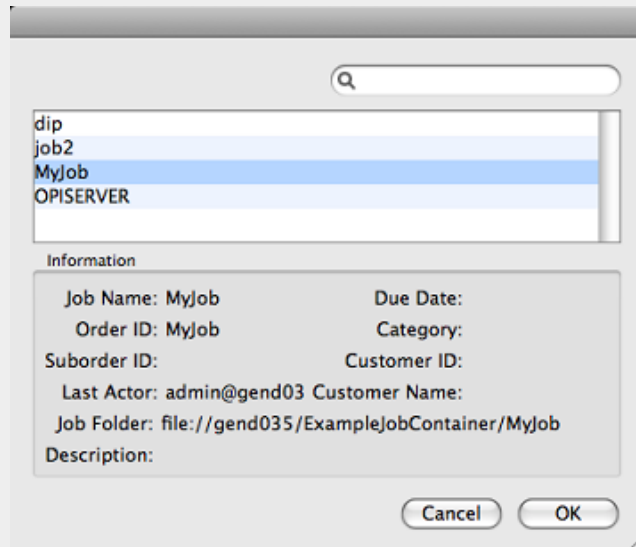
2. **Launch as:** Your open file is an ArtPro file, but you can choose as which file type you will send it to the selected workflow.

If your workflow is...	you can launch the file as...	with...
an Automation Engine workflow accepting Normalized PDF files as input,	Normalized PDF	either <b>Normalized PDF</b> or <b>Normalized PDF (embedded)</b> .
an Automation Engine workflow accepting PDF files as input,	PDF	any of the available PDF flavors.
an Automation Engine workflow accepting ArtPro files as input,	ArtPro	with the included images (TIFF, EPS...) or without (then only the ArtPro file and any ArtPro CT file).

- If you want to add your file to the **Job Folder** of an Automation Engine Job, select it from the **Job** list or fill in its **Job ID** and/or **Job Part ID**.



**Note:** Use the **Search...** button to see a list of active Jobs, including some of their metadata.



- If you want to add your file to an Automation Engine **Product**, select it from the **Products** list or fill in the **Product ID** and/or **Product Part ID**.



**Note:** Use the **Search...** button to see a list of your server's **Products**.

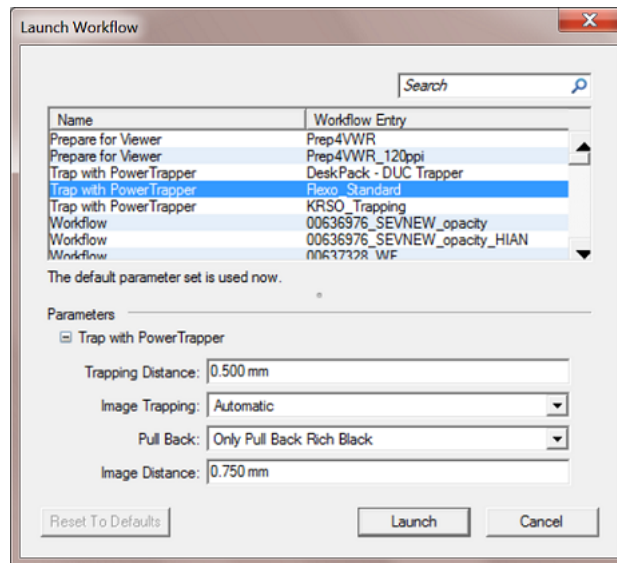
- Select the workflow you want to launch.
- Fill in any of its **Public Parameters**.  
If you want to go back to the default parameters values after changing them, click '**Reset To Defaults**'.
- Click **Launch**.

## 10.5. Launching Tasks from PackEdge or Plato



**Attention:** Before you can launch a task on it from within PackEdge or Plato, you must save your file on an Automation Engine **Container**.

- Go to **File > Launch Workflow...**  
The dialog lists all public tickets. When selected, a ticket shows its **Public Parameters**.



**Tip:** When you expect tickets to show up here but none do, check if the Shuttle server is running.

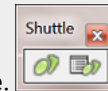
2. Select the task or workflow you want. If it has public parameters, fill them in.
3. Click **Launch** to launch that workflow on your open file.



**Tip:** To access this "Shuttle Server" easily in the future (without using the menus):



1.

Go to **Window > Toolbars > Shuttle** to open the Shuttle palette.



2. Drag it into your application's toolbar.

3.

Click  to open the **Launch Workflow** window. Click  to open the **Shuttle** window where you can monitor and manage the launched tasks.

## 10.6. Launching Tasks from FastImpose

When working with **FastImpose** Server, you must save your file on an Automation Engine Container before you can launch a task or workflow.

1. Go to **File > Launch Workflow...**
2. Choose what file type you want to launch your file as.
  - When working with FastImpose Server, you can only launch your file as an IMP file.
  - When working with FastImpose Standalone, you can launch your file either as a JDF or a PDF file.

Click the **Settings...** button to set **JDF** or **PDF Export Preferences**. Learn more in the [FastImpose documentation](#).

3. Select the workflow you want. If it has public parameters, fill them in.
4. Click **Launch** to launch the workflow on your file.