WebCenter 21.03

User Guide

ESKO✱

Contents

1. Copyright Notice

2. Getting Started with WebCenter

Use WebCenter to search for information and manage projects. Anyone can search for information, but only Project Managers can manage projects. This document includes documentation for the most common and often-used features, but you will find other features and abilities as you explore the site.

2.1. Opening WebCenter

1. Open your web browser and navigate to http://yourservername/WebCenter_Inst or the URL that your system administrator has provided.

   Note:

   - On a PC using Microsoft Windows, Microsoft Edge or Mozilla Firefox or Google Chrome are supported for use with WebCenter.

   - On Mac OS X, Safari, Mozilla Firefox and Google Chrome are supported for use with WebCenter.

2. Once the page loads, enter your user name and password in the appropriate fields and click **Log In**.

   Note:

   If your administrator has enabled this, you can click the **Forgot Password?** link in the **Log In** page if you can't remember your password.

   Enter your **Username** or **E-Mail** address in the pop-up that opens, and click **Request New Password**.

   You will then receive an e-mail with a temporary password and a link to the **Log In** page.

   After logging in, you will be asked to change your password.

   The start page defined by your administrator appears (this is generally your **My Work** page).

   Note: You can later change the contents of your start page.
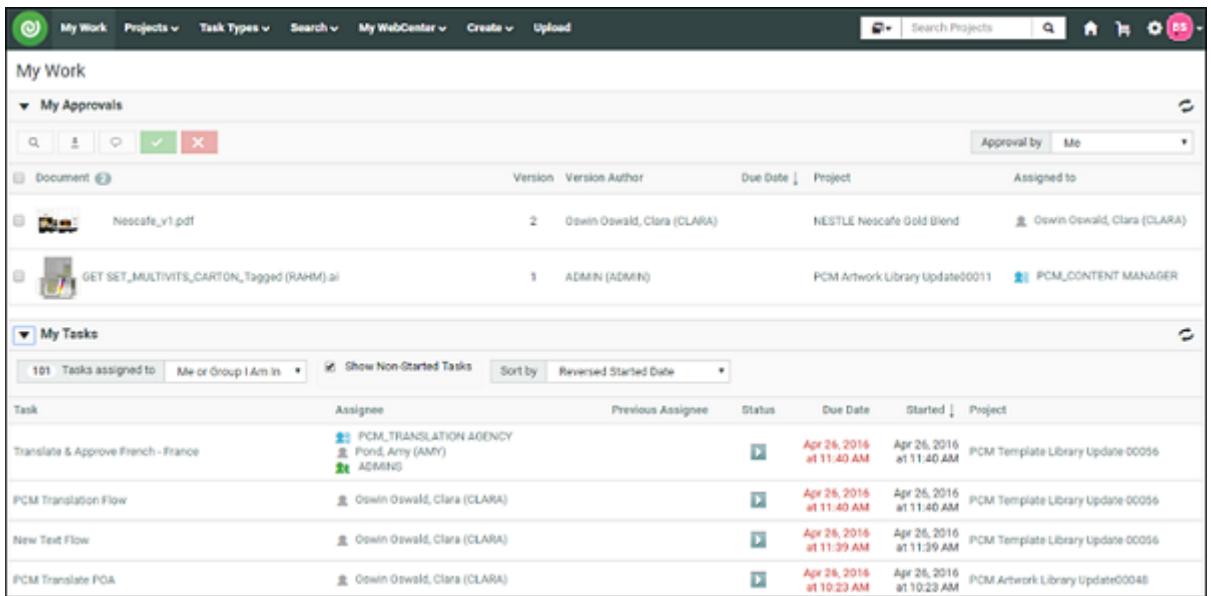
2.2. Understanding the WebCenter Page Layout

Header

The top right of the WebCenter page always shows:

• the name of the current user,

• a icon to go back to the user's start page,

• a Discussions icon which indicates the unread messages and redirect to My Discussions. You can view all discussions related to Project or Document or Tasks that you are involved in. For more details, refer to *Discussions in WebCenter* on page 304

• the Cart ,

• Avatar icon displays the user initials (first letter of first name and last name),or an image, if any is uploaded in the User page.

• a link to the WebCenter **Welcome** page,

• **Admin** (if the user is a member of the Admins group),

• **Contact**,

• **Logout**.

Top Menu Bar

By default, the top menu bar contains the following menus: **My Work**, **Projects**, **Task Types**, **Search**, **My WebCenter**, **Create** (if you are a Project Manager) and **Upload** (see *The Default WebCenter Menus* on page 14 for more details). An administrator can customize the menus.
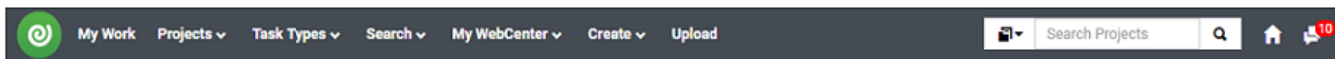
If you have the optional Task Management module and the **User Can Create Task Type** permission, **Task Types** also appears in the top menu bar.

Documents Pages

Below is a sample of project's **Documents** page, in grid layout, for a user who is a Project Manager.

Area 1 is the project actions area, allowing you to perform actions on the whole project (for example, mail a link to the project to a reviewer, add the project to your favorite projects...)
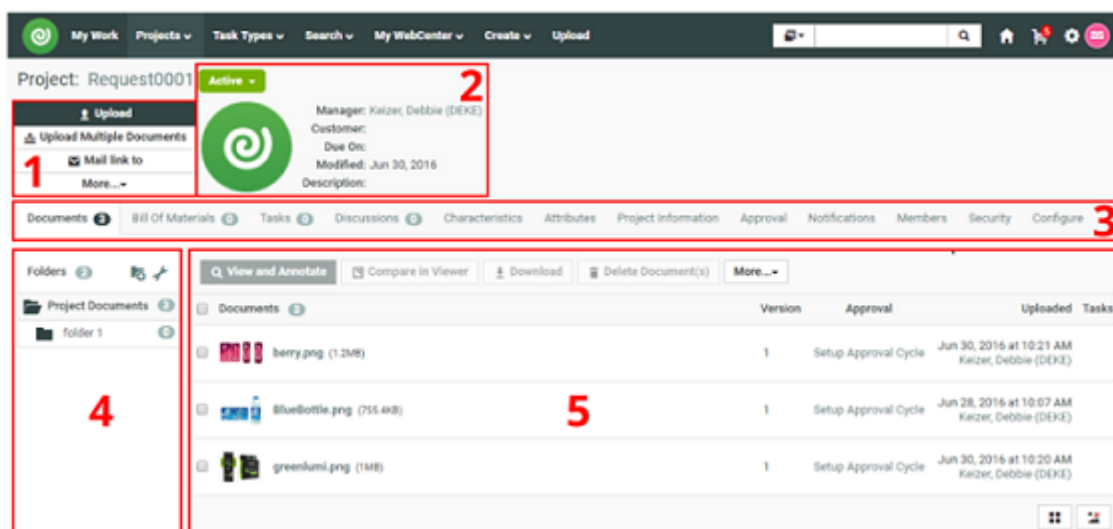
- **Area 2** is the Project Details area, containing the project icon, the name and description of the project, the project status...
- **Area 3** shows links to the project pages. For example, click **Members** to view the project members. The page you are on is shown in bold.
- **Areas 4** and **5** are part of the content pane, that changes depending on the project page you are on. Here, on the **Documents** page, they show the project folders and documents.
- **Area 4** is the Folders pane, showing the projects folders. Click a folder to see the documents it contains.
- **Area 5** is the document pane, that can show the documents in a list or grid view, with or without thumbnails.

Notes

- To act on many documents at once, select their check boxes and then choose an action in the **Actions** menu.
- To select all documents in the current folder, select the check box before the **Documents** header.

- To switch to a list layout, click **Show as List**.

- Hovering over a thumbnail shows a larger version of it in a pop-up window.

  For Graphic documents viewable by the WebCenter Viewer, you can click the zoom icon to show an even larger thumbnail (500 x 500 pixels). This is applied to all Graphic documents on which you hover until the page is reloaded.

  The pop-up window closes when you move the cursor off the thumbnail.

There is usually more than one way to accomplish a task by using a combination of menu entries, action menus, and clicking status messages. Many methods will lead to the same result.

Note: This layout is the default layout. However, your layout might be different depending on your customization.

2.3. The Default WebCenter Menus

2.3.1. My Work

What is displayed?

Your **My Work** page lists the documents waiting for your approval, as well as the Tasks assigned to you, or to a group you are in.

Documents that are overdue have red due dates. Documents whose due dates are within the next day have orange due dates, and documents that have far-off due dates have gray due dates. You can also view the **Discussions** and messages in the discussions that you are part of, if you have chosen to view discussion in **My Work** page.

Tip:

If you have a long list of items to attend to, use the filter options in each panel: for example you can limit the display to items assigned directly to you (**Me**), to one of the groups you are in (**A Group I Am In**), or both (**Me or Group I Am In**).

If you are an **Approval Master**, you can filter the approvals you need to follow up by status (for example, to only show the approvals still **Pending**), by due date, etc.
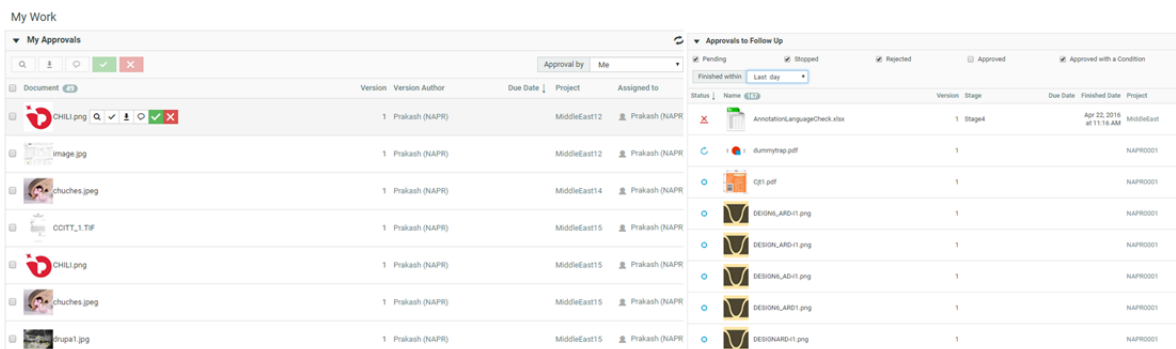
Working from My Work page

- Click a document name to go to the document, or click the project name to go to the project. Note that the behavior may be different in case you are using a **simplified My Work** page.

- To load multiple documents into the Viewer, select their checkboxes and click **View and Annotate** in the actions menu.

  You may then navigate between the documents by using the controls in the Viewer header.

- To approve, reject or comment multiple documents, select their checkboxes, and click ✓ , ✕ or

  💬 (choose a status that applies to all the documents you selected).

  In the pop-up that opens, enter your comment (if applicable) and your password (if required by your server) and click **Commit**.

Note: For Page List documents, the My Work page also displays the number of pages that have already been approved, as well as the total number of pages.

Indirectly Assigned Group Tasks

If you are a Group Representative, you will be the preferred assignee when a Role is assigned to this Group. So the related approvals and tasks appear in your **My Approvals** or **My Tasks** sections on My Work page.

When the Group Representative is absent, any of the Group Members can do the tasks on his or her behalf. To do this,

1. Go to **My Work** > **My Approvals** > **/** > **My Tasks**.
2. Click on the drop down **Documents waiting for Approval** and select the **Me Indirectly** option.

   When you select this an additional drop down **On Behalf Of** will be displayed.
3. Select the Representative on whose behalf you are approving the document or doing the task. All Documents / Tasks to which he / she is assigned through a Role or on behalf of a Group are loaded in this page.

   You can now do the Approvals from the **My Approvals** section.

Note:

Project History will indicate that those **Approvals** / **Tasks** were executed on behalf of the Role that is represented by the Group.

To know more about how to setup your **My Work** page, read *My Work Setup* on page 15
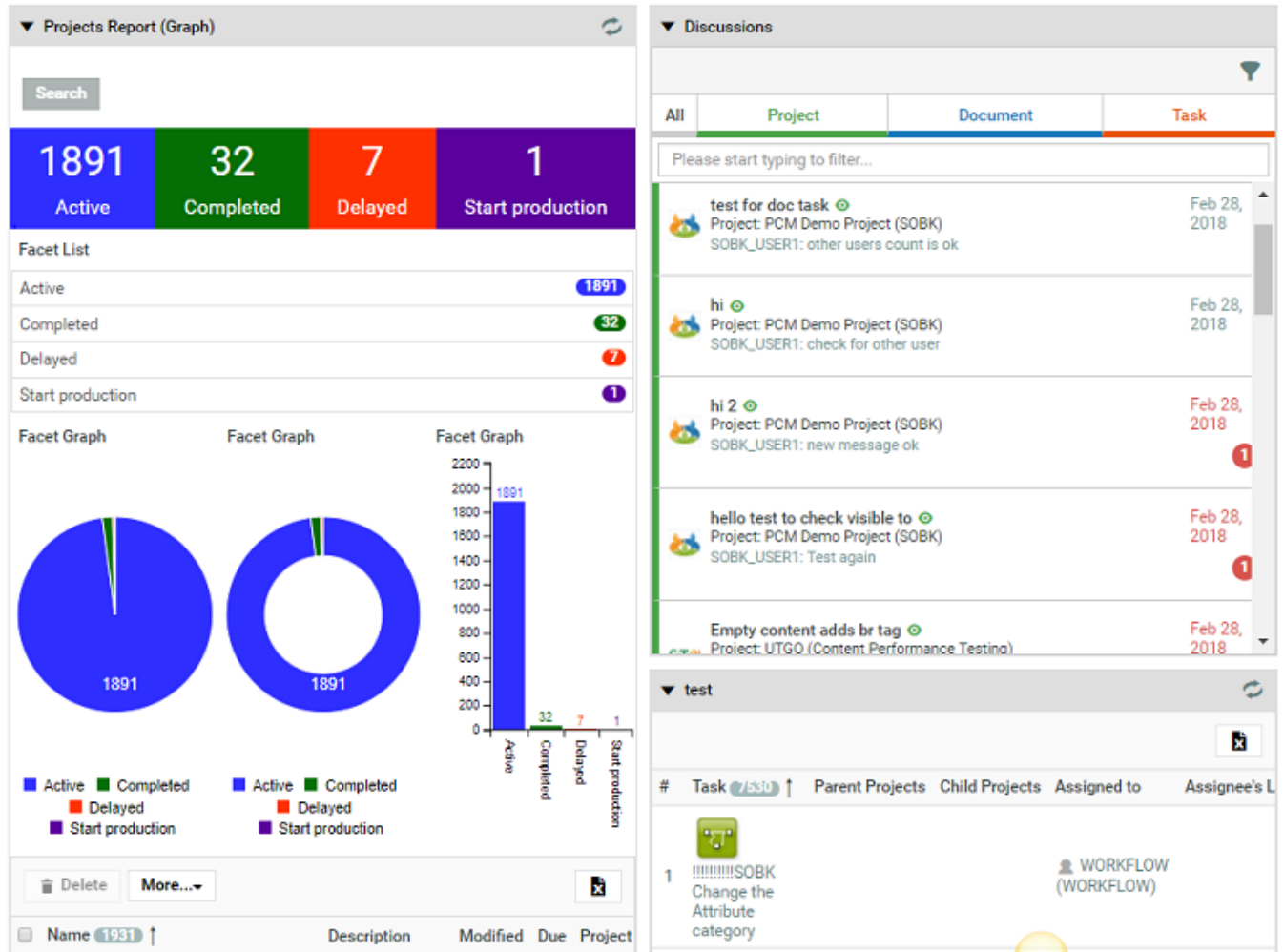
2.3.2. My Work Setup

This is where you can customize your **My Work** page. To do this, click **My Work** > **Edit My Work Setup**. Select the blocks you want to be displayed and drop it to **My Work** panel.

My Work

✎ Edit My Work Setup

This text can be translated

You can also select **Show simplified My Work page** (with no links to projects or documents) or you can choose **Reset to Default** option. To know more about My Work page set up, read *Edit the Default My Work Page*

Click **Save** when you are done.

Admin users can now create Dashboards with **My Work** context, which are suitable for all users. These dashboards are visible in the gallery, **My Work (custom)** category.

You can drag the Dashboards block from the gallery to the **My Work** Dashboard. You can switch the selected Dashboard to another Dashboard with the **My Work** context, in the configuration panel.

2.3.3. Projects

The **Projects** menu contains the following menu items:

- **Projects** (shows all projects visible to your user),

-

If you are a Project Manager, you can also see:

-

- *Create Project*.

Favorite Projects

Favorite Projects shows those projects for which you have clicked **Add to Favorites** in the project's **Actions** menu.

The Favorite Projects' **Actions** menus contains **Remove from Favorites**, **Add to Cart**, and **Update Project(s)**.

- Filter the list of projects by entering a filter in the **Show Projects** field, or by changing the value in the **Modified** list, and clicking Go.

- To sort the list of projects, click the column header of the field on which you want to sort. For example, click the Created column header to sort on project creation date. This preference is saved in your profile, so it will become your new default sort option.

- To **view** a project, click its name.

- **Add to Favorites** adds the selected projects to your list of Favorite Projects.

- The **Cart** lets you download multiple projects or documents at once, and also lets you e-mail links to projects and documents. The recipients must have user names and passwords for your WebCenter site in order to view the information when they click a link. The Cart retains its contents only until you close the browser window or until you log off.

- **Update Project(s)** checks the version of each visible document in the selected projects and updates each document to its latest version if needed.

To remove a project from the Favorite Projects list, select it and click **Remove from Favorites** in the **Actions** menu.

Projects I Manage

Projects I Manage shows those projects for which you are the Project Manager, or which are managed by a group of which you are a member. It only appears in the menu if you are a Project Manager (either individually or through your group memberships).

In the **Actions** menu are **Delete**, **Update Project(s)**, **Add to Favorites**, **Add to Cart** and **Change Manager**.

- Filter the list of projects by entering a filter in the **Show Projects** field, or by changing the value in the **Modified** list, and clicking Go.

- To sort the list of projects, click the column header of the field on which you want to sort. For example, click the Created column header to sort on project creation date. This preference is saved in your profile, so it will become your new default sort option.

- To **view** a project, click its name.

- **Add to Favorites** adds the selected projects to your list of Favorite Projects.

- The **Cart** lets you download multiple projects or documents at once, and also lets you e-mail links to projects and documents. The recipients must have user names and passwords for your WebCenter site in order to view the information when they click a link. The Cart retains its contents only until you close the browser window or until you log off.

- **Update Project(s)** checks the version of each visible document in the selected projects and updates each document to its latest version if needed.

Delete deletes the selected projects.

To have somebody else manage one of your projects, select the project, click **Change Manager** in the **Actions** menu, then select the new Project Manager and click **Finish**.

Projects I Am Invited to

Projects I am invited to shows all the projects of which you are an invited member.

In the **Actions** menu are **Add to Favorites**, **Add to Cart**, and **Update Project(s)**.

- Filter the list of projects by entering a filter in the **Show Projects** field, or by changing the value in the **Modified** list, and clicking Go.

- To sort the list of projects, click the column header of the field on which you want to sort. For example, click the Created column header to sort on project creation date. This preference is saved in your profile, so it will become your new default sort option.

- To **view** a project, click its name.

- **Add to Favorites** adds the selected projects to your list of Favorite Projects.

- The **Cart** lets you download multiple projects or documents at once, and also lets you e-mail links to projects and documents. The recipients must have user names and passwords for your WebCenter site in order to view the information when they click a link. The Cart retains its contents only until you close the browser window or until you log off.

- **Update Project(s)** checks the version of each visible document in the selected projects and updates each document to its latest version if needed.

2.3.4. Task Types

You will only see this menu if you have the Task Management license. See *Task Management in WebCenter* on page 309 for more information.

2.3.5. Search

Searching Content in WebCenter

When searching for projects or documents, you can use normal searching or keyword searching.

The normal method searches more fields than keyword searching, but keyword searching may be more useful when you know less about the desired results.

Both are accessed by clicking **Search** in the main menu.

> **Tip:**
>
> Keyword searching is also available in the header of every WebCenter page, at the top right under **Welcome**, **Contact**, **Logout**... You can search for **Projects**, **Documents** or **Saved Searches** in this search bar.
>
>
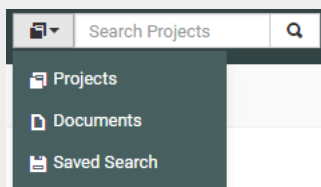
By combining with the **OR** keyword, you can also search for properties which are empty have a specific value, **EMPTY OR** some value.

Normal Searching

1. In the **Search** menu, click **Projects**, **Documents** or **Tasks and Approvals**, depending on what you want to search.

2. When using **normal searching**, you see multiple fields to fill in. Click **Keyword Search** to search on keywords alone.

   To switch from keyword to normal searching, click the **More options** link.

3. Enter search terms in the fields as desired.

   > **Note:**
   >
   > - To search for **Documents** or **Projects** based on attributes:
   >
   >   - click the **Attributes** link,
   >
   >   - select the **Attribute Category**,
   >
   >   - specify the values of the **Attributes** you are searching for,
   >
   >   - and click **Add** to return to the **Search** page.
   >
   > - To search for **Documents** or **Projects** based on **characteristics**:
   >
   >   - click **Characteristics**,
   >
   >   - select the desired items in the characteristics tree or **Find more characteristics**.
   >
   >   You can choose to search on **any of** or **all of** the items selected. Click **Add** to return to the **Search** page.
   >
   > Searching on attributes and characteristics is available only using normal searching.

Tip:

You can search for documents based on their **Approval Status**: select either a single approval status or:

- **All Approved** to select documents with any approved status (**Approved**, **Approved with comments**, **Force Approved** or **Force Approved with comments**).

- **All Rejected** to select documents with any rejected status (**Rejected** or **Force Rejected**).

- **All Completed** to select documents with any approved or rejected status.

Tip:

You can search for document **revisions**. The **revision** field can be shown in the search results and can be used to sort the results.

You can search for revisions only if your administrator has set this up for you. Read about this in *Configure Search Crawler Setup*.

You can specify the **revision** you want to search for from the drop down. Select:

- **Latest Revision** to search the latest revision of the document you are searching for. Only the latest revision will appear in the results. A document can appear multiple times in the search results if multiple versions are linked to different projects.

  Note:

  The search results will show only the document revisions linked to at least one project. If a version is linked to a project, all the revisions prior to that can be found in the search.

  For example, a document has three revisions (Base- versions 1, 2 and 3; Revision A- versions 4,5 and 6 and Revision B-version7).

  If the revision indexing is not enabled, the search will find only version 7 if this is the only version linked to a project currently. When revisions are indexed, all the latest versions of the previous revisions will appear in the search results. The search will find version 3 (Base), 6(A) and 7(B).

- **All Revisions** to display all revisions of the document.

- **Base Revision** to search for the first revision of the document.

- **Specific Revision** and specify the revision letter in the field.

Tip:

Searching based on Project Status:

You can specify **Project Status** as a criteria in Project Search. To do so, select the **Project Status** from the drop down. Read more in: *Searching based on a Project Status* on page 265

To type in a custom value (or to use wild cards /AND/ OR etc.) click the edit button.

> **Tip:** When you are searching for **Tasks** based on task specifications:
>
> • click on the link **Task Specifications** and start typing the name of the specification
>
> • or select from the drop down listing all specifications.

4. Use the *Search Results Options* to determine what you want to see in your search results and in what order.

5. You can also:

   • clear all fields: click **Clear this form**.
   • save the search query for future use (see *To Save a Search* on page 30).

6. Click **Search** to search using the criteria you entered.

> **Note:** For normal searches, WebCenter searches all the fields available on the **Search** page. Each document type in the **Search for** list has different searchable fields.

The **Search Results** page shows your results.

   • You can view your Project search results in a **List** or a **Grid** or a **Card**, and choose to view the thumbnails or not.

   • Task and Approval Searches can be viewed only as a List

   • Document searches can be viewed as **Card** or **List** or **Grid**.
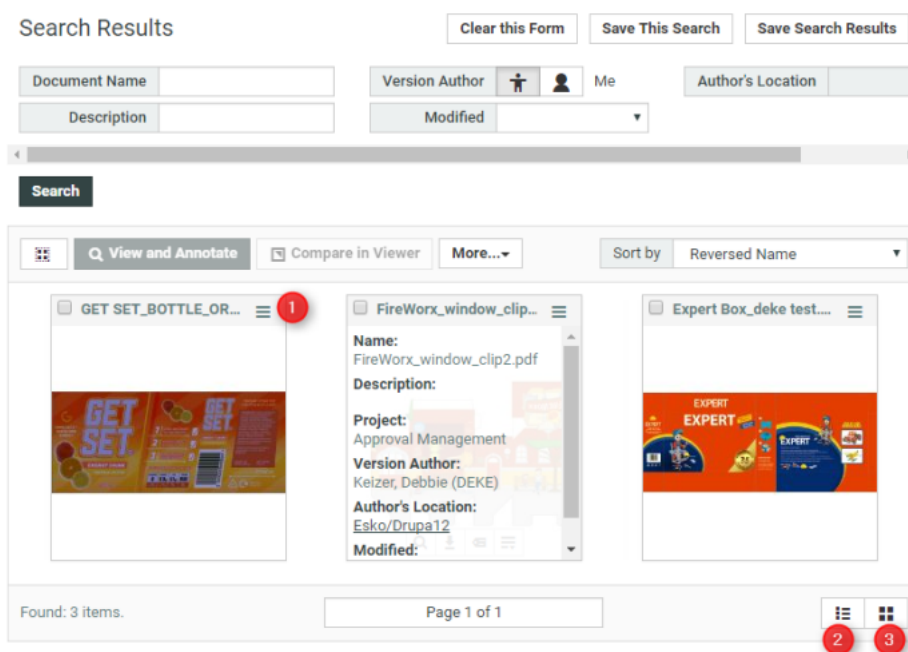
When using **Card** search, you have a catalog like view of your Documents. To view the related information, click ≡.

The number of items displayed in Card, List or Grid is set in *Preferences*.

Note:

It is possible to configure a specific Saved Search to always show up as card view in the Search Results Layout options.

The Card style Search provides a new way of displaying Document Search results. The new Card style is more image-centric and allows to hide additional metadata initially.

Note: Search results display only projects or documents for which you have **View** permission.

Use Basic and Advanced Search Character

Basic Search

You can type in multiple words separated by spaces when searching and generally these words do not need to be in a particular order. However, when in Document, Project, Template and Task names or Attribute related fields, the order of the words is respected.

Remember:

If there are no search characters (* ? "), basic or advanced, the search adds stars (*) around every word. The results will show anything that starts, ends or contains the word you are looking for. Text attributes have an exception that the stars are not added automatically.

For example, if you search for box company, it will return results which include both words but it could also find boxed instead of box.

The basic search characters *, ?, NOT, OR, AND, EMPTY ,"" are always available when searching.

Searching with NOT You can use either *NOT myvalue* or ** NOT myvalue**

Search AND /&& , OR /‖ , NOT operator priority order

Note: If you have a saved search before WebCenter 20, where you use a combination of AND, &&, OR, ‖ or NOT without brackets in a single filter, then you might need to add brackets to get the same behavior as before.

The new operator order is:

1. NOT
2. AND / multiple parts without operator (implicit AND)
3. OR

Example:

EMPTY OR "esko webcenter" NOT test AND production will become: (EMPTY OR ("esko webcenter" *AND* (NOT test) AND production))

In the example, first the part with NOT is executed, then executes everything next to each other (including AND, words, wildcards and parts surrounded by quotes) and combine those parts with AND. Lastly both sides of the OR are compared, to return the documents that match any of the two sides. Add brackets to influence the order of execution.

See other examples below:

box company	The search results will contain both box and company in no specific order. The results may also contain `boxed`.
	If you would like to search for a string with multiple words, type them with a space in between them. The order is not important. The search will return results containing both words.
"box company"	If you need the words to be exact (so not sub-strings) and to be in a particular order, use **""** around the words.
box comp*	If you want to only find results for prefix or suffixes, you can use stars. The search will only look for the substrings for the words where you added a *.
	A search with box comp* will find "company" and "box" but will not find "boxed".
com?any	Use **?** as a placeholder for an unknown character.
	The search will not find substrings when you use **?** .
	A search with com?any will find "company".
box OR company	If you don't need the results to contain all words but want to find results that contain any of them, use OR (uppercase!).
	The example will find results that contain "box" or "company" (or both).
box AND company	Use AND to combine words in the search.
	The example will find all results containing both "box" and "company".
	Note: This is the default behaviour when you type in two words together.
box NOT company	Use ***NOT** to exclude results that contain the term after the **NOT** from the results.
	For example you want to find all documents containing box but not company.
EMPTY	You can search on the keyword **EMPTY** which allows you to search for any documents, projects or tasks where some text attribute or other text property is not filled in.
	For example, to search for projects that are not created from a template, search with keyword **EMPTY** on the **Project Template** field.

Project Template | EMPTY

By combining with the OR keyword, you can also search for properties which are empty or have a specific value.

Advanced Search

If you want to perform a more precise search, enable **Use Advanced Search Characters**.

Enables strict interpretation of brackets ( ) and wildcards *.
Search for: | All | ▼
Note that OR, AND, NOT, EMPTY, *, ?, "", &&, ||, ( ), ~ and \ are always available.

Note:

When using the advanced search characters, the search won't include the sub-strings. If you would like sub-strings to be included, add *.

(box company) OR (apple raspberry)	Use **( )** to group queries. This example search will find all documents containing box and company along with all documents with apple and raspberry.
company~0.9	Use **~** after a word to find words which might contain typing errors.
	In the example, the search will find all words that have a 90% match with "company". This will also find "company" or "copany".
"company boxes"~3	Combine **""** and **~** to search for words in a particular order with some flexibility.
	The example search will find "company" and "boxes" in that order with up to 3 other words between them. It will find "company that produced boxes".
Jean\-Luc or "Jean Luc"	If you need to search for a special character, you can use **""** around it. You could also escape the special character with the "\" character like: Jean\-Luc.
box && company	&& does the same as AND, || does the same as OR.

When Advanced Search Character option is OFF

When the option **Advanced Search Character** is not chosen, the search will try to guess whether you want to use a special search character or not.

For brackets for example, typing: **Esko (Belgium)** will still search for the text "Esko (Belgium)" (brackets are interpreted as text).

However, searching for **(Esko (Belgium) OR Esko (Spain)) AND WebCenter** will consider the first and last brackets as special characters to group the OR while the other brackets are considered text.

Note: When searching for Attribute values, the strict interpretation of **Advanced Search Characters** is always on.

Search Result Options

Use the **Search Results Options** to determine what you want to see in your search results and in what order.

Search for Projects

Fill in one or more fields. Prefer less fields? Try Keyword Search.

		View	Column Order	Editable	Sort	Order
☐ Use Advanced Search Characters ⓘ	**Search Results Options**					
☐ Search Panel Design ☐ Enable SmartNames ⓘ						
Project Name		☑	1	☐	☑	1 ▲
Description		☑	2	☑	☐	
Project Status	▾	☑ ⚙	3	☑	☐	
Project Calendar		☐ ⚙				
Created	▾	☐ ⚙			☐	
Started	▾	☐ ⚙			☐	
Modified	▾	☑ ⚙	4		☐	
Due	▾	☑ ⚙	5	☑	☐	
Completed	▾	☐ ⚙			☐	
Duration	= ▾ +/- days	☐ ⚙			☐	
Time Left	= ▾ +/- days	☐ ⚙			☐	
Project Status Started	▾					
Project Status Due	▾					
Project Status Completed	▾					
Project Status Duration	▾					
Project Status Time Left	▾					
Customer/Location		☐			☐	
Salesperson	👤 ⚤	☐ ⚙		☐	☐	
Project Creator	👤 ⚤	☐ ⚙			☐	
Project Manager	👤 👥 ⚤	☑ ⚙	6	☑	☐	

View

Select the information you want to see when viewing the results.

For example, when selecting **Description**, **Created** date and **Project Manager** (the **Project Name** is always shown), your results are displayed as below.

Note:

If the Administrator has enabled **Editable** items, you get an Edit ✏ button next to the selected items in the List View.

You can also show the time in the search results for the **Project Due** /**Modified** /**Created** dates by enabling **Show time in search results**.

Column Order

Use the **Column Order** column to define how to display the information for each Project found: enter numbers to order the columns (in **List View**) or the text under the project icon (in **Grid View**).

Note: The first column is always the **Project Name**.

Sort

Use the **Sort** column to define how you want your results sorted. First click the check box of the first sorting criterion, then the check box of the second, etc. WebCenter shows numbers indicating the sorting order.

For example, if you want your results to be sorted first by Project Manager then by date created, first click the **Sort** check box for **Project Manager** (this shows a **1** beside it), then the **Sort** check box for **Created** (this shows a **2**).

Read more about sorting in

Order

The order column shows the sorting order (**1**, **2**...) but also allows you to sort by **ascending** or **descending** order.

- Ascending order ↑ sorts **from A to Z** (for alphabetical fields like **Project Name**) and **from old to new** (for chronological fields like **Created**).

- Descending order ↓ sorts **from Z to A** (for alphabetical fields) and **from new to old** (for chronological fields).

Configuration Options

Display User

To enable the navigation and filtering for specified users in the search results, you can choose to configure fields like **Project Manager**, **Project Creator**, **Sales Person**, **Version Author**, **Pending Approver** in the **Search Results Options**. You can choose to show the results either as **Name** or **Avatar and Name** or **Avatar only**.
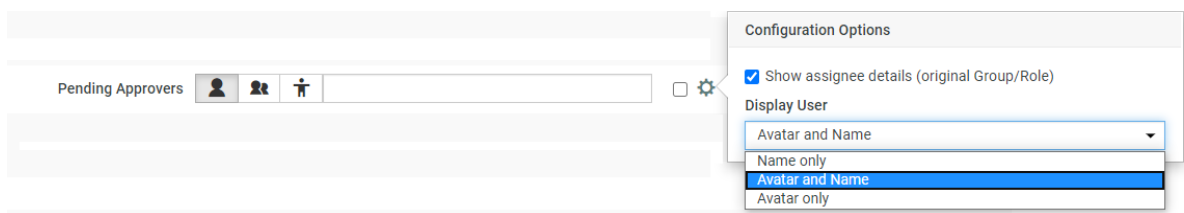
Similarly for Task Status, you have an option to show the results as Label only or Icon only or Label and Icon in the search results.

Sorting Search Results

You can sort the **search results** in the **List / Grid** view based on sort-enabled search columns.

In the List Layout:

You can click on the primary sort field header ↑ / ↓ to switch between ascending and descending. All sortable fields will have the sort icon next to their header text.

To change the primary sort field, click on the sort icon next to it.

- Up arrow ↑ in the column header indicates that the results are sorted on this field in ascending order. To sort the results in the reverse order, click ↓ .

- Down arrow ↓ indicates that results are sorted on this field in descending order. To reverse the order, click ↑ .

In the Grid Layout:

If the search results are in the **grid layout**, you will see a drop down with sortable fields instead of the sort icons.
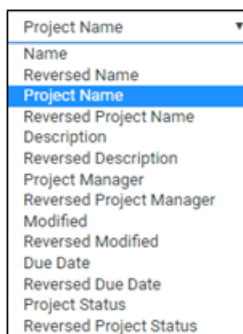
For example, sorting by **Name** / **Reversed Name** will make the name field in the ascending or descending order.

> **Note:**
>
> The configured *sort fields* will be applicable in both the **grid** and **list** layouts.
>
> You can navigate to the page number you want by typing the page number in the footer. If there is only one page to show the results, then there is no footer shown.

Keyword Searching

You can use the Search setup page to search based on a vast array of parameters. However, it is also possible to search using a single **Keyword**.

It is also possible to setup a Keyword search in the Search Panel. This is useful when you want to create Saved Searches with a Keyword field.

- The easiest way to access the search is using the top right menu bar. Enter the terms to search in this **Keyword Search** field.

> **Tip:**
>
> Keyword searching is also available in the header of every WebCenter page, at the top right under **Welcome**, **Contact**, **Logout**... You can search for **Projects**, **Documents** or **Saved Searches** in this search bar.
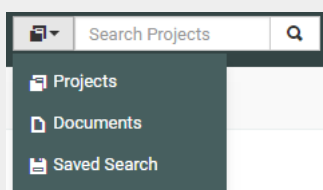
- Alternatively, in the **Search** menu, click **Projects**, **Documents** or **Tasks**, depending on what you want to search. From the normal Search page, you can use either:

  - the **Keyword Search** link.
  - or the **Keyword** field.
- Click the link **Try Keyword Search** to get a simplified page.
  a) When using keyword searching, you see the **Keyword Search** field.

b) Type in your **Keyword** and click **Search**.

- For keyword search of projects, WebCenter searches the project name, project description, project characteristics, the modification date, and text attributes.
- For keyword search of documents, WebCenter searches the document name, document description, document characteristics, project names, approval status, and text attributes.

c) Click **Search** to search using the keyword(s) you entered.

- If you'd like to use SmartNames in the **Keyword** field or if you want to create a Search Panel with the Keyword field, use the Normal Searching page.

The **Search Results** page shows your results. If you want to save the search, click **Save Search As...**

Alternatively, you can choose **Save Results to Excel** to download your search results in excel format.

You can choose your desired view of results by clicking **Show as List**, **Show as Grid**, **Show Thumbnails** or **Hide Thumbnails**.

Note: Search results display only projects or documents for which you have **View** permission.

Advanced Searches

Use the **Search** menu to search content in WebCenter. You can search for:

- **Projects**
- **Documents** including their **revisions**.
- **Tasks**
- **Reports**

You can create **Saved Searches** based on your chosen search criteria. If you are an administrator, you can create advanced asset browsers this way. Read in *Searching and Browsing Assets* on page 32

To Save a Search

1. In the **Search** menu, click **Projects**, **Documents** or **Tasks**, depending on what you want to search.
2. Define your search criteria.

   For more information, see *Search* on page 18.
3. Click **Save Search As** and the search results are downloaded in the excel format.

   The **Save Search** page appears.

   Alternatively, you can also **Save Results to Excel** .
4. Do one of the following:

   - To create a new saved search, type a **Name** for the saved search.
   - To update/change an existing saved search, select it from the **Your previously saved searches** list.
5. Administrators have to select one of the following **Search scope** options (other users can only save personal searches):

   - **Personal**, if only you should be able to see this saved search.
   - **Global**, if all users of the system should be able to see this saved search.
6. Click **Save**.

You can read more about working with Saved Searches in *Creating Advanced Saved Searches* on page 31.

After editing an existing Saved Search, click **Save** to update the search and **Save As** to create a new Saved Search.

Downloading Search Results

You can download the results of your search as an Excel file (`.xls`).

1. In the **Search Results** page, click **Save Search Results**.
2. In the pop-up that opens, choose to **Open** the resulting Excel file in your spreadsheet application, or **Save** it to your hard disk.
   When the **Save Search Results** are generated to save in an Excel, a progress indicator is shown on the button. This feature is currently not available in Safari Browser.

Creating Advanced Saved Searches

Normal and keyword searches may be saved for future use as a **Saved Search** and can be plugged into menu items (of the main menu or Project details menu), **My Work** and as a document source during project creation and in document referencing.

To access saved searches, click **Search** > **Saved Searches**. Shown below is a sample Saved Searches page.

Searches can be saved as:

- a **Personal** search visible only to the individual user.

- a **Global** search visible to all WebCenter users.

> **Note:**
>
> 1. For each Global Saved Search, an Administrator can determine a set of Groups/Companies/ Locations whose members can view this Saved Search.
> 2. It is not possible to set Visibility for Personal Saved Searches.

Saved Searches can be configured with advanced *Drilldowns* and extensive and visually enhanced *Dashboards*. You can plug these

- To execute a Saved Search, simply click its name from the **Saved Searches** page. Or select it from the Search window in the menu bar.
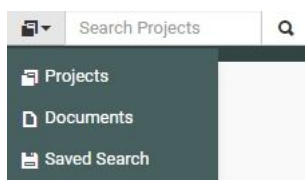
- To edit a saved search, click ✏ **Edit Search**.

- To **Make Search Personal**, click 👤

- To **Make Search Global**, click 👥

Smart Names r₁ enabled Searches do not have the **Make Search Personal** option.

• To create Global Saved Searches dedicated to a company or group, click **Edit Visibility** 👁 link. In the next window, select the **Available Groups**, **Available Companies/Locations** to whom you want to give the exclusive visibility. In this case, if you assign the visibility to a group, a company or location, the search will be visible to either the group or the company or both.

○ Visible to all

◉ Visible to selected Groups and Companies

Available Groups

[Please select or start typing...   ▼]

Available Companies/Locations

[Please select or start typing...   ▼]

[All Locations   ▼]

Add

Note:

If you select a company without specifying any of its locations, all the company locations will be able to access the saved search.

If you remove the **Available Groups**/**Companies** /**Locations**, the visibility settings will be modified.

• To delete saved searches, select them and click **Delete**. Use **Select All** and click **Delete** to delete all of them.

Running Reports

You can run pre-configured reports from the **Search** menu if your Admin has given you access to these reports (see the Administration Guide for more information).

Note: This only includes system-wide reports. *Project reports* are available from within the project.

1. Go to **Search** > **Reports**.
2. Click on the desired report name on the **Reports** page.
3. If the report requires parameters, the **Run Report** page appears. Specify the report parameters (the mandatory parameters are marked by an *) and click **Run Now**.

Searching and Browsing Assets

The asset browser is a user-friendly feature to search and find assets in a large collection of WebCenter assets. The administrator can customize the Asset Browser into a Menu for easy access. You can use the configured Asset Browser to browse for assets stored in the WebCenter.
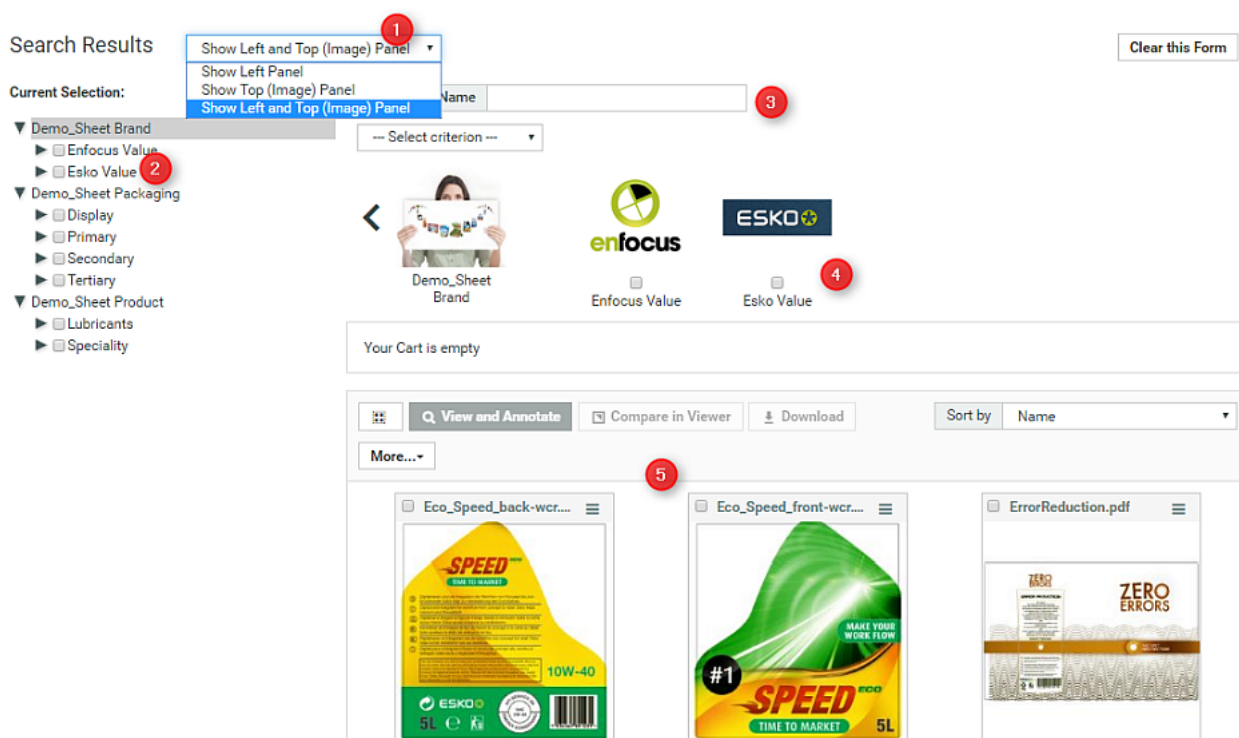
In the Asset Browser you can:

1. Select the browsing options in the Asset Browser. You can choose to see the left Panel (the browsing tree) or the top panel (with images). You can also choose to have both options.
2. Browse the tree(s) on the left panel to select the items based on the visible attributes.
3. You can use the options in the Search Panel at the top to refine the Asset Browsing (Searching) results in addition to the tree selection.
4. If you opted for the image panel, you can browse through the image representations.
5. Select the assets from the results to download or view them (by clicking the **Actions** menu).

You can select the assets and start actions directly from the action list menu if you have all the assets that you need in one single page. You can download the assets, view them or start a new projects with the selected assets from action list.

If the Cart is configured in the Asset Browser, you can use it to collect items from several rounds of searching. You can then download or start with a new project from the Cart.

Tree Browsing in the Asset Browser

You can see an example for tree browsing in Asset Browser below.

- There are different trees with multiple branches for each of these as well.
- If you want to select the sub-brands of **Esko**, select them one by one. In this example, **DeskPack**, **Dynamic Content**, **Studio** and **Visualizer** are selected. Note that if you select the main branch, all the sub-branches will be automatically included.
- Refine other criteria from other trees according to your needs.
- Click on **Search** to get the assets filtered to your criteria.

> **Note:** If the **Search** button is not available in your Asset Browser, your results will be automatically set according to your modified criteria.

You can see your selection on the top left hand side.

> **Note:** You can change the result layout from card layout to grid or list layout by clicking on one of the buttons at the bottom right.

Graphical Browsing in the Asset Browser

Graphical Browsing is possible when the administrator has configured the **Attributes** with associated images. Image browsing is straightforward like tree browsing and an example is given below.

- There are three **lists** (Brand, Packaging and Product) in this example. You have multiple **Attributes** under each of these **lists**. For graphical Asset Browsing, you need images configured for the **lists** and **Attributes**.

  Administrator rights are necessary for adding images to **Attributes** and **lists**.

- To select sub-brands, click on the image representation. This will bring out the images representing sub-brands on the top image pane. Note that if you select the main branch, all the sub-branches will be automatically included as search criteria.

- Refine other criteria from other **lists** according to your needs. In this example all **Attributes** under **Packaging** and **Product** are selected by selecting the **list** images.

  You can use the triangular back button to go back one step at a time.

- Click on **Search** to get the assets filtered to your selections.

  Note: If the **Search** button is not available in your Asset Browser, your results will be automatically set according to your criteria.

Using the Cart from the Asset Browser

You can use the Cart in the Asset Browser to assemble the assets selected from the Asset Browser. From the Cart, you can:

- start the viewer
- download the assets
- start a new project with these assets
- modify the assets.

You can do several rounds of searching and browsing to add documents one by one to the Cart and then proceed with the actions listed above.

Note: The Cart has to be configured by the administrator while determining the settings of the Asset Browser (the **Saved Search**). Read more in *Configuring the Cart in the Asset browser*
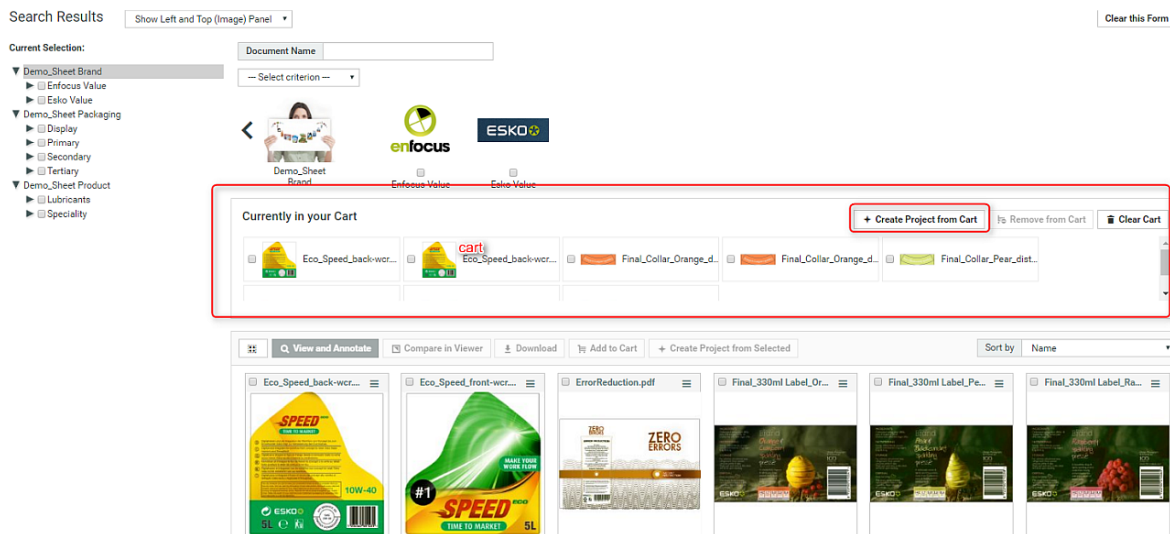
You can read more about Cart in *Using the Cart* on page 55

Creating a Project from the Asset Browser

Your Packaging Projects often involve modification of existing packaging or creation of new packaging with recurring elements. You can use a template for the recurring elements. Asset Browser will help you to browse for these templates and existing packaging projects. You can start creating a project directly from the Asset Browser. You can do this by:

- using the **Cart** to collect items and starting a project using **Create Project from Cart** link.

- or by selecting the **Create Project from Selected** option from **action list** menu.

This will lead to the WebCenter project creation user interface.

Note: The administrator has to enable project creation this in the **Saved Search** settings. Read more in *Configure Project Creation from the Asset Browser*.

Bulk Editing in Search Results

Fields selected as editable in the **Search Results Options** page during configuration are available in the header of the **Search Results** page. You can also click on the pencil icon next to the field name in the search results to perform bulk edit.

Note: Only Admin Users or Project Managers can set the fields to **Editable** for **Project** searches whereas all users can select for **Document** and **Task and Approval** Searches. Admin users can also enable *Bulk editing* in the Search Results Layout option.

You can select the item(s) for bulk edit in the pop-up or select the pencil icon next to any of the editable field(s) in the header and choose the change both for the field and the rows.

You can add/remove items in the selection, sort columns or move to a different page of the search without losing the current selection. While selecting, filtering and sorting, you will see an upto date preview of the changes done.

Note: Inline editing of individual field is not possible when bulk editing is in progress.

A Warning is displayed, if the edit is not possible due to the permission not available for the user.

Fields editable in Search Results

Search Results can be edited in Bulk by all the users (based on permissions) in **Project** or **Document** or **Tasks and Approval** Search results. Only the Admin user can set certain fields like Task Specifications and Attributes as **Editable.**

You can edit the following for

- **Project Searches**: Project Description, Project Status, Project Due date, Project Manager Project Salesperson, Attributes

- **Document Searches:** Document Description, Attributes

- **Task Searches**: Task Description, Task Assignee, Task Due Date, Task Specifications, Task Estimated Date, Task Status

> **Note:** Tasks that require password for completion cannot be done in bulk editing.
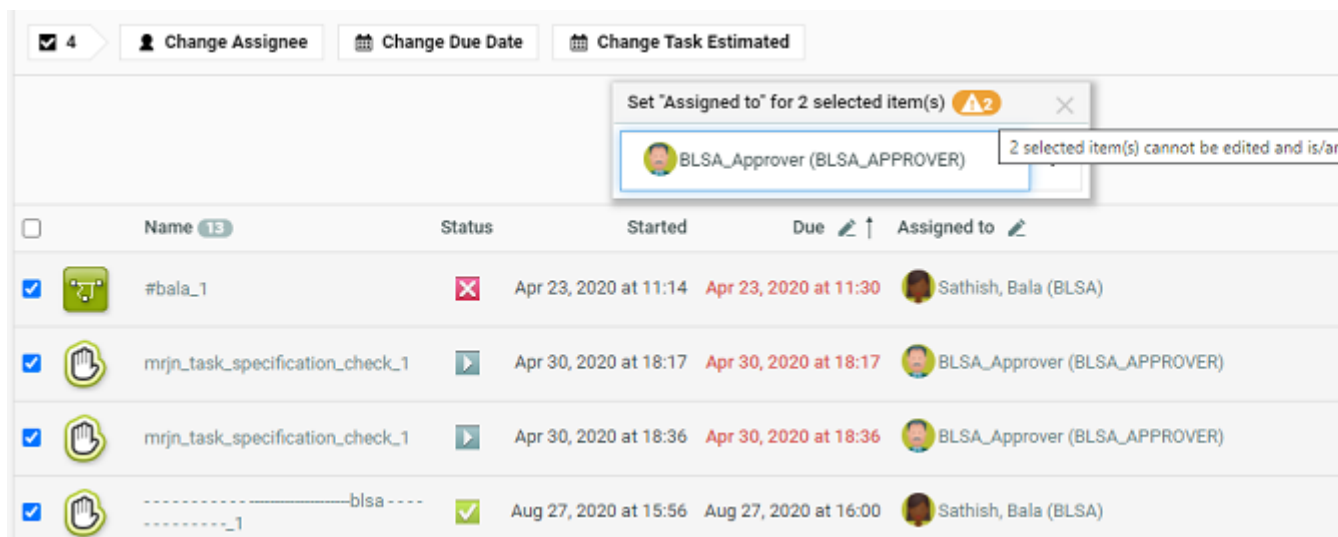
An example of re-assigning tasks in bulk is shown in the image above. You can select some tasks and bulk change the assignee. For the tasks you selected, changes are shown immediately and warning message is displayed when changes are not done.

Bulk Operations in Saved Search

Updating Attribute Category, Project Member or Project Permissions in Bulk

You can change the Project Attribute Category of multiple projects from Project Search results in one go. Also, you can add Project Members to multiple projects and set their permissions.

1. Go to **Search** > **Saved Searches**. Select one or more projects from the Saved Search Results.
2. Select the **Projects** for which you want to change the Project Parameters.
3. Use the buttons **Change Attribute Category** or **Manage Members/Permissions** in the table header.

Delete
Change Attribute Category
Manage Members/Permissions
Change Due Date
Change Project Manager
Change Project Status

- To change the **Attribute Category**, pick an attribute category from the list.
- To add a **Project Member**, first choose whether you want to add a **User**, **Group** or **Role**. After that, select a user, group or role from the list, or start typing to find the one you want. Once you have selected your desired new project member you can immediately modify the new member's project permissions.

  You can specify Custom folder permissions for inviting Project Members in the bulk operation. Use **Add folder** link to add a new line. Specify a set of permissions for the folder by typing in the folder name inside the provided edit field. Only the specified folders' permissions will be changed. Permissions on folders that do not exist in a given Project will be skipped

  You can take out the Root permissions from the list. If no Root is in this list but the member is new to the project, he will only get view rights on the Root.

  Note: The selected User, Group or Role will be invited if it is not yet present in the Project.

4. Click **Start** and wait for the action to complete. You will be notified of any issues regarding the operation.

5. Click **Close** to close the dialog. Your search results will automatically update.

Updating Role Members in Bulk

1. Go to **Search** > **Saved Searches**. Select one or more projects from the Saved Search Results.

2. Select the **Projects** for which you want to change the Project Parameters.

3. Click the pencil icon for the **Role** you want. Or select the desired bulk action from the table header.

Due Date	Manager	TEMA_DESIGN
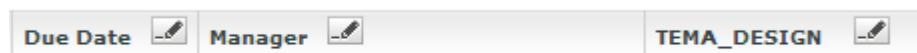
Assign Project Role Member dialog will open.

4. In this window, you can **Add members to role** or **Replace members of role**.

5. Change the value of the desired parameter:

   a) Select a User and/or Group to assign to the role.

   b) You may add multiple assignments using the **actions** buttons.

   c) Select whether to add the members to the group and replace the members.

   If the members are replaced, all blocking tasks and approvals will be moved to the first of the new members.

6. Click **Start** and wait for the action to complete.
   The dialog will indicate which projects were successfully modified. It will also list all of the problems.

7. Click **Close** to update your search results.

Searching on Documents

Search by Document Size

Users can search for documents which are of a certain size range using **Version Size.**

Version size will only show the size of the version of the document shown in the results. The size of the previous version of the document is not shown.

The **Version Size** criterion is available for all document types. You can search, sort and facet on the size of the document version (in bytes).

Search by Document Created Date

You can search the documents based on the creation date in a range or in the specified previous number of days and make it hidden or visible or available in the results.

Folder Search

You can search for the folders and it is described in detail *here*.

Live Text in Document

You can search for a text within a pdf document or a AI file using this **Live Text in Document**. This field is available for search, based on the setting in the ***Search Crawler configuration*** set by the Admin user. This search does not find results for the text present within an Image or outlined text.

When the search results are shown as a *Focus layout* with a viewer block, the matches for the searched text are highlighted in the document. You can navigate through the matches to see where the searched text occurs. The number of instances of the text occurring in the document are shown in the header.

Note: This field does not support right to left text used in languages like Hebrew, Arabic.
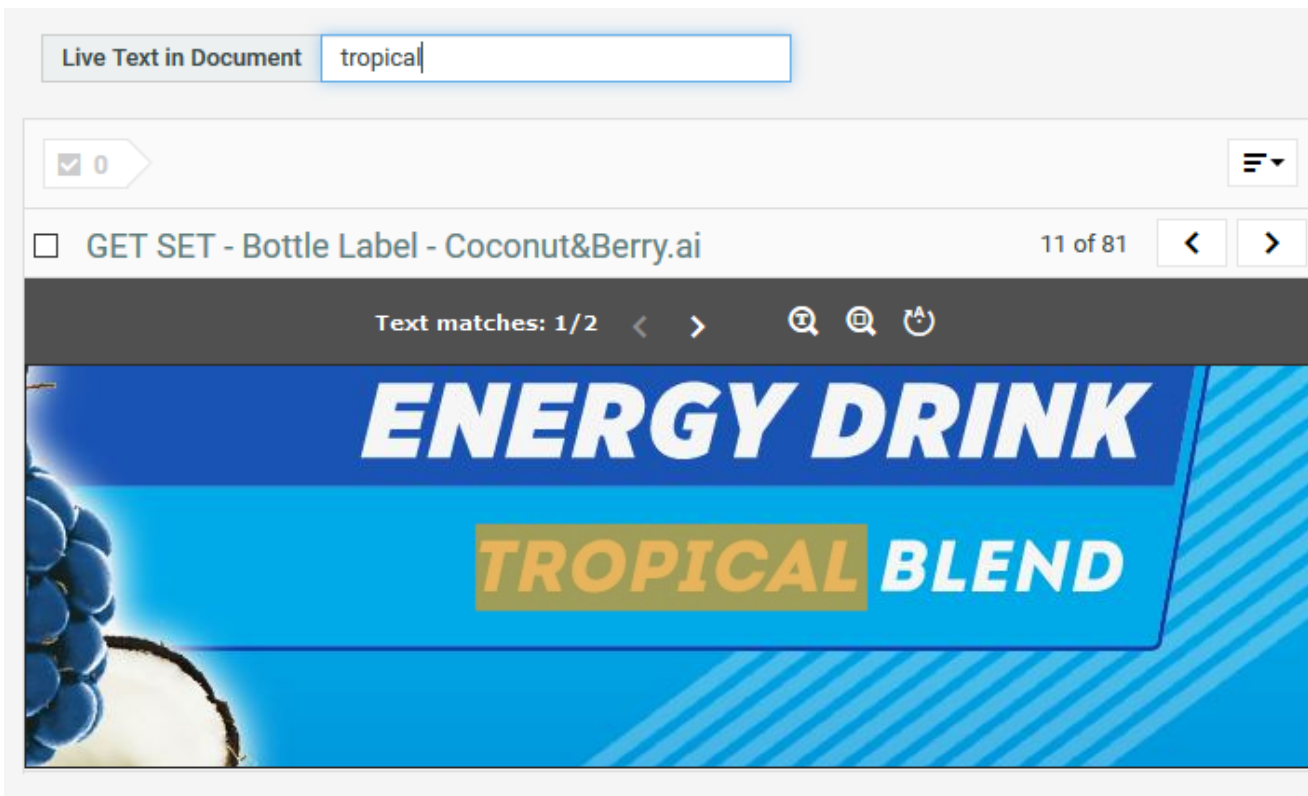
You can navigate through the matches to see where the searched text occurs.
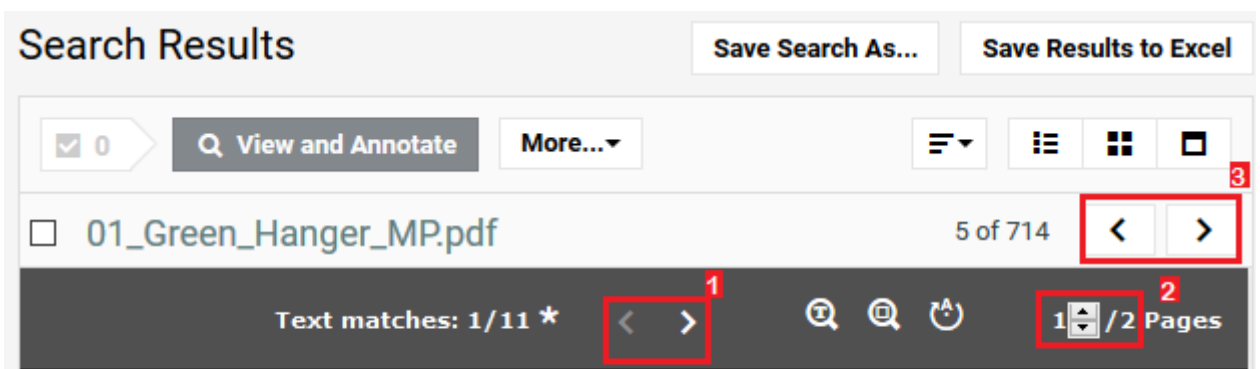
1. Navigate through the text matches within the document
2. Navigate through the pages within the same document
3. Navigate to the next document in the search results

The number of instances of the text occurring in the document are shown in the header. When multiple pages contain a match for the searched text, it is indicated with an asterisk and navigating through the matches will also navigate through the different pages. By hovering over an arrow, you can also see the number of pages containing a match.

Search for Live Text in Document only works on left to right text. For example, text in Arabic or Hebrew are not supported yet.

Searching for Text Content Document

Search and Select Text Content in Search Menu

To search for Text Content, go to **Search** > **Documents** > **Search for** > **Text Content**.

You can search based on the Text Content Criteria such as:

- **Element Type**: To search for a document based on its Element Type, select it in this field. Smart Names are available when **Enable SmartNames** is selected. Read more in: *Element Types*.

- **Document Status**: To search documents based on its status, select the status (**Draft** / **Signed Off**) from the drop-down.

- **Statements**' criteria: These fields allow you to select and search based on:

- **Language** of the Text Element. For example, select `English – United States` to search for Master statements in English (US).

- Whether the Element is a **Translation** or **Master**. It can be specified in the **Translation** drop-down.

    - The directionality of the text will be based on the language selected. You can search both **Master** and **Translation** languages for right to left languages like Arabic or Hebrew.

    Note: You can also leave these fields blank. If the language field is blank, all languages (both Master and Translated) are searched for.

- Actual **Text** from statements: Type the word you want to search in the **Text** field.

- **Text Element Status**: Click **...** and select the status from the drop- down. For example, you can search for Signed-off statements with a particular text piece.

- Modified: Specify the time line you wish to search for like today, yesterday or last month etc .

- A combination of Text Statements' criteria

    You can add new rows for additional search criteria by clicking **+**. When you have multiple rows, you can use either **AND** or **OR** operation to refine the Search.

    You can also ignore the search criteria mentioned and only display the results by choosing ``` icon or you can choose the **Any** option to show results of text documents in any of the status.
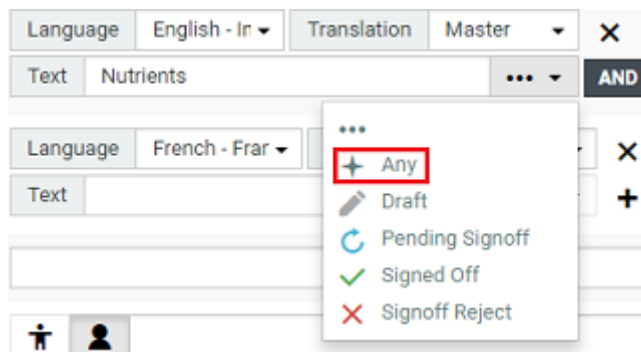
In the example screen shot, the **Search** will find all Master Statements with `Nutrients` in its content **AND** with French- France as Translation.

Configuring Text Content Documents Search Results

The Search Results page shows all Text Content Documents that match the specified criteria. Each **statement** row selected to **View** is represented as a single column in the Results.

Note: You can save Text Document Searches in Excel. The document statuses are not included in the Excel export.

Search Results Options

To customize the Search Results, select your criteria in the **Search Result Options** fields. The **Document Name** is selected by default but can also be removed by unchecking the box. Read in: *Search Result Options* on page 25.

Search Panel Design

As an Admin, you can setup a Text Content Search with a *Design Panel* just like other document saved searches. The users can select individual text statement criteria in the Panel to filter the search results.

Note: When smartname is selected for the language field, to view each resolved language in a separate column in the Search Results page, select the view as visible.

Note:

- If no **Statement** language is selected from the language drop down, you will not be able to view it as a separate column. The results will then match Text statements of any language.

- If the language chosen for the text has the directionality right to left or a custom font, then the text is also rendered right to left or in the custom font in the search results.

Saved Search for Text Content Search

To view My Saved Searches, go to **Search** > **Saved Searches,** you can view the saved search in the table under **Text Document Searches**. Saved Search for Text Content Document behaves exactly like any other document saved in the WebCenter.

Note: Only an Admin can modify the visibility of a Global Search.

Search Strings Examples

Shown below are different search phrases and their results. For more extensive help on searching, click 🛈**Help** in the Search page.

Sample search string	Results	What it does not find
box	box products box company box co. inc.	bottle holders
bo*	box products box company box co. inc. bottle holders	
box NOT "box company"	box products box co. inc.	box company bottle holders
box AND company	box company	box co. inc. box products bottle holders
"box company" OR "box co."	box company box co. inc.	box products bottle holders
box AND (products OR company)	box company box products	box co. inc. bottle holders
* NOT *company*	box products box co. inc.	box company

2.3.6. My WebCenter

The **My WebCenter** menu contains items specifically related to your user.

My Profile

My Profile is where you set your name, your e-mail address, your phone numbers, your function, picture and your company/location.

User Avatar

You can choose to upload your picture or select one of your previously uploaded picture as an **Avatar** which is reflected in all places in WebCenter like Dashboards, Discussions My Work and so on.

Note: Your Administrator can also change your picture.

My Password

The **Password** field is where you change your password. Enter the new password in the **Password** and **Confirm Password** fields and click **Change**. To set a blank password, enter nothing in the fields and click **Change**.

Note: This presents a security risk and is therefore not recommended.

If the **Passwords must meet complexity requirements** option is enabled by the Admin user, then your WebCenter password:

- May not contain the user's username, first name, or last name
- Must be at least "X" characters, where the minimum password length "X" is defined by your Admin user.
- Must contain characters from three of the following four categories:

  - English uppercase characters (A through Z)
  - English lowercase characters (a through z)
  - Base 10 digits (0 through 9)
  - Non-alphanumeric characters (for example: ! $ # %)

- Must be different from the previous " **Number**" password(s), where the number of previous passwords is defined by your Admin user.

If the option is not enabled, then the only requirement is that the new password is not blank and not the same as the previous password.

Single Sign-On Settings

You can view the Single Sign On settings specific to your User account in the **My WebCenter** > **My Password** page. This page will display the Single Sign On Instances that are enabled for your User account.

You may modify configuration details of the Single Sign On Instance depending on your permissions to do so. If you have permission to modify, all your values will be saved.

Note: User specific settings are possible when the Single Sign On Instance supports user specific configuration.

My Preferences

In **My Preferences** you set the unit system used to display data, the language used, the display of thumbnails, your start page, and the grid size for search results (for Esko ArtiosCAD and Graphics documents) and discussions.

General

- **Language** sets the language used by the user interface.
- **Start Page** sets the page that appears when you log on. You can, for example, select a Saved Search with a visual Dashboard as the starting page.
- **Units** sets units for all measurements to either Metric (mm, cm, dm, m) or Imperial (in, ft, yd).
- **Thumbnails**: selecting **Show thumbnails** shows thumbnails in document lists by default.
- **Cart**: **Clear Cart on Logout** is always enabled by default. Disable this option if you want to access **Cart** contents in future sessions.
- **Your Browser Timezone** shows the timezone used by your browser and WebCenter.

Project Lists

- **Show ... Rows** sets the number of projects displayed in the List layout.

Document Lists

- **Default Layout** sets the default view for document lists: **Grid** or **List** or **Card** layout.
- **Show in Grid** sets the number of documents displayed on a single page in the Grid layout (defined as a number of **Columns** and **Rows** in the grid).
- **Show in List** sets the number of documents displayed on a single page in the List layout (defined as a number of **Rows** in the list).

Search Results- All

Show in List sets the number of documents displayed on a single page in the **Search** results List layout (defined as a number of **Rows** in the list).

Search Results- Documents

- **Default Layout** sets the default view for document **Search** results pages to **Grid**, **List** or **Cards** layout.
- **Show in Grid** sets the number of documents displayed on a single page in the Search Results Grid layout (defined as a number of **Columns** and **Rows** in the grid).
- **Show Cards**sets the number of the documents displayed in Card View on a single page in the Search Results.

Search Results- Projects

- **Default Layout** sets the default view for project **Search** results pages to **Grid** or **List** layout.
- **Show in Grid** sets the number of projects displayed on a single page in the Search results Grid layout (defined as a number of **Columns** and **Rows** in the grid).

Discussions

- **Discussions per Page** sets the number of discussion threads displayed per page on the **Discussions** pages.
- **Postings per Page** sets the number of discussion posts displayed per page on a **Discussions** page.

Viewer

- Select your **Viewer Type**. You can set your preference to the *HTML5 Viewer* or keep at the default (*Java Viewer*).

Note: You can always switch to *Java Viewer* from *HTML5 Viewer* using the ⚓ button.

- **Viewer and Workflow Applet**: When *opening a document in the Viewer* or when *creating a workflow*, WebCenter will download a Java applet to your computer.

  From Java 1.7.0‗21 (for Windows and Mac OS X 10.7 or later), you will get a security warning as the one below when the applet is downloaded. This makes the WebCenter applet look like a security risk for your computer.

You can adapt how this security warning will look like when downloading the applet. In **Viewer and Workflow Applet**, choose either:

- **Signed (sandboxed)** if you want to run the applet in a strict sandboxed environment (with no access to your computer's resources). As the applet is signed by Esko, the security warning looks less threatening.

Note:

As the applet is sandboxed, it will also show a warning when trying to print from the Viewer. You will just need to click **OK** to be able to print.

- **Signed (not sandboxed)** if you want to run the applet without restricting it to a sandbox (the applet can request additional access to your computer's resources). This means that you will not get an additional warning when printing from the Viewer.

  As the applet is signed by Esko, the security warning looks less threatening.

- **Unsigned** if you want to run the applet as a default unsigned applet. You will get the default security warning that does not mention Esko, but the applet will be sandboxed. This means that you will have an additional security warning when printing from the Viewer, as for the **Signed (sandboxed)** applet.

Tip:

By default, the applet is set to run as **Signed (sandboxed)**. This will work fine for most users.

More frequent users may want to switch to the **Signed (not sandboxed)** option to avoid always having to click an extra warning away when printing from the Viewer.

Mac OSX 10.6 users running Java 1.6.0 may also want to switch to the **Signed (not sandboxed)** option to avoid getting a warning when closing the Viewer by clicking ❌.

With the latest versions of Java 1.7 installed, most browsers block unsigned applets by default. In this situation, it is recommended to use one of the signed settings instead.

- **Viewer Style (Java Viewer)** sets the Viewer mode as:

  - **Normal** (Default): All HTML5 Viewer features are available in this mode.

  - **Restricted**: In this mode, the user cannot access features such as *Channels widget*, *CAD widget* and *View widget*.

    The side panels displaying the widgets will be in a collapsed format by default.

  - **Advanced**: In Java Viewer all features are activated.

- **Viewer Workspace**: Select any workspace from the drop down or **Create new Workspace** by selecting the option. Select the gear icon to open the Workspace Configuration pop-up window and view the options available in workspace selected or to edit the configuration in the workspace.

  You can choose to add or delete any tool or widget to the workspace or altogether delete the workspace itself.

- **Unregistered User Viewer Workspace**: A workspace is configured specifically for unregistered users who access WebCenter viewer, when they are shared with a document to view or to approve.

Other workspaces or tools/ widgets are not visible apart from the workspace configured by the Admin User. Admin user can also create a new workspace specifically for this purpose.

- **Annotation Color** sets the color in which annotations will be displayed in the Viewer (you can set **Viewer Default** or choose a color from the list).

- **Annotate Approved Documents** sets if and how the users are allowed to annotate documents that are already approved.

  - Select **Enabled** if you want the users to be allowed to annotate approved documents.

  - Select **Warn if Approved** if you want to display a warning before allowing the users to annotate approved documents.

  - Select **Read-Only if Approved** if you don't want the users to be allowed to annotate approved documents.

  - Select **Warn if Approved or Rejected** if you want to display a warning before allowing the users to annotate approved or rejected documents.

  - Select **Read-Only if Approved or Rejected** if you do not want the users to be allowed to annotate approved or rejected documents.

- **Annotate Documents under Approval** sets who can add annotations in the documents under approval.

  Note: A document version is considered under approval as soon as an approval cycle is started

  Choose from the following settings:

  - **All Users**: This is the default setting. All users with view access to a document can annotate that document once the approval cycle has started.

  - **All Approvers and Approval Master**: The Approvers and Approval master defined in the document approval setup (all stages) for the current version can annotate during the approval cycle.

  - **All Approvers**: All approvers defined in the document approval setup (all stages) can annotate the document while it is being approved.

  - **Pending Approvers and Approval Master**: Only an approval master or approvers who can submit an approval state (Approve or Reject) for the current version can annotate the document during the approval cycle.

  - **Pending Approvers Only**: Only approvers who can submit an approval state (Approve or Reject) for the current version can annotate the document during the approval cycle.

- Specify the **Viewer Quality** as:

  - **Best Performance** (Default): In this mode, the Viewer uses less compression to transfer images. These images are transferred faster but may contain small compression artifacts.

  - **Best Quality**: In this mode, the Viewer uses less compression to transfer images. It takes longer to transfer these images. However, you can view them without compression artifacts.

    Note: This setting is applicable to both the HTML5 and Java Viewers.

- **Settings for Automated Artwork**

Note: The below options are visible only when Automated Artwork license is enabled.

- **Task Type for Bulk Text Replace**: Choose from the list of task types shown. The selected task type is used in the **Files marked for Edit** widget when editing Artworks in the Viewer.

- **Text Replace Library**: Choose from the list of Text Document Saved Searches shown. The selected Saved Search is used in the **Action List** Widget. Read more about it *here*.

  Note: This option requires Packaging Content Management License.

- **PCM Attribute for linking Text Statements**: Choose from the list of document reference attributes shown. The selected document reference attribute is used to attach text content documents (such as .wcc) when saving a graphic file modified with **Action Lists** in the viewer.

  Note: This option requires the Packaging Content Management License.

- **Log out user when inactive** Select this option, to log out the users whose sessions are not active for a period of time. Option is given to log in again and continue when the user returns to the viewer.

- **Stream video through WebCenter proxy** Enable this option to open video files located in Asset management system in the HTML5 viewer.

- **Show Discussions in Viewer** Enable this option to view discussions widget in the viewer and view all the discussion posts about the document viewed.

Note: Project Managers who can Force Approve or Force Reject is not considered an approver. They can add annotations only if the setting is **All Users**.

ArtiosCAD

To open your document in the ArtiosCAD desktop application directly from the WebCenter server, you need to set the **ArtiosCAD Preferences** accordingly.

Open ArtiosCAD Documents

- **No Application**: This is the default **Preference**. When this is selected, you cannot open the documents in the ArtiosCAD desktop applications.

- **ArtiosCAD Standard Edition**: Select this setting to be able to download ArtiosCAD documents and open them in your ArtiosCAD desktop application.

- **ArtiosCAD Enterprise Edition**: Select this to open your ArtiosCAD documents in the installed ArtiosCAD Enterprise Edition directly from WebCenter.

  The documents will open in the **managed mode** allowing you to make modifications to the file and update it without having to browse to the corresponding project and folder.

  Note: This option is only supported from ArtiosCAD Enterprise 14 onwards.

Document Upload Preferences

- **Allow raising Document Revision when uploading a new Document Version**: Enable this to allow the users to raise the **revision** while uploading a new **document version**.

- **Allow Instant uploading when selecting documents:** X Choose this option to start uploading documents immediately when they are selected, while the rest of the page is still being filled in or other documents are still being selected.

•

Workflow Editor

By default, HTML5 is used as Workflow editor.

User Creation

To create a new approval User from an approval page quickly, you can select and apply a particular user's settings as the **Approval User Template**.

> **Tip:** If you do not want to take up a license for a Template User, deactivate the user by unchecking the **Active User** option in the Profile page.

It is possible to configure this at two levels.

• To specify a global template, go to **Admin** > **Preferences** > **General** > **User Creation Preferences**. Select a particular user existing in the system as your **Approval User Template**.

  This template will be set as the system wide approval user template. However, it is possible to override this in **My WebCenter** > **My Preferences** > **User Creation Preferences**.

• To specify a template for a User who can create other users, go to **My Preferences** > **User Creation Preferences** and specify an **Approval User Template**. You have the following options and your choice will override the admin settings:

  • **Do No Use a Template**
  • **Use Global Approval User Template** to apply the user template specified in the **Admin Preferences**.

    > **Note:** If you have not explicitly selected the **Do not Use a Template** option or has any other user specified as the template, the global template will be applied by default.

• You can select a particular user as your template. In the drop-down you will see your own Users if you are a Project Manager and all Users if you are an administrator.

The following Preferences and settings of the template are copied to the newly created user:

1. Preferences:
   • **Language**
   • **Units**
   • **Start Page**
   • **User Menu**
   • **My Work Setup**
   • **Viewer Preferences**
   • **Collada Viewer Preferences**
   • **Workflow Editor Preferences**
   • **Document Upload Preferences**

- **ArtiosCAD Preferences**

- **Download Formats**(copied only if the user creating the new user is an Administrator)

- **Group Memberships**(copied only if the user creating the new user is an Administrator)

- **Other Preferences** are the user preferences not mentioned above (for example: show thumbnails or not, search results layout, etc.).
2. The Authentication Settings (*Deactivation*, SSO, etc.)

My Locked Documents

My Locked Documents shows documents you have locked to indicate that you are currently working on them. If other users try to download a locked document, they will have to confirm that they really want to download a locked document.

Note: In order to lock a document you need specific permissions.

Only the person who locked it, or the Project Manager, or a member of the Admins group can unlock a locked document.

To unlock a locked document, select the checkbox to the left of its name and click **Unlock**. The function **Upload New Version** of the document also unlocks the document.

Note:

Unlocking a document without uploading a new version does not make any changes to the document. In order to change it, you must lock it, download it, change it as desired, and upload it as a new version.

My Users

In case you are a project manager with **Create User** rights, you can see the users that you have created on the **My Users** page.

My Group's Tasks

In case you are the Group Task Manager for one or more groups, you can find the tasks assigned to your group(s) on **My Group's Tasks** page.

My Group's Members

If you are a Group Manager of a specific Group (or multiple Groups), you can use **My Group's Members** to manage your Group members.

Note: The administrator has to give you the Group Manager permission to access the Group members.

- If you are the Group Manager for more than one group, specify the group by the **Group Name**. This will allow you to see the members of the selected group.
- From this page, you can:

- **Remove User(s)** from the members of the group.

  Note: The group manager cannot remove himself / herself from the list.

  Remember: If there are dependencies such as a pending approval associated with the member being removed, the removal will not be effective. You will be warned about those dependencies during your attempt to remove a member.

- **Add Users** to the group. Your permissions and visibility determine the potential users whom you can add as the group members.

  If you are a :

  - **Project Manager**, your Visibility settings affect whom you can add as members.
  - **Normal User**, you can add the Users associated with the same Company..

- Select from **Notifications settings** to **Send notifications to a Group e-mail Address**. You can set the **Group E-mail address** and the language to be used in the group **Group E-mail Language** by selecting from the drop-down menu. All notification mails will be sent to this e-mail address.

My Delegates

If you have added delegates, you can view the delegates and the details of delegation on this page. See below:

- The name of your delegate(s)
- The start and end date of your delegation(s).

- Permanently active delegation(s) which are the delegations without a specified end date.
- Comments
- An option to Delete the delegation in progress
- An option to notify new delegates. This option when checked notifies the delegate of any changes you made to the relevant delegation.

2.3.7. Create

You can use this menu to create projects or users. You can only see it if you are a Project Manager. See *Project Management in WebCenter* on page 247 for more information.

2.3.8. Upload

Use this menu to upload documents into any WebCenter project for which you have upload permissions.

See *Different Ways to Upload Documents* on page 59 for more information.

2.4. Filtering Content

As more information is managed over time by WebCenter, some pages can potentially show large amounts of information. To reduce the time needed to show the page when it first loads, some pages have a filter.

To use the filter, enter a search string with an asterisk either before it, surrounding it, or after it in the **Search** field, and click 🔍. For example, on the **Companies** page, to only see those companies with the word Containers in their name, enter `*Containers*` and click 🔍.

When filtering users, use the last name of the user.

To show all the items, up to the truncation limit, click 🔍 with nothing in the field.

Note: The truncation limit prevents lists of thousands of items from impacting response time; if you know in advance that your search will return that many items, refine it with the filter. The truncation limit can be changed; contact Professional Services at your local Esko office for more information.

2.5. Using the Cart

My Cart is a dedicated placeholder for a single user to gather a specified set of Projects and Documents. You can add them to the Cart from the Project or the Document **Actions** menu. The Cart also lets you **Mail link to**, **Mail Download LinkRemove** or **Download** multiple items at once.

The contents of the Cart (the count is displayed next to the cart icon) are retained only for the current login session by default.

Note:

Your **Cart** contents can now be saved. Your can disable the option **Clear Cart on Logout** in **My Preferences** to save the Cart contents for future sessions.
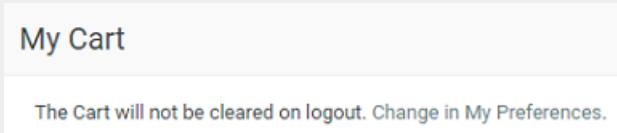
Click **Change in My Preferences** to clear/save cart on logout.

The Cart contents can also be cleared by clicking **Clear Cart**option on the top-right corner.

Note:

Downloading multiple documents at once or downloading projects requires having a decompression utility, or operating system support for opening compressed archives.

Mac OS X, Microsoft Windows XP, and Microsoft Windows 2003 Server have built-in support for opening compressed archives.

When e-mailing an object from the Cart, only a link to that object is placed in the body of the e-mail message. The recipient must have a username and password for your WebCenter site, so he or she can log in to the site and see the object after clicking the link.

Shown below is a sample Cart.

You may start the Viewer on documents in the Cart by selecting the desired documents and selecting **View and Annotate** or **Compare in Viewer** from the **Actions** menu.

3. Working with Projects and Documents

This section contains information on using WebCenter from an everyday use (non-Project Manager's) perspective.

3.1. View a Project

- To view a project, click its name in **Search**, **Search Results**, **My Work**, **Favorite Projects**, **Projects I Manage Projects I Am Invited to**.
- Click an underlined item to see more information about that item.
- Click a folder name to open a folder.
- Click a document name to see the Document Details page.

  By default, clicking the document name leads to the Document Action History page, but if you click a different page, WebCenter associates that desired page with the document type for the duration of the session.
- You can use the **Actions** menu to perform various actions, based on the security settings you have in the project.
- To view a document in a project, you can either click its name on any of its Details pages, or you can download it to your computer if you have download permission. If you click its name, it will be handled by your browser's default method for files of that type.

3.2. Add Documents

One of the main functions of WebCenter is sharing documents between project members in a safe and traceable way.

3.2.1. How Documents are Organized

Any document in WebCenter is placed at least in one project. The same document can however be used in different projects at the same time, and are called linked documents. Linked documents are used, when the same design needs to be re-used and synchronized between projects. If synchronization is not needed, it's better to copy the document and each of the documents are placed separately in WebCenter. The vast majority of documents are in just one project.

Projects are organized in folders. Documents are put into a folder or on the root folder of the project.

> **Note:**
>
> Currently, WebCenter only allows going one level deep. In most circumstances, this is not a real limitation, unless you try putting too many documents into the same project. WebCenter is well equipped to work with extreme amounts of projects so it's better taking advantage of this than creating projects with entire sub-projects put into a folder structure.

> **Note:**
>
> Document names within a project are unique. When trying to upload a second document with the same name in a different folder of the same project, you will get an error message.

WebCenter is fully "version enabled". This means that each document can have multiple versions. By default, you'll only see the latest version, but you can go back to previous versions. In addition, there is an action history showing when versions are uploaded and what actions took place on these versions (for example approval actions). The viewer also allows comparing versions graphically.

3.2.2. Document Types

The following document types can be uploaded in WebCenter:

> **Note:** You can hover on any viewable file to view the expanded thumbnail. You can further click on the **Zoom** icon on the right top corner to view a larger thumbnail.

- **Graphic file**: WebCenter supports most common graphic formats. PDF, PS, EPS, AI, AP, EPF, DCS, PSD, CT, LP, TIF, TIFF, PAF, GRS, PNG and JPG will all be recognized.

  After upload, WebCenter will calculate preview data for the WebCenter Viewer.

  If you don't want this, you need to upload the graphic file as an "other" file type. Typical examples are office-based PDF files (manuals, quotes...) which are better viewed in Adobe Acrobat.
- **LENX**: LEN is a bitmap file format developed for Esko's Cyrel Digital Imager ("CDI"). LENX is a special version of the LEN file format developed for Esko's CDI Crystal Imager series and Crystal screens.

  > **Note:** You can also upload a ZIP file containing graphic files (a set of TIFF or LEN files, or LENX files or a PDF, GRS or AP file with external images) as a "graphic file", and view it directly in the Viewer.

- **ArtiosCAD**: Native files of Esko ArtiosCAD. The standard extension are .ARD (Design) , .A3D (3D), .MFG (Manufacturing) and .ACD (Canvas).
- **Cape**: Cape is a program to calculate pallets and truckloads. WebCenter allows two ways to upload files from Cape:

  - uploading a triplet of files (You need at least 2 files: the CLF and XML files. The report / diagram file (usually a JPG) is optional).
  - uploading a single ZCP file.

    When you have uploaded a ZCP file, check the **Cape Information** tab in the In the **Document details** page to see the information from the XML document. To view the report / diagram file, click on the document thumbnail.
- **Collada**: Collada is an interchange file format for interactive 3D applications. Regular Collada files have .DAE extension, Zipped Collada files use .ZAE.
- **Page List**: a multi-page document that will be treated like a Page List in WebCenter. A Page List represents an imposed multi-page document, the individual pages of which can be approved and version-controlled separately in WebCenter.

- **CHILI Package**:

    This is CHILI WebCenter document type. A CHILI Package version is linked to a native CHILI document on the CHILI server. Read more about *CHILI* in Administrator Guide.

- **Text Content**

    This Document Type is for Text Content in WebCenter. When **Text Content** Document Type is enabled, a *.wcc* will be recognized as Text Document.

- **Component:** Component is an unique file type which has no physical presence but acts a placeholder for all the documents related to the product. Read detailed about Component file type *Component File Type* on page 59 here.

- **Other**: any other file. Mostly these are office files like Microsoft Word, Excel, PowerPoint etc. Video files must also be uploaded as "other".

- **URL**: Here you can enter a link to another document anywhere on the network or on the Internet. WebCenter does nothing else than remembering this link and allowing to define attributes.

Component File Type

The Component document type in WebCenter is a document type for holding only a set of attributes. This can represent a non-file packaging component like a Copy Sheet or a Barcode, an alternative to a project or a placeholder document for holding a packaging specification.

For example a collection of all assets required for a Product Content Sheet(PCS), that includes images, symbols, Barcode, text statements, CAD files, 3D, Collada files and so on.

The Component document type shares most properties with other document types, but there are a few exceptions like

- This file type does not have a physical file and have zero size.
- Document type will change depending on the extension of the uploaded document, when a new version is uploaded
- Opening a Component will open a view of the Default attribute category

To Create/ Upload a Component Document

In the **Upload** page, choose the file type **Component** to create a new component type document. When the mandatory fields are filled, click **Save** to create a new Component document.

You can restrict the file that can be uploaded by specifying a file type for the first version.

When no extension is defined for the first version, the document type is changed according to the extension of the uploaded document.

Opening a Component document will allow you to view or update the attributes of the document.

Search for Component Document type

Component file type is available in the **Search for** drop down selector in the **Document Search** page.

The available criteria are the same as for the **All** selector, but the results are filtered with the **Component** document type.

3.2.3. Different Ways to Upload Documents

There are multiple ways to upload documents to WebCenter:

- Upload via **Upload Document**: use this if you only have a single document to upload, or to upload documents one by one.
- Upload via **Upload Multiple Documents**: use this to upload multiple files at once, if you do not want (or are not able) to use a Java applet.
- Upload via **Advanced Upload Applet**: This opens a HTML5 applet allowing you to browse or drag-and-drop multiple files. These files are all uploaded in one go.
- **Upload from a workflow system**: Automation Engine, Odystar and Nexus can also upload documents to WebCenter.

  In many cases, it is beneficial to upload graphic files using a workflow system, because:

  - It is quicker and automated.
  - The workflow system can do calculation in advance.
  - You have better control over the generation of the view data (when using Automation Engine).

- **Upload from ArtiosCAD**. Use this to upload CAD files. You can only upload one document at a time but you can make the project selection and document name automatic. This makes uploading a one-click operation.
- **Upload by Drag and Drop** Documents can be uploaded to projects or one of the folders of the project by dragging and dropping them from the user's file browser.

Uploading a Document via Upload

1. You can either go to the project/folder you want to upload the document into and click the

    ⬆ Upload button, or just click the **Upload** menu item from anywhere.

    When instant upload is configured by an Admin user, and a file is chosen for upload, the upload of the file starts immediately. You can view the progress of the upload and there is an option to pause or stop the upload.

> **Note:** You can also drag and drop multiple files into the upload button, with the above option selected.

2. On the **Upload** page, select the **Project** and **Folder** you will upload the document into (if you are already in the project/folder, those are filled in automatically, but you can still **Change the Destination**).

> **Note:**
>
> You can also select:
>
> • **Upload Multiple Documents** to use the *HTML5* upload. Just drag and drop files to upload them.
>
> • **Copy/Create Multiple New Documents** to *add multiple documents at once* (either from your computer, from another project or from a template).
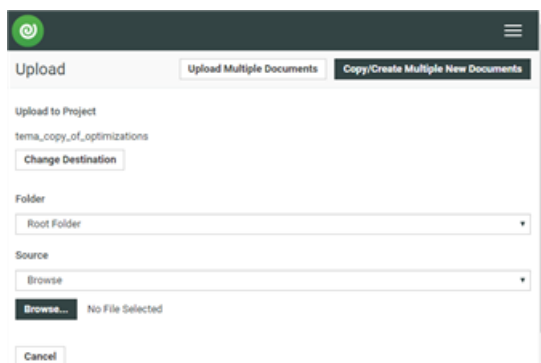
3. Select the document to upload as explained below.

If you want to...	do this...
Upload a document saved on your computer or network.	Select **Browse** in the **Source** list and click the **Browse...** button to open a browser dialog.
	Note:
	If you are uploading Cape files, you can upload a single `.zcp` file.
	If you are uploading a **Page List** document, you must also specify the **Name** and **Starting Index** of the Page List.

> **Note:**
>
> You can only do this if:
>
> • you are an Administrator,
> • you are the Project Manager,
> • you have the **Change BOM** permission.

7. If the document has attributes, fill them in (at least the required ones).

> **Tip:** The document has the attribute category associated with its document type in the **Configure** > **Document Creation** tab of the Project (see *Document Types*).

8. If you want to use the **default** approval settings of the project/folder for the document, select **Apply Default Approval Settings** (this is not available for document URLs).

> **Note:**
>
> You can also:
>
> • Set the approval **Due Date** (only if you have the **Change Approval Setup** permissions): enter a date or pick one in the calendar, then choose an hour.
>
> • Start the approval cycle.

9. Click the **Upload** button.

10. If you want to define approval settings **specific to this document**, click **Setup document approval**. This will bring you to the **Approval** tab of the document details page.

If you have the task management license, you can also upload a document to a task in a project.

You can upload documents the same way as described and the document will immediately be linked to the task.

> **Note:** TIFF and JPG bitmap files using indexed color spaces or RGB are not supported by the WebCenter Viewer.

> **Note:** When you try uploading a document which already exists in the project, the upload of this document will fail. You won't get a new version. Use **Upload new version** instead.

The first time you save a project document, you enter all its database information. The next time you work on that document, you can:

• *lock a document*

• *upload a new version or revision*

It is up to you to decide if it is a draft, revision, or version according to your company's best practices. Some people publish minor changes as revisions and major changes as versions; others do the opposite, and yet others just save drafts.

Copy / Create Multiple Documents

1. You can either go to the project/folder you want to upload the document into and click the
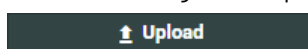
    ⬆ Upload   button, or just click the **Upload** menu item from anywhere.

When instant upload is configured by an Admin user, and a file is chosen for upload, the upload of the file starts immediately. You can view the progress of the upload and there is an option to pause or stop the upload.
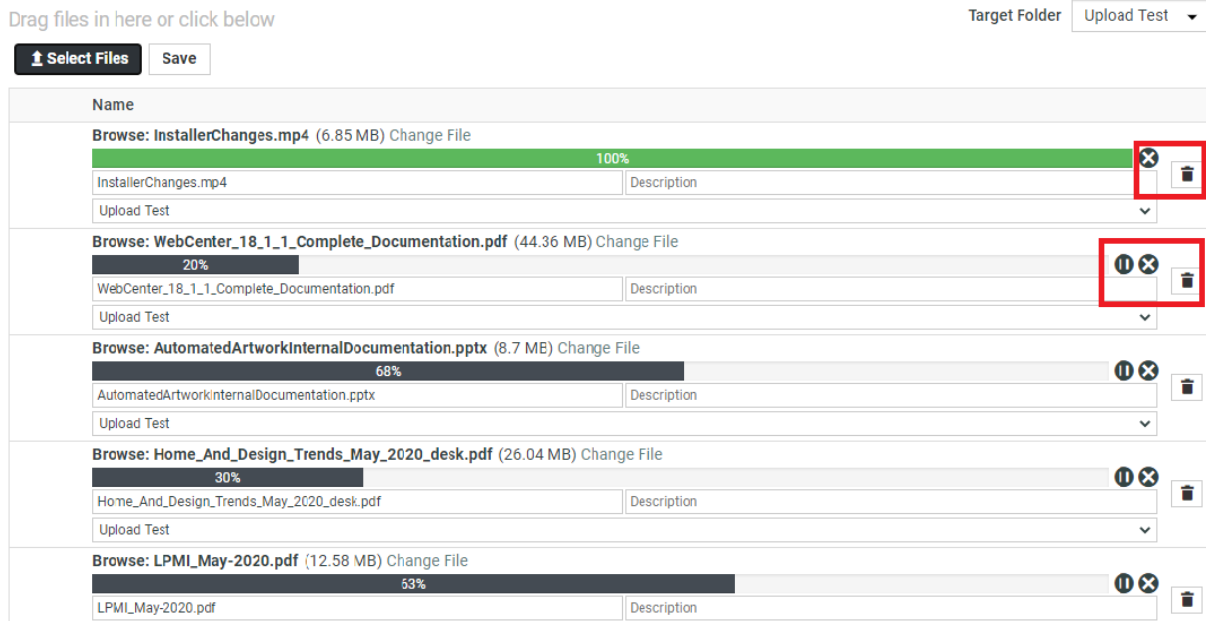
> **Note:** You can also drag and drop multiple files into the upload button, with the above option selected.

2. On the **Upload** page, select the **Project** and **Folder** you will upload the document into (if you are already in the project/folder, those are filled in automatically, but you can still **Change the Destination**).

3. Click **Copy/Create Multiple New Documents**.

> **Note:** From this page, you can also click **Upload Multiple Documents** to use the *HTML 5 Upload* to upload multiple documents.

4. Add a document as explained below.

If you want to...	do this...
1. **Upload a document saved on your computer or network.**	Click **Upload** then click the **Choose File** button to open a browser dialog. **Note:** You cannot upload CAPE files, or upload PDF files as page lists when uploading multiple documents. Please use the normal **Upload** option for this.
2. **Copy a document from another project.**	Click **Copy**, then select the project to copy the document from, and the document to copy.

If you want to...	do this...
3. **Create a document placeholder from a document template.** **Note: This is only available if the project has been created from a project/template containing document templates.**	Click **New**, select the document template to use in the pop-up, and fill in any attributes that may be required. To collapse a document's attributes, click the square minus sign in front of the document. To collapse all documents' attributes, click **Collapse All** at the top of the page. See *Document Templates* in the Administration Guide for more information about document templates, and *Assigning Document Attributes* on page 77 for more information about attributes.

5. Repeat for each document you want to upload.

> **Note:** If you want to remove a document, click the delete button behind it.

6. If you want to use the **default** approval settings of the project/folder for these documents, select **Apply Default Approval Settings** (they will not be applied to document URLs).

> **Note:**
>
> You can also:
>
> • Set the approval **Due Date** (only if you have the **Change Approval Setup** permissions): enter a date or pick one in the calendar, then choose an hour.
>
> • Start the approval cycle.
>
> You cannot setup document-specific approval settings for several documents at once.

7. Click the **Upload** button.

> **Note:** When you try uploading a document which already exists in the project, the upload of this document will fail. You won't get a new version. Use **Upload new version** instead.

Upload Multiple Documents via the Upload Applet

You can **Upload Multiple Documents** in two ways:

1. Click **Projects** on the Menu Header. Select the **Project** you want to upload the document to.

2. Click the ⬆ Upload Multiple Documents option. Select the **Target Folder** from the drop-down menu.

   • You can also select menu **Upload** and upload multiple documents. In this case, select the **Project** and the **Folder** you want to upload the documents to and click **Upload Multiple Documents**.

3. You can either **Select Files** (one by one or by selecting a few) or drag-and-drop from any file browser into the applet window.

   You can change the destination Folder of each document if you want to.

4. If you want to use the default approval settings of the project / folder for these documents, select **Apply Default Approval Settings**.

   • Set the approval **Due Date** (only if you have the **Change Approval Setup** permissions): enter a date or pick one in the calendar, then choose an hour.

   • Start the approval cycle.

   You cannot setup document-specific approval settings for several documents at once.

5. Click **Upload**.

The upload will start and you will see a progress window. Depending on how many files and how big they are, this can take a while.

Note: You cannot upload ZIP files, individual CAPE files, or upload PDF files as page lists with the upload applet. Please use the normal **Upload** option in the Project for this.

Note: When you try uploading a document which already exists in the project, the upload of this document will fail. You can, however, upload it as a new **Version**.

Important: If your **Document Upload Preference** is set to **Java Applet**, your applet will be Java based. To change it go to *My Preferences* on page 46 and change the **Multiple Document Upload Type** to **HTML5**.

Upload from a Workflow System

You can upload documents to WebCenter from:

• a Automation Engine workflow, using the **Publish on Web** task,
• an Odystar canvas, using the **WebCenter Output** gateway,
• a Nexus workflow, using the **WebCenter Output** activity.

Note:

You can also start an approval cycle on your uploaded document directly from the workflow. It uses is the default approval cycle, inherited from the project or folder you upload the document into.

If you have the **Change Approval Setup** permission, you can also set the approval due date.

For details on how to upload documents from Automation Engine, Odystar or Nexus, please see the corresponding user manuals.

Upload from ArtiosCAD

For details on how to upload documents from ArtiosCAD, please refer to the ArtiosCAD user manual.

Note: You cannot start an approval cycle from ArtiosCAD.

Upload by Drag and Drop

You can upload documents by Drag and Drop. To do so, you can

1. Add a document into a project or folder by dragging from your browser.
2. **Upload Files to (Project Name)** window is opened along with the document that is dragged.
3. You can add more documents by dragging into this window or use **Select Files** to browse. Select **Upload** to add the documents to the project.

3.3. Working with Documents

Once a document has been uploaded to WebCenter, you perform a number of basic operations on it, such as copying, deleting, updating or locking it, to ensure it completes its lifecycle within the system.

3.3.1. Move a Document

Note:

When a document with approval settings is copied or moved to another project, the approval settings are not copied or moved.

A document with a started approval cycle may not be moved or copied as a link until the approval cycle is stopped.

A locked document cannot be moved.

1. Open the project and folder containing the document to copy and select it. If desired, select more than one document by selecting their checkboxes.
2. Click **More...**. Select **Move Document(s)** from the drop-down menu.
3. Choose to either **Move inside the current Project** or **Move to another Project**.
4. Do one of the following:

If you chose to move the document	Then you must...
in the same project,	Select the folder into which to move the document.
to another project,	• Choose the project into which to move the document.

If you chose to move the document	Then you must...
	• If that project has folders, choose the folder into which to move the document.

5. Click **Move**.
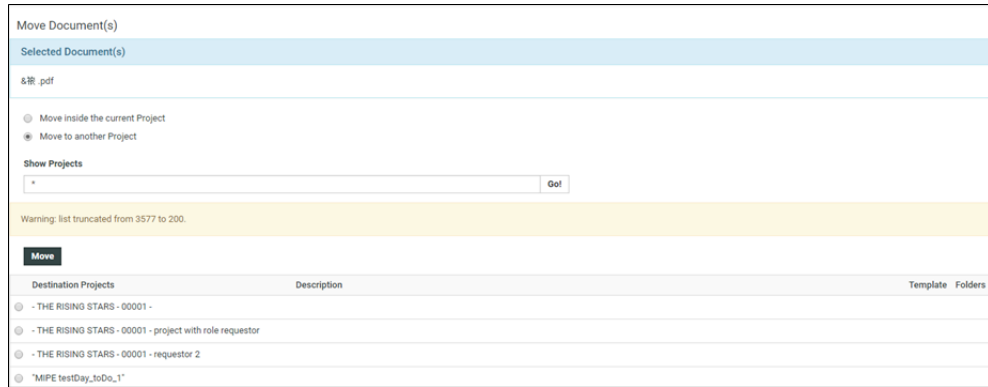
3.3.2. Copy a Document

1. Open the project and folder containing the document to copy and select it. If desired, select more than one document by selecting their checkboxes.

2. Click **More...**. Select **Copy Document(s)** from the drop-down menu.

3. Choose to either **Copy inside the current Project** or **Copy to other Project(s)**.

4. Select **Copy as Link** to copy a link to the destination folder or project.

    Note: If you opt to **Copy as Link**, you will not be able to **Rename Document** or be able to **Copy Viewer Annotations**.

5. Do one of the following:

If you chose to copy the document	Then you must...
in the same project,	Select the folder into which to move the document, or provide a new name for the copy in the **Rename Document** field.
to another project,	• Choose the project into which to copy the document. • If that project has folders, choose the folder into which to copy the document.

6. Click **Copy**

The document is now available in both the source and target projects.

3.3.3. Delete a Document

> **Note:** A document with a started Approval Cycle cannot be deleted. The Approval Cycle must be stopped before you can delete the document.
>
> A locked document cannot be deleted.
>
> If a document is used for a document reference attribute, it cannot be deleted

1. Open the project and folder containing the document to delete and select it. If desired, select more than one document by selecting their checkboxes.
2. Click **Delete Document(s)** in the **Actions** Header.
3. Click **OK** to confirm the deletion.

The selection is deleted. If any selection is a linked document, only the particular link that was selected is deleted; other instances of the link are not deleted.

3.3.4. Lock a Document

Locked documents are documents you have flagged as being in use so that other users do not download them and work on them at the same time.

1. Open the project and folder containing the document to lock.
2. Select the checkbox of the document to lock and click **More...**.Select **Lock** from the drop-down menu. To lock more than one document at a time, select more than document. You may not lock URLs. The latest version of the document is selected for locking.

The document is now marked as locked 🔒 . If other users try to download it, they will be asked to confirm downloading a locked document.

3.3.5. Unlock a Document

1. Click **My WebCenter** > **My Locked Documents**.
2. Select the document(s) to unlock.
3. Click the **Unlock** 🔓 Unlock button. The document(s) will no longer be shown on the list.

3.3.6. Upload a New Version or Revision of a Document

1. Open the project and folder containing the document to which you will **Upload New Version** or **Raise to Revision**.
2. In the **Documents** list, either:
   • Hover over the document link and click **More** or the **Upload** button to **Upload New Version**.

- click **Upload New Version** in the Actions Header.
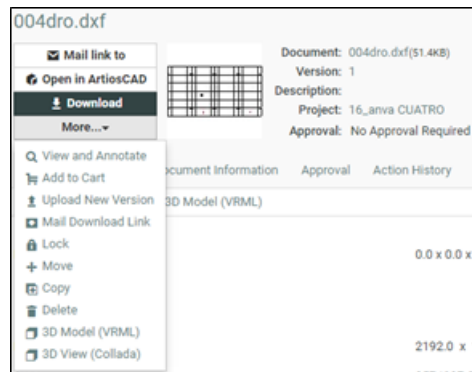
Make sure you use the buttons on the document's row.

3. **Browse** to select the new version of the document.

   For document types that have more than one file, specify multiple files as needed. The filenames can differ from the original file names, but they must of the same type (i.e. have the same extension) as the original document.

   Note: By default, if the file name of the new version of the document is different from the filename of the previous version, WebCenter will use the filename of the original or previous version when you download the new version. This behavior can be changed; contact Professional Services for assistance.

4. In the **Version comment** field, enter your comments regarding the new version.

5. You can make the new version a **Revision** by enabling **Raise to Revision A**.

   This is only available if the admin has enabled this for you.

   Note: The revisions will be denoted as A,B,C following the version number.

6. If this is a linked document, select the project(s) to check the document into.

7. When you upload a new version of a document which has an approval cycle ongoing, the approval cycle stops automatically. If you want to have the approval cycle restart immediately, select **Start approval cycle on new document version**.

8. If you have the **Change Approval Setup** permission, you can adjust the approval cycle's due date (in the **Specify New Due Date** option).

> **Note:** If the document was in a **staged** approval cycle, **where** the cycle restarts from depends on the **When a new version is uploaded** setting. See *Define How to Handle a New Document Version* on page 279.

9. Click **Finish**.

> **Note:** To access a previous version of the document, click its number in the **Version** column on the **Action History** page for that document.

3.3.7. Delete the Last Version of a Document

You can delete the last version of a multi-version document if:

- you are the Project Manager for the project containing that document, an Admin, or a project member with **Delete** permission

- the project containing the document is active

- the document is not checked out by another user

- the document has more than one version

- On the Document Details page, click **More Actions...** then **Delete Version**.
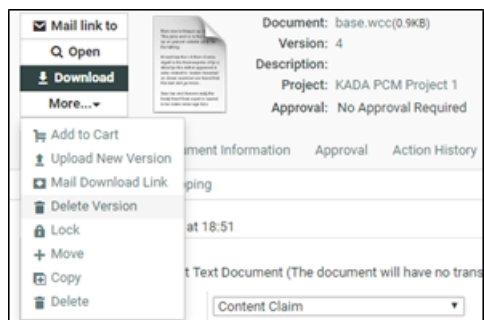
Confirm your choice by clicking **OK**.

> **Note:**
>
> If that document version is in a running approval cycle, WebCenter will show this message: `There is a running approval cycle on this document version. Are you sure you want to delete this document version?`
>
> Clicking **OK** stops the approval cycle for that document version.
>
> If the document came from Automation Engine, the Pilot will indicate the deletion.
>
> If the deleted document version was linked in other projects, the link is updated (to link to the previous document version)
>
> The document record indicating the last version index is decreased by one.

3.3.8. Update a Document across Projects

If you have a document that is linked in many Projects, and upload a new version into only one Project, the links in other Projects continue to reference the prior version.

Note: Project Managers may update entire Projects at once, not just the contents of a single folder.

To update a document in a Project to ensure it references the latest version, do the following:

1. Open the project and folder containing the document to update.
2. Select the document to update. To update more than one document at a time, select as many as desired.
3. Click **Update** from the **More** drop-down menu.

   All documents in the folder that you selected for which you have Update permission are updated. A list is shown of the updated document(s), the containing Project, the old version number, and the new version number.

3.3.9. Open a Document

Opening a document means having WebCenter open the document using the document's default application as defined in the Web browser. You need **View and Download** permissions to **Open** the document.

1. Navigate to the document by searching for the document and clicking its name in Search Results, or by clicking its name in a project.
2. Click **Open** on the Document **Actions** Header.
3. The **Open** button has different behavior for different document types.

Document Type	Behavior
CHILI	Opens CHILI Viewer in new window
PDF	**Open** button unavailable. Use **Open in Acrobat**.

Document Type	Behavior
ArtiosCad Design,Manufacturing, Canvas or 3D	**Open** button unavailable. Use **Open in ArtiosCAD**
Graphics	**Open** button unavailable. Use **View and Annotate**
Other (text,xml, MS Word, MS Excel...)	If the browser has a plug-in for the document format extension, it shows the contents of the file in a new window. If no plug-in is available, the document is downloaded.

Note: You can hover on any viewable file to view the expanded thumbnail of the document. You can further click on the **Zoom** icon on the right top corner to view a larger thumbnail.

3.3.10. Download a Document

1. Navigate to the document by searching for the document and clicking its name in Search Results, or by clicking its name in a project.

2. In the **Document**list, either:

   • Click **Download** in the **Actions** Header.
   • Hover over the document link and click **Download**

   • If it is an ArtiosCAD document, choose the format in which to download it and click **Download**. You may only download in formats for which you have the **Download** permission.
   • If it is a CHILI document, choose from the download options (CHILI Package, CHILI XML, PDF), and click **Download**.

   You can enable the notification for **Document downloaded** to keep track of who downloaded a Document.

   The document is downloaded and may be manipulated as desired.

3.3.11. Documents in Esko Cloud

It is now possible to store and retrieve documents from the Esko Cloud. This has been enabled with the help of work flow nodes. This requires an Asset Management connection to be setup for Archiving service.

Status of the document location is indicated in the document information with an icon.

Upload and Download from Esko Cloud

With an existing connection for Archiving, documents can be uploaded in a workflow using the **Upload to Asset Management System workflow** node.

You can select the **Only archive old Versions of a Document** option to upload all the versions that are no longer linked from within a Project in WebCenter. Uploaded documents have an indication in the document header with a cloud icon and the document information tab has the cloud connection link along with the external document id.

You can select the **Remove Document from Filestore after upload to Esko Cloud** option to remove the Document from the WebCenter Filestore after a successful upload to the Esko Cloud. After running a Workflow with this option configured, the Document will still be useable in WebCenter. It is still possible to download/generate view files for this Document, however the document data will be served from the Esko Cloud. Read more about the work flow node *here*.

Restore from Esko cloud

You can restore the file back to WebCenter in a workflow using the work flow node *Restore from Esko cloud*.

Choose the right archiving connection where the document is located and on execution the document is back in the Filestore.

3.3.12. Download Multiple Documents

You can download several documents on a same page (in a Project or a Search Result page) in one go.

When you select multiple documents for download, WebCenter automatically adds them to a compressed archive, and then the archive is downloaded (WebCenterDownload.zip).

To download multiple documents, do the following:

1. Select the checkboxes of the documents to download.
2. Click **Download** in the **Actions** Header.

   Use a decompression utility to extract the documents from the archive. The documents are now on the hard drive and may be manipulated as desired.

   Note: To download all of a project's documents, click **More actions...** then click **Download** in the header of the Project Details page.

3.3.13. Download Documents from Multiple Locations

To conveniently download documents from several projects, you can use the **Cart**. You can add documents to download to the cart as you are browsing the projects, then download them in a zip archive when you are done.

1. For each document that you want to download, click **Add to Cart** in the **Actions** Header.
2. Click the **Cart** button in the top row menu or next to a document name to go to the **Cart**.
3. Select the checkboxes of the documents to download.
4. If you are downloading ArtiosCAD or CHILI documents, choose the format in which to download them and click **Download** in the Actions Header. You may only download in those formats for

which you have permission, and you may only choose one download format for designs and one for manufacturing files, respectively.

Use a decompression utility to extract the documents from the archive. The documents are now on the hard drive and may be manipulated as desired.

3.3.14. Viewing and Printing a Document's Annotation Report

You can view the annotation report page with an overview of annotations done in a document without opening the document in the viewer. To view the annotation report, go to:

• **Document details** > **Annotations**.

Note: This feature is only enabled for graphic files.

You can view all the details related to the annotations in this page. In addition, you can also filter based on **Review** status, **User** and **Report style**.

Click the **Print** link to print the Annotation Report.

Note: The print layout will follow your annotation filters.

This feature only works correctly in browsers supporting the HTML5 Canvas feature.

3.3.15. Online Document Editing with CHILI

Open CHILI Document in Editor

When a user opens a document, it will be opened in the CHILI Editor. In the editor, the user will be able to edit the parts of the document, based on Workspace and Constraints. Read also *Dynamically assign workspaces and constraints to CHILI Documents*

In the header bar, some document information will be shown. Below, the buttons "Return", "Save as Draft" and "Save as New Version" are shown. If the user who opened the editor is an approver, he can see the approval options and from there, he can do all available approval actions. When the user approved/rejected the document, the action button list will be updated.

NOTE: "Save as Draft" button is only available if the current User has 'CHECKOUT' permission for the CHILI document; "Save as New Version" button is only available if the current User has 'ADD' permission for the CHILI document.

Save a CHILI Document

When a user saves his document as a draft, it will be saved on the CHILI server. When he then reopens the document in the editor, the changes are still there. However, when downloading the document from WebCenter, the changes will not be visible. They are only visible in the editor.

In the document details page (header), a warning should be shown that there is a draft version of the document.

When a user saves his document as New Version, it will be saved on both the CHILI server and WebCenter. The previous version will be restored to its original state in case there was a draft version.

When saving as a new version, a version comment is required. It is also possible to start approval and set a due date. When saving a linked document, the user will also get the option to select in which projects the document needs to be updated.

Using and Updating WebCenter Attributes from the CHILI editor

In a CHILI document, variables can be defined. Filling out those variables will change certain fields in the document.

When loading the document in the CHILI editor, attributes can be pushed to the editor. If an attribute in WebCenter (either project or document attribute, where document attribute gets priority) has the same name as a variable in the CHILI document, the value in CHILI can automatically be filled out. The user will be asked if he wants the variables to be updated when opening the editor on a clean document (without a draft version). After this, the user will always be able to synchronize the values on demand by clicking the "load attribute values" button. This update button can be clicked at any time.

Note: This panel and button will only be shown when there are actual matches between attributes and variables.

When an attribute name and a variable name match, and that variable is edited, it is possible to save these values back into the attribute category again when saving as a new version. When saving the Document as a new version, a popup window will come in which the user can specify a version comment and restart approval. In the same window you will have two check boxes to specify if you want to update project and document attributes. Note that for linked documents, it is not possible to save project attributes.

Note: For a lot of the variable types, conversions are foreseen in WebCenter. However, there are some limitations:

• There is no conversion between the WebCenter Rich Text Attributes and CHILI's Formatted Text variable.
• Multivalued Text attributes in WebCenter cannot be imported into the CHILI editor's list variable.

3.3.16. Viewing References of a Document

If your current Document (including all versions of the Document) is being referenced in other Documents, you can view the details in the **References Tab**.

This tab will list the Documents referencing the current Document Version as a Document Reference.

This tab provides a view of:

- the Documents in which they are referenced,
- the Projects in which those Documents reside,
- the Version
- and details on who Uploaded the Document (Version)

If the document has additional versions and one or more of these are explicitly referenced, a checkbox **Show parent references for all versions** will be displayed. Enable this to view a list for each version that are referenced.

3.4. Assigning Document Attributes

Attributes are a way to assign user-configurable fields and their values to documents and projects. They can be restricted to a group of preset values, or can be prompted so that the user has to set a value each time it is used.

Attributes need to have been created by an Administrator before you can use them (see the Administration Guide for more information).

3.4.1. Assign Document Attributes

1. Open the project and folder containing the document to change and click its name.
2. Click **Attributes**.
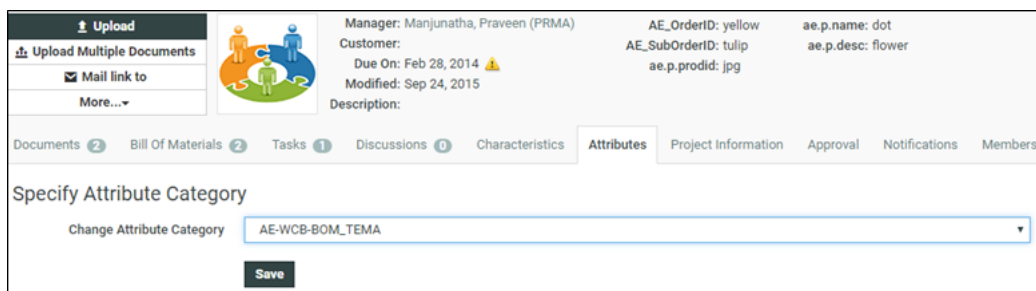
3. **Specify Attribute Category** by selecting from **Change Attribute Category** drop-down. Click **Save**.

4. In the **Attributes in Category** page, fill in the desired values for the Attributes and click **Save**.

3.4.2. Change Document Attributes

1. Open the project and folder containing the document to change and click its name.

2. Click **Attributes**.

3. Change the Attributes values as desired and click **Save**. The values are changed.

3.4.3. Change an Attribute Category

Attribute Categories are related Attributes grouped together for convenience. If you change an Attributes Category, the previous values are not saved.

1. Open the project and folder containing the document to change and click its name.

2. Click **Attributes**.

3. Click the **Change Category** link.

4. Select the new Attributes Category to use and click **Save**.

5. Enter the values for the new Attributes and click **Save**.

3.4.4. Export Attributes to JDF

To make working with other systems easier, you can export and import document Attributes by using JDF (Job Definition Format) files. You can export the Attributes, modify them in another system, and then import their changed values back into WebCenter.

Note that you cannot add more Attributes to a document this way; this only lets you change the values for existing Attributes.

Note: Option to Import from or Export to JDF buttons are enabled only when **Allow importing from/ exporting to JDF** is enabled in the WebCenter Security Preferences by the Administrator users.

1. Navigate to the document with the Attributes to export.

2. Click **Attributes**.

3. Set the values for the Attributes as desired and click **Save** to set them. If they are already set as desired, skip this step.

4. Click **Export...**.

   WebCenter automatically names the file `<document name>_attrs.jdf`. Any periods in the document name will be converted to underscores.

5. Save the file in the desired location.

3.4.5. Import Attributes from JDF

Important:

If you want to import Attributes that are not generated by another WebCenter system, you should generate a sample JDF file for the people using the other system to use as a reference, so that they format their JDF file correctly.

The important lines are the ones similar to <eg:SmartName Name="Attribute Name" Value="Value"/>; there must be a Value tag for each Name tag.

Note: Option to Import from or Export to JDF buttons are enabled only when **Allow importing from/exporting to JDF** is enabled in the WebCenter Security Preferences by the Administrator users.

To import a JDF file containing Attributes with changed values for a document, do the following:

1. Navigate to the document with the Attributes to import.

2. Click **Attributes**.

3. In the **Import from JDF file** field, enter the path and name of the file, or click **Browse...** and select it that way.

4. Click **Import**.

The values for existing Attributes are updated if necessary. If there are either too few or too many Attributes defined in the file as compared to the document, WebCenter will mention it in a status message.

3.5. Viewing Document References of a Document

3.6. Assigning Document Characteristics

Characteristics are descriptive tags that can be assigned to projects or documents to make them easier to find.

Characteristics are hierarchical. This means there can be different levels of characteristics for various product lines so that you can drill down through the information to find the exact characteristic desired when searching the database.

Note:

Characteristics are linked to the document itself and not to a specific version.

So changing the characteristics of a linked document will affect all versions of the document, in all projects that have the document linked (including inactive projects).

You can only assign characteristics to a document if:

- you are an Admin,
- you are the Project Manager,
- you have **Change Properties** rights for that document.

> **Important:** If the project is inactive, you will not be able to edit a document's characteristics if your Admin has not enabled **Allow changing attributes and characteristics of inactive projects** in the Preferences (see the Administration Guide for details).

1. Open the project and folder containing the document to change and click its name.
2. Click the **Characteristics** tab of the Document Details page.

   You can also find CAD design Characteristics (associated to ARD files) in the **Characteristics** tab.

   When using ArtiosCAD Enterprise, the CAD design Characteristics you assign in WebCenter will be reflected back in ArtiosCAD.

3. Select the checkboxes of the desired Characteristics. The selected Characteristics will appear in the list of Characteristics. Click the **+** plus sign next to a Characteristic to see its child Characteristics.
4. Click **Save**. The selected Characteristics will be associated with the document.

To remove Characteristics from a document, do the same as described above, but deselect the checkboxes of the Characteristics to remove them from the list.

3.7. Downloading a Project

> **Note:**
>
> Only those documents in a project for which you have **Download** permission are included when downloading a project.

To download a project:

1. Open the project.
2. Add the project to the **Cart** by clicking **Add to Cart** on the **Projects** Header bar.

   You can also select multiple projects in a project list and click **Add to Cart** in the **Header**bar to download them all at once.

3. Click the **Cart** button.
4. Select the project(s) to download and click **Download** in the **Header** bar.
5. If prompted, choose where to save the files and click **Save**.

The project is saved as a compressed ZIP archive with the same name as the project. Use the decompression software of your choice to open it; some operating systems can open compressed archives without the need for a separate program.

When downloading multiple projects, individual projects are compressed into their own archives and then those archives are nested together in one master archive.

Your system may be configured to download and open the archive automatically, in which case you can extract the files as desired.

3.8. E-Mailing Links to Documents and Projects

You can send links to documents and Projects with any MAPI-compliant messaging program.

Note:

The recipient(s) must be able to log in to your WebCenter system and have the appropriate permissions to view the Documents or Projects referenced by the links. You can **Mail link To** single or multiple Documents and Projects.

1. To **Mail link To** single Project or Document:
1. Navigate to the Document or Project.
2. Click **Mail link To** from the Project or Document details page.
2. To **Mail link To** Multiple Projects or Documents:
3. Select the Documents/Projects you want to send. Click **Add to Cart** in the **Document** or **Project** Header bar.

   You can also add multiple documents or Projects to the cart. Simply repeat this step.

4. Click the **Cart** 🛒 button.
5. Select the Documents or Projects you want to send.
6. Click **Mail link To** in the **Header** bar.
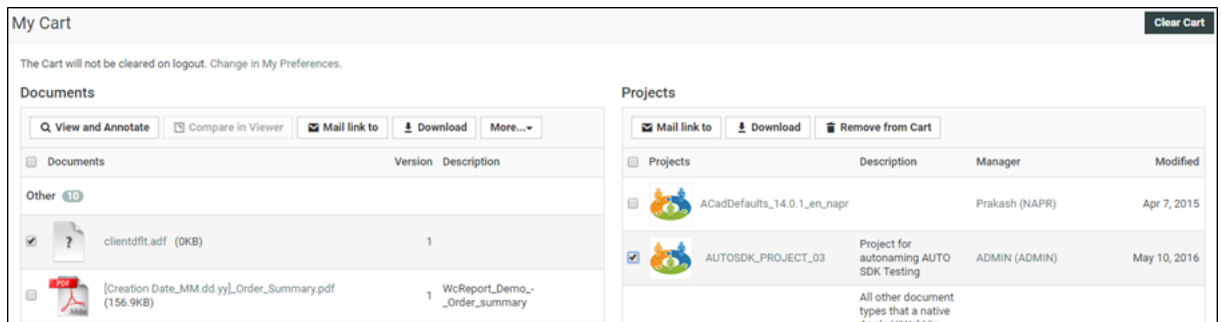
A message opens containing links to the documents or Projects in the body of the e-mail.

7. Address the message as desired and send it as usual.

Tip:

To send only one message containing links to both Documents and Projects, leave both messages open and cut and paste links between messages as desired.

3.9. E-Mailing Links to Download Documents

You can send a link to download a certain document (or multiple documents) to non-WebCenter users. This link will only enable the recipient to download one specific file and has a fixed validity (number of days that the link is available).

To use this functionality, an Admin user first needs to enable it and set the validity for the download link (see the Administration Guide for details).

This functionality is available to Project Members that have Download permission for a given Project Document Version and to the Project Manager of the parent Project.

The following steps describe how to send a download link(s) to a non-WebCenter user:

1. Select the checkboxes of the document / documents to download.
2. Choose **Mail Download Link** from the **Header** bar.
   Your default e-mail client will open with an e-mail containing a link (URL) generated by WebCenter.
3. You can add a recipient and edit the content of the e-mail message.
4. Send your e-mail.

   > **Note:** You can also **Mail Download Link** from the pages below:
   >
   > • **My Cart**
   >
   > • **Document Search Results**
   >
   > • **Project Details** documents
   >
   > • **BOM** documents
   >
   > • The recipient of the e-mail will be able to use the download link to download the file for as long as the link is valid. In case the link is no longer valid, the recipient will be informed it has expired.
   >
   > • When a recipient clicks a link that is invalid, expired or tampered with (for example if the URL was changed), he/she will see a web page stating that the link is invalid.

3.10. Viewing the Action History

The **Action History** page for a document shows all actions performed on the document such as version Uploads and Approval Actions.

• To view the action history, click the **Action History** link on a document.

The page displays these document details:

- **Version**: An overview of document versions

- **Event**: An overview of:

  - Details of Upload Document/Upload Document Version, Approval, Lock document...
  - **View Generation** (for Graphics only) with a link to **Show Task Details**.

  - **Annotations** which display date, time, user and annotation comments.

    > **Note:** The document uploaded event also includes the description of the document. When a document is copied from another project to the current project, the source project information is also mentioned.

- **Status** displays the current status of the document (Approved, Rejected, Locked...) and their icons.

- **Stage**: displays the Approval stage

- **Date** displays both Date and Time of action performed.

- The **User** that uploaded the Document/Document Version.

- **Comment**: displays Version/Approval/Annotations comments.

> **Note:** The Document **Action History** varies according to the document types. Some display page information too.

The changes done to the attributes of a document when uploading the document are also tracked in the project history (under the attribute changed event type)

You may print a printer-friendly report of the **Details** page by clicking **Print** in the header. A new page will open showing the entire Action History which you can print using the browser's **Print** command.

3.11. Viewing ArtiosCAD meta-data

You can see the meta-data associated with the new ArtiosCAD Design (ARD) and Manufacturing (MFG) documents uploaded via the WebCenter interface or via an ArtiosCAD Enterprise client version 14.0.2 (or later).

In the **Design Information** tab (for design files) or in the **Manufacturing Information** tab, you can see:

- the **Grain / Flute Direction**

- the **Default Side** for the Design (ARD) and Manufacturing (MFG) documents.

Note: You can also view the 3D Model of this document in the **3D View (Collada)**.

- the **Die Side** for the Manufacturing (MFG) documents.

Note:

Older document versions or document versions uploaded from ArtiosCAD Enterprise client 14.0.1 or earlier will not show these data.

3.12. Viewing Project History

You can view the history of various events in the Project by navigating from **View History** page. You can navigate from **Project** > **More** > **View History.**

Any user with access to a Project, can see the events history of the particular project. Based on the notifications setup for the project or the template for various events, records are added to the project history.

Events are added when a Project was created and information like Project name, Project description, customer, customer location and Project Manager of the project are logged.

Any change of the information status, due date, attribute, attribute category or permission changes are also logged as events in the project history.

You can filter or sort the events by the date, time, user, or event type. You can also print the **View History** page.

3.13. Running a Project Report

You can run pre-configured project reports from the projects you have access to if your Admin has given you access to these reports (see the Administration Guide for more information).

Note: This only includes project reports. *System-wide reports* are available from the **Search** menu.

1. In the project, go to **More actions...** > **Run Project Report**.
2. If you can run several reports for this project, select the desired report on the **Run Report for Project** page.
3. If the report requires parameters, specify them (mandatory parameters are marked by an *) and click the **Run Now** button.

4. The WebCenter Viewers

4.1. The Java Viewer

4.1.1. Opening a Document in the Java Viewer

To open a document in the Viewer:

1. Click the document's thumbnail or the 🔍 button.

You can do this from:

- the **My Work** page (under **My Approval** if you have documents to approve or under **Approvals to Follow Up** if you are an **Approval Master**),
- the **Documents** tab in the project,
- the header of the Document Details page.

2. If you see a security warning, you need to allow the Viewer applet to run on your computer.

Depending on what is set in the *Preferences*, you will see a different security warning:

- If you see...
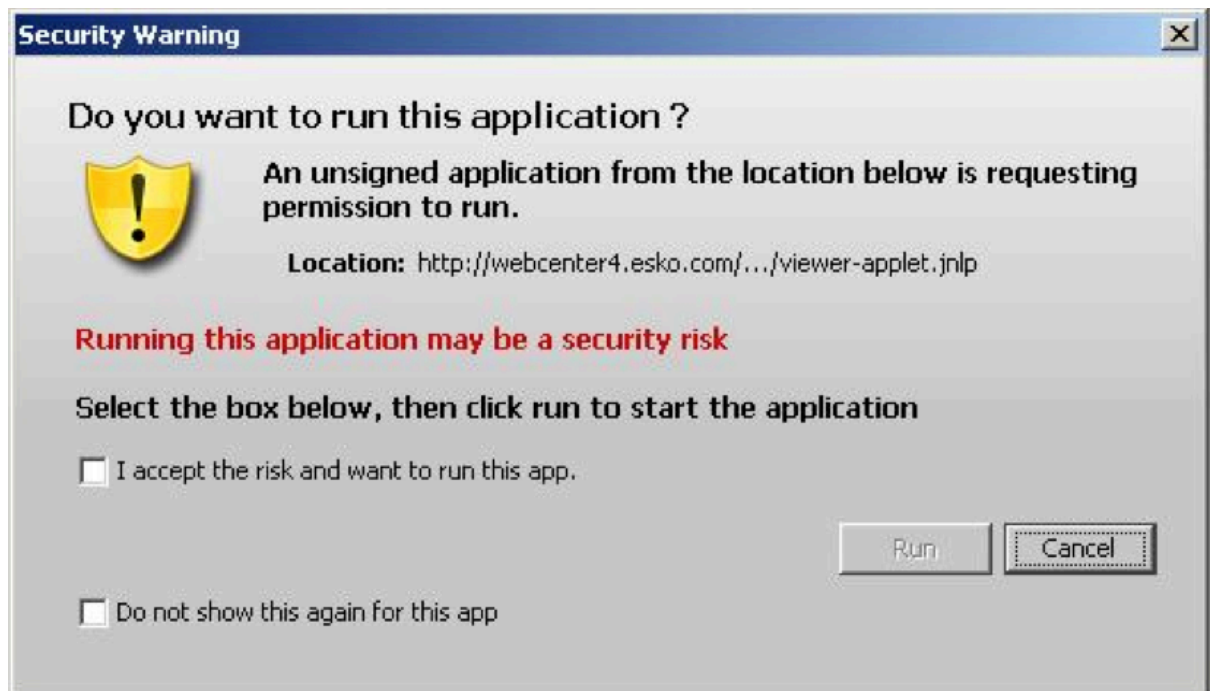
... you need to:

1. click **I accept the risk and want to run this app**,
2. optionally, click **Do not show again for this app** (if you don't want to see this security warning the next time you open a document in the Viewer),
3. click **Run**.

Note:

You will also see a warning when trying to print from the Viewer. You will just need to click **OK** to be able to print.
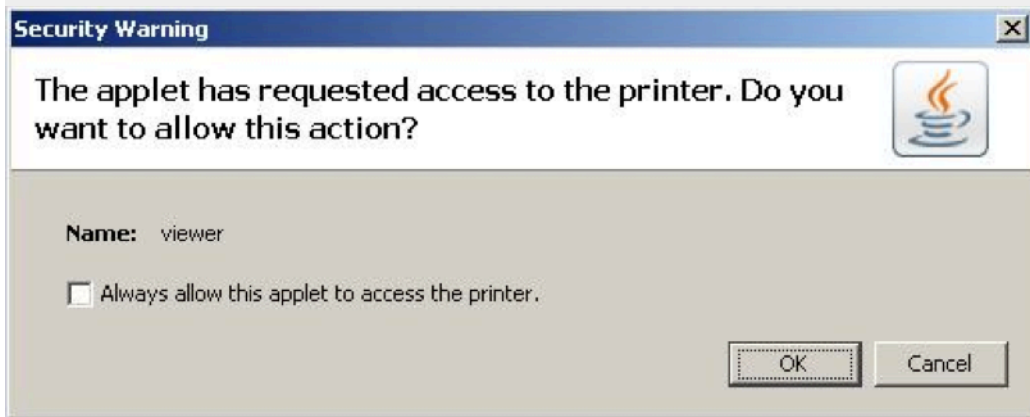
Note that due to a bug in Java 1.7.0_21, you need to leave **Always allow this applet to access the printer** deselected or you will get a security error (`Printing failed java.lang.SecurityException: checkPrintJobAccess`).

• If you see...
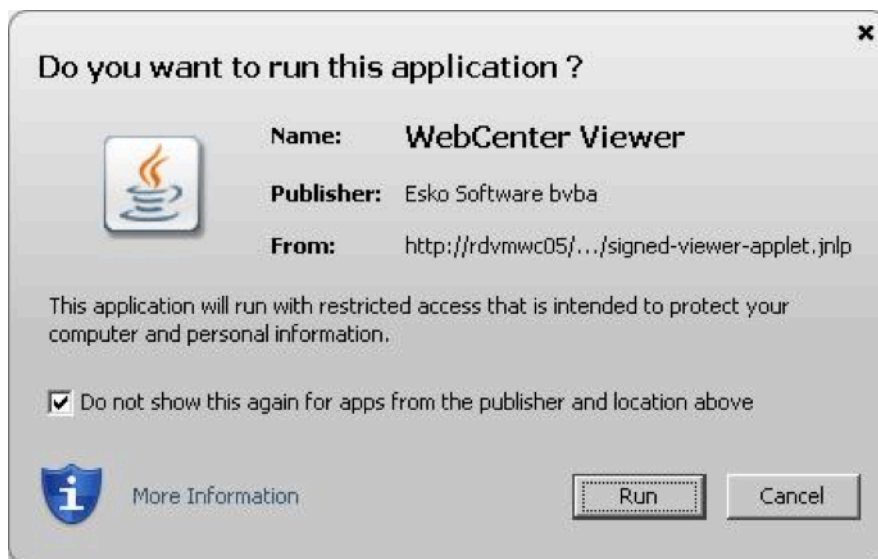
... you need to:

1. optionally, click **Do not show again for apps from the publisher and location above** (if you don't want to see this security warning the next time you open a document in the Viewer),
2. click **Run**.

Note:

You will also see a warning when trying to print from the Viewer. You will just need to click **OK** to be able to print.

Note that due to a bug in Java 1.7.0_21, you need to leave **Always allow this applet to access the printer** deselected or you will get a security error (`Printing failed java.lang.SecurityException: checkPrintJobAccess`).

• If you see...
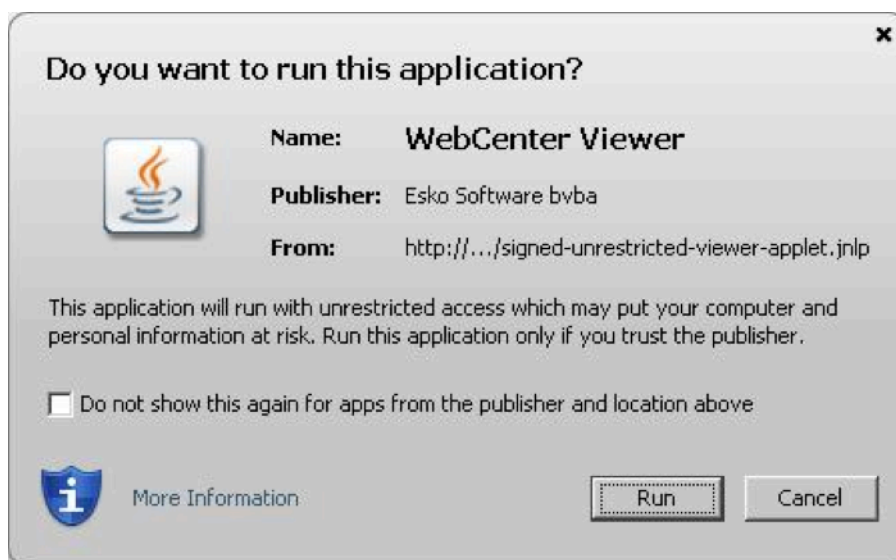
... you need to:

1. click **I accept the risk and want to run this app**,
2. optionally, click **Do not show again for this app** (if you don't want to see this security warning the next time you open a document in the Viewer),
3. click **Run**.

> **Note:**
> - You can only view the latest two versions of a document.
> - If a document of type **ArtiosCAD**, **Graphic File**, or **Other** did not have view data generated when it was uploaded, or does not have view data for some other reason, WebCenter will ask you to create the view data when trying to view it. You must have **Update** permission on a document to generate its view data after it is uploaded.

4.1.2. Viewer Samples

An ArtiosCAD workspace in the Viewer
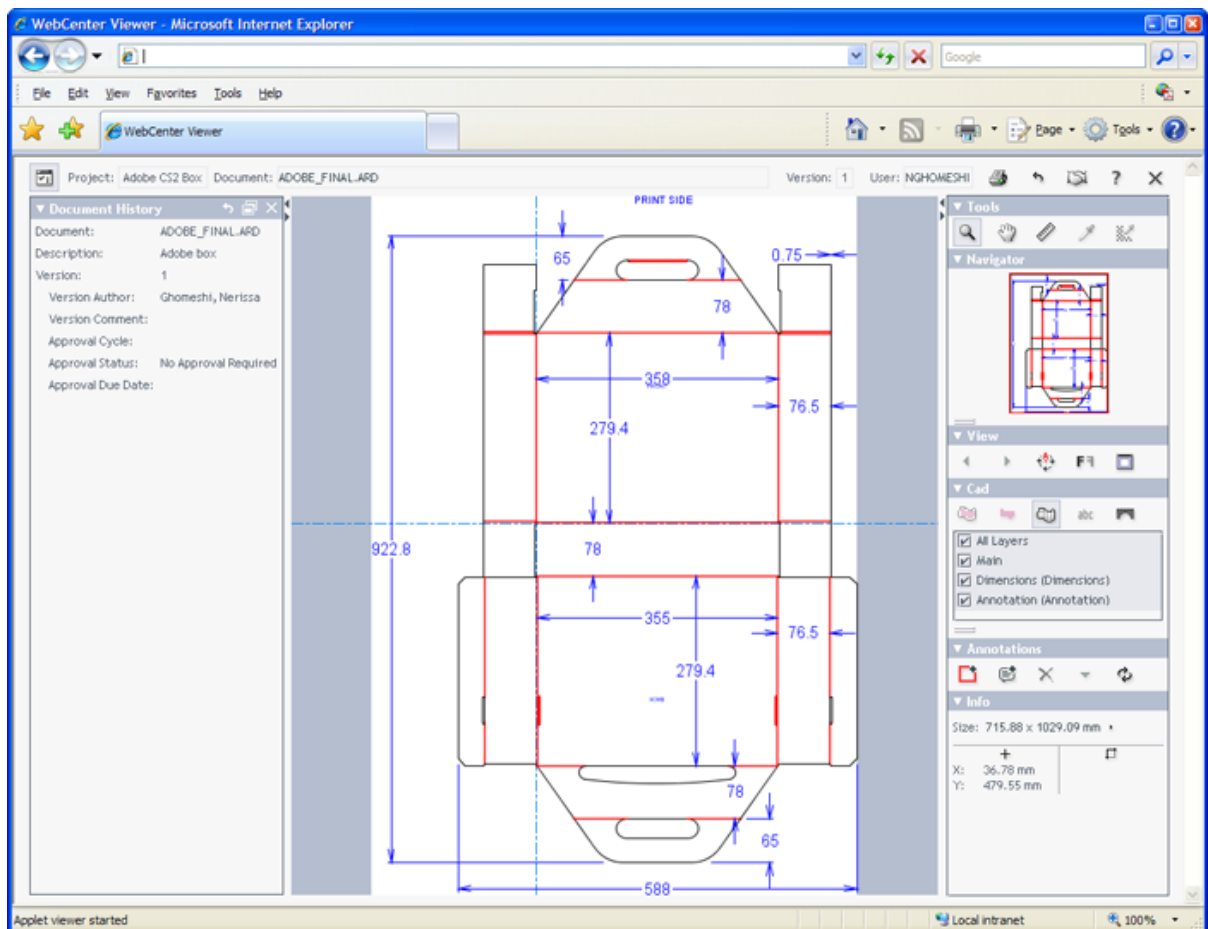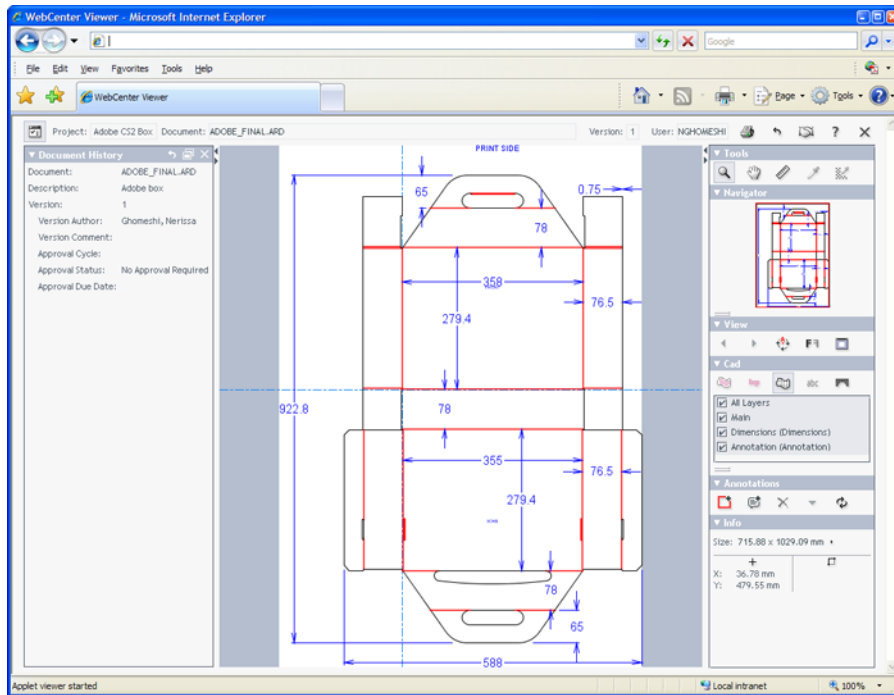
A Packed Archive Format (PAF) file containing both CAD and Graphics data
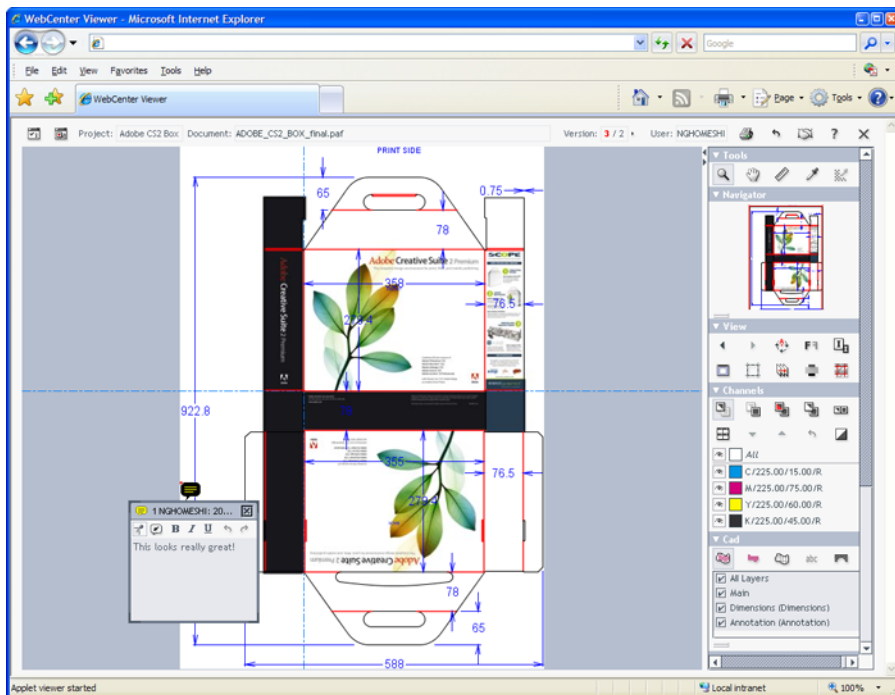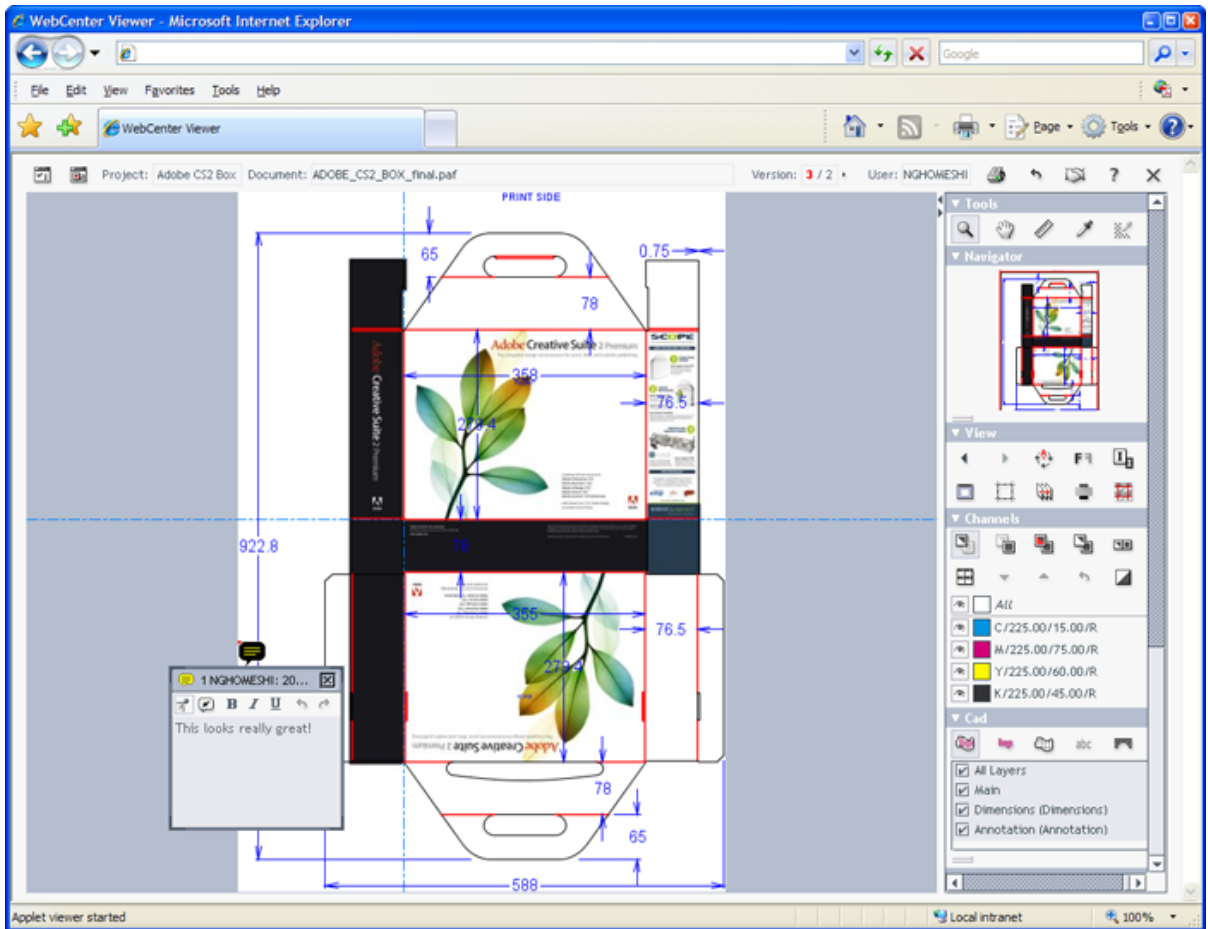
A multi-page PDF file uploaded by BackStage / Automation Engine
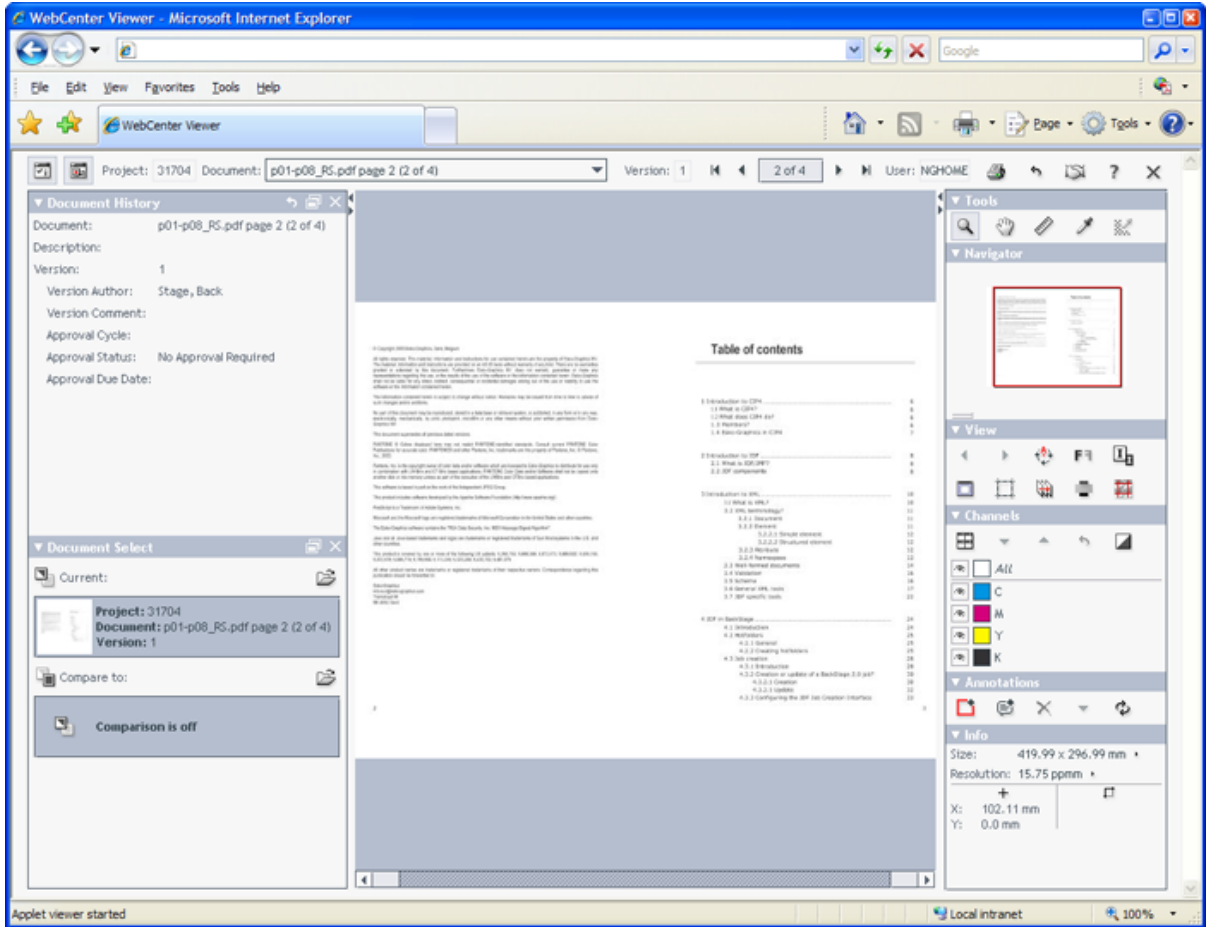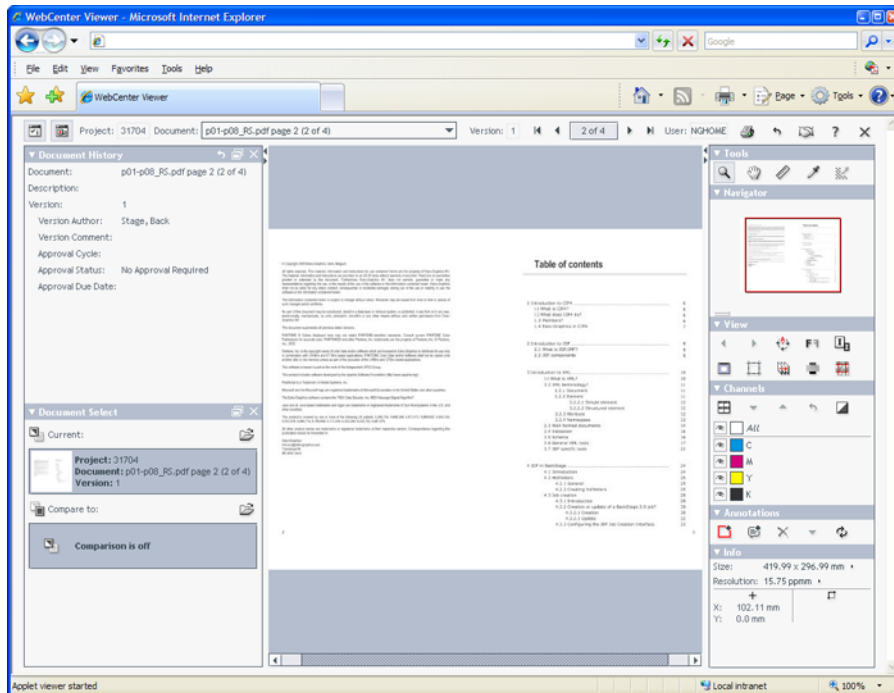
4.1.3. More Help with the Viewer

Help

To learn more about using the Viewer, click the question mark at the top right of the screen.

Note: Some browsers consider the Help window to be a pop-up. Either turn off the browser's pop-up blocker or add the WebCenter Web server to the browser's list of allowed sites.

Document types

For a **Graphics** document to show CAD data, it must reference the ArtiosCAD file. The Viewer does not show graphics contained in an ArtiosCAD document.

For the Viewer to show **multiple pages of a PDF file**, it must have been uploaded as a **Page List** document: either through the user interface with the Upload document feature, or uploaded to WebCenter by Automation Engine.

For Page List documents, the Viewer offers a list of all the pages as a navigation aid, and a reader spread mode to evaluate impositions.

Multiple documents

To view multiple documents at once, select their checkboxes, and click **View and Annotate** in the **Actions** menu (inside a project or the Cart) or the 🔍 symbol at the top (on your **My Work** page).

Navigate between documents using the drop-down list box in the **Document** field or the navigation arrows in the information bar across the top of the Viewer.

Zoom

To zoom in, click inside the document or draw a rectangle around the area to enlarge with the Zoom tool 🔍.

To zoom out, hold down shift or ctrl while the Zoom tool is active. The symbol inside the magnifying glass cursor will change from a plus sign to a minus sign.

To make the view scale to fit the space in the browser window, right-click the Zoom tool and select **Fit document in view**.

Microsoft ISA Proxy server

If you will be using the Viewer through a Microsoft ISA proxy server using authentication in an HTTPS session, use Java 1.4.2 on your machine, not Java 1.5.

To check the version of Java installed on your machine, double-click the Java applet in **Control Panel** and click **About**.

If needed, download the J2SE Java Runtime Environment (JRE) 1.4.2 from the following URL: http://java.sun.com/j2se/1.4.2/download.html.

You must be able to download and install Java applets automatically for the Viewer to work properly. If Java is installed but a red X appears in the browser, consult your system administrator to see if a firewall or proxy blocks Java downloads.

Returning to WebCenter

To leave the Viewer and return to WebCenter, click the x at the top right of the Viewer next to the question mark. Do not close the Web browser window by accident!

4.1.4. Viewing RIPped Data in the WebCenter Viewer

You can view RIPped data from Odystar or Nexus (TIF or LEN files) in the WebCenter Viewer. This allows you to approve RIPped files in the powerful Viewer.

Workflow Overview

To make sure WebCenter recognizes your RIPped TIF and LEN files as digital film, use the following workflow:

1. In Odystar or Nexus, **set up a flow** that contains the following stages:

   - **Split Pages**, to split the pages of a multi-page PDF document;

   - **RIP**, to RIP every page to separated TIF or LEN files;

   - **Compress**, to gather the separations back into a ZIP file that WebCenter will recognize as digital film;

   - **WebCenter Output**, to upload the ZIP files into the WebCenter project of your choice.
2. **Submit a PDF document** to the flow.
3. Log on to WebCenter and **navigate to the project** you specified in the **WebCenter Output** stage of your Odystar or Nexus flow.
4. Click a ZIP file in the document list to view the RIPped page in the WebCenter Viewer.
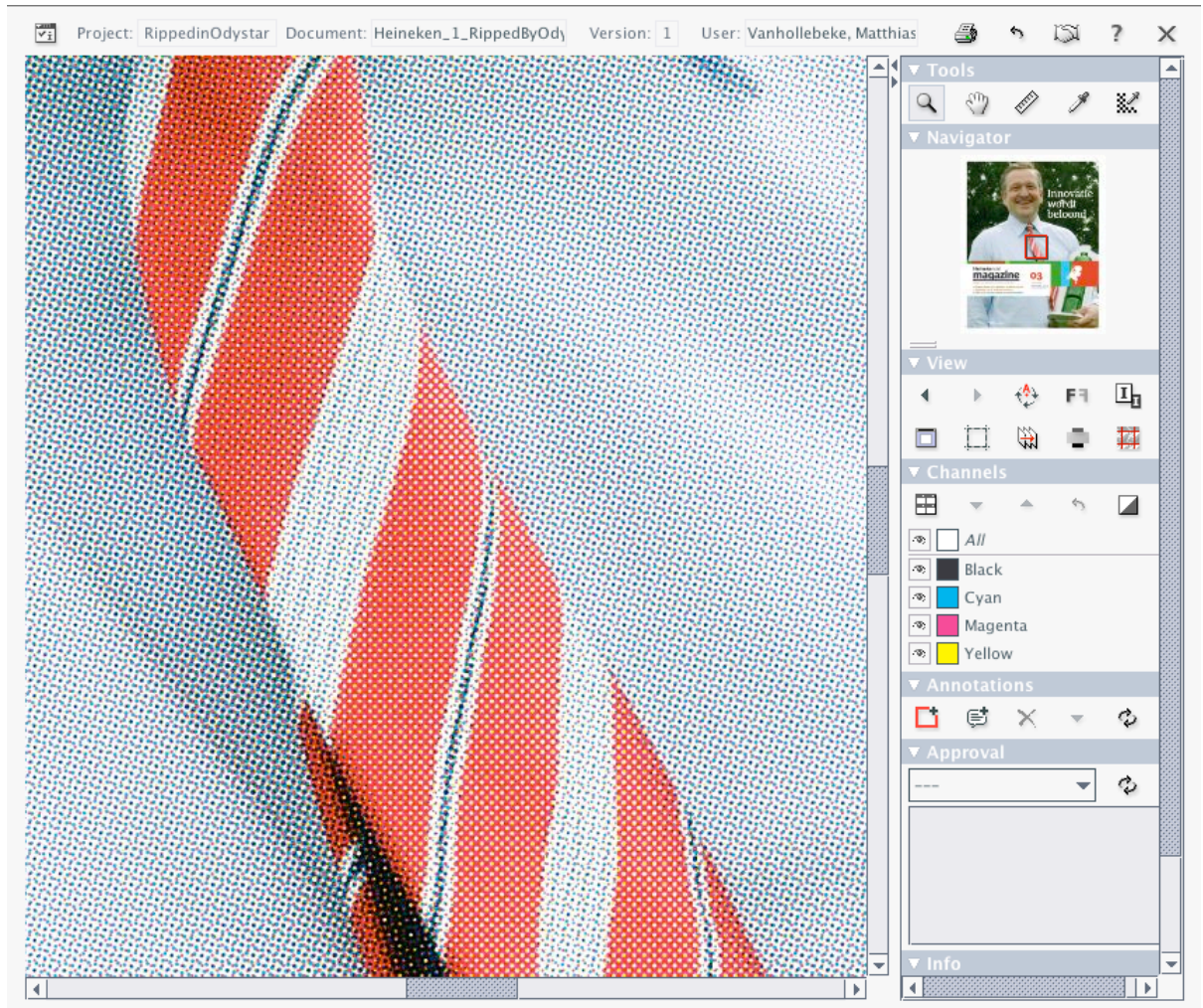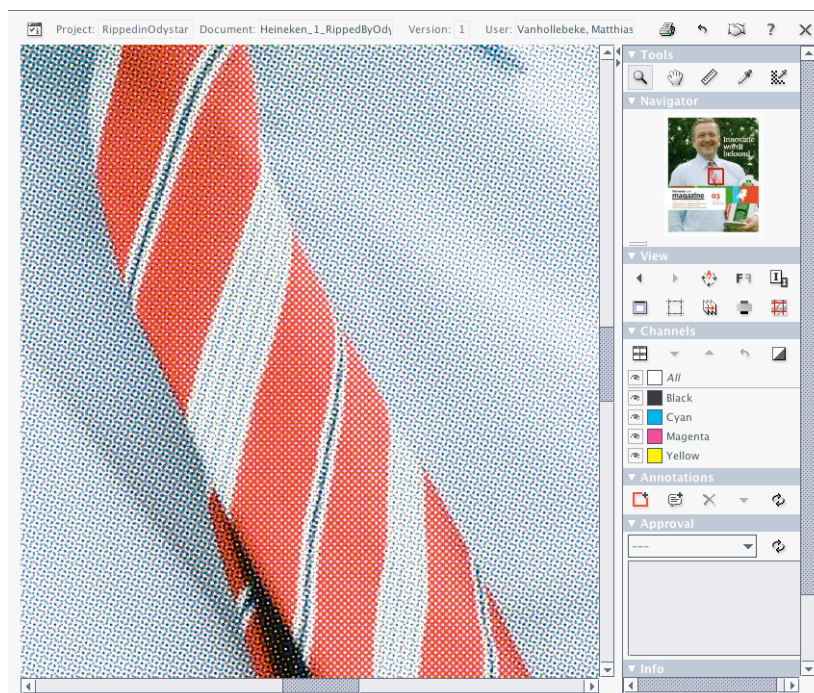
Note:

Of course, you can build on this basic workflow to include approval, or even use workflow folders in WebCenter to send PDF documents to Odystar or Nexus hot folders at the start of the flows.

Prepare the Odystar Canvas

• Set up the following Canvas:
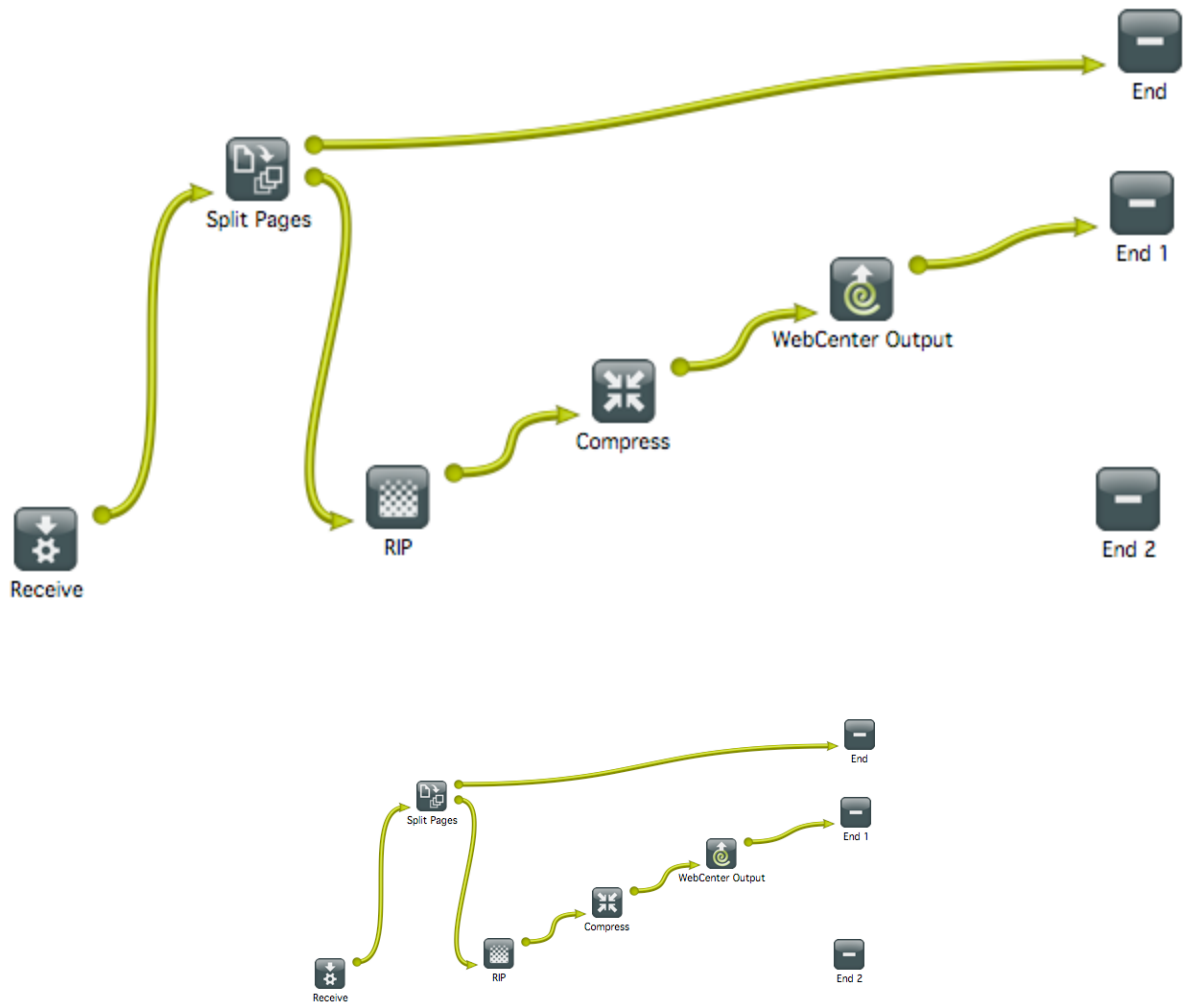
Table: Gateway details

Gateway	Notes
Split Pages	Splits the pages of submitted multipage PDF documents, so they are sent to the RIP gateway page by page.
RIP	RIPs the pages to TIF files.
Compress	Collects the separated RIPped TIF or LEN data and gathers it in a ZIP archive.
WebCenter Output	Selects the ZIP file and uploads it to the desired WebCenter Project.

Prepare the Nexus Workflow

- Set up the following workflow:
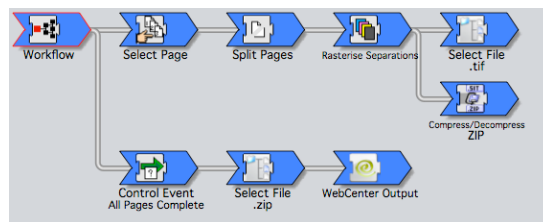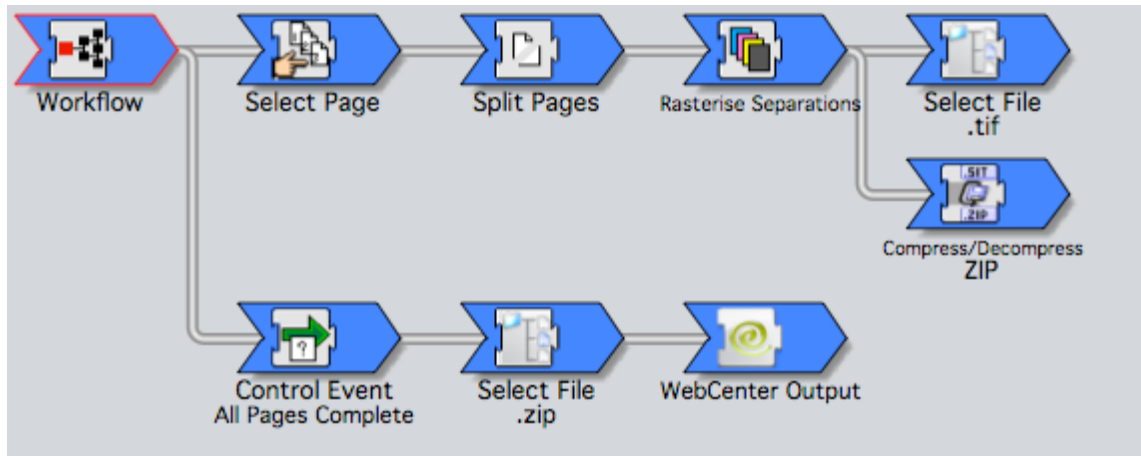
Table: Activity details

Activity	Notes
Split Pages	Splits the pages of submitted multipage PDF documents, so they are sent to the RIP gateway page by page.
Rasterise Separations	RIPs the pages to TIF or LEN files.
Compress/Decompress ZIP	Collects the separated RIPped TIF or LEN data and gathers it in a ZIP archive.
WebCenter Output	Selects the ZIP file and uploads it to the desired WebCenter Project.

Submit Files and View

Once you have set up your Odystar or Nexus workflow, you can submit PDF documents.

The submitted documents will be RIPped and uploaded to WebCenter in the form of ZIP files, which can be recognized by WebCenter as digital film files.

Log on to WebCenter and navigate to the Project you selected as the upload destination in the **WebCenter Output** gateway/activity. You should see the digital film files appearing in the document list, with thumbnails being generated on the fly.

Click a document thumbnail to view it in the Viewer. Use the Viewer to zoom in, compare to previous versions, annotate or approve the RIPped page.
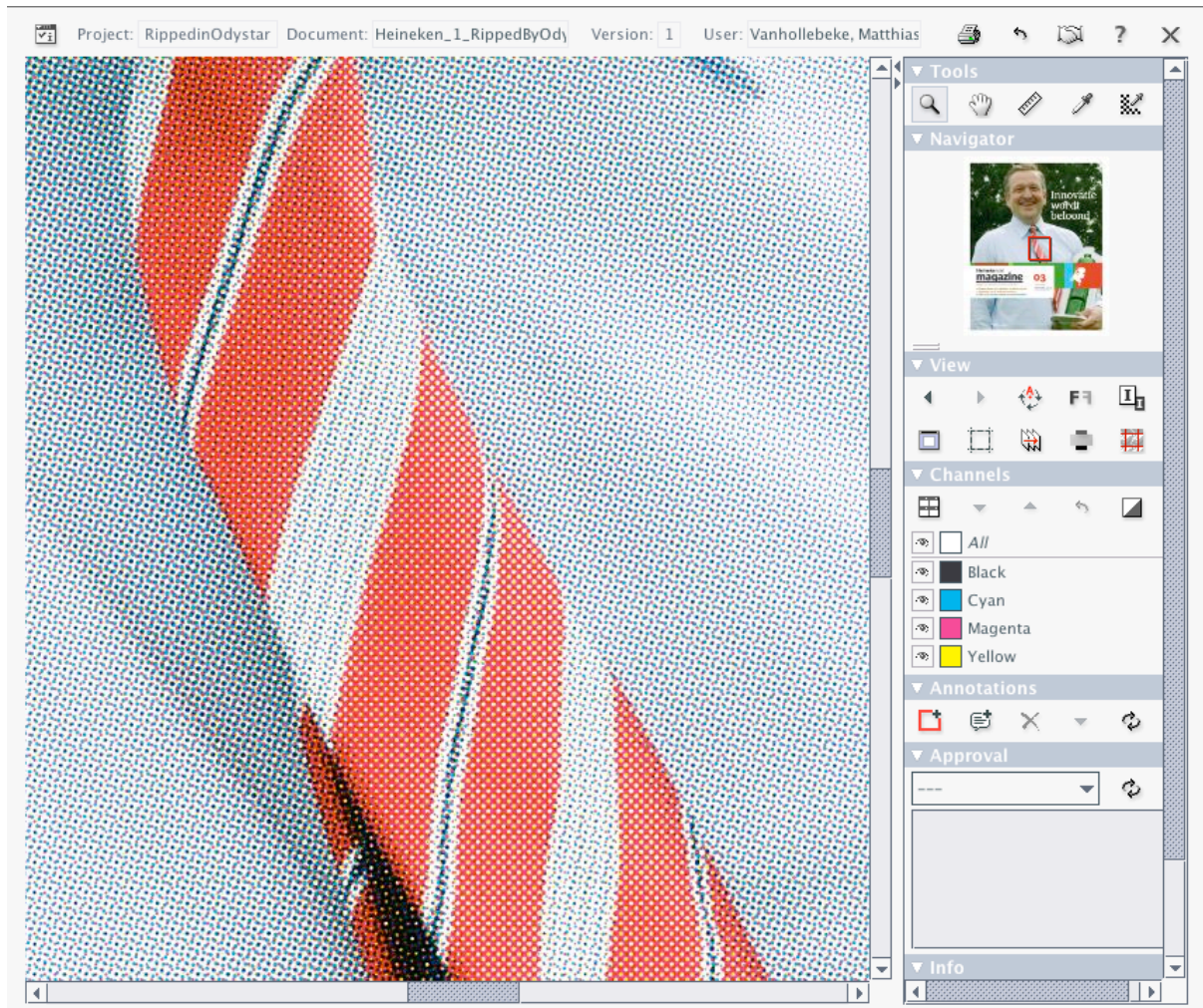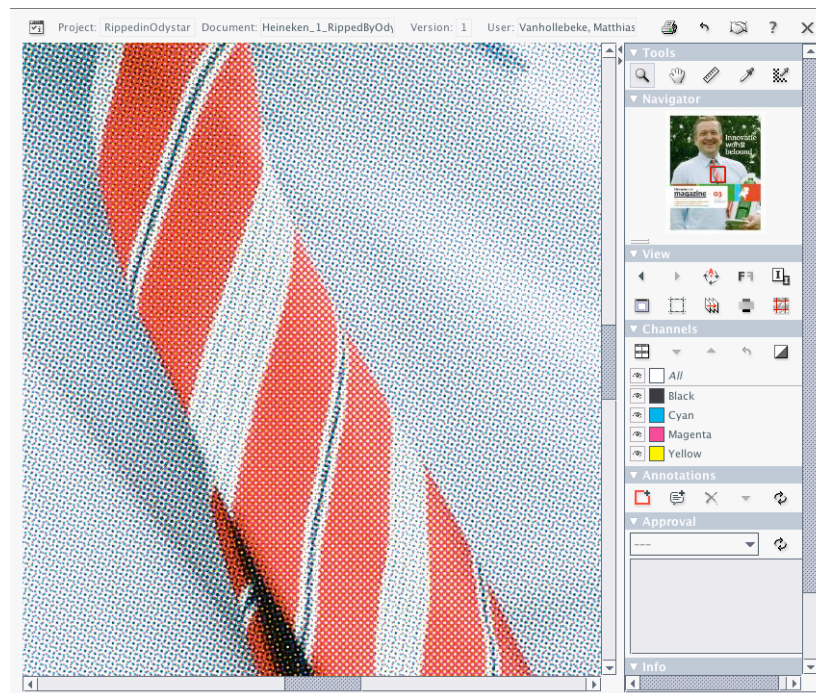
Combine with a Workflow Folder Configuration

You can combine the workflow to view RIPped data in the WebCenter Viewer with the workflow folder feature, to create a user-friendly digital film viewing and approval solution.

Note: Workflow folders are sometimes also referred to as "push-through folders". More information can be found in *About Workflow Folders* on page 255.

To achieve this, proceed as follows:

1. Log on as a WebCenter administrator, and in the **Admin** mode, go to **Configuration** > **Push Through Configuration**.
2. To create a workflow folder, click **New Push Through Configuration** and, in the **Destination UNC** field, specify the path to the **Hot Folder** of your Odystar or Nexus server that will be RIPping your data.

   Also, make sure you select the correct **workflow type** (Odystar, Nexus or Automation Engine) from the corresponding list.

   Note: For detailed instructions on setting up workflow folders, see *Configure Push-Through Configurations for Workflow Folders* in the Administration Guide.

3. Create a new folder in your WebCenter project, and in the **Folder Properties**, select the **Workflow Folder (Advanced)** option. Then select the push through configuration you just created.
4. Modify your Nexus or Odystar flow to include the **WebCenter Input** activity or gateway. Make sure the settings point to the same Hot Folder you specified in the push through configuration in WebCenter.
5. Upload a PDF document to the workflow folder in WebCenter.

If you set up the whole workflow correctly, the files you upload will be copied to the Odystar or Nexus hot folder, where they are picked up by the WebCenter Input. The flow will RIP the pages, collect them into ZIP files and return them to the WebCenter project, where you can view and approve them.
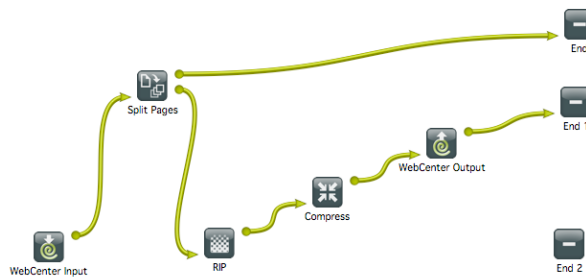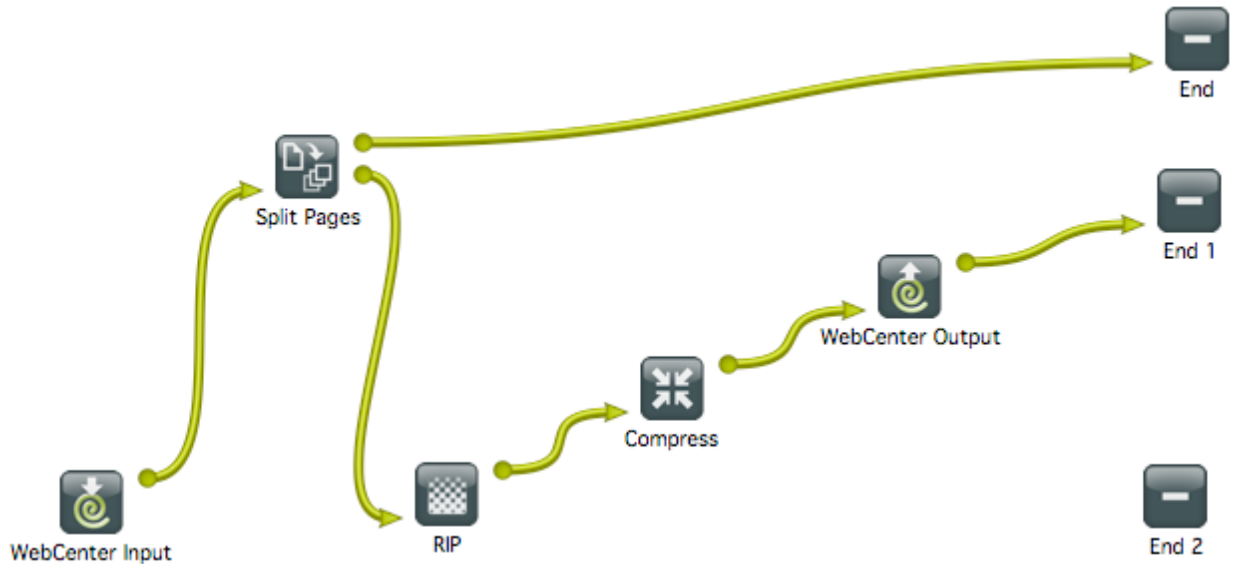
4.2. The HTML5 Viewer

4.2.1. About the HTML5 Viewer

The HTML5 Viewer is a fast and comprehensive viewing tool introduced in WebCenter 14.

From 14.1.1 onwards, the HTML5 Viewer is the default WebCenter Viewer. However, you may choose to work with the Java Viewer (default) by changing it in the **Viewer Preferences**.

What does the HTML5 Viewer offer you?

- Speed: fast viewing for Graphics and CAD files. High speed 3D viewing (14.1 and later).
- Compatibility: high speed performance on the new client browsers.

Browser	Supported Version - Windows OS	Supported Version-Mac OS
Microsoft Edge	Latest	-
Firefox	4.0 or higher	4.0 or higher
Chrome	5.0 or higher	5.0 or higher
Safari	-	5.0 or higher

- Reliability: high accuracy in displaying your data.

- Detail: advanced zoom to see finest details, measuring exact distances. Fast zooming.

- Customizable widgets. You can even restrict access to certain features depending on the user preferences.

- Keyboard shortcuts. To see all of them, press **?**

- Easy access to help and knowledge base. Search in the **Help** widget or press **F1** to access help.

Note: The default Viewer in the WebCenter *Viewer* on page 47s upto 14.1 will be the Java Viewer. You can set the preferred Viewer as the HTML5 Viewer in the General or User Specific **Preferences**. Read more in Preferences.

Note: The HTML5 Viewer does not offer live collaboration or working together at the same time. You can use *annotation threads* for discussions.

4.2.2. What is New in the Viewer 21.03

- Improved Component Widget that renders Assembly Documents
- Editing and Printing of Assembly documents from Viewer

4.2.3. The Simplified Viewer

Two types of desktop layouts can be viewed when you open the viewer in a normal browser: the HTML5 Normal Viewer and the Restricted (New Look)/ the Simplified Viewer. This new viewer presents a cleaner, less complicated and clutter-free look.

Viewing Simplified Viewer

The leaner viewer offers easy navigation through some of these features:

- The Simplified Viewer comes with all the enhanced features available in the HTML5 Viewer.
- In the Simplified Viewer the side panels are collapsed by default. You can open the specific widgets that you need.
- The new viewer allows you to resize the opened widgets (even as the side panels remain collapsed).
- With some configuration, it also allows each widget to be hidden.

Opening the Viewer in Simplified Mode

In **Viewer Preferences**, select the Restricted (New Look) as the **Viewer Style** to open the Simplified Viewer layout. It is set to **Normal** by default.

This layout consists of four sections: center, top bar, right and left side panels:

- The Information bar on the top consists details of the document, the user and buttons to execute other actions *The Information Bar* on page 108

- Below the information bar, you have the top tool panel with all the toolbar components. Activating these help you perform different functions on the document. Read more in: *Top Tool Panel* on page 111

- You have the View area in the center.

- The collapsible side panels contain the **Viewer Widgets** which are collapsed by default.

Ordering and Collapsing Widgets in the Side Panels
The widgets display document information and help perform different functions. To facilitate ease of view, you can adjust them in many ways:

- Click the **Widget Header** to collapse or expand the widget.

- You can drag the widgets to either of the two side panels. The height of each widget is automatically adapted by the side panels.

- The side bars do not disappear on collapsing but remain as a thin bar containing the widgets icons that represent the widgets. Click the icon needed. It opens next to the side bar.

Note: You can open only one widget per side bar at a time. If you click another icon on the same bar, the first widget closes.

Collapsing and Resizing Side Panels
The side panels contain all the widgets and can be manipulated in different ways to maintain the leaner look:

- Resize and collapse side panels by using the ▶ or ◀ **Toggle Right/Left Side Bar**. The side panel becomes a thin bar containing only the icons.

- When you click the expand toggle, the panels expand to fit in both side panels and the viewport.
- To revert the side panels to their original size, click the toggle button.

Resizing Widgets in the Simplified Viewer
You can choose to have a full or partial view of the widgets when you:

- Resize opened widgets even when the side panels are collapsed
- Drag the widget borders horizontally or vertically. You can also resize by dragging the bottom corner. The width and height are saved and the widget will retain these dimensions when you open the viewer the next time.
- Restore the widget to its default size by double clicking the respective icon on the side panel.

Tools in Simplified Viewer
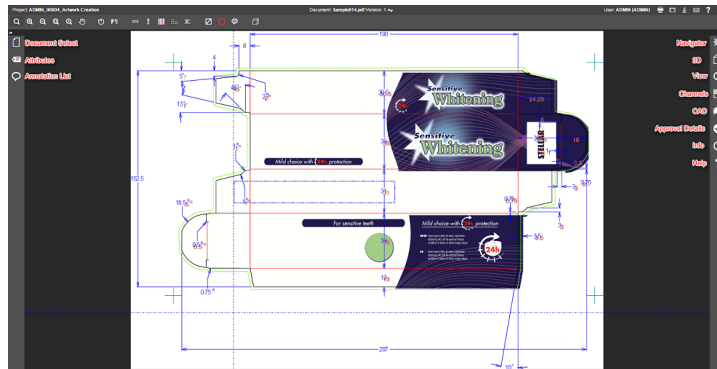
The Simplified Viewer offers tools that are similar to the Normal Viewer:

- *The Information Bar* on page 108
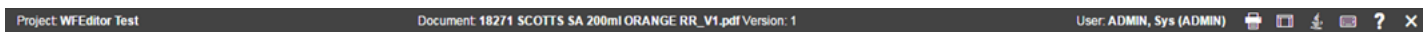
- *Top Tool Panel* on page 111
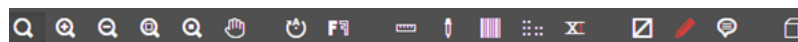
- Use or to Toggle Side Panels.
- To open the widgets, click the corresponding icons:

  - *Navigator* on page 133

  - *3D View* on page 133

  - *View* on page 135

  - *Channels* on page 145

  - *CAD* on page 148

  - *Approval Details* on page 131

  - *Info* on page 134

  - *Help* on page 151

  - *Document Select* on page 125

  - *Attributes* on page 144

  - *Annotation List* on page 129

4.2.4. The Viewer Window

The HTML5 ViewerViewer comes with a number of powerful tools that make it easy to navigate, view and compare your artwork and design files.

In the Viewer Window, you can:

- quickly scan for information regarding the active document. For example, you can view the document size, resolution and the axes in the *Info* widget.
- inspect the document using the *top tools* and *the Navigator widget*. The channels of the document will be visible in the *Channels* widget.
- compare the document to a reference selected via *the Document select widget*.
- browse and inspect individual pages of your Page List using *the Page List widget*.
- view the *approval details* of your document.
- *approve or reject* your document
- view CAD design and CAD layout files. You can see the available layers in the *CAD* widget.
- *view the annotations* and comment on them. You can also *annotate* on your documents.
- *view*, *compare*, *annotate* and *approve* Page Lists and multi-page documents.
- view *CAD Overlay referred in Graphics*.
- view *document attributes and document reference attributes*, edit and save them.
- open the *HTML5 Collada Viewer* to view documents in 3D.*Viewing 3D in the HTML5 Collada Viewer* on page 195
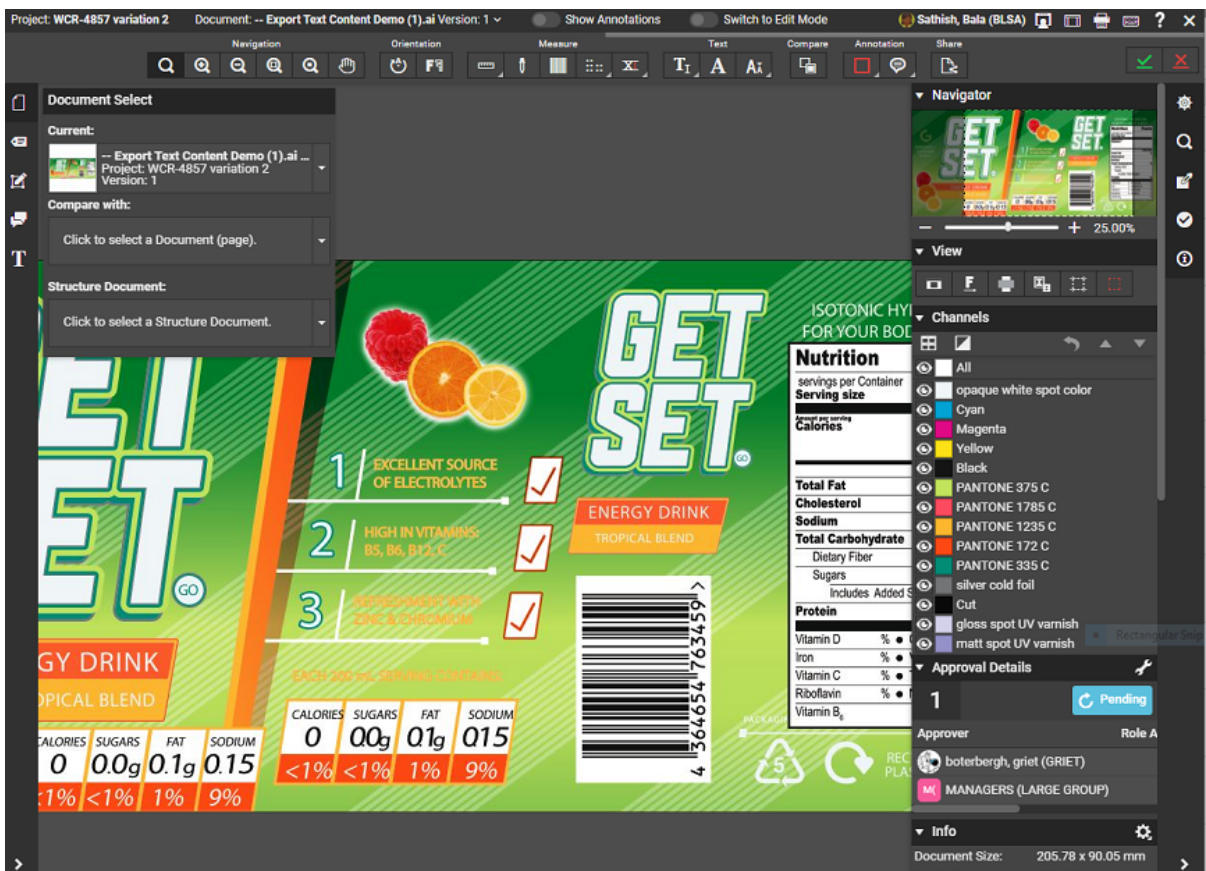
1. *The Information Bar*
2. *Top Tool Panel*
3. *Toggle Side Bar*
4. *Document Select*
5. *Attributes*
6. *Annotation List*
7. *Approval Details*
8. The View area
9. *3D View*
10. *Navigator*
11. *View*
12. *Channels*
13. *CAD*
14. *Info*
15. *Help*

See also: *HTML5 Viewer video tutorial*.

The Viewer Window Layout

The Viewer window will be in the desktop layout if it is opened in a HTML5 compatible desktop browser.

When you open the Viewer in a tablet or a smart phone, you will get a mobile optimized layout.

This example layout has:

1. the top panel containing *the information bar* and *the top tool panel*.
2. the central panel where you will see the document / image being viewed.
3. the left sidebar
4. the right sidebar
5. collapsed widgets.
6. a modal widget

Customizing the Viewer Window Layout

You can customize your window to suit your needs. You can:

- click-drag:
  - a widget to the center of the window (outside of the side panels).

    This will make this widget a modal window. You can make a widget modal when you want this to always appear in the Viewer even when the browser window becomes small. The widget will remain modal even when you restart the Viewer.
  - a widget up or down in the same panel.
  - a widget from one panel to the other.
- collapse or expand a widget by clicking on its header. The sizes of the widgets in the side panel will adjust according to its contents. The scroll bars will help you navigate within the widgets.
- adjust the width of the side panels by dragging the border line.
- use the **Toggle Sidebar** 🔲 option to collapse the sidebars.

> **Note:** Your layout settings will be saved for your next use.

See also *The Viewer Window* on page 106.

> **Note:** If your browser window becomes too small, the sidebars will be collapsed automatically. Make your window larger to view the sidebars again. The modal widgets will stay in its location.

4.2.5. Opening a Document in the HTML5 Viewer

To **View and Annotate** in the HTML5 Viewer, you have to set your **Viewer Type** in the Preferences.

* To open a document in the Viewer, click the document's thumbnail or the 🔍 button.

  You can do this from:

  * the **My Work** page (under **My Approvals** if you have documents to approve or under **Approvals to Follow Up** if you are an **Approval Master**)
  * the **Documents** tab in the project
  * the header of the Document Details page.
  * the **View and Annotate** link in the Documents/Bill Of Material page

* To load multiple documents into the Viewer, select them and choose **Actions** > **View and Annotate** .

* To open a document in 3D, click 🗖 from the *CAD* on page 148 widget or the *Document Select* widget. Read more in: *Opening Documents in the 3D Viewer* on page 198 and *Viewing 3D in the HTML5 Collada Viewer* on page 195.

4.2.6. The Information Bar

The Information bar displays:

* The **Project** name

* The **Document** name

* The **CAD info icon**: If your CAD files were saved using ArtiosCAD 14.0.2 or newer, you will see CAD info icons Document: **BoxCo.ard** (Version: 1) 🎵 🏗 . The icons are:

  * Grain/Flute direction (Horizontal or Vertical)

  _0_180_front.pdf (Version: 1) ⚡ 🏗
  Horizontal Flute (Corrugated) or Grain (Folding Carton)
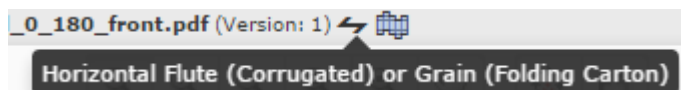
  * Side (Inside or Outside)
  * Die Side (Die Knife Side or Back Side, only for MFG files)

* The **Version** number and the **Revision** letter.

> **Note:**
>
> In **Compare** mode, the two document names and version (revision) details will be visible separated by **/**.
>
> **compare1b.pdf** (Version: 1) / **compare1a.pdf** (Version: 1)

- **Show Annotations** toggle button to make annotations visible in the document viewed.
- **Switch to Edit Mode** to enable editing in AI(Adobe Illustrator) or pdf documents and is present only with the Automated Artwork license.
- The **User Name**

> **Note:** This will be used in **Annotations** and **Approvals**

- **Configure Workspace** to customize workspace according to the user preference or switch to another workspace according to the user role. Read more about Workspace in Viewer *here*.

> **Note:** You can also switch between 'light' and 'dark' style viewers in the workspace configuration.

- **Page Navigator** ⏮ ◀ 3 of 3 ▶ ⏭ :

  This is only available when a multi-page document is active.

  Use this to navigate through the pages of open documents. Or navigate to a page by typing in the number and pressing **Enter**.

  Read also *Viewing Multi-Page Documents and Page Lists* on page 184

- The **Print** 🖶 button. This opens the *Print Dialog*.
- The **Reset** ▢ button. Use it to reset the layout of the viewer to the default.
- The **Show Keyboard Shortcuts** button ⌨.

  Click this or type in **?** to see the keyboard shortcuts.

- To **Display Help Pages** ? button to open help pages.

> **Tip:** To access online help, use the keyboard shortcut **F1** or click ? .

- The **Close** button ✕ . Use this to close the viewer and return to WebCenter. If changes have been made to *annotations* or to the *approval* state, the user will be prompted to save or discard the changes.

Viewer Workspace

A Viewer Workspace is a customizable set of tools and widgets for a user in the viewer. Every user has a workspace assigned based on the role of the user in the project, a personal workspace or the system default and same can be customised by the user in the Viewer.

Admin users can choose to change the default workspaces to show/hide more widgets and tools for each User or Role. To make the change to the workspace in the Viewer, navigate to the **Information Bar** > **Configure Workspace** option.

Read more about Workspace configuration by Admin Users *here*.

Choosing a Workspace in Viewer

When the user is present in more than one role in any of the projects the document is present in, then a drop- down with all the available user roles and its respective workspaces are available for selection. You can choose the workspace you want to use in the Viewer.

Widgets and Tools Configuration

To customize a workspace as per your requirement, select the option **Configure Workspace**. A pop up window is available to make changes to the workspace.

Workspace Configuration

Workspace

General preferences Workspace ⌄

Color Theme

light ⌄

Tools
- ☑ Navigation
- ☑ Orientation
- ☑ Measure
  - ☑ Ruler
  - ☑ Barcode
  - ☑ Braille
  - ☑ Measure Color Percentages
  - ☑ Calculate screen ruling and angle
  - ☑ Caliper
- ☑ Text
- ☑ Compare
- ☑ Annotation
  - ☑ Add Annotation
  - ☑ Note Annotation
  - ☑ Toggle 2D/3D
  - ☑ Toggle Dynamic Content
- ☑ Thumbnail
  - ☑ Share for Viewing
  - ☑ Assisted QA

Widgets
- ☑ ✔ Approval Details
- ☑ ▭ Attributes
- ☑ ▭ Component
- ☑ ▭ Discussions
- ☑ T Content
- ☑ ✎ Annotation List
- ☑ ▦ CAD
- ☑ ▯ Document Select
- ☑ ⓘ Info
- ☑ ✎ Channels
- ☑ ⚙ Navigator
- ☑ 3D 3D View
- ☑ Q View
- ☑ ◼ Keyframes
- ☑ ▮ Files marked for Edit
- ☑ ▤ Actions

Other Settings
- ☑ Switch to Edit Mode
- ☑ Allow loading more documents

☑ Visible
⊟ Available

Reset Workspace   Close   **Save to Workspace**

Firstly choose the workspace that you wish to use and configure. You can also choose the **Color Theme** of the viewer specific to the workspace.

Tools and Widgets set to Available or Visible for the workspace by the Admin user are shown. You can further configure to suit your requirements.

- **Visible**: Check box is selected for for the tool or widget and is currently available in the viewer.
- **Available**: Check box with a dash or dot (depending on the viewer). Tool or Widget is available but unchecked and can be checked and added from the viewer.
- **Hidden**: These are not available in the Viewer Workspace at all and means it is a unselected by the Administrator in the Setup.

Any configuration changes made to a workspace does not have any impact on other users and are saved only for the specific user. You can undo the changes made to your workspace by selecting **Reset Workspace**.

4.2.7. Top Tool Panel

The Top Tools Panel contains some of the Viewer's most used tools. They help you in document interaction.

Navigation Tools

- Zoom tool
- Zoom in tool
- Zoom out tool
- Zoom to 1:1 Pixel
- Zoom to Actual Size
- Fit Document in View tool
- Pan tool

See *Interactive Zooming* on page 113 for more information.

Orientation Tools

- Rotate view tool
- Mirror view tool

See *Rotate and Mirror* on page 115.

Measure Tools

- Ruler tool to *Measure Distances and Angles* on page 115
- *Measure Color Percentages* on page 118 (densitometer) tool
- *Check Bar Codes* on page 121 tool
- *Check Braille* on page 118 (Powered by Global Vision) tool
- *Caliper*

Text

- **Select Text**
- **Detect Font**
- **Check Font Sizes**

3D Tool

- If you have opened a document in the *HTML5 Collada Viewer* once, the top tool panel will show an **Open 3D View** ▢ button.

Annotation Tools

- *Hide Annotations* on page 162 tool
- *Add Annotation* on page 151 tool
- *Note Annotation* on page 155 tool

See *Annotating in the Viewer* on page 151 for more information.

Page List Tools (only when viewing a page list / multi-page document)

- Reader Spread view

  Read more in *Reader Spread View* on page 185

- ◀ ▶ Arrows to navigate between pages or spreads

- ☆ Mark the active page. A yellow star indicates that the active page is marked.

  ⭐ Clear Mark from the active page.

Compare Tools (only when comparing)

You can only see the **Compare** tools when you have two documents open to compare (see).

- View Current Version
- View Reference Version
- View Both- Blinking
- View Both-Show on Top
- View Both-Show Difference
- View Both- Side by Side
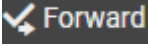
See *Compare Documents in the Viewer* on page 170 for more information.

Share Files

- **Share for Viewing**

Approval Tools (only when an Approval Cycle is set up)

The Approval tools are only available when an **Approval Cycle** is set-up and you are an approver for the document. The number of Approval tools may vary depending on the approval setup.

- ✅ Approve

- ❌ Reject

- ◀ Forward Forward

- 💬 Comment

If you are the Project Manager in WebCenter, you have tools to

- ✓ Force Approve

- ✗ Force Reject

See *Approval* on page 166 for more information.

Interactive Zooming

You can use the **zoom** tools from the *Navigation Tools* to view the fine details of your file.

Activating the zoom

Select the Zoom tool 🔍 to activate the zoom. Alternatively, activate the Zoom tool by pressing the **Z** key.

When Zoom is activated, the mouse pointer changes to 🔍 icon. Use the following shortcuts to effectively use the zoom function.

Click	Zoom in by a factor of two
Right -click	Zoom out by a factor of two
Alt + click	Reverse the zoom to Zoom out 🔍
scroll	Zoom in/out with the location of the mouse as center.

Tip: Double-clicking on the zoom tool 🔍 will fit the document back to view from whatever zoom factor it was in.

Zooming into a specific area

Use Click-drag action to zoom into a specific area to examine the finest details of your document. When you hold the left mouse button and drag, a selection rectangle will appear. You can change the size of the selection rectangle by dragging the mouse without releasing the left mouse button.

To move the selection rectangle around, hold the left mouse button and **space** bar while dragging.

When the left mouse button is released, the viewer zooms to fit this rectangle.

If you are zoomed in with a ratio 1:10 or more, each document pixel is displayed with a small border as a grid. In compare modes, you will see the active document area as grid.

Zoom to 1:1 Pixel

When you have artwork with a defined resolution, you can use it to zoom to the image resolution.

- Right-click on 🔍 and select from:

  - **Zoom to 1:1 Pixel**: use this to view the image in its rasterized resolution.

  - **Zoom to Actual Size**: use this to view your artwork or image in the size corresponding to the printed size. You may need to set your monitor resolution to make this accurate.

    Note: When the monitor resolution is not set or when the image resolution is not set, the Viewer takes 72ppi as default.

  - **Set Monitor Resolution**: use this option to set your monitor resolution. Your set monitor resolution will be stored in the Viewer.

    - You can specify the resolution as a decimal number (e.g. 36.05 ppcm) or as a fraction in the `pixels / size` format. Read more about this in the *Knowledge Base article*.

      Note: Your settings will be saved for your later use.

Using the Pan Tool

To pan the view, click the 🖐 Pan tool or activate the Pan tool by pressing the **H** key. The pan tool lets you grab a location in the document and drag it to a new location.

Tip:

- You can pan the document by holding the **space** bar and dragging a line in the Viewer window. When you release the **space** bar, it returns to the previous mode.

- For a single pan action, use the 🖐

Tip:

While panning, you can zoom in/out with the mouse point as the center in the following ways:

- double-click to zoom in
- right-click to zoom out
- scroll to zoom in/out

Using the Navigator

When you are zooming in the document, the navigator shows the highlight area as the zoomed area. To pan the document, hold the mouse and drag this selected rectangle around. The central view port will display the area correspondingly. Clicking outside the rectangle will move the rectangle to the clicked point and update the current visible area.

When the **zoom** is not activated, you may use these short-cuts to work with the zoom.

Ctrl + / **Cmd +**	Zoom in one step
Ctrl – / **Cmd –**	Zoom out one step
Ctrl 0 / **Cmd 0**	Zoom to fit. This will adapt the zoom to fit the entire image in the current window.

Double click the zoom tool	Zoom to fit

Rotate and Mirror

You can rotate or mirror the document in view using the *Orientation tools*

- ⟳ **Rotate view**: Rotates the current view by 90 degrees clockwise.

- ⫘ **Mirror view**: Mirrors the current view.

  Use this to flip the document vertically from the center of the screen. If you are zoomed into an area, the center of this area will be used as the reference.

  Tip: The shortcut **Ctrl+M** can be used to flip the view.

Measure Distances and Angles

The **Ruler** tool calculates the distance between any two points in the work area with a click-drag-release action.

When you measure from one point to another, a line is drawn and you can see measurement information such as:

- The starting location (X and Y).
- The angle measured relative to the axis (A).
- The total distance (D), the Horizontal Distance (W) and the Vertical Distance (H).

in a pop-up in the View.

Measuring the distance

1.
   Select the ⟋ Ruler tool.
2. Specify the measurements in the pop-up tool bar that appears below.

   - ∠ : Displays the Angle (A) and the Distance (D)

   - ⊢ : Displays the starting and end location (X and Y)

   - ⊞ : Displays the horizontal (W) and vertical (H) distances traveled from the x- and y-axes.

   Note: You can choose to display all of the measurements by selecting all of the above. If you select just one, corresponding measurements will be displayed.

   - ∠ : Displays the Angle (A) positive upwards (Counter Clock Wise)

   - ◹ : Displays the Angle (A) positive downwards (Clock Wise)

   - ▮ : Changes the color of the Ruler line in the View

- ↶ : Resets the color of the Ruler

3. Drag from the start to the end point.

An information pop-up located at the end point will display the measurements. The location ⊥→ will be visible at the start point.

You can drag the line to another point and the ruler will update its measurements. To move, drag the start or end point to another location.
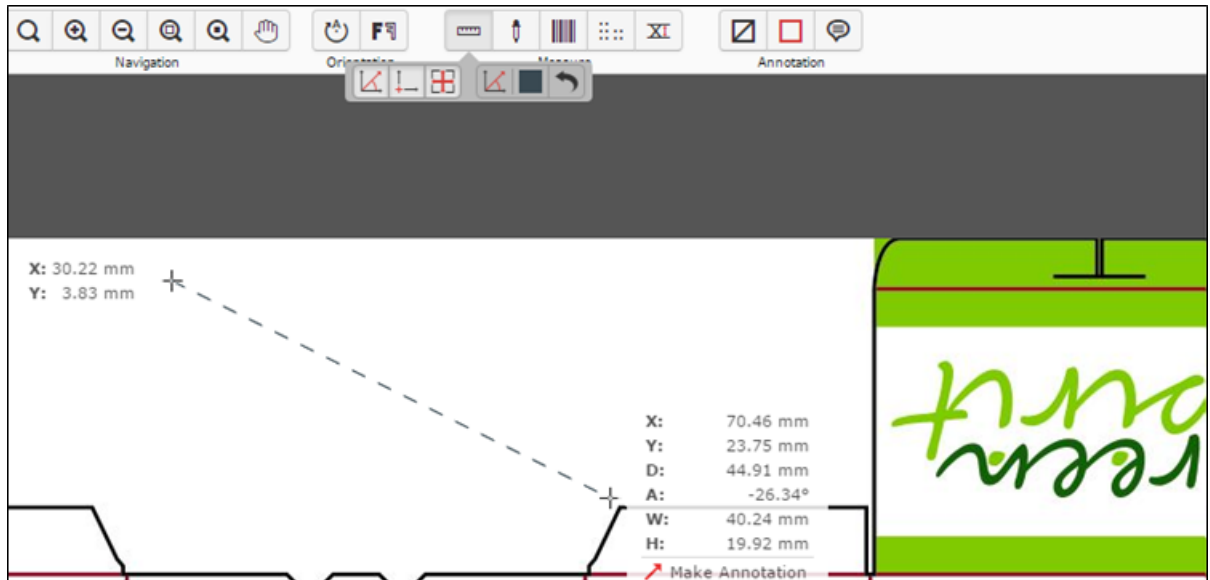
Note: While viewing CAD data, then the **Ruler** will snap to the end points of most line segments in the CAD drawing.

Tip: The Ruler tool can be combined with different view tools. You can for example indicate a certain point, then change the view by zooming out, navigating, and then indicate the second measuring point.

To make an annotation from this pop-up, click on the **Make Annotation** option. You will get an arrow annotation with the current measurements as its content.
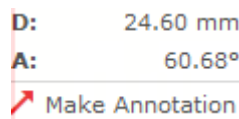
Measure Screen Ruling

You can use the **Screen Ruling and Angle** ▦ tool to measure the ruling and angle in digital film files.

Click ▦ to activate the tool and then select a point in your file or drag it to measure within an area. The measurements are shown in *the Channels panel* and in a pop-up near the point or area you measured.
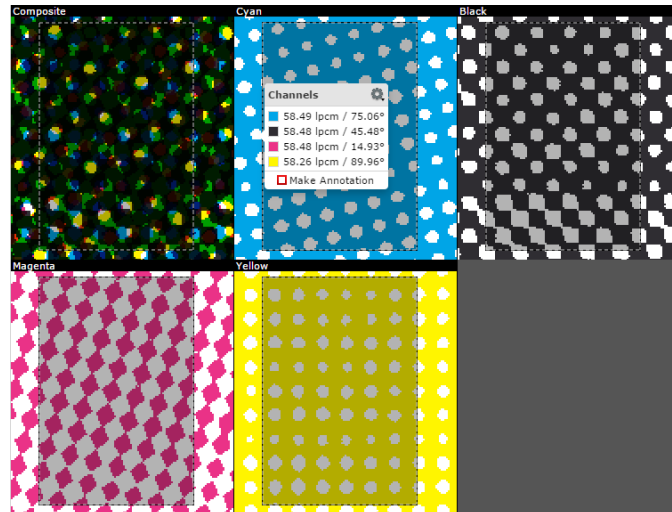
For each measured channel, you can see the lines per millimeter (lpmm) and the angle (degrees) of the line in the pop-up. When there is no screen in a channel, the value will be blank.

You can change the units of the measurements from the information pop-up. Click the **settings** ⚙. button and select your preferred units. Your units will revert to the User Preference settings when you close the active session.
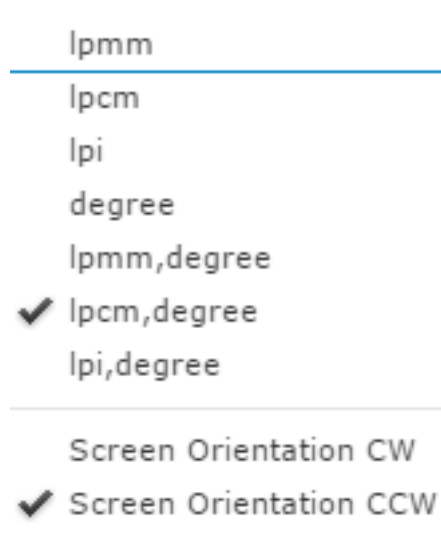
To change the orientation of the angle to either clockwise (**Screen Orientation CW**) or counter clockwise (**Screen Orientation CCW**).

To make an annotation from this pop-up, click on the **Make Annotation** ▢ option. You will get a rectangle annotation with the measurements as its content.

Measure Color Percentages

You can use the densitometer 🖊 tool to measure ink coverage at a certain point or at the selected area.

Click in your file with the densitometer tool to measure the color percentages at a certain point, or drag it to measure densities within an area. The densities are shown in *the Channels panel* and in a pop-up near the location you measured.
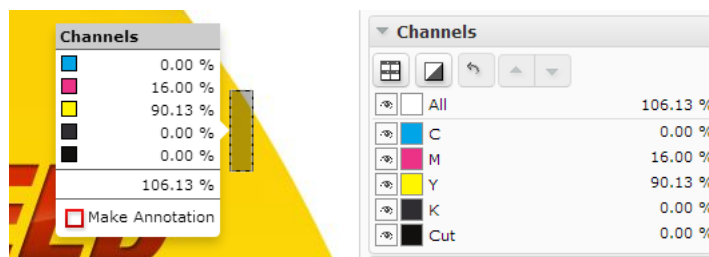
You can also click the 🖊 tool button to make a measurement based on the current view. In this case, the densities are only visible in the **Channels** panel.

Note:

While viewing Digital Film files, you can change the units of the information pop-up. Click the **Unit Settings** ⚙ button and select your preferred units. Your units will revert to the User Preference settings when you close the active session.

To make an annotation from this pop-up, click on the **Make Annotation** ▢ option. You will get a rectangle annotation with the measurements as its content.

Check Braille

Check Braille ⬚ tool allows you to analyze and interpret the Braille text in the selected language.

Note: The tool is visible only when the system has an Advanced Approval License.

Select the area around the Braille text with a click–drag–release action. You can also select the Braille text area and click the ⬚ tool to interpret the selection. The result appears in *The Channels Panel* and in a pop-up near the location you measured.

You can choose the language from the language list by clicking on the current language visible under the braille tool.

Note: By default, English is selected. See also: *Braille Languages Supported in the Viewer* on page 119

The tool checks the validity according to the Marburg Medium Braille Specification. A green tick-mark indicates a valid Braille. If the selected Braille contains at least one regional code that doesn't pass these checks, you will see a warning.

Note:

The validation check has a Tolerance of +/- 0.1 mm and a dot diameter range of 1.3 – 1.6 mm. See details below:

- 2.5 mm horizontal dot to dot
- 2.5 mm vertical dot to dot
- 6.0 mm from cell to cell
- 12.0 mm from cell to cell with single space in between
- 10.0 mm line spacing

When multiple lines are present in the Braille text, a line number in square brackets will be shown before the text of each line. For example, [1] for the first line.

To make an annotation from this pop-up, click on the **Make Annotation** [■] option. You will get a rectangle annotation with the measurements as its content.

Braille Languages Supported in the Viewer

// 1: English

```
// 2: French
// 3: Polish
// 4: Portuguese
// 5: Russian
// 6: Spanish
// 7: Finnish
// 8: German
// 9: Italian
// 10: Latvian
// 11: Romanian
// 12: Slovene
// 13: Swedish
// 14: Hungarian
// 15: Dutch
// 16: Maltese
// 17: Danish
// 18: Greek
// 19: Bulgarian
// 20: Czech
// 21: Estonian
// 22: Lithuanian
// 23: Irish (Gaelic)
// 24: Albanian
// 25: Basque (Spain)
// 26: Belarusian
// 27: Catalan (Spain)
// 28: Croatian
// 29: English (UK)
// 30: Faroses (Denmark)
// 31: French (Traditional)
// 32: Galician (Spain)
// 33: Greenlandic
// 34: Icelandic
// 35: Kazakh
// 36: Norwegian
// 37: Serbian
```

// 38: Slovakian

// 39: Turkish

// 40: Ukrainian

// 41: Uzbek

Check Bar Codes

Use the Check Bar Code ![icon] tool to analyze and interpret the Bar Code text in the selected language.

Select the area around the bar code with a click-drag-release using the left mouse button. You can also

select the area and click the ![icon] tool to check the bar code. The result appears in *The Channels Panel* and in a pop-up near the bar code.

The following information will appear in a pop-up:

• **Type**: The bar code type

• **Value**: The encoded value

• **Magnification**: The bar code magnification in percentage (visible only when the value is not 100%).

• **Bar Width Reduction**: The line width compensation in mm. (visible when the value is not 0).
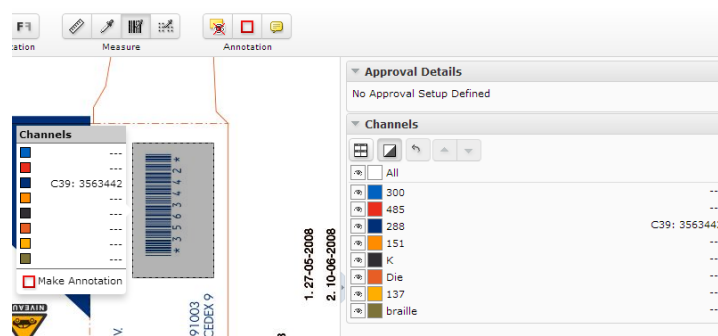
Note: The information will be displayed in the following order :

<Type>: <Value> <Magnification> % [<Bar Width Reduction> mm]

The tool is visible only when the system has an Advanced Approval License.

To make an annotation from this pop-up, click on the **Make Annotation** ![icon] option. You will get a rectangle annotation with the measurements as its content.

Caliper

Use the **Caliper** XI tool to measure and standardize the height or width of aligned objects in the Viewer. For example, you can use this to check the text height in your artwork. You can create a **Preset** to customize your Caliper to your standardization and compliance needs.

Click the Caliper XI button from the **Measure** tools to activate the tool. You will get the **Free** style as the default Caliper form. In the sub tool bar, you can:

- select the **Style**. Choose from the **Style** options:

    - **Free** (Default)

    - **Fixed**

    - **Preset**

- specify the **Gap** Size which is the distance between the start and end lines. If your selected **style** is:

    - **Free**, changing the **Gap** size will alter the end line.

    - **Fixed**, the distance between the start and end lines update according the **Gap** size.

    - **Preset**, the saved **Gap** size will be applied

- define the orientation as either vertical (↕ **H**) or horizontal (↔**W**).

- **Save** the **Gap** size and orientation as a **Preset**. The saved **Presets** will be added to the **Style** drop down. Use the **Delete Gap** option to delete the saved **Presets**.

Free (Default option):

- Hold down the left or right mouse button to draw the start line and drag to the end line. Release the mouse when the desired width or height is achieved.
- To adjust the height / width, simply drag the lines. You may also move the caliper form from one location to another.

    If the horizontal distance between two selected points is larger than the vertical distance, you will get a vertical form to measure the width.

    If the vertical distance measures more than the horizontal, you will get a horizontal form to measure the height.

    Note: The Caliper tool will switch to horizontal or vertical orientation corresponding to the direction of your mouse movement.

    A pop up will display the current gap size and the X / Y coordinate of the end line. The information is updated when you move the lines of the Caliper.

- You can **Save/Delete** the **Gap** size and the H / W as a **Preset** on your profile. This allows you to have a customized Caliper form for your future use.

Fixed:

In this mode, you can specify a fixed **Gap size**. Use this when you want to standardize your artwork object to a pre-determined size. For example, if you have a certain text height needed in the artwork, specify that as the gap size and check the artwork text.

- Specify the **Gap** size.

- Use **H** or **W** button to fix the Caliper orientation.

> **Note:** When it is fixed, the your mouse movement will not alter the Caliper orientation.

- Hold down the left or right mouse button to draw the start line and the end line will be drawn according to the **Gap** size.

- Click **Save** to create a **Preset** with the current measurements (the gap and the orientation).

Preset:
Select your saved **Preset** in the **Style** selector. Hold down the mouse to draw the lines with your preset **Gap** size and **Style**.

> **Note:** In the **Fixed** and **Preset** mode, you can grab the start or end line to drag the form to another position.
>
> Press **Esc** to revert to initial state (no lines drawn).

Text Selection in Viewer

You can select the text in the document by clicking on **Text Selection** button for any PDF, AI files and documents with SVG perspective in the Viewer.

When you select the text, you can also

- **Search in text**: Search for specific text in the sub toolbar of the text selection tool. The searched text is highlighted which you can zoom to or navigate to the selected text using the previous and next buttons in the sub toolbar.

- **Select all text**: Select all the text statements in the document using the **Select All** . You can also alternatively select all the text using Ctrl+A keys in the keyboard. Right click on the selected text to either highlight the text or add an annotation or copy.

You also have an option to find the font and the font sizes used in the document.

- **Detect Font** : Click on this icon and then click on a selection of text to detect the font in the selected text. A pop over is shown with the Font, Font Size, Selected text and an hyperlink to make annotation.

- **Check Font Sizes**: Click on this icon and then select the font size using the text box or slider to detect text which text is smaller than the selected font size.

Text Edit Mode

You can edit the text in the artwork document with the **Switch to Edit Mode** icon. This would be helpful to correct or change the text instantly from the WebCenter Viewer.

Click on the **Switch to Edit Mode** ![icon] icon, to switch to edit mode. Following widgets are enabled when you Switch to Edit mode.

• Annotation Widget
• **Files marked for edit widget**
• **Actions widget**
• Channels widget
• Navigator widget
• Info widget
• Help widget
• Zoom/Pan tools
• Rotate/Mirror tools
• Text Selection tools
• **Switch back to view mode and save button**

You can choose the files where the text has to be edited in bulk in **Files Marked for Edit** widget.

Open 3D View

If you have opened a document in the *HTML5 Collada Viewer* once, the top tool panel will show an **Open 3D View** ![icon] button.

Click this to generate the *3D View*.

Finishing Profile

When you select the 3D button in the top bar, two new widgets appear namely

• **Print Finishing**
• **Geometry**

When your document is a PDF or AI Document, it is possible to simulate the Finishing effects in the 3D Viewer. To do that, the user can select a **Finishing profile** when a 3D structure is selected in the **Compare** Widget.

The Finishing Profile is a file that can be exported by Studio. When stored in the same project as the Graphic Document or in the StudioManager project, it will be possible to select it in the Viewer.

Note: Generation of the Graphics with a Finishing Profile may take a while.

2.5 D

You can preview your artwork with finishing effects without having a Collada file available. In the **Document Select** Geometry widget in the viewer, you can navigate to **Structure Document** Shape option.

There is a built-in Structure Document curved sheet that is used to see how the artwork would render in a 3D environment. You can change the angle of the curve as per requirement.

Click on the **Open 3D view** button, to show a surface in the angle that was chosen. The surface contains the graphic, which will follow the selected Finishing Profile.

4.2.8. Document Select

The **Document Select** panel allows you to select the **Current** view from the multiple files (documents or document versions) loaded into the Viewer.

The panel will contain three document lists:

- **Current**

- **Compare with**

- **Structure Selector** (only available with Graphic Documents)
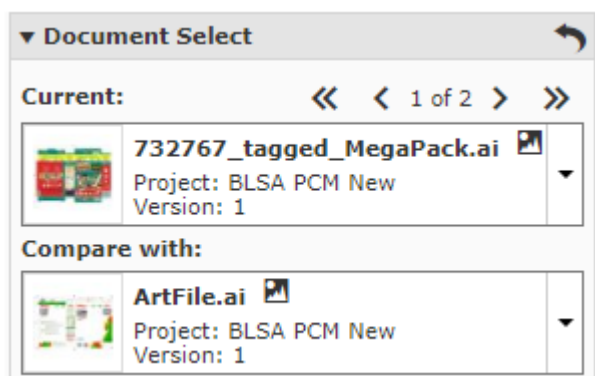
From the **Current** list, select the file you want to view. You can switch to different documents view from this list.

You can also add new documents in both Current or Compare With to the list by clicking on **Find More Documents**. This opens a **Select Document** pop up window. You can filter the document based on the Document Name or Project Name.

> **Note:** If you do not want to compare documents or versions, leave the **Compare with** field empty.

Compare To

The **Compare To** list contains the possible reference documents. Select the reference document from this list to compare to the **Current**.

When a reference document is selected from the **Compare to** list, the lower part of the panel will display controls for adjusting **Channel Matching**, **Orientation** and **Alignment**.

Read *Compare Documents in the Viewer* for more details.

Selecting Documents

You can select the current and the reference versions using the two document selectors in the **Document Select** panel.

> **Note:** The reference document type has to be the same as the active document type. For Example, when a CAD document is active only other CAD documents can be selected as the reference.

The *The Information Bar* displays the selected active and reference document name and version.

The Viewer will start the last used compare mode except the **Show Current** and **Show Reference** modes.

Selecting Multi-Page Documents

You can select the **Current** and **Compare to** pages using the two document selectors in the **Document Select** panel.

While comparing multi-page documents, a **Reset** button is enabled in the **Document Select** header. If you have defined a special mapping for *comparing pages of multi-page documents*, you can use this to reset the mapping. You have to specify whether to reset the mapping of the active page or for all pages.

Read also *Channel Matching, Orientation and Alignment in Compare Mode*.

Structure Document Selector

While viewing a *graphic file with CAD reference*, the **Document Select** widget will have:

- a Structure Document selector listing all the CAD documents and 3D Documents opened in the Viewer and the *CAD references* associated with the graphics file.

  If a Structure /CAD reference is found, you will see this in the *document select* panel with a link icon. You can select this to view together with the graphics document. If the graphics file does not have a XMP link, you can use the *document references* feature to link them.

  To remove the CAD link from the graphics file, click **Turn off CAD Overlay** in the **CAD Overlay** selector and **Save**.

  Read more in: *Viewing CAD with Graphics*.

- **Open 3D View** button. Click this generate a *3D View*.

> **Note:**
>
> The 3D button will be available in this widget only when it is possible to generate a 3D from the current Graphics and the selected or referred CAD overlay.
>
> Use **Ctrl+S** to switch between Show Current and Show Reference compare modes

Multiple Documents Select option

You can view multiple documents one by one in the viewer. To view, select the multiple documents in the **Documents** panel and click **View and Annotate**. In the Viewer, **Document Select** panel, you can choose the documents in the **Current** and **Compare to** options.

You have the option to go the first document, previous document, next document or to the last document chosen with the arrow keys.
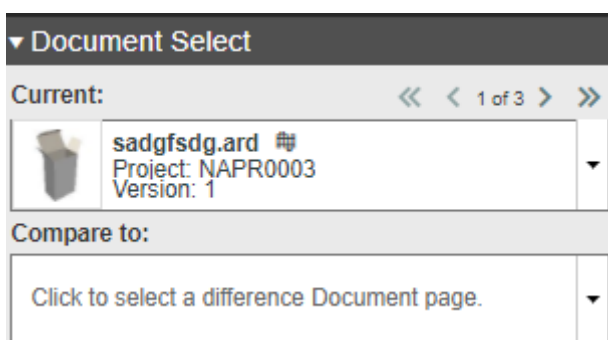
Current selected Document Index displays the number of documents selected and the number of the current document displayed.

4.2.9. Page List

The **Page list** panel will be available when you open multi-page or page list documents.
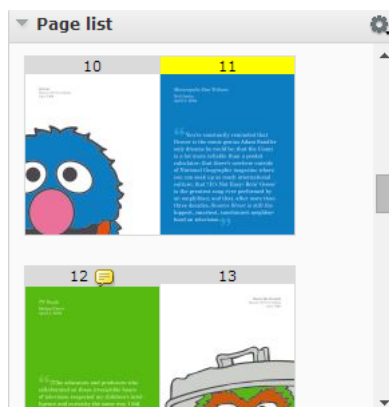
Here you can:

- see the thumbnails of all the pages. Each row will contain two thumbnails.

- configure size to **Small Thumbnails**, **Medium Thumbnails** or **Large Thumbnails**

- view a specific page by clicking the corresponding thumbnail. The thumbnail of the active page will be highlighted.

- view the page name or folio for the thumbnails. This allows you to select a page corresponding to a folio or page name.
- view which pages are annotated. These pages will have a note on the thumbnail.
- view the approval status of individual pages of a Page list. A blue circle indicates the pending approvals on a page. Read also *Approval in Page Lists* on page 187.

  Note: You can define page by page approval in a page list. For a multi-page document, the approval set-up is for the entire document.

- view the blank and empty pages as thumbnails. The blank pages of a page list will be displayed as white thumbnails and the empty pages as crossed thumbnails.

  Note: You cannot view empty pages. You can view the blank pages, but you cannot annotate or compare them.

Tip: You can collapse other widgets to make more space for Page List panel while viewing large multi-page or page list

Read also *Viewing Multi-Page Documents and Page Lists* on page 184

The page thumbnails of a page list or multi-page document are displayed according to the binding type:

- Left edge binding: the first page and the odd numbered pages are displayed on the right. The even numbered pages will be on the left.

- Right edge binding : the first page and the odd numbered pages are displayed on the left. The even numbered pages are displayed on the right.
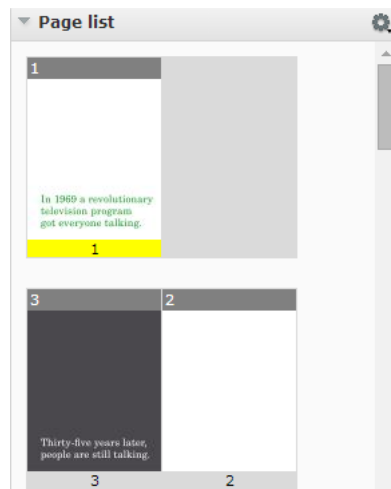
4.2.10. Annotation List

The Annotation list panel provides a listed view of the existing annotations in the currently viewed image. You can collapse this panel to hide the annotation list panel.

You can see them in the created or modified order depending on the *setting* and filters. Replies are visible immediately below the corresponding annotation in the created/modified order.
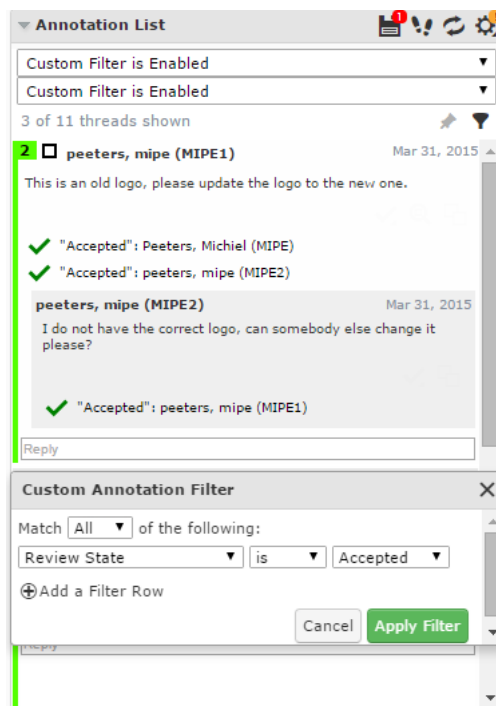
The Annotation list panel has tools to:

• *Save annotations*
• *Step through annotations*

• **Reload** :

  You can **Reload** the annotations of the active image. This reloads all annotations without restarting the viewer. You will be warned about unsaved annotations while reloading.

• *Annotation Options*
• *Filter Annotations*
• *Create Custom filters for annotations*

If you select an annotation either in the annotation list or in the viewport, this will be highlighted in the annotation list. You will also see the possible options concerning the annotation and its replies.

Note:

The time will be displayed as **5h ago**, yesterday, 2d ago... To see the exact time, hover over the displayed time.

Note: In video annotations, start time and end time of the annotation is displayed in the list.

Tip:

If you click and hold the left mouse button on an annotation in the annotation list, the annotation becomes highlighted in the view.

From within the Annotation list panel, you can:

• **Set Review State** ✔ of the annotation

• **Zoom to annotation** 🔍

• If you are the author you can perform more actions via **More actions** •••

  • **Edit Annotation**
  • **Duplicate Annotation**

    Use this to make a variation (e.g. correction) of an annotation made by another user.

  • **Save Annotation**
  • **Delete Annotation**

    You can only delete comments that you have authored. All the replies to the deleted comments will also be deleted, irrespective of the author.

• Filter annotations by **User** or **Review State**.

• Click 🔽 **Edit Custom Filter** to get the **Custom Annotation Filter** window.

• **Lock Filter** by clicking the **pin** 📌.

If you lock a custom filter, it stays active for other documents and consequent viewer sessions.

4.2.11. Approval Details

In **Approval Details**, you can see:

• the current approval status
• the approval actions
• approval info.
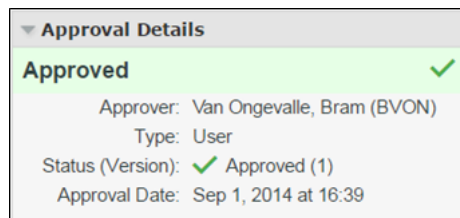
You can collapse/expand this widget and drag it around.

4.2.12. Content Widget

Artwork documents that contain Images, Symbols, Tables, Text Contents and Barcode as reference documents can be viewed in the viewer. You can view all the above content or filter the specific content to view in the Content Widget.

If the artwork (AI or normalized pdf) contains location information for any of the dynamic elements, then an annotation is shown around the dynamic element.
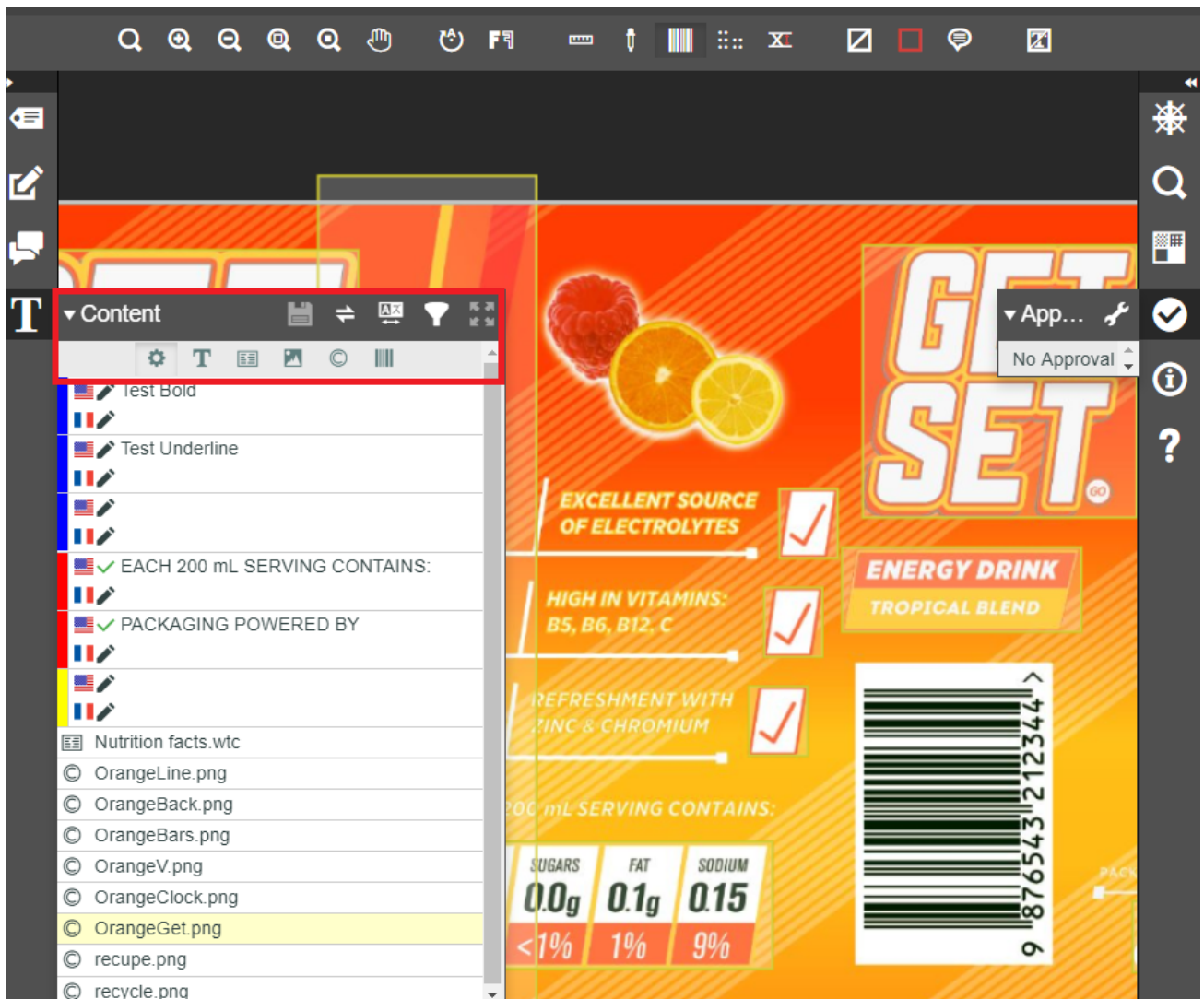
View and Filter Content

By default, when an artwork is viewed in the viewer, all the contents of the artwork are visible without any filtering.

You can view all the content in the artwork or you can view and filter the contents based on

- Text Content
- Tables
- Images
- Symbols and
- Bar codes

Note: If there are no document references used in the artwork, then the content widget will not be shown.

Map Locale to Languages

You can view the **locale id** present in the artwork and map it to the languages existing in the project. If either the Project or the Document attribute category contains the hard-coded attributes **LOCALE_XX**, then locale mapping will be automatically taken from these attributes. If no locale id are mapped to languages in the project or document attributes, then user can manually assign the values in the viewer.

Compare Artwork with the requirements.

Read more about it *here*.

4.2.13. 3D View

The **3D View** widget always shows the HTML5-version of the 3D viewer.

After the 3D generation, you can view the 3D mockups in this widget.

From within this widget, you can:

•
Open the 3D Viewer in a new window
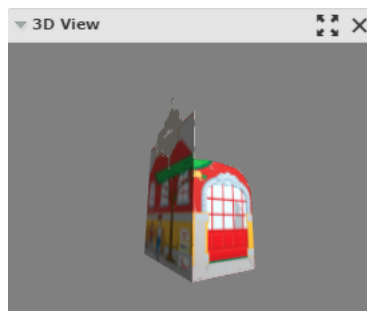
• close the **3D View** widget.

4.2.14. Navigator

When you open a document in the Viewer, you can view its thumbnail in the **Navigator**. This gives an overview of the current view position. Use this widget to quickly navigate through the entire document.

The navigator highlights the area visible in the view port with a dotted rectangle. If the zoom is not active, the dotted rectangle will be around the entire document.

When you are zooming in the document, the navigator shows the highlight area as the zoomed area. To pan the document, hold the mouse and drag this selected rectangle around. The central view port will display the area correspondingly. Clicking outside the rectangle will move the rectangle to the clicked point and update the current visible area.

You can see the current zoom percentage at the slider bar located below the document thumbnail. You can adjust the slider or click the **+** or **–** to adjust the zoom level.

Note: By default, this widget is available on the right sidebar. You can drag this widget to the center or to the other sidebar.

4.2.15. Info

This widget displays information about the document being viewed. You can see the following info:

• the size of the active document
• the size of the trim box of the current page
• the resolution of the active document. If you are in compare mode, it will display the resolutions of the current and reference documents.
• the current mouse position in the document
• the current selection within the current page document when using measuring tools

In this widget you can change the units for resolution and measurements. To change, click 🔧 and select your preferred units.

> **Note:**
>
> The changes made will be applied to all of the Viewer measurements for the current session:
>
> • Offsets in Compare panel
> • Information Pop-ups of all measurement tools and Caliper tools

> **Note:**
>
> The changes made from the info widget are applied only to your current session. The next time you start the Viewer, the units will be reset to the WebCenter User settings.

> **Note:**
>
> To switch units for resolution and measurement, use shortcut keys. While switching, it takes the values of the next unit from the drop down list.
>
> • **Ctrl+U** to toggle the units for the sizes used in the Viewer.
> • **Ctrl+Shift+U** to toggle the units for the current resolution and screen ruling units.
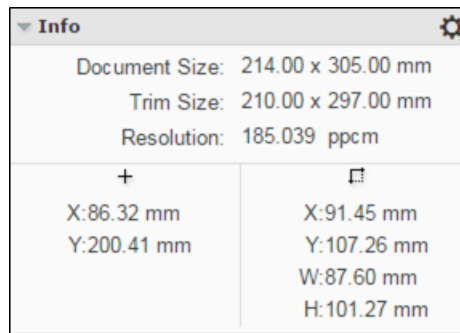
4.2.16. View

This widget contains advanced tools for view manipulation such as:

• *changing the background color of the image or window*
• *view from the back*
• *highlighting overprint with colours*
• *viewing or hiding the trimbox (margins)* and *clipping to trim box*
• *viewing in inverse colors*
• *compensate distortion and scaling while viewing*

Change Background Color of the Image or Window

You can use this tool to manipulate the view with a different background color other than white. This is especially useful when you are evaluating an image that will be printed in a colored background.

When you click the **Change Image or Window Background Color** ▢ tool, you will get an additional row of tools in the View widget.

- **Change Image Background Color...** ⬜

  When you activate this option, you will get a color picker. Select the image background color and click 🌈 to return.

  > **Tip:** You can also click outside of this color picker to close the color picker and inspect the image with the new background.

- **Change Window Background Color...** ⬜

  Select your color as described above and inspect the image with the new window color.

- **Change Both Image and Window Background Color...** ⬜

  When you activate this option, you will get a color picker to select a color for the image and window background. Select the image background color and click the 🌈 to view the result.

  > **Note:** Your color choices are remembered for your next session. When you enable the background color options, the same colors will be available.

- **Reset Background Colors** ↩

  > **Note:** The Viewer retains the last used colors for your next session. However, if you select different background colors for different pages or documents, those will be remembered only in the current session.

To turn off the tool and view the image with white background, click the ⬜ again.

View from Back

Use the **View from Back** 🔲 to mirror the view. You can see the image from the back and the channel sequence will be reversed.

This is a useful tool if you are inspecting an image to be printed on a transparent medium.

Set Overprint Highlight Color

The **Set Overprint Highlight Color** ![icon] lets you select a mask color to display in all areas where two or more active channels are overlapping. This allows you to check if trapping is done correctly.

Click the ![icon] tool on or off to have the overprint color highlight on or off.

Note: Click **Ctrl+H** to switch between No Overprint display and Overprint display with the last selected color

Invert View

Use the **Invert View** option to invert the image or images being viewed. While comparing, if you enable **Invert View** option, both the images will be inverted.
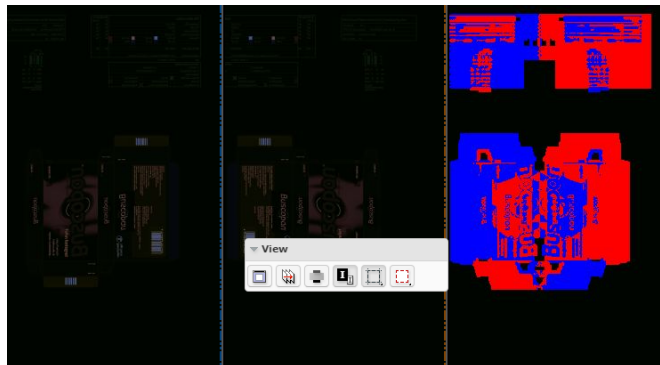
The orientation and alignment tools in the **Document Select** widget has **Invert Reference Image** option. When this is enabled, the reference image will be inverted.
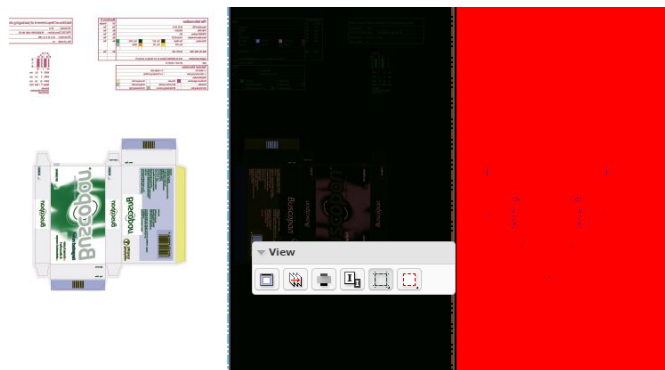
Note: If you enable the **Invert View** option in the View widget after inverting the reference image, your reference image will be displayed in the original state.

Show or Hide Margins (Trimbox)

The **Show/Hide Margins(Trim Box)** option allows you to toggle the margin (trim box) lines on or off.

While viewing an image with trim box information, this option will display the trim box as colored margin lines. If there is no trim box, the margin lines will follow the image outline (media box).
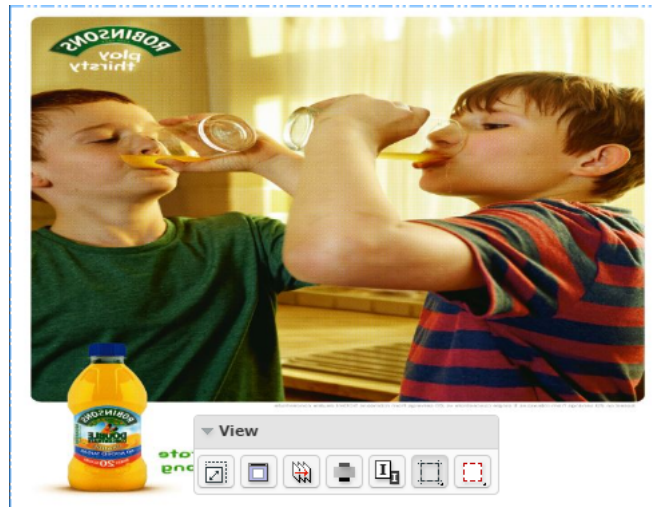
Right-click on for options:

- **Show margins on current page**
- **Show margins on both pages in reader spread mode**
- **Set margin (trim box) color** sets the margin color for the current image while comparing two images.
- **Set reference margin (trim box) color** sets the margin color for the reference image while comparing two images.
- **Set current and reference margin color** sets the margin color for both images while comparing.
- **Reset margin colors** reverts to the viewers default margin color settings.

Clip Document to Margin

The **Clip Document to Margin (Trim Box)** option limits the content to the trim box (margin).

Right-click on to get more options:

- **Clip Document to margin (trim box) in reader spread mode only** prevents overlapping page margins with image content in **reader spread** view mode. This option is useful while viewing multi-page documents.
- **Clip Document to margin (trim box)** clears the content outside the trim box. This is the same as a

    simple click on the **Clip document to margin** button.

Compensate Distortion and Scaling

Distortion is a technique used to pre-compensate graphics which will be printed with a non-uniform printing technology. Distortion is typically done during the RIP'ping process. In some workflows scaling is used in place of distortion to pre-compensate for distortion in printing process.

The **Compensate Distortion** tool allows to compensate both distortion and scaling.

You can use this tool while comparing files with and without distortion or with different distortion values.

> **Note:** This tool is available in the **View** widget only when the active or reference file has a distortion and/or scale.

Hover on the tool to see the current distortion and scale values for the documents.
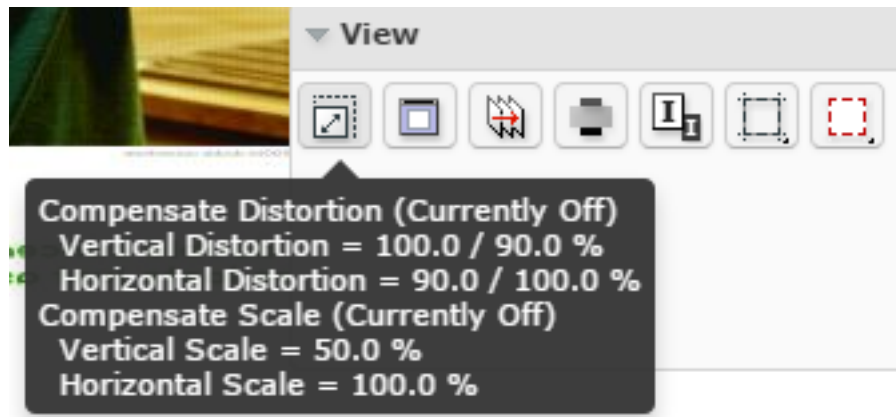
Use this tool to compensate:

- the distortion of the active and reference document when the documents only have distortion
- the scale if the active documents only have scaling
- both the distortion and scale of the documents if the active documents have both.

To activate the tool, click on the **Compensate Distortion** tool.
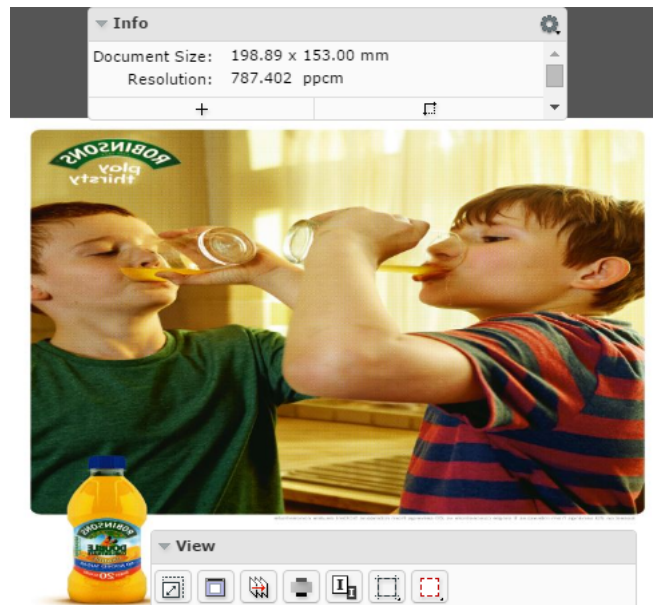
You can:

- **Compensate distortion only**

• **Compensate scale only**

- **Compensate both distortion and scale**
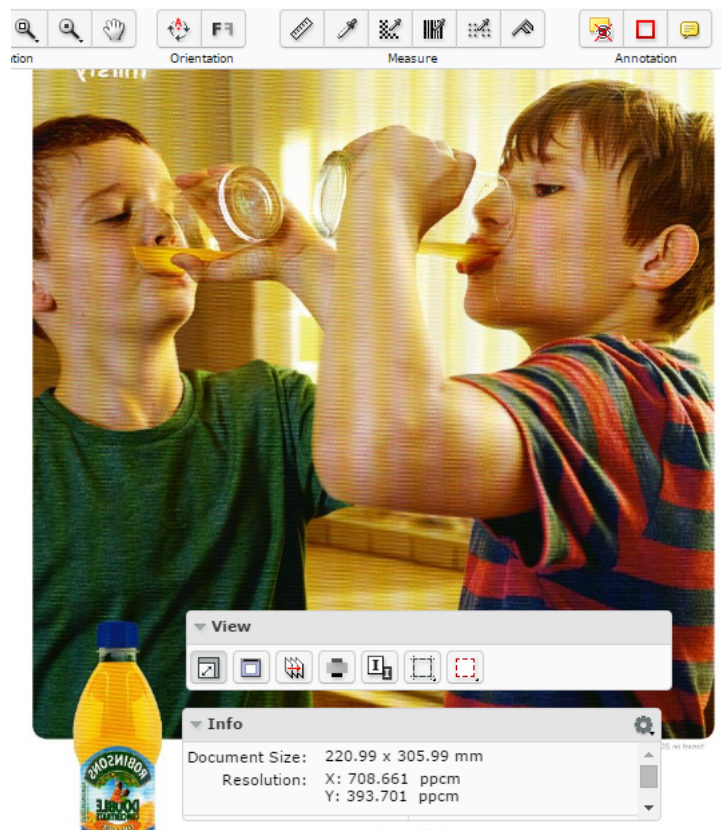
You can activate or deactivate one of these options by clicking on that option.

After the compensation of distortion or scale or both:

• the tool tip displays the updated distortion and scale information.
• the *Info* widget displays the updated resolution and size.

4.2.17. Attributes

If the document in the Viewer has an **Attribute Category** with a Viewer specific View, you will see the **Attributes** widget in the Viewer.

Note: If the document does not have any **attribute category** or an attribute category with Viewer optimized view, you will not see this widget.

When you have multiple Views, they are listed alphabetically and the first applicable view is enabled by default. You can:

•
   Save Attributes 💾 from this widget.

   Note: Only the users with **Project** / **Folder** level **Change Properties** permissions can change and save attributes from the *attributes* widget.

   If the user does not have permissions to edit the attributes, the editing and saving is disabled in the widget

Your unsaved changes will be notified with a **Save attributes** ![icon] warning. Click this to **Save**. When the data is saved, you will see a notification.

.

- **Switch View** ![icon] when you are a member of multiple Roles and/or Groups with dedicated Viewer views. Refer this *table*.

  Save your attribute changes before switching to another View. You will be warned if you try to switch views without saving your changes.
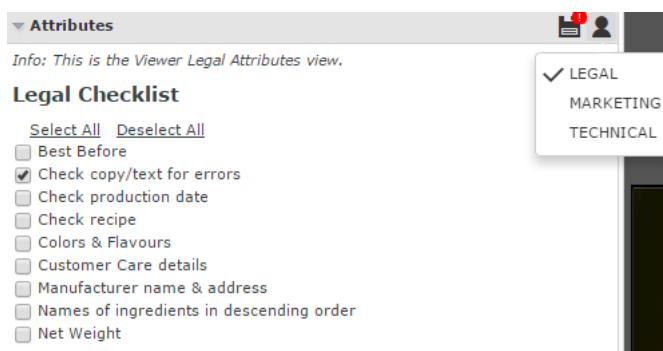
4.2.18. Channels

The **Channels** panel shows the file's channels and offers separation viewing possibilities.

Viewing Separations

Click the **View channels in separate windows** button ![icon] to switch to a tiled view of the individual separations. The separations will be visible in the same order as in the channel list.

The **composite** view will always be shown as the first view followed by the visible channels in the displayed order. Right-click ⊞ to choose from :

• **Automatic tiling**
• **Horizontal tiling**
• **Vertical tiling**

Viewing and Hiding Channels

Channels Widget displays the channel list in the printing sequence. The first in the list is a channel **All**. The list displays:

• activated channel 👁 button
• channel swatch indicating the color of the channel. In the case of **All**, swatch box will be white.
• the channel name

for each channel.

Use 👁 button next to the channel name to hide it.

Note:

By default all channels are enabled.

Viewing a single Channel

Right-click on the eye 👁 button of a particular channel to view it as a single channel.

When all the channels are displayed, clicking on **All** will show only the first channel.

Tip:

Deselect the selected channel to select the next one. This allows stepping through the channels one by one

From single channel viewing, click **All** to view all the channels.

Tip:

Alt + 1, **Alt + 2** …, **Alt + 9**	To select a particular channel in the sequence (from channel 1 to channel 9)
Ctrl + Alt + 0, **Ctrl + Alt + 1**… **Ctrl + Alt + 9**	To select a particular channel in the sequence (from channel 10 to channel 19)
Alt + N	To view a single channel.
	Use this to view the first channel when multiple channels are displayed. Also use this to step to the next channel while viewing a single channel.
Alt + A	To view all channels.

Editing the Channel Color in the Viewer

Click the color swatch next to the channel name to open the **Channel Colors** window. You can redefine the channel colors in the **Viewer**.

Original color definition: This section displays the name, the RGB values, the opacity and the color swatch of the original channel color.

You can redefine all these parameters in **Display color definition**.
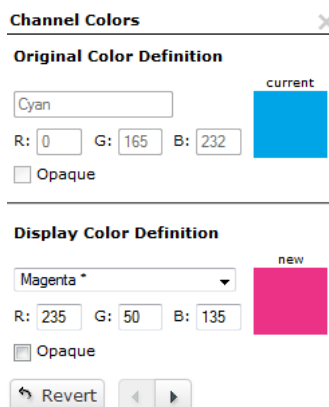
Display color definition: This section allows you to edit the color. You can choose a new color from the drop-down, edit the RGB values and make the color **opaque**. The color swatch will display the new channel color.

The **Revert** button resets the color definition back to the original.

The left ◀ and right ▶ arrows let you to step through all the channels from within the dialog.

Note: Editing color definitions in the viewer does not change the actual image file.

Viewing a Channel Opaque

Click on the **Show Single Channel as Black** ◣ button to make the selected separation/channel opaque.

Note: This setting is remembered the next time you open the Viewer.

Right-click ◣ to get the options:

• **show single channel in channel color**

In this setting, you see the separation in its original color.

• **show single channel as black**

You can view single channels in black instead of its defined display color.
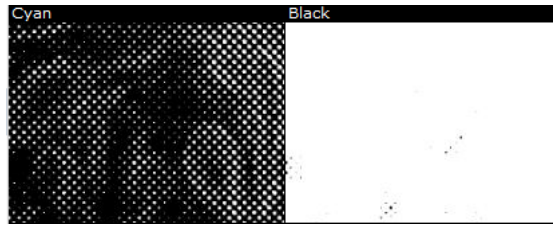
- **show single channel as black with show all effect** :

  This eases the detection of areas with small dots by using black rather than a grey value for a display pixel that represents a partially covered area in the channel.
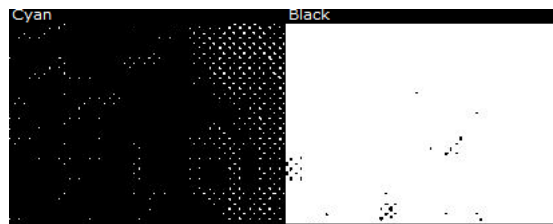
Changing the Channel Order

Select the channel you want to move and click either **Shift the active channel up** ▲ or **Shift the active channel down** ▼ arrow. You may also drag a channel to a different position to change the order.

Moving the channels down will put them later in the printing sequence. This would cover the other colors printed before.

Note: This only changes the order in the Viewer and does not influence the actual printing sequence.

Reverting the Changes

Reset channel order and color definitions button 🔙 will undo all display color edits by default. Right-click to specify :

- **Reset channel order only**

- **Reset color definitions only**

- **Reset all channel information**

4.2.19. CAD

The **CAD** panel will have options depending on the file you opened in the Viewer.

While Viewing CAD files and Manufacturing Data

CAD panel contains a list of layers and classes. You can select the parts of the CAD data to be displayed in the view. This panel is only available if the viewed document contains CAD data.

When you open a CAD document in the Viewer, this panel displays:

- **Layers** list:

  Here you can turn each CAD layer off so that it is hidden from the view. Only layers present in the CAD data are shown in this list.

- **Classes** list:

  Manufacturing data usually contains a number of one-up designs consisting of a number of layers. These layers belong to a layer class. In the **Classes** list, you can turn off the layer classes.

  - Click **All Layers** / **All Classes** to view or hide all data at once.

  - Use the eye button 👁 to select the layers or classes in view.

  - Right-click on the eye 👁 next to a layer or class to view just that one. All other layers / classes will be hidden from the view.

  > **Note:** The order of these layers and classes is defined in the CAD file.

CAD Options
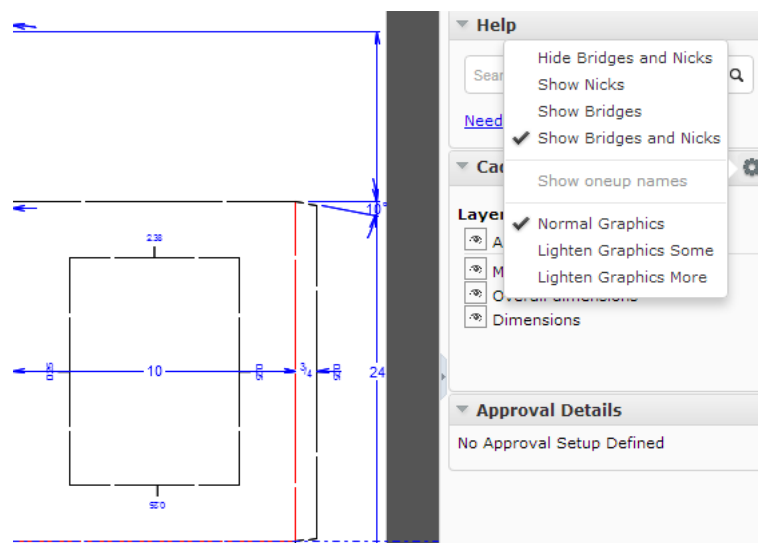
You can choose to view or hide Nicks and Bridges in the CAD file :

- **Hide Bridges and Nicks** or **Show Bridges and Nicks**

- **Show Nicks**

  Enable this to view Nicks in the display. You can also see the size of the nicks

- **Show Bridges**

  With this option, you can view the bridge-gaps.

- **Show one-up names**

  While viewing manufacturing data, you can see the names of the One-ups using this option. This option is turned off by default. This button is disabled when displaying a single design file.

While viewing CAD linked with Graphics

When a Graphics file with a reference CAD file is opened, the CAD line work is shown on top of the graphics file in the view. You have also options in the **CAD** panel to:

- **View both Graphics and CAD data**

- **View Graphics only**

- **View CAD data only**
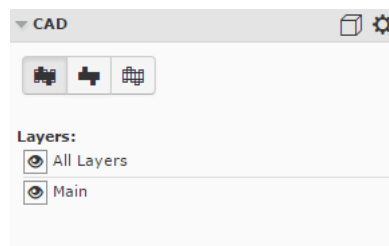
In CAD options, you can also set various degrees of dimming the graphics data to make the CAD data more visible:

- **Normal Graphics**

- **Lighten Graphics some**

- **Lighten Graphics more**

Note: When you re-open the viewer, CAD line work will be displayed on top of the graphics file. The modes in the CAD widget are not persistent.

While viewing CAD in 3D

While viewing a CAD design file (or a *graphic file with CAD reference*), the CAD widget will have an **Open 3D View** button.

Click to open the file in the *HTML5 Collada Viewer*. The 3D Viewer will open up in the *3D View* widget.
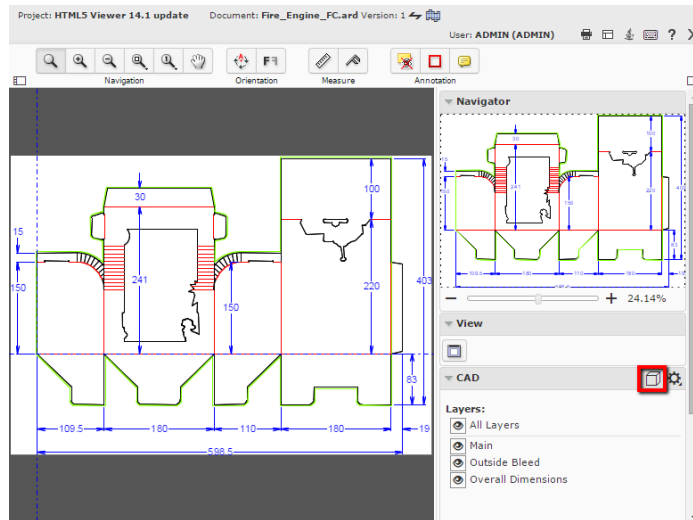
Note:

Once you have opened the file in 3D, the **Open 3D View** button is added to the top tool panel.

4.2.20. Help

You can search for information in the **Search Knowledge Base** panel from within the Viewer window.

Tip: To access online help, use the keyboard shortcut **F1** or click .

4.2.21. Annotating in the Viewer

You can use the Viewer *annotation tools* to add annotations or comments to the Viewed image.

To add an annotation, Click on either the *Add Annotation* on page 151 button or the *Note Annotation* on page 155 button.

Click the to get a list of additional annotation options. If you select a different annotation type, this button will change to the selected annotation type.

Add Annotation

- Click the **Add Annotation** button.
  This opens a sub-menu of different annotation tool options. You can use these with a click-drag-release action:

  - **Rectangle Annotation Tool** : Use this to select a rectangular area where you can annotate.

- **Oval Annotation Tool** ⬤ : Use this to select an oval area within the image.

- **Freehand Annotation Tool** 🖉 : Use this to make a freehand marking within the image.

- **Line Annotation Tool** ╱ : Use this to make a line marking on the image.

- **Arrow Annotation tool** ↗ : Use this to create an arrow marking on the image. The arrow head will be at the place where the mouse is released.

- **Highlight Annotation Tool** 🔳 : Use this to select an area and highlight it in transparent yellow overprint.

- **New Global Rectangle** ▢ : Click on this to create a rectangle annotation surrounding the entire image without the dragging action. You may create multiple global rectangles.

  You can also re size this global rectangle.

- **Change default annotation line color...** ■

  When you click this color block, a window opens from which you can select a new color. This new preference is saved for all future annotations.

- **Reset default line color...** ↰

  When you reset the color, a message asks if you want to update all the annotations with this color.

- From the *sub-menu*, select the type of annotation.

  The Viewer remembers the selected tool until another tool is selected.

- Optionally, change the color of the annotation line. Otherwise, the default color (red) will be used.

  You can change the annotation line color from the *annotation window* as well.

- Click, drag and release within the image.
  You can type and format your annotation in the *Annotation Window* on page 152. You may also **Change Color** of the annotation.

- Enter your comment inside the annotation window and save. Read also *Annotation Window* on page 152.

Annotation Window

While creating an annotation, an annotation window appears where you can add comments.
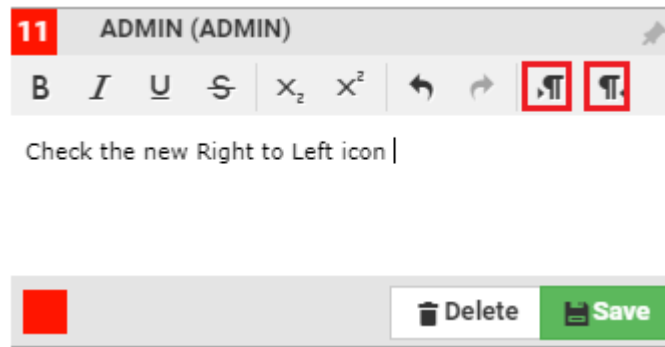
You can emphasize parts of the text using the formatting options. You may also undo and redo any changes you made in the text.

You can also change the direction of the text based on the language used for annotations. For example, you can use right to left or right to left buttons when working with languages like Arabic or Hebrew.

Tip: You can *move* the window to move the annotation to a new position.

Annotation Pop-up

If you select an existing annotation, the corresponding annotation pop-up opens. The pop-up contains :

- the *type of annotation*

- the annotation sequence number
- the annotator's name
- the annotation text
- the list of replies
- the list of review states
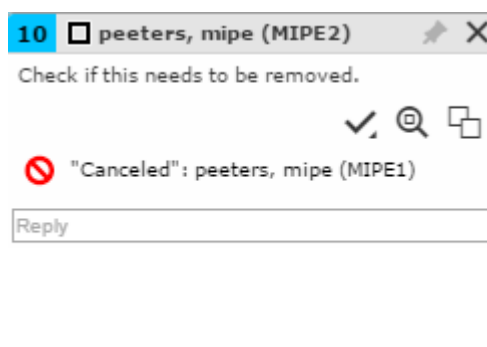
In the annotation pop-up you can:

- **Pin** the annotation pop-up.

  By default, the annotation pop-ups are unpinned. Use the **Pin** icon to pin the annotation pop-up to the location. To unpin, click on the **Unpin** button. The setting you choose will be remembered.

• **Close** the annotation.

• **Set the review state** ✔ of the annotation

Choose the review state from the sub-menu.
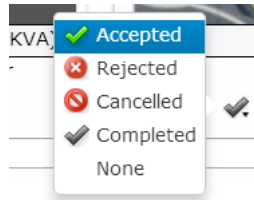
The annotation list panel will display the new review state including the name of the reviewer. Save your changes after setting the review state.

• **Zoom to annotation** 🔍

• do more actions via **Actions Menu** •••

  • **Edit annotation**

  • **Delete the annotation**

    You can only delete comments that you have authored. All the replies to the deleted comments will also be deleted, irrespective of the author.

  • **Duplicate the annotation**

    Use this to make a variation (e.g. correction) of an annotation made by another user.

  • **Save the annotation**

Note: Only the original author can edit, delete or save.

• **Reply**. Click on the **Reply** field to get a rich text editor and type in your reply. You can either **Save** or **Cancel** the typed reply.

  These replies are visible in the annotation window as well as in the *Annotation List*.

Tip: Only two of the latest replies are visible in the window. Click **Show x more replies** to view the rest of the replies. To view less replies, click on the **Show less replies** button.

Note:

In the **Show only selected annotation** setting, the annotation pop-ups of the selected ones are shown.

When this setting is turned off, select **Show only selected annotation pop-up** to view the selected one's pop-up and all other annotation markings. This setting overrules the **Pinning**.

Read more in *Annotation Options* on page 158.

Note Annotation

You can create a text annotation at any specific point on the image using the 💬 **Note Annotation** tool.

*   Select the 💬 Note annotation tool

    You can also set the color using :

    *   **Change Default Note Annotation Color**. The default is yellow.

        When you click this color block, a window opens from which you can select a new color. This new preference is saved for all future note annotations.

    *   **Reset Default Note Annotation Color** ↰

*   Click on the point on the image where you want the note.
    The *Annotation Window* on page 152 will appear where you can enter your note.

The annotation will be marked by a small note icon in the image.

Note: When you select a note annotation, it will be displayed in inverted colors within the view.

Editing Annotations

You can edit or move the annotations in the Viewer.

*   You can select your *annotations* by:

    *   grabbing the annotation shape. When you hover near an annotation shape, the mouse pointer changes to a select arrow.
    *   selecting it in the *Annotation List* on page 129. T

    Note:

    When selected,

    *   the annotation is highlighted in the annotation list with a yellow background.
    *   the annotation shape border thickness becomes double.
    *   the annotation shape displays handles to enable resizing.
    *   the *Note Annotation* on page 155 color is inverted in the view area.

    *   a rectangle, line, arrow, oval and highlight annotations display **anchor points**.

*   You can drag the annotation using the mouse.

    *   You can move a *Note Annotation* on page 155 or a Rectangle annotation by dragging it. When you hover near a note annotation, the mouse pointer changes to a select arrow.

    *   To resize **rectangle annotations**, click the anchor point and drag either one of the four border lines. You can also grab one of the four corners and resize with the help of a resize cursor. To move a rectangle annotation, click and drag it to the new location.

    Note: Highlight annotations can be modified in the same way as Rectangle annotations.

- To change an **oval annotation** shape, use any of the anchor points. Click and drag to move the annotation.

  - Hold and drag the end-points to modify **line annotations** or **arrow annotations**. You can also select and drag the line or arrow to another location.

  - Select and drag **freehand annotations** to change its location within the image. However, the size and shape cannot be changed.
- You can use **More actions** > **Edit annotation** in the annotation window (or in the *Annotation List* on page 129) to edit the annotation or reply text.

  Note: This is only possible if you are the author of the annotation/reply.

  After editing, you can either **Save** or **Cancel** the text changes.

Linking Annotations

You can add multiple annotation areas to a single annotation note.

The linked annotations share the same text, sequence number, replies and review state. This helps you to draw multiple areas to one single annotation.

1. Select the annotation to be linked with the new annotation shape.
2. Click on **Add Annotation** and choose the annotation shape.
3. Create the new annotation holding the **Shift** key.
   The new annotation is linked to the selected annotation. The new annotation will share the same annotation pop-up. You can connect many locations in the same image to one annotation this way.

Duplicate Annotations

You can duplicate annotations that were created by you or another user.

-
  To duplicate an annotation created by another user, click the Duplicate icon

- To duplicate your own annotation, use **More actions** > **Duplicate Annotation** in the *Annotation Pop-up* on page 153

The annotation (and any linked annotations) from which you duplicated will be made into a new annotation thread with your name as the author and the current time. The text will be duplicated as well.

The color of the duplicated annotation will be the your default color for that annotation type.

Delete Annotations

You can delete your own annotations using the **delete** key. You cannot delete replies to your annotations this way.

You can also delete annotations using **Annotation List** > **More actions** > **Delete Annotation**. From the *Annotation Pop-up* on page 153, use **More actions** > **Delete annotation**.

You have to confirm the deletion when you are deleting an annotation. However, if you are deleting replies, a confirmation is not required.

Save Annotations

Your annotations and changes to annotations are not automatically saved to the server.

If you

- create a new annotation
- add/edit a reply
- move the pop-up
- pin/unpin pop-up
- change the annotation color
- set a review state
- edit text
- delete an annotation or a reply

the **Save** in the *Annotation List* on page 129 warns that there are unsaved annotations (or unsaved deletions). Save these annotations or changes by either clicking this icon, or by using the Save option in the *Annotation Pop-up* on page 153.
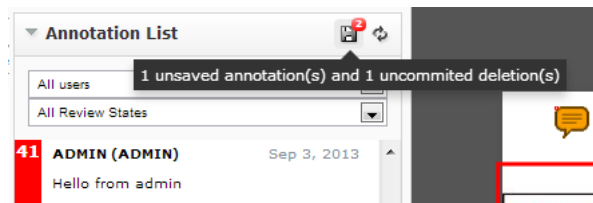
A message will indicate that the messages were saved successfully.

Viewing Annotations

When you open an annotated document, the annotations will be visible on the document and the *Annotation List* on page 129 widget.

If you select an annotation either in the annotation list or in the viewport, this will be highlighted in the annotation list. You will also see the possible options concerning the annotation and its replies.

Note:

The time will be displayed as **5h ago**, yesterday, 2d ago... To see the exact time, hover over the displayed time.

Note: In video annotations, start time and end time of the annotation is displayed in the list.

Tip:

If you click and hold the left mouse button on an annotation in the annotation list, the annotation becomes highlighted in the view.

Step Through Annotations

You can step through all the listed annotations using the 👣 button. By default it will step through each annotation. After the last one, it will return to the first annotation again.

Tip: Hold the **Shift** and click 👣 to step backwards.

When you select an annotation, its comment window will appear.

You can set your preferred step through setting in *Annotation Options* on page 158. You can set your preference as any of the four options available.

- **Step by Thread**: This is the default mode. Will step through each annotation, but not through the replies to the annotations.
- **Step by Decreasing Date**: This mode will step through all annotation comments and replies sorted according to their modification dates.
- **Step by Thread - Fit View**: Same as "by thread", but will zoom the view to fit the selected annotation.
- **Step by Area/Position - Fit View**: Will step through all positions/areas of linked annotation and zoom the view to fit the selected annotation part.

Annotation Options

Step through Options

You may choose to step through the annotation in any of the following ways.

- **Step by Thread**: This is the default mode. Will step through each annotation, but not through the replies to the annotations.

- **Step by Decreasing Date**: This mode will step through all annotation comments and replies sorted according to their modification dates.
- **Step by Thread - Fit View**: Same as "by thread", but will zoom the view to fit the selected annotation.
- **Step by Area/Position - Fit View**: Will step through all positions/areas of linked annotation and zoom the view to fit the selected annotation part.

Show only Annotations

Use these two options to set the visibility of annotation and annotation pop-ups in the view. This helps in simplifying the view by displaying only targeted annotations.

- **Show only selected annotation**: Only the selected annotation is shown in the View and the pop-up appears when the annotation is selected.

  In this setting you will see a warning.

```
Warning! Only the selected annotations is shown.
```
- **Show Only Selected annotation pop-up**

  You can choose this option when the **Show only selected annotation** is unchecked.. All the annotations will be in the View, but only the selected pop-up will be present in the view.

  Note: This setting overrules the *Pinning*.

- A warning message will indicate your current setting.

```
Warning! Only the pop-up of the selected annotation is shown.
```

Always show Annotation pop-ups

- Enable **Always Show Annotation Pop-ups** the *Annotation List* on page 129 settings. This setting is persistent and will show the pop-ups when you reopen the Viewer.

  When this setting is enabled, the **Close** button will not hide the pop-ups.

Show or hide sequence label on the annotation

Use this option to show or hide the sequence number of annotations.

Unlinked annotations with sequence label:

For linked annotations, the sequence number remains the same for all linked parts. A second number after a hyphen indicates different annotation areas.
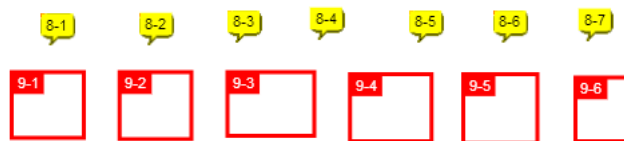
Show or hide character and line count

You can track the exact number of characters and lines in the annotation texts using this option.

When you enable this, the character and line count will be shown in the *Annotation pop-up* and in *Annotation List* panel.
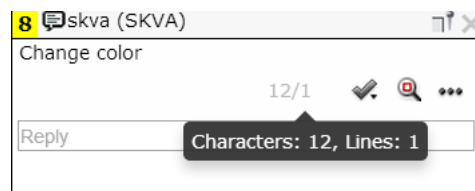
To turn this off, disable this setting in the **Annotation Options**.

Fit View to the selected Annotation
Use this option to automatically fit the view and the zoom to the selected annotation. The Viewer will remember this setting and will return to this view when you reopen.

Ordering the Annotations

You can order the annotations in the *Annotation List* in two ways:

- **Ordered by creation date**: All annotation comments and replies will be sorted according to their creation dates.
- **Ordered by modification date**: All annotation comments and replies are sorted according to their modification dates.

Filter Annotations

In the *Annotation List* on page 129, you can :

- filter annotations by user / author.

  When you select a single author, only the annotation threads and replies made by this author is displayed.
- filter annotations by its review state.

  - **Any Review State** will select all where there is a review state on the main annotation or any of the replies made.
  - **No Review State** will select all where there is no review state on the main annotation. If the review state is "None", it will not be shown.
  - **Accepted** will select all annotations and replies with Accepted review state.
  - **Rejected** will select all annotation threads and replies where the review state is Rejected.
  - **Cancelled** will select all annotation threads and replies where the review state is Cancelled.
  - **Completed** will select all annotation threads and replies where the review state is Completed .

- **None** will select all annotation threads and replies where the review state is None.

- You also can filter using :

  - **All Except Accepted**

  - **All Except Rejected**

  - **All Except Cancelled**

  - **All Except Completed**

  - **All Except None**

- customize your own filter combining the author and review state. Read in *Custom Filters for Annotations* on page 161.

Custom Filters for Annotations

Use custom filtering to create advanced filters.

Click the **Custom Filter** ▼ button to enable this option.
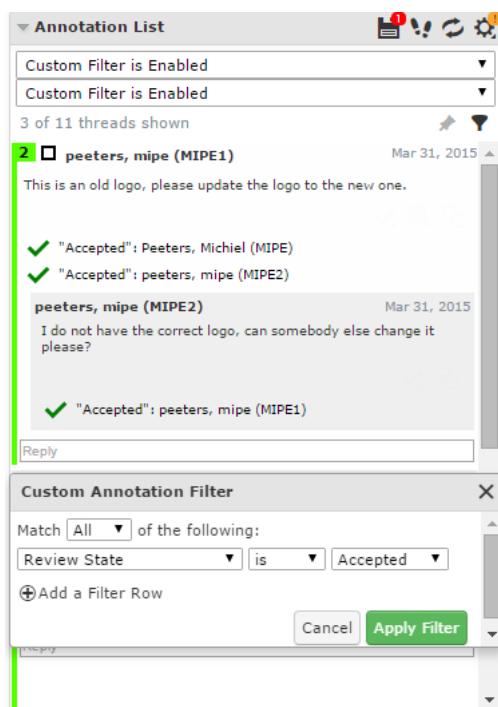
In the **custom annotation filter** dialog, you can combine the basic **Author** and **Review State** filters with a logical AND/OR operator.

Click **Apply Filter** to apply the changes and close the dialog. An active custom filter will show a message **Custom Filter Enabled** in the normal filter.

Locking the custom filter

Click the pin ![pin button] button to lock the custom filter. If you lock a custom filter ![green pin], it stays active for other documents and consequent viewer sessions.

Note: You can always switch back to the basic filter by selecting a value from the drop down.

Hide Annotations

To hide annotations, you can click ![hide annotations icon] **Hide annotations** in the toolbar. You can view them again by clicking on the same button.

Viewing Annotations in Compare

The annotations are hidden by default when comparing two documents. Set **Show Annotations for**:

• **Current**

• **Reference**

to display annotations from either the current or the reference version.
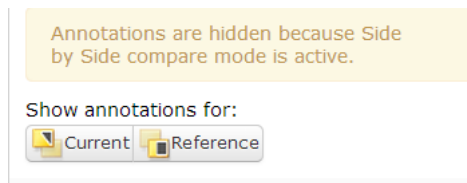
In **Blinking** compare mode, the annotations are hidden.

Note:

You can edit the annotations from the current document, but not from the reference document.

Viewing External Annotations

You can view annotation information in the Viewer even when the annotations are created by external tools such as Global Vision nodes of Automation Engine.
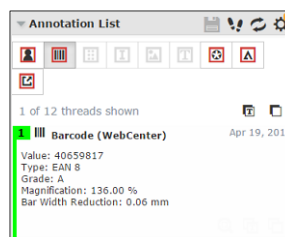
The Global Vision nodes create these five different types of annotations in an Automation Engine workflow:

- **Barcode Annotations**

- **Braille Annotations**

- **Spell Check Annotations**

- **Artwork Compare Annotations**

- **Text Compare Annotations**.

  The Viewer also supports:

  - Acrobat Annotations from Adobe Acrobat

  - Editor Annotations from the Esko editors

  - External Annotations coming from an unknown external tool.

Note: To view an external annotation in WebCenter Viewer, you have to ensure that the .xfdf files are uploaded along with the pdf document.

When a document has Global Vision annotations, a group of buttons is shown in the **Annotation Widget** of the Viewer. Select any of them to see their information.

There is also a button for **User Annotations**. Learn more in *Viewing Annotations* on page 157.

Note:

- Global Vision annotation buttons are only active when the document contains such annotations.
- The other annotation buttons are only shown when the document contains such annotations.
- All these externally created annotations are read-only. You cannot reply to them.
- The **Filter** option is only displayed for user created annotations.

- You can view the **Braille**, **Barcode** and **Spelling** annotations on a single document checked in Automation Engine.

• **Artwork Compare** and **Text Compare** annotations are available when you have compared documents in Automation Engine.
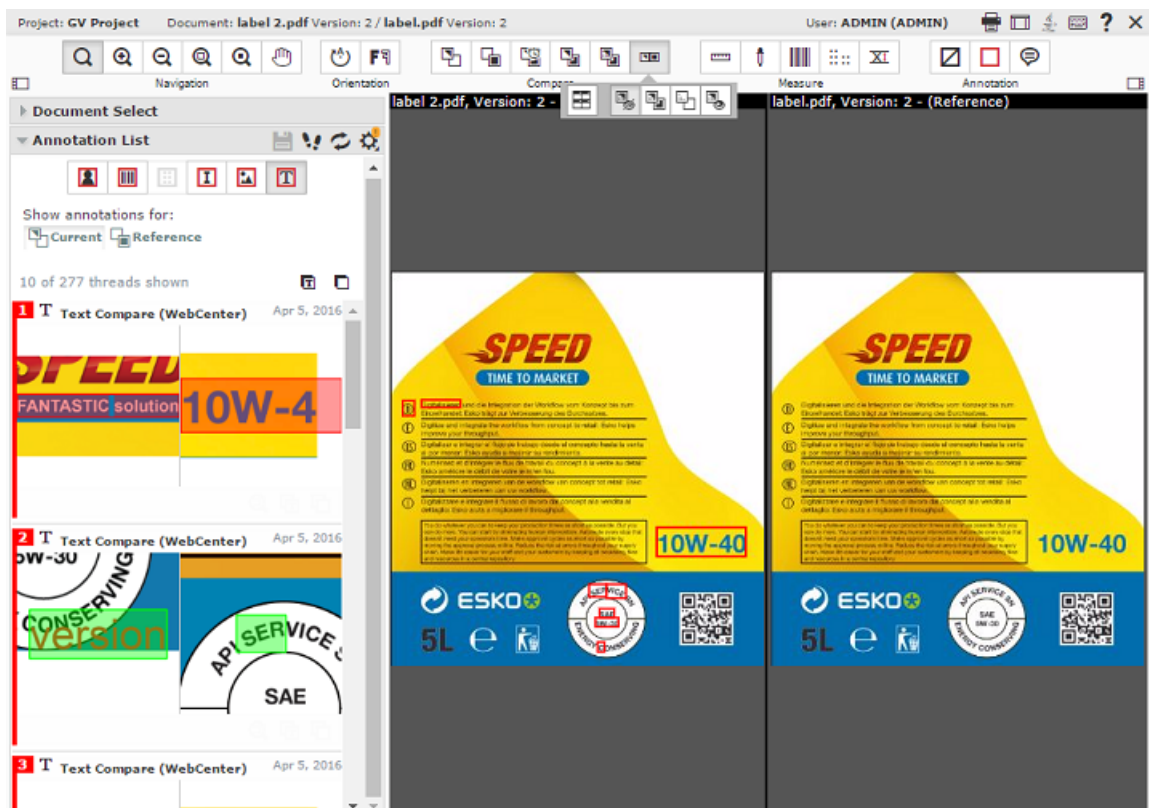
Creating User Annotations out of External Annotations

Creating User Annotations out of External Annotations

You can copy and create new **User Annotations** out of the external annotations that a document contains. You can choose to create from any one or all the external annotations; with or without text.

Note: You cannot create text annotations from Global Vision **Artwork Compare Annotations**.

To create such **User Annotations**:

- Click ⬛ **Create a User Annotation Here** button on an external annotation thread. The annotation is created.

- Click ⬛ **Create a Blank User Annotation Here** button on an external annotation thread. The annotation is copied, but without the text.

- Click ⬛ **Create User Annotations From All Annotations** button located on the **Annotations Widget**, when filtering on a type of external annotation. This creates **User Annotation** out of all currently displayed annotations.

- Click ⬛ **Create Blank User Annotations From All Annotations** on the **Annotation Widget**, when filtering on a type of external annotation. This creates **User Annotations** out of all currently displayed annotations but without the text.

The newly created annotations have the same properties and are shown in the **User Annotations** list.
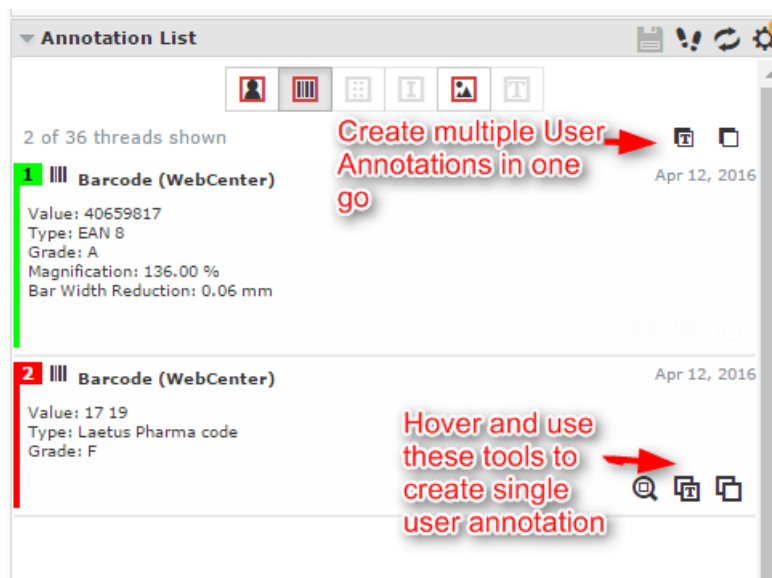
Annotating in a Multi-page / Page List Document

While *Viewing Multi-Page Documents and Page Lists* on page 184, you can make annotations:

- on the active page
- on the adjacent page
- across both pages

When you draw annotations in the non-active page area, a message will ask you to confirm if you want to draw an annotation outside the current page. This warning does not appear when you draw an annotation across both pages.

Note: *Reader Spread View* on page 185 displays only the annotations from the currently active page.

4.2.22. Approval

You can evaluate and approve the documents in approval cycle from the Viewer using the *approval tools*.

You can view the status of the approval in the viewer.

Clicking on any of the *approval tools* opens the approval pop-up.

- You may set a condition for your approval (if the approval cycle allows this). Select **Set approval condition** and type in your condition.
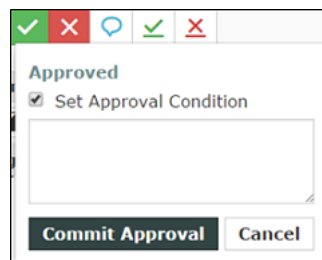
- You can give a reason for your rejection in the text box.
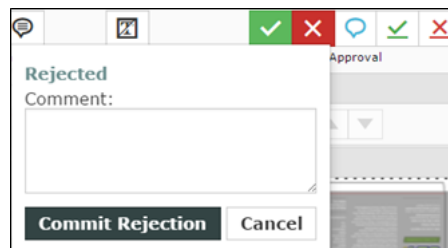
> For example, if you reject a document because of a specific image detail, use *annotations* and add this as an approval comment.

- You may also just **Comment** without approving or rejecting. Then the status of the document is in Pending, until you approve or reject it later.

- **Commit** button to save your approval or rejection and comments to the server.

The approval status will be displayed in the top toolbar in the place of Approval tools. This status will be **Pending** if the **Approval Cycle** is still on-going.

> **Remember:**
>
> If you are in the Compare mode, you can only do the approval actions on the current document page.
>
> Read also *Evaluate a Document in the Viewer* on page 167

Evaluate a Document in the Viewer

When you evaluate a graphic file or a page list (see *Document Types* on page 58 for information about the supported file types), you can first open it in the Viewer to look at it in detail. You can then approve, reject, or share a document for approving or viewing or add a stage or comment it directly from the Viewer.

1. Click the document's thumbnail or the 🔍 button.

    You can do this from:

    - the **My Work** page (under **My Approval** if you have documents to approve or under **Approvals to Follow Up** if you are an **Approval Master**),
    - the **Documents** tab in the project,
    - the header of the Document Details page.
    - the viewer

2. In the top toolbar, click:

    - ✅ to approve the document,
    - ❌ to reject it,
    - 💬 to comment it,
    - ☑ to forward approval request
    - ✓ to force approve it if you are a Project Manager
    - ✗ to force reject it (if you are a Project Manager).

    Alternatively these options are also available in the **Approval Details** widget. This is available only if the user has **Change Approval** permissions.

    > **Note:** You can view the status of the approval of the document in top tool bar.

3. In the pop-up that opens, do the following:

if you are...	you can...
approving or force approving the document	set a condition for your approval **if the approval cycle allows this** (see *Allow Conditional Approval or Not* on page 281): select **Set Approval Condition** and type your condition in the box.
rejecting or force rejecting the document	type a reason for your rejection in the box.
commenting the document	type your comment in the box.

4. If the user has **Change Approval** permissions, then the user can access the **Approval Setup** in the

Approval details widget. Click ![wrench icon] to open the **Document Approval Setup** pop-up window. User can perform all actions as specified in

Defining Approval Settings on page 273

5. It is possible to also Edit the approvers when the approval stage is in progress. When you click on the **Edit Document Approval Setup** , you can add a new approver or replace an existing approver based on the permission you have.

You can read about it in *detail*.

6. Enter your password, if your WebCenter server requires it.

In case, the approval cycle is completed and the document is in Approved state, then the user cannot make any changes to the approval cycle from the viewer.

7. Click the **Commit** button.

A warning message is shown, if unsaved annotations are present, when you try to **Approve** / **Reject** /**Comment** on a document.

Once you have approved or rejected the document, you may not change its approval status later (only a **Pending** status allows future changes).

If you have entered an approval condition, a rejection reason or a comment, it will be shown in:

- the **Approval** tab of the Document Details page,

- the **Action History** tab of the Document Details page,

- • the Java **Viewer**'s **Document History** panel.

  - the **Approval Details** panel.

To see all the documents you have recently evaluated, go to **My Work** > **My Recently Submitted Approvals**.

Note: If you cannot see **My Recently Submitted Approvals**, go to **My Work** and add it to your **My Work** page.

Forwarding Approvals from WebCenter Viewer

An Approver can forward a document for approval to another user(s) from the viewer itself. **Forward** option is enabled based on the preferences set by the **Administrator** in the Security Preferences.

You can view the **Forward** button in the document and clicking it opens the **Forward Approval** window. You can select the User(s) from the list of approvers available or you can enter the email id (unregistered user) for which you wish to forward the document for approval.
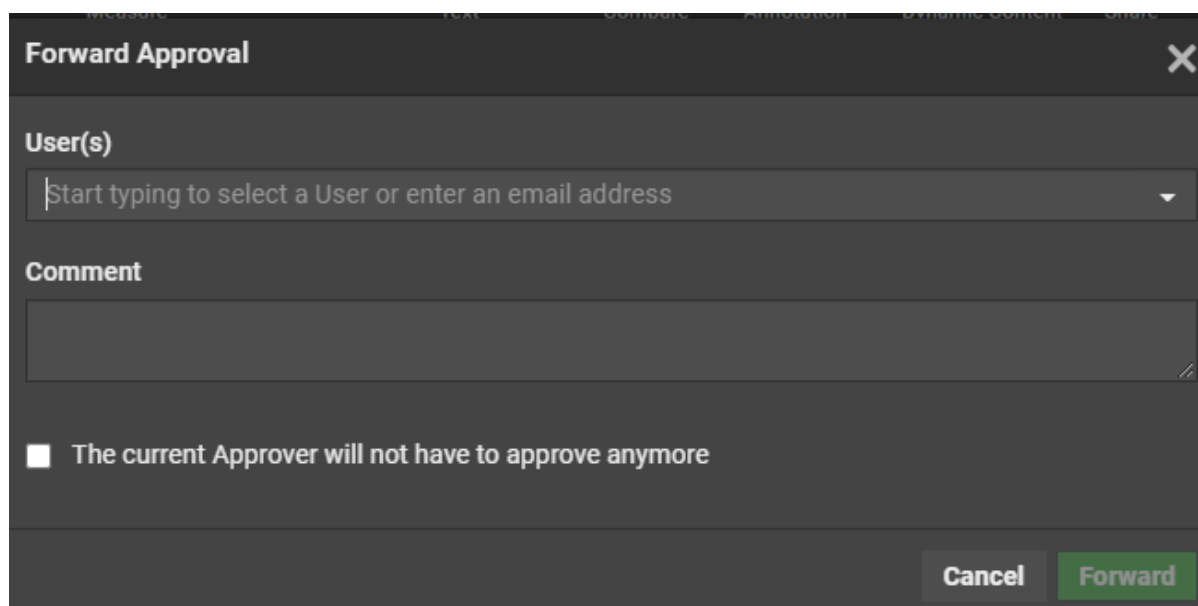
Option to Forward and remain as Approver or not

Approve user has an additional option to forward the document for Approval and remain as Approver or can forward the document and not remain as Approver.

4.2.23. Compare Documents in the Viewer

You can compare two versions of a document or two documents in the Viewer. Use the different comparison modes to have a close look at the differences between the two files. First, *select the documents* to compare and then *align* them as required.

Once you have opened the documents to compare, there will be extra comparison modes buttons in the *Top Tool Panel* on page 111, *Channels* on page 145, **Orientation and Alignment** and **Annotation List**.

Click...	to...
View Current Version	view the current version (the file in the first document selector). See: *Show Current and Show Reference Modes* on page 179
View Reference Version	view the reference version (the file you opened in the second document selector). See: *Show Current and Show Reference Modes* on page 179
View Both – Blinking	keep switching from the first to the second file rapidly. Read details in *View Both - Blinking* on page 179
View both – Show on Top	view both files on top of each other.
Difference Compare Mode	view both files on top of each other and highlight the differences in red. Read more in: *Difference Compare Mode (View both highlight differences)* on page 180
View both – side by side	view both files side by side.

Note: Comparison of 3D files are possible with all the options above except **Difference Compare Mode**. You can read more on 3D compare at *Comparing 3D documents* on page 183

Note: This feature is not available for video files.

Checklist for Approval in Viewer

You can set up validation fields which are to be filled mandatory, before the approval in the viewer. To set up validation, ensure that you have assigned an attribute category with a Viewer view of a document that contains required attributes.

In case, the validation fields are not filled, then you cannot approve the document, although comments may be updated.

• The validation criteria may be set based on the role in which the user is approving. For example, Artwork Designer Role may have to enter the answer for the question1 and 2, while Marketing Role has to answer for question 3 and 4.

- If there is only a Viewer View, then the view is validated regardless of role. If there is a specific view for the role, then that view is validated.
- If there are views for multiple roles that the user has, then the user approves on behalf of each of the role and all the role views are validated.
- If there is no view for the role the user is approving, but there are views for other roles the user could approve as, no validation is done.

> **Note:** **Force Approve** and **Force Reject** options override filling the mandatory fields.

Channel Matching in Compare Mode

Channel Matching in Compare

The **Channel Matching** influences the way differences in images are displayed while comparing them. For example :

- differences in display color of the same channel in the **current** and **reference** document

- differences in ink names. For example, a design ink name could be different from its production ink name.

When a **Compare To** (reference) document is selected, a message may prompt you to open the *Channel Matching Dialog* on page 171. This happens only when there are unmatched channels in one of the documents.

Alternatively, click on the **Channel Matching** button to open the *Channel Matching Dialog* on page 171.
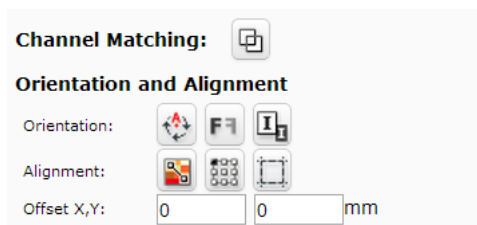
Channel Matching Dialog

channel matching allows linking channels that have been changed in one of the documents/versions while comparing. Channel matching can be done automatically or manually.
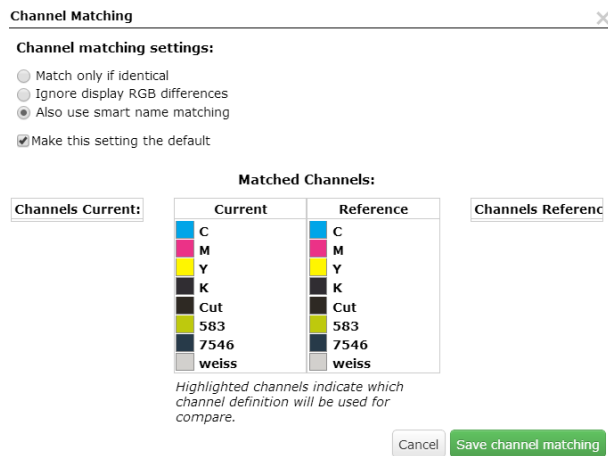
There are three settings:

- **Match only if identical**: Select this to match only the channels with identical names and display colors.

- **Ignore display RGB differences**: Select this to match channels with matching names. This setting ignores the display color differences.

- **Also use smart name matching**: Select this to match the channels with related names. For example :

  - when the names differ in the letter case (Magenta - magenta)
  - when the names differ in color book specification (660 - Pantone 660 C and Cyan-Process Cyan)
  - when the names are known abbreviations. Example C – Cyan

  Note: This setting ignores display color differences.

Note: The selection of a particular channel matching setting applies only to the current document. To make it default, enable the **Make this setting the default** check box.

It is possible to edit channel definitions of the current image to match those of the reference image (or vice versa). Read in *Manual Channel Matching in the Viewer* on page 172

Manual Channel Matching in the Viewer

The *Channel Matching Dialog* on page 171 displays four channel columns listing:

- the **Channels Current** and the **Channels Reference** columns display the unmatched channels.

- the **Current** and the **Reference** columns represent the matched channels. Matched channels are displayed next to each other.

1. Drag the channel to be matched from the **Channels Current** column to the **Current**.
2. Drag the corresponding channel from the **Channels Reference** column to the **Reference**.
3. Click on the Channel from which the definition has to be copied. The clicked channel will be highlighted in the dialog. This indicates that the corresponding channel copies the definition of the highlighted one.

Matched Channels:

Channels Current:	Current	Reference	Channels Referenc
anva 350 C	C	C	583
anva	Y	Y	7546
877	K	K	weiss
Artios Crease	M	M	
	Artios Cut	Cut	

Highlighted channels indicate which channel definition will be used for compare.

Cancel | Save channel matching

4. Click **Save Channel Matching**. After saving, the modified channel is marked with an asterisk * next to the name.

Matched Channels:

Current	Reference
C	C
Y	Y
K	K
M	M
Cut *	Cut

Highlighted channels indicate which channel definition will be used for compare.

Note:

Channels displayed in bold in the matched columns cannot be unmatched.

If you manually move the channels from the matched lists to the unmatched lists, the channel definitions are reset.

Using Orientation Tools while Comparing

Use the **Orientation** tools to rotate, mirror or invert the reference document / version relatively to the current document / version.
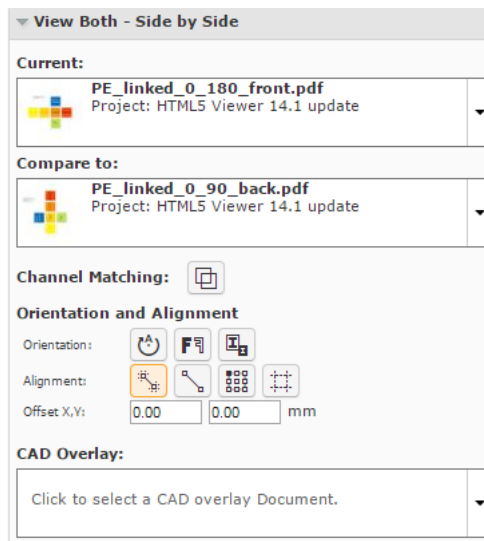
Use:

- **Rotate** to rotate the reference document.

- **Mirror** to mirror the reference document.

- **Invert** to invert the reference document.
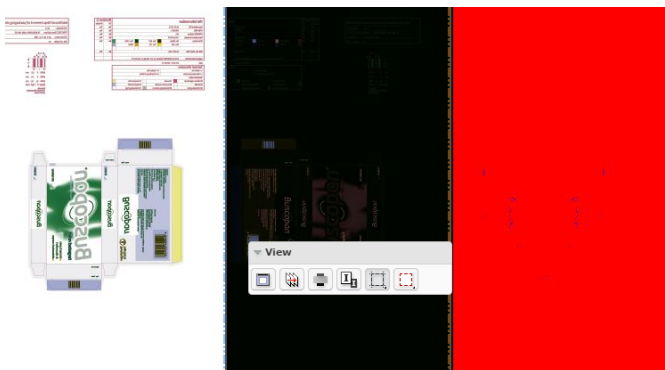
Tip: Use this when comparing a positive and negative version of the same document.

Note: The buttons indicate whether the rotation / mirroring / inverting of the reference document is currently on or off.

Aligning Files

You will get Viewer tools to align files in the **document select** panel while:

- comparing two graphics / CAD files.
- viewing a graphics file and a linked CAD Overlay. Read in:
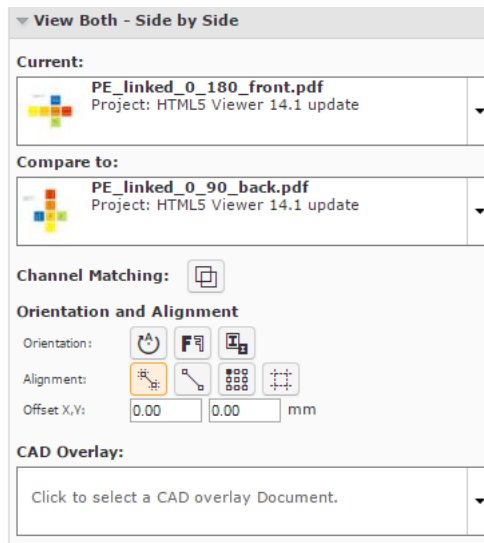
You can align the current and reference files during compare using:

- *auto-align*

- *anchor points*

- *corners, margins (Trim-boxes) or offset values.*

Auto-aligning Files while Comparing (Graphics)

Auto Align aligns the currently visible view of the two compared images automatically.

Tip: Using this tool along with the **zoom in** function is a quick way to align the current and reference images in the Viewer.

You can also use this to align the CAD overlay on the graphics correctly.

1. Select the files to compare from the **documents**.
2. Click **Actions** > **Compare in Viewer**.
3. Select the **Current** and **Reference** documents in the *Document Select* on page 125.

   The viewer starts the last used Compare mode (except the **View Reference Version** or **View Current Version** modes) with those documents.
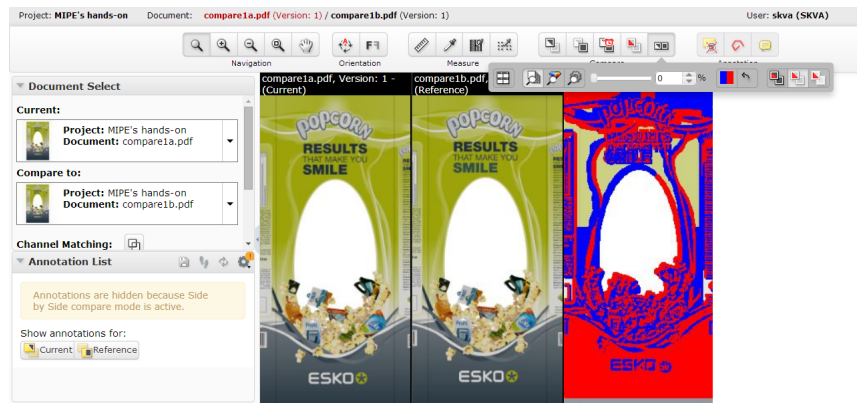
4.

Select your preferred Compare mode, for example, **View both – side by side** view.

5.

Zoom-in to a specific area and use **Auto-align** .

Auto Align uses the currently visible view of the two compared images to attempt an automatic alignment.

Note: The **offset** values are filled in automatically.

Tip:

Using this tool repeatedly with one or more zoom-ins can be a very convenient and quick way to align two images.

Using Anchor Points

1. Select and load your documents to the Viewer.

2. Select the **Current** and **Reference** documents in the *Document Select* on page 125.

   The viewer starts the last used Compare mode (except the **View Reference Version** or **View Current Version** modes) with those documents.

   Your **document select** panel will have **Orientation and Alignment** tools when you select two documents to compare.

3. Select your preferred Compare mode, for example, **View both - side by side** [icon] view.

4. Click on the **Anchor Point Alignment** [icon] tool.
   The Viewer will transform to the anchor point alignment mode. You can access the **navigation** and **orientation** tools in the top panel. You can also use the **Auto-align** [icon] function in combination with the anchor points.
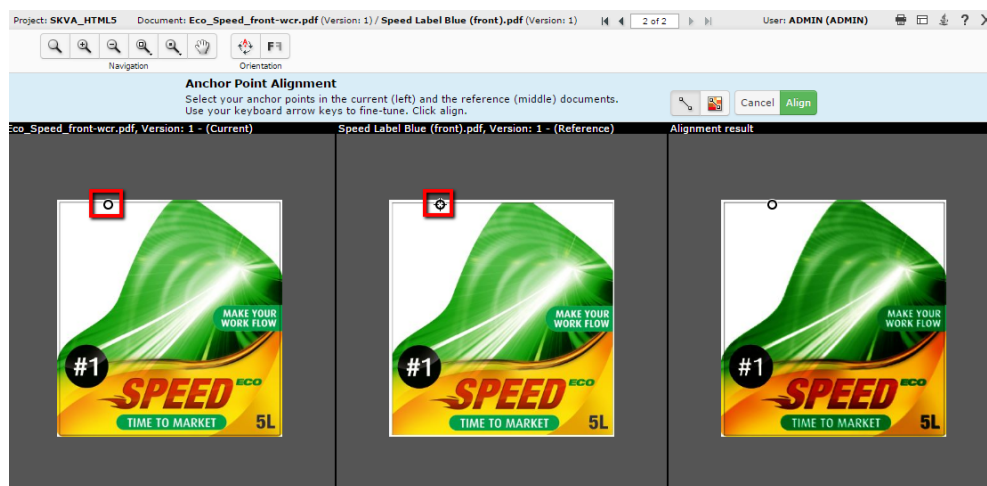
> **Note:** The active anchor can be recognized by the crosshair icon.

5. Select your anchor point in the reference document displayed in the middle.

   • click to select a point.
   • use the arrow keys to fine-tune your anchor points
   • you can also drag the selected point to another location.

> **Note:** Use zoom tool to help you in finding the anchor point.

6. Check the result on the right pane. Click **Align** to confirm.

> **Tip:** If you click **auto align** after selecting the anchor points, it will start auto-aligning by moving the reference .

   The Viewer will return to its original state when you click **Align**/**Cancel**.

Aligning Graphic Files Using Corner, Trim box or Offset

You can use the **Alignment** tools to align two graphics files.

1.

You can align the files to compare using the **Choose corner for alignment of the reference**

option. To specify the corner point for alignment, click and select your reference corner from the alignment drop-down.

Top Left
Top Center
Top Right
Center Left
Centered
Center Right
Bottom Left
Bottom Center
Bottom Right

2.

Click on the **Use margins (trim boxes) for alignment** option to align the images relative to the trim-boxes of the compared documents. When this option is not on, the alignment will be relative to the document boundaries.

Note: If the trim-box information is not included in the document XMP, the document boundary will be used for aligning files.

When you do a specific corner alignment after clicking this option, the trim box alignment will be remembered.

3. You can specify numbers in the **Offset** X and Y fields. This offset is added to the corner alignment.

Note:

If you are aligning two graphics files, the offset will be the distance between the **current** and the **reference** according to the graphics coordinate system (positive horizontal is set to the right and positive vertical is pointing downwards).

For CAD overlay and graphics, the offset is taken as the distance between the CAD overlay and the graphics page using the CAD coordinate system (positive vertical pointing downwards).

While aligning two CAD files, the offset is the distance between the **reference** and the **current** document page (in that order) according to the CAD coordinate system.

Aligning CAD files

• To open multiple CAD documents, select them and click **Actions** > **Compare in Viewer**.

The documents will open in the **compare mode**. Read details in: *Compare Documents in the Viewer* on page 170

- Use the **Rotate Reference** ⟳ tool to rotate it with respect to the **current** document.
- **Mirror Reference Image** will flip your reference (from the centre of the view) with respect to the current document.
- Use the *anchor point* alignment tool to align twoCAD files correctly.

  a) Click on the **Anchor Point Alignment** ⬿ tool.
  The Viewer will transform to the anchor point alignment mode. You can access the **navigation** and **orientation** tools in the top panel.

  > **Note:** The active anchor can be recognized by the crosshair icon.

  b) Select the anchor points in the **current** and **reference**documents. Use the arrow keys to fine-tune your anchor points. You can also drag the selected point to a new location.
  c) Click **Align**.
- **Offset X,Y** fields allow you to enter precise offsets for accurate alignment.

> **Note:**
>
> If you are aligning two graphics files, the offset will be the distance between the **current** and the **reference** according to the graphics coordinate system (positive horizontal is set to the right and positive vertical is pointing downwards).
>
> For CAD overlay and graphics, the offset is taken as the distance between the CAD overlay and the graphics page using the CAD coordinate system (positive vertical pointing downwards).
>
> While aligning two CAD files, the offset is the distance between the **reference** and the **current** document page (in that order) according to the CAD coordinate system.

Compare Modes

Show Current and Show Reference Modes

If you click the **View Reference Version** or **View Current Version** button, the tools update their information accordingly. The annotations are also changed to the current document in view.

The *Approval Details* on page 131 will be updated as well. In the **View Reference** mode,you will still be able to perform the approval actions of the **current** document.

View Both - Blinking

In this mode, you will see the two selected document pages rapidly one after the other.

- All annotations will be hidden
- Approval details will be unavailable
- If the channels are split in different views, in each view the documents will rapidly change.
- If measure tools are active, the information pop-up will be updated rapidly depending on the visible page.

View Both on Top

You can view the documents to be compared on top of each other in this mode. You will not see the difference view in this mode.

Difference Compare Mode (View both highlight differences)

In **Difference Compare Mode**, you can view a combination of the current and the reference channels in the same window. When you select this mode, you will see an additional tool bar.

Selecting the Compare color space

You can use compare color space tools to judge the nature of the differences between the compared documents.

- **Compare: Channels** - This is the default mode. Use this to compare Channels one by one. The added and subtracted content is displayed in highlight colors.

- **Compare: HSV** - This mode compares the HSV color of the two documents and you can see the relative differences in a graded color overlay. The common parts among the compared documents are shown in a neutral gray color.

  The overlay color will be a grade of the selected "Subtracted" color with the strength depending of the magnitude of the difference. Use this to compare documents where the channels are not the same. For example, a CMYK document and a Pantone spot color document.

- **Compare: Automatic** - In this setting, Channels will be used as compare color space if the definition of all the visible channels is the same in the two compared documents. If this is not the case, HSV compare will be used.

Change the difference threshold

You can change the precision of difference detection using the slider tool. You can also enter a percentage [0-100%] value. If the threshold is higher than 0 is set, you will see a message warning about the hidden differences.

Note:

Your **difference threshold** will be saved for your next compare session.

Change Difference highlight colors

Depending on your documents to compare, you may want to change the highlight colors. You can do this by clicking on the color block tool and selecting your preferred colors.

By default,

- the added channels and objects on common channels are displayed in blue to highlight the differences. The left part of the color block button indicates this highlight color.
- the subtracted channels and deleted objects on common channels are displayed in red. The right part of the color block button indicates this.

You can:

- **Change added highlight color**

- **Change subtracted highlight color**

- **Change both highlight colors**

There is a button to reset the changed highlight colors back to red/blue.

Difference Compare Modes

You can select different compare modes for effective comparison of documents. These modes differ in how they display the unchanged parts in the compared documents. Select from:

- **View both (default)**

  This mode displays the unchanged image parts as it is in its normal colors and changes in its highlight colors.

  - **Channels** only present in the current version is indicated with a **+** after the channel name.

  - **Channels** only present in the reference version is indicated with a **–** after the channel name.
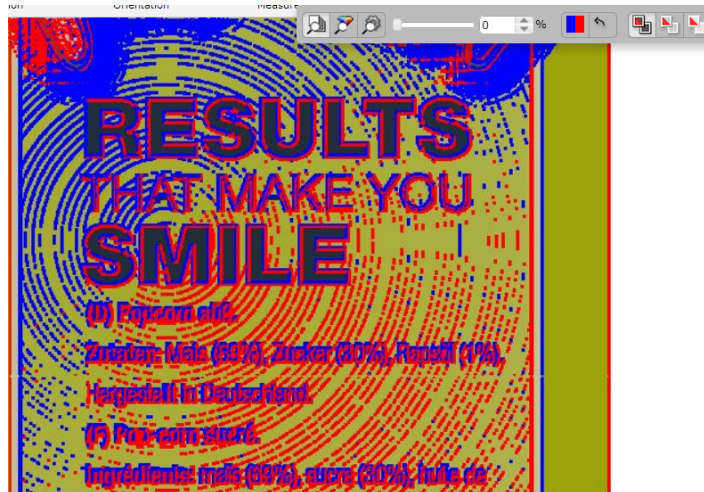
- **View both – highlight difference**

  This mode hides the unchanged parts. Select this to view unchanged image parts with lightened colors. This way, you can spot the differences in a colorful image.
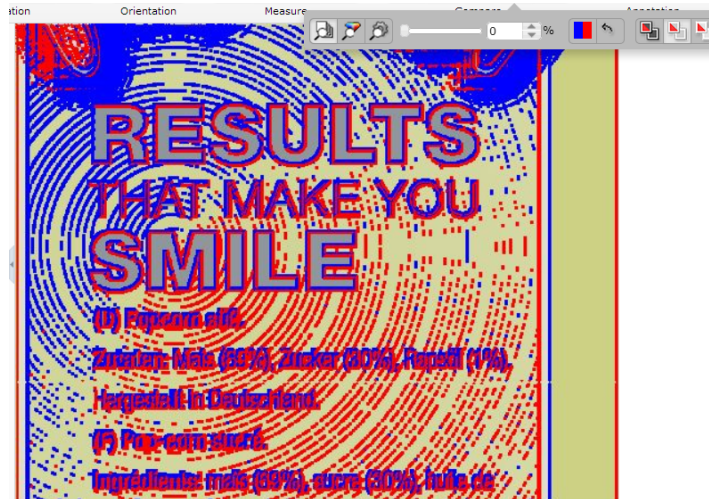
• **View both – show difference**

The unchanged image parts are displayed in white. In this mode, you can see the differences in its highlight colors and the rest of the image in white. This way, you can spot even small changes easily.
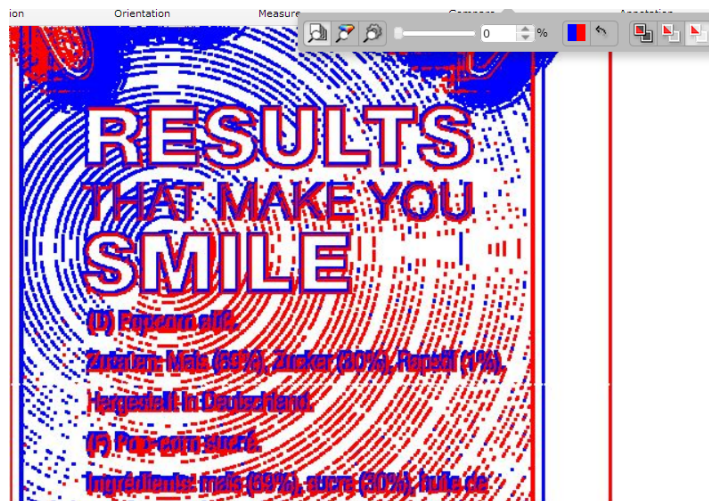
Note: View Both on Top and **Difference Compare Mode** are not possible when comparing SVG files.

Compare Modes for different file types

Compare Modes	Graphics	SVG	3D
Current Document	Possible	Possible	Possible
Reference Document	Possible	Possible	Possible
Blinking	Possible	Possible	Possible
Side by Side	Possible	Possible	Possible
View Both on Top	Possible	Not possible	Not possible

Compare Modes	Graphics	SVG	3D
Difference Compare Mode	Possible	Not possible	Not possible

Annotations in Compare Modes

By default, all annotations are hidden and you cannot make new annotations in compare modes. However, in the **annotation list**, you can specify the **Show annotations for:** as either **Current** or **Reference**. Select:

• **Current** to view and make annotations in the current document.

• **Reference** to view the annotations present in the reference document. You cannot draw new annotations in the reference document.

Comparing 3D documents

You can compare the 3D view of two versions of the same document or reference to a 3D view of another document. When a 3D file is selected as the **Current** version, the Document Selector **Compare To** displays all the other files that have a 3D view to compare with.

Selecting one of the files as **Reference Version** will activate the side by side comparison of the 3D views.

Following compare modes are available for 3D documents

• **View Current Version**

• **View Reference Version**

• **View Both Blinking**

• **View Both Side by Side**

When a **Graphics file with 3D perspective** is compared with :

• **Another 3D Document**

  This can be another 3D file or a graphics file with a 3D perspective. Selecting one of the reference versions in the difference selector activates the side by side comparison of the 3D views.

• **Graphics file with a 3D perspective**

  If a graphics file with a 3D perspective is chosen as reference version, the default 2D compare mode is used.

  When in a 2D compare mode, clicking the 3D button enables the 3D version of that compare mode.

  When in a 3D compare mode, clicking the 2D button enables the 2D version of that compare mode and the Difference compare modes for 2D are available.

Lock Images to Compare

When you compare the 3D perspectives in the viewer, you can lock the view of both the **Reference Document** or the **Current version** by enabling the Lock Movement tool.

One of the document is locked while you can rotate the other. The angle reset option synchronizes the view of reference 3D object with respect to the current 3D object.

Update View in Real Time

This option is enabled by default and you can view the current and the reference document aligned with respect to the each other.

However, when the option is disabled, the viewer only synchronizes after the interaction has stopped.

Compare SVG Documents

You can compare two different SVG files or versions of the same file with each other or a SVG with a graphic file. The supported compare modes are **Blinking Mode** and **Side-by-Side**.

Note: The **Channels** Widget is hidden when SVG documents are opened.

4.2.24. External Comparison (QA) Tool in Viewer

WebCenter allows integration with third party external web QA (quality assurance) tools namely InformaIT and TVT for additional comparison features. The connectivity to the external tools can be created by the Admin user in the **Assisted QA** tools menu option where the **Name** and **URL** of the tool must be entered along with tool specific information.

How to Access the QA Comparison Button(s) in the Viewer

When the graphic documents are compared in WebCenter Viewer, additional button(s) are enabled if any external tools are connected. On click of the button, the viewer is connected to the external QA tool in a new tab and the comparison is performed.

On completion of the comparison session in the external tool, the reports and annotations are stored back into the WebCenter.

Reports from the QA Tool

The report is automatically imported in the same WebCenter project as the compared artworks.

Reports names are same as the document along with a suffix string as defined by the Administrator during the configuration of the connection to the QA Tool.

Annotations from the External Tool

After the report is generated of the compared documents, the annotations made are imported back to the current document in WebCenter and the existing annotation in the document are overwritten.

Note: Annotations can be viewed, when the external QA tool is accessed from the viewer.

4.2.25. Viewing Multi-Page Documents and Page Lists

The Viewer has a number of features that make working with Page List and Multi-page documents intuitive:

- *Reader Spread View*

- *Page List Widget*

When you open a Page List or Multi-page document, the Page List widget displays its pages as thumbnails. You can switch the main view to a specific page by clicking on the corresponding page thumbnail.

Special thumbnails are used for Blank and Empty (Non-available) and pages of a Page List. An empty page cannot be selected as the active page.
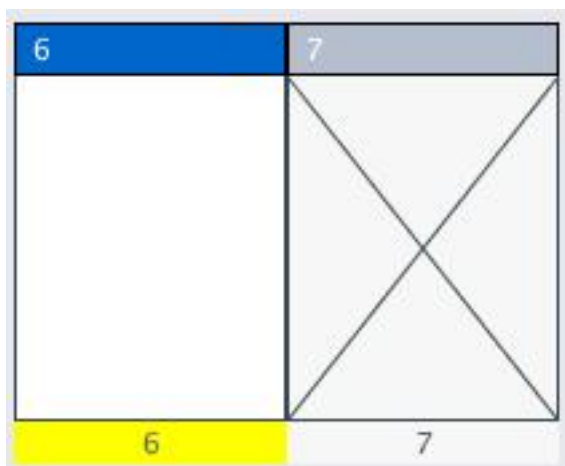
Note: Blank and Empty page thumbnails are only available for Page Lists.

You can see the page name and folio of each page below its thumbnail. A yellow color bar below the page thumbnail indicates the currently active page. The bar above the thumbnail contains the page number (index) and icons to indicate the page's approval state. In addition to the icon, a *color code* indicates the primary approval state.

Use the Viewer to *compare*, *annotate*, inspect and *approve* the pages.

4.2.26. Reader Spread View

The Reader Spread view allows you to see pairs of pages from a multi-page or page list in the Viewer. This enables you to visualize the document matching the appearance of the final document in print.

Note: Reader Spread View is not available in compare mode.

You can turn this on or off by clicking on the button. You can use arrows to navigate between reader spreads.

When one of the two pages is absent, the active page is displayed with an empty area next to it.

Note: Although you can view two pages at the same time, there can only be one active page. You can make a page active by clicking on its thumbnail.

The pairs will be displayed according to its binding:

- Left edge binding: the first page and the odd numbered pages are displayed on the right. The even numbered pages will be on the left.
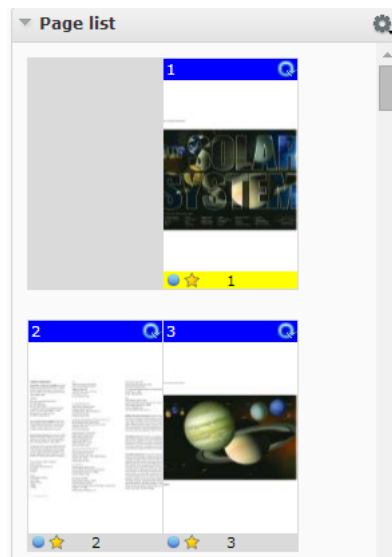
- Right edge binding : the first page and the odd numbered pages are displayed on the left. The even numbered pages are displayed on the right.

Read also *Marking Pages in a Page List* on page 190

4.2.27. Comparing Multi–Page / Page Lists Document Pages

1. Load the Multi-page / Page List documents into the Viewer by selecting them and clicking **Actions** > **View and Annotate** or **Actions** > **Compare in Viewer**.

   Special thumbnails are used for Blank and Empty (Non-available) and pages of a Page List. An empty page cannot be selected as the active page.
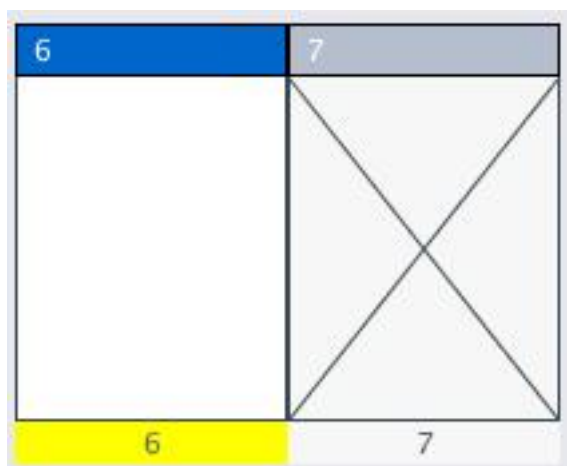
Note: Blank and Empty page thumbnails are only available for Page Lists.

2. Select specific pages in **Current** and **Compare To** document selectors.

   The pages are grouped by document version. Use **Hide all pages** in the **Current** and **Compare To** document selectors to have the display aggregated.

   A dialog opens up where you can set your comparison mode.

3. In this dialog, define how the pages of the active document are mapped to the reference pages. Click **OK**.

   • **Current page only** : to map the current active page to the selected reference page. The other pages will follow page number mapping.

   • **Current and following pages**: to map the current active page to the selected reference page. This mapping will be used for the next reference pages.

   Note: If there are no following reference pages, the last one will be set as the **Compare To** page.

   • **All pages**: to map all pages of the two documents. The previous **current** pages will be mapped to the respective reference pages.

   Note: If there are no previous **reference** pages, the first one will be set as the **current** page.

   Any changes in the active page will lead to a corresponding change in the reference page (as defined in the dialog). If you have not defined any comparison mode, the page numbers will be mapped.

4. You can use *the Compare mode* tools to compare the details of the pages.

4.2.28. Approval in Page Lists

You can set up approval cycle on individual pages of a Page List. However, for multi-page documents, the approval cycle is only possible for the entire document. You will see the approval tools when the loaded document is in an approval cycle.

Tip: A color coded bar on the page thumbnails display the approval state of the document.

- Grey bar: no approval cycle
- Blue bar: pending approval
- Green bar: approved or force approved
- Red bar: rejected or force rejected

In addition, a blue circle at the bottom of the thumbnails informs you that you need to approve the document.

Approval Details on page 131 widget will display the approval information regarding the active page. The widget updates the information when you view a different page of a Page List. When an approval status is submitted, the approval status will be updated for all visible pages.

Read also *Evaluate a Page List in the Viewer* on page 188

4.2.29. Evaluate a Page List in the Viewer

1. Navigate to the Page List in a Document list, and click on its thumbnail image. The **Viewer** opens, displaying the Page List in the Page List widget.

2. In the Viewer tool bar, click:

   - to approve the document,

   - to reject it,

   - to comment on it,

   - to force approve it (if you are a Project Manager),

   - to force reject it (if you are a Project Manager).

3. In the pop-up that opens, choose to approve / reject / comment the :

Options	Description
Current Page	 Select this option when you intend to approve only the active page.
Marked Pages	

Options	Description
	Approved Pages: ○ Current Page ◉ Marked Pages (4, 7) ○ Selected Pages: [____] ○ All Pages ☐ Set Approval Condition [Commit Approval] [Cancel] You can *mark pages* while evaluating to do approval actions in bulk.
Selected Pages	You can approve / reject the **selected pages** in one go by specifying them : • as a page range • or separated by commas ◉ Selected Pages: 14,16,17,18-21 .
All Remaining Pages	**Approved** Pages: ○ Marked Pages (No Marked Pages) ○ Selected Pages: [____] ◉ All Remaining Pages ☐ Set Approval Condition [Commit Approval] [Cancel] If you are clicking on the Approval tools from an Approved /Rejected page, you will get an option to approve / reject all the remaining pages.

a) Optionally:

if you are...	you can...
approving or force approving the page(s)	set a condition for your approval **if the approval cycle allows this** (see *Allow Conditional Approval or Not* on page 281): select **Set approval condition** and type your condition in the box.
rejecting or force rejecting the page(s)	type a reason for your rejection in the box.

if you are...	you can...
commenting the page(s)	type your comment in the box.

b) Enter your password if your WebCenter server requires it.

c) Click the **Commit** button.

4.2.30. Marking Pages in a Page List

When you need to approve pages of a page list, you can first open it in the Viewer to inspect. You can then mark the pages ready to be approved, rejected or commented. This allows you to do bulk approval actions on marked pages.

Note: You cannot mark pages in a multi-page document.

- Select the page you want to mark and click on the ☆ **Mark** button (from the **Page list**) tools to mark the active page. For more options, right-click :

  - **Mark**
  - **Mark all pages**
  - **Clear marks on all pages**

- You can also right-click on any of the page thumbnails in the Page list widget to get the following options :

  - **Mark / Clear Mark**
  - **Mark all pages**
  - **Clear marks on all pages**

- To clear the mark or marks, click on the ⭐ **Clear Mark** button For more options, right-click :

  - **Clear Mark**
  - **Mark all pages**
  - **Clear marks on all pages**

4.2.31. Viewing CAD with Graphics

You can view a graphics document with its CAD overlay for reviewing purposes.

When you open a normalized graphics document (PDF) in the viewer, WebCenter will check the meta-data (XMP) for a linked ArtiosCAD (ARD) resource.

Note: This link between graphics and CAD can be made in a desktop application like DeskPack or PackEdge. Here the relative orientation and offset is determined and saved together with the graphics file meta data (XMP).

If a Structure / CAD reference is found, you will see this in the *document select* panel with a link icon. You can select this to view together with the graphics document. If the graphics file does not have a XMP link, you can use the *document references* feature to link them.
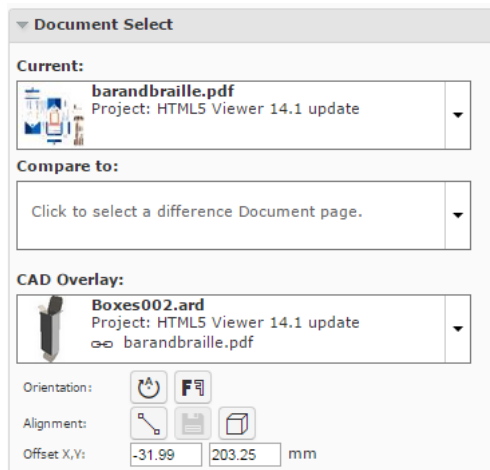
Linking a CAD with Graphics using Document References

You can assign a **Document Reference Attribute** in your graphics file to refer to a CAD Overlay. To use this feature, you need a few **Attributes** with **specific** names. These are created automatically during installation or update of your WebCenter.

- `CAD_OFFSET_X`(**distance**)
- `CAD_OFFSET_Y`(**distance**)
- `CAD_ORIENTATION`(**integer**).
- `CAD_REFERENCE`(**document reference**)
- `CAD_PRINTABLE_PART`
- `CAD_PRINTABLE_PART_SIDE`
- `CAD_FINISHING_PROFILE`

- Add the `CAD_REFERENCE` attribute to a new category or an existing category. You can name this category according to your needs.

    a) Configure a document source for your CAD overlay files.

       Read in: *Adding Document Sources for a Document Reference Attribute*.
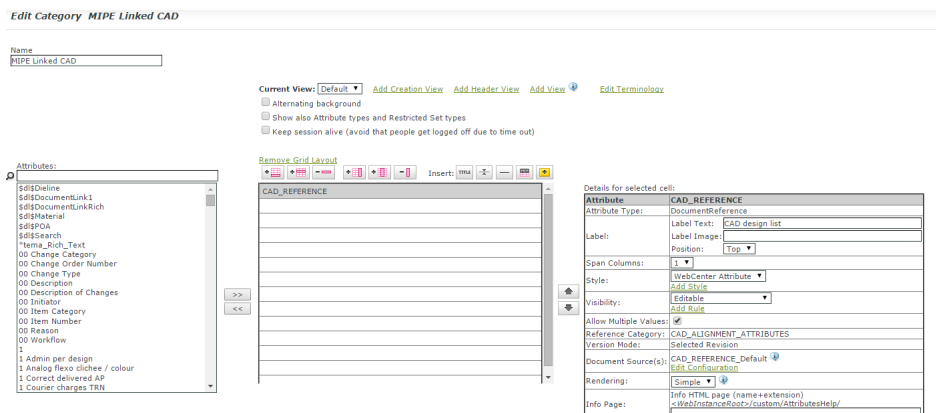
- Assign this **attribute category** to a graphics file.

Alternatively, **configure document types** in your Project/Template and assign your attribute category containing CAD_REFERENCE as the **default attribute category** for graphics.

- Select or upload a CAD overlay file to the category of your graphics document.

- Open the Graphics file in the Viewer once the View files are prepared.
  The Viewer will load the linked CAD reference in the **CAD Overlay** section of the **Document Select** widget.
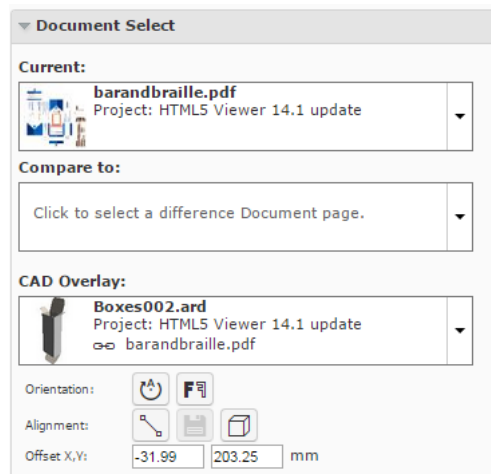
If the CAD reference is stored via a **Document Reference Attribute**, the user can alter and save the CAD Overlay settings to the graphical document.

When a graphics document is opened with the CAD_REFERENCE attribute, you can **Save** 💾 the alignment changes made in the viewer.

Note: You need the rights to change a document attribute to get the 💾 option . The administrator has to enable **Document** > **Security Change properties** option for you.

The **Save** 💾 option is enabled when:

- you change the alignment. For example, new offset values.
- you select a new CAD overlay.

   If you select another CAD file as the overlay, the previous file (with link icon) is deleted from the document selector. You will see the new overlay in the selector with an active link.

The new orientation and offset will be saved to the `CAD_REFERENCE` attribute of the graphical file.
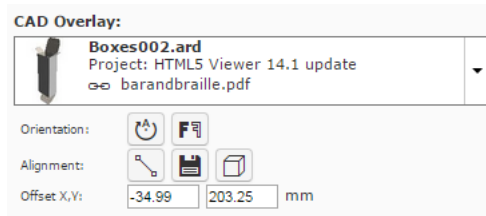
To remove the CAD link from the graphics file, click **Turn off CAD Overlay** in the **CAD Overlay** selector and **Save**.

Read also:

- *Aligning CAD overlay and Graphics* on page 193

- *Viewing 3D in the HTML5 Collada Viewer* on page 195

Aligning CAD overlay and Graphics

- To open multiple documents (both Graphical and CAD), select them and click **Actions** > **View and Annotate**.
   You will see a graphics document as the current document.

   If the active document has a *linked* overlay, the Viewer will display this as the linked CAD overlay in the document selector.
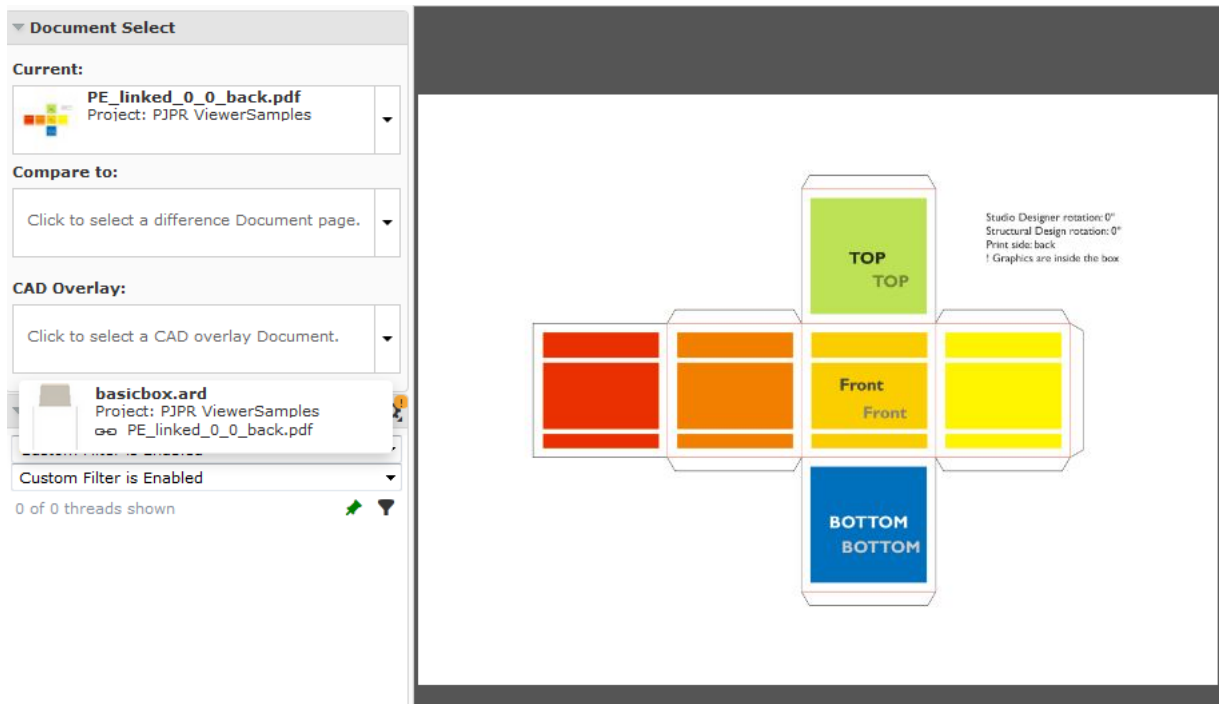
- Select the corresponding CAD overlay from the **CAD Overlay** selector drop down. This drop down will display all the available CAD files including the linked CAD files.
  The Viewer will display the selected CAD file on top of the graphics file. The **Orientation and Alignment** tools in this view allows you to position the overlay accurately on the graphics file.

    - **Anchor Point alignment** for CAD overlay.

      > **Note:** The respective buttons indicate whether the rotation / mirroring / inverting of the reference document is currently on or off.

    - **Offset X,Y** for CAD overlay

- Use the **Rotate CAD Overlay** tool to rotate the overlay to match the graphics correctly.

- **Mirror CAD Overlay** will flip your overlay with respect to the graphics document. This will show you the opposite side of the CAD overlay. If the current view is the inside of a box, flipping will display the outside view.

- Use the *anchor point* alignment tool to align the CAD overlay on graphics correctly.

    a)
    Click on the **Anchor Point Alignment** tool.
    The Viewer will transform to the anchor point alignment mode. You can access the **navigation** and **orientation** tools in the top panel.
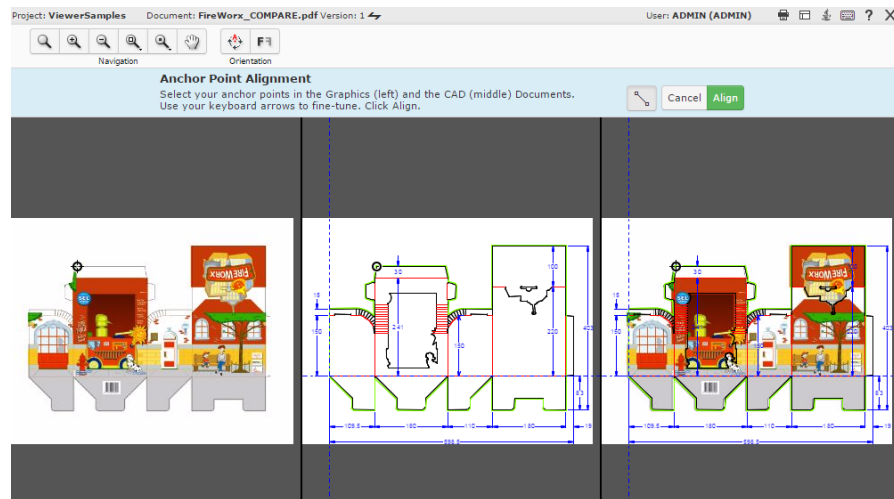
> **Note:** The active anchor can be recognized by the crosshair icon.

b) Select the anchor points in the Graphics and CAD documents. Use the arrow keys to fine-tune your anchor points. You can also drag the selected point to a new location.

c) Click **Align**.

• You can change the values in the **Offset X,Y** fields to be precise.

> **Note:**
>
> If you are aligning two graphics files, the offset will be the distance between the **current** and the **reference** according to the graphics coordinate system (positive horizontal is set to the right and positive vertical is pointing downwards).
>
> For CAD overlay and graphics, the offset is taken as the distance between the CAD overlay and the graphics page using the CAD coordinate system (positive vertical pointing downwards).
>
> While aligning two CAD files, the offset is the distance between the **reference** and the **current** document page (in that order) according to the CAD coordinate system.

• **Save** the alignment changes.

• After aligning the tools, you can generate a *3D*. You can also use the tools in the *CAD* on page 148 widget to further refine the display.

If you did not save the alignment changes before generating 3D, you will see a message:

```
Do you wish to change your CAD overlay alignment?
```

Click **Save** to generate 3D.

4.2.32. Viewing 3D in the HTML5 Collada Viewer

You can view 3D digital mockups in the HTML5 Collada Viewer. This is very useful when your browser does not support Java Applet. You can set the 3D Viewer as the HTML5 Collada Viewer in the *My preferences*.

This will help you to:

- Enhance artwork and shape approval with its 3D representation.
- Communicate the final packaging in the most realistic form.
- Use WebCenter as an online medium to share 3D mockups.

> **Note:** The HTML5 based Collada Viewer does not offer the same rendering quality as the Java applet Viewer for Collada files. The advanced material and lightning visualization is not yet available.

In the HTML5 Collada 3D Viewer, you can view the following:

- Collada. When you open Collada files, it will open the HTML5 3D Viewer if your **Preference**is set as HTML5 Collada Viewer

- Aligned CAD and Graphics *Viewing CAD with Graphics* on page 190

- CAD *Viewing CAD Design files as 3D*

Browser Version Requirements

Browser	Minimum version
Chrome (Desktop, Mobile)	30
Firefox (Desktop, Mobile)	4
Microsoft Edge (Desktop, Mobile)	latest
Safari (Desktop)	6
Safari (Mobile (iOS))	8 (iOS 8)

Generating a 3D View from a Graphics file with CAD reference
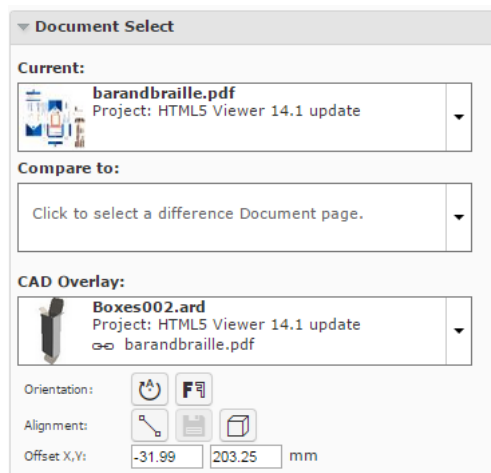
- Open a graphics file with a CAD reference. Align the CAD overlay correctly on the graphics file. Read: *Aligning CAD overlay and Graphics* on page 193.

  When you open a graphics file with a CAD reference in the Viewer, the *document select* panel will show a ⬚ button.

> **Note:** The link between graphics and CAD can be made in a desktop application like DeskPack or PackEdge or using *document references*. *Aligning CAD overlay and Graphics* on page 193

- Click the **Open 3D View** ⬜ button.

  The Viewer will open the *3D View* widget with a message.

  ```
  Loading the 3D model...
  ```
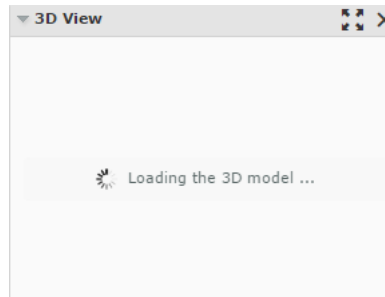

  The **3D View** widget always shows the HTML5-version of the 3D viewer.

  After the 3D generation, you can view the 3D mockups in this widget.
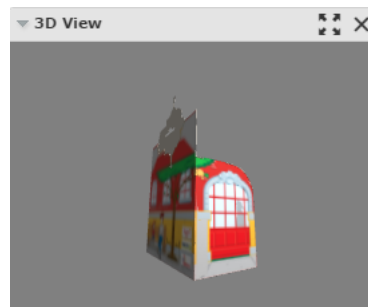
  From within this widget, you can:

  - **Open the 3D Viewer** ⤢ in a new window

  - close the **3D View** widget.

- After the 3D perspective is generated, the **Open 3D View** ⬜ button is available in:

  - the *top tool panel*
  - the *CAD widget*
  - the **Documents** list and from all pages where the **document operations** area available.

- To generate a 3D Perspective from the **Document Details** page, go to **Document Information** > **More Actions**. Choose **3D View(Collada)**.
- To delete a 3D Perspective, go to **Document Details** > **Document Information** > **More Actions**. Choose **Remove 3D View**.

Opening Documents in the 3D Viewer

Once you have a generated a 3D perspective by opening it in the HTML5 3D Collada Viewer, you can open this again from different pages in WebCenter.

You can also generate a 3D Perspective from the **Document Details** page. To do this, go to **Document Information** > **More Actions** and choose the **3D View(Collada)** option.

You will have the **Open 3D View** button next to the normal **document operations**. You will have this option for:

- Graphics Files with aligned CAD reference
- ArtiosCAD Design and Canvas files
- ArtiosCAD 3D files

To open a 3D view, click from:

- The **Task** execution page:
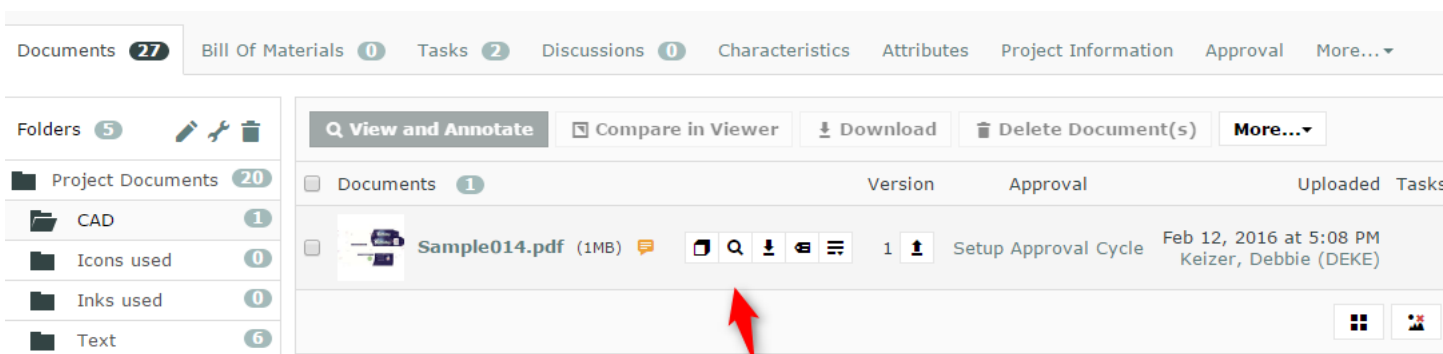
- The **My Work** > **My Approvals** page:

Pages Waiting for Approval: 42, Total Number of Pages: 42

Juice - 6 Pack Bottle Box.pdf
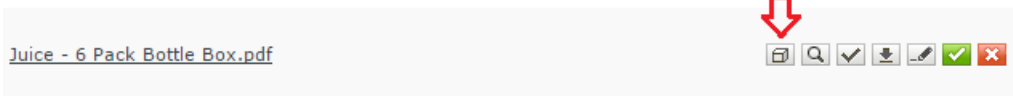
- The Document search results:

> **Note:** For this option to be available, enable **Search** > **Documents** > **Show Result Layout Options** > **Document Operations** > **View**. Read more in: *Document Operations in Search*.

(if View is an enabled Document Operation in the search Result Layout Options) – grid and list view

Name: Juice - 6 Pack Bottle Box.pdf
Description:
Project: HTML5 Viewer 14.1 update
Actions:

Juice - 6 Pack Bottle Box.pdf
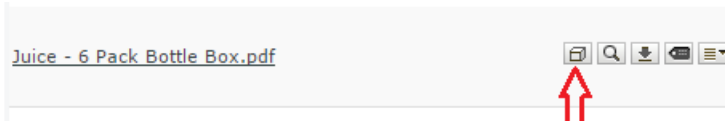
Annotations and the 3D Viewer Positions

The 3D Viewer can remember its view position when you create annotations in the Graphics document.

> **Note:** The 3D view that will be remembered along with an annotation will be the view that is currently on. For this feature to work, the 3D view widget has to be open in the Viewer.

- To save a camera position of the 3D viewer into an annotation:

  a) Open the **3D View** widget by clicking ⬚ button on the Top Tool Panel.

  b) Add your Annotation in the view port and click **Save**. The view position in the 3D view is now linked and saved with the annotation

  > **Note:** You cannot add a 3D View position to replies or linked annotations.
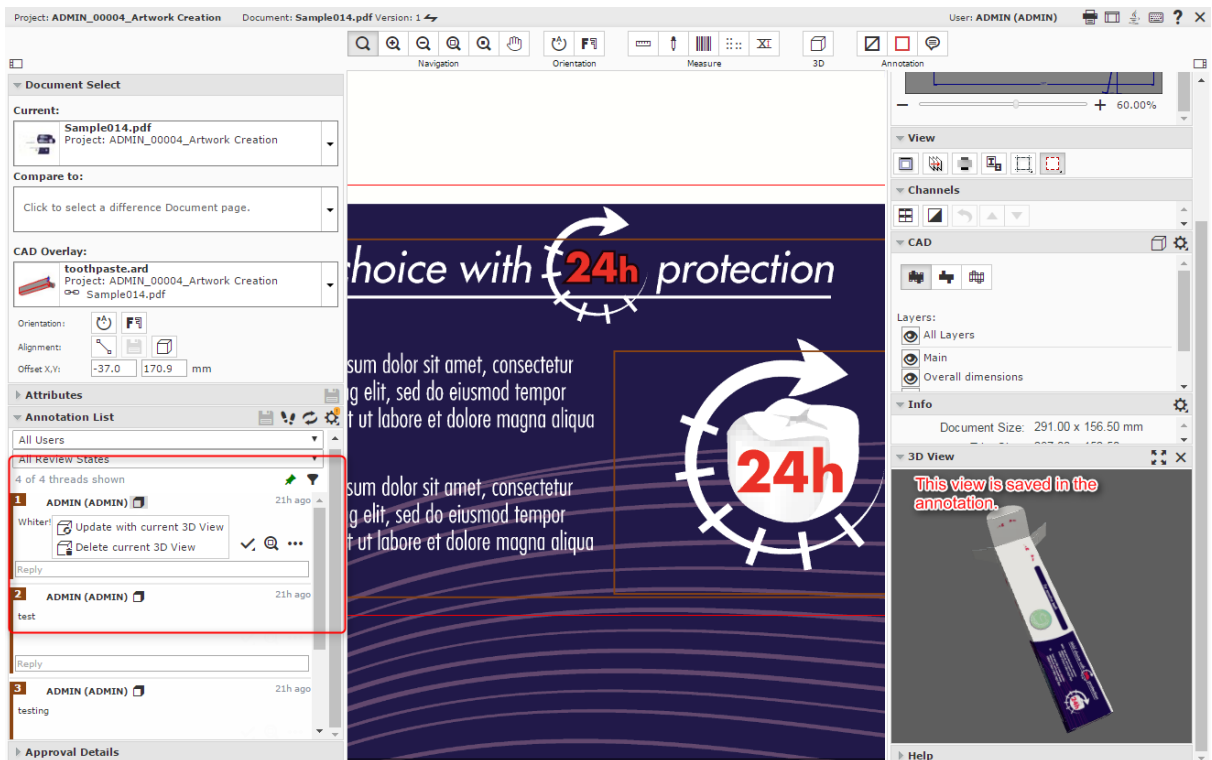
- When a 3D view is saved to an annotation, use the icon in the Annotation List widget to delete or update the 3D view:

  a) Select the saved annotation in the Annotation List.

  b) Use the **Update with current 3D view** from the Actions List from the Annotation List widget or the Annotation pop-up and save the annotation. You can also do this even when there is no previous camera position saved in the annotation.

  > **Note:** The 3D widget should be open to update or save a new 3D view.

  c) Use **Delete Current 3D View** from the Actions List to delete the stored 3D position and save.

Viewing Component Document in the Viewer

A component is considered "viewable" once it meets the following conditions:

• Contains one or more document reference attribute

• The attributes contain in total at least a document

Viewable components can be opened in the viewer. The documents attached to the component are loaded dynamically and are visible in the document selector.

If the documents attached to the component are not viewable, then opening the component in viewer throws an error.

Component Widget

The component widget displays the configured document references on the component and the documents that it contains.

By clicking on a document in the tree structure, it becomes selected and behaves as if it would have been selected in the document selector.

The component widget stays visible if the currently shown document is part of a component structure.

If the component has the CAD_REFERENCE attribute with at least one document, and the component is the current selected page; then the 3D document present in the first row of that document reference is shown in the viewport.

If the first document is not a 3D document, then the loading of the 3D documents fails in the viewport.

Combining 3D + graphics view

When the component is the active document then it shows the combination of all graphical files that are linked to the same CAD_REFERENCE document as the component CAD_REFERENCE document. To apply graphics to a 3D structure, see function WCR_HTML5Viewer_1935.

Following requirements must be met:

• Graphic files must be referenced from the component in a document reference attribute

• Graphic files must be linked to a structured 3D document with a specified printable part

• Both component and graphic document must point towards the same CAD_REFERENCE

This is useful to see multiple different graphical files being applied on the same 3D structure.

Viewing Assembly documents in the Viewer

Component documents can be opened in the viewer, if it has a document reference attribute containing at least a single document. On opening a component document with reference, this widget is populated and displays the attached documents.
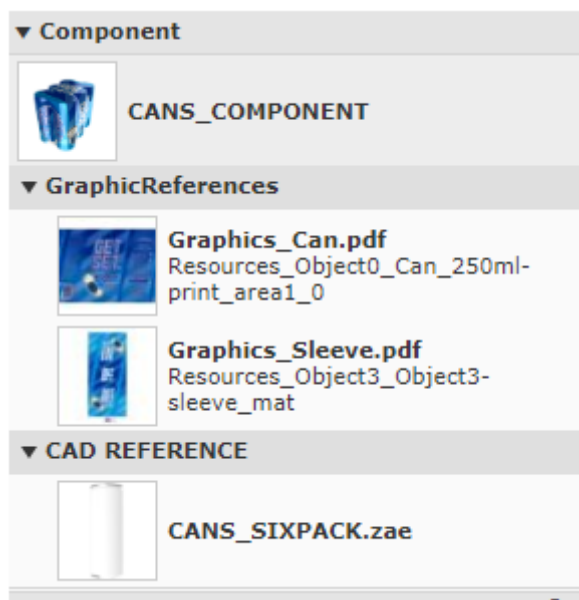
The component widget displays the configured document references and the documents that it contains. If the component document has a document reference namely, CAD_REFERENCE attribute containing a 3D viewable file then it displays that 3D model when the component becomes the current selected document.

The component widget stays visible if the currently shown document is part of a component structure.

Assembly Documents in Component Widget

The Component Widget displays all the documents contained in the document references on the component document attribute category.

When opening an Assembly document in the Component Widget, it has three sections namely:

•   **Structure** : First document present in the **CAD_REFERENCE** attribute is shown and the graphic document is referenced by the assembly (any document reference).

•   **Printable Parts:** Printable parts associated with the structure document are listed and if any graphical document is attached to the printable part, that document is shown along with the printable part.

•   **Other Graphics** Graphics documents in the component which are not associated to a printable part are shown in other graphics section.

A graphical document is associated to a printable part if the document.

- Contains the attribute **CAD_REFERENCE**, in which it references the structure document with the name of the printable part filled out in reference property **CAD_PRINTABLE_PART** and the graphic document is referenced by the assembly (any document reference) or

- Is referenced by the assembly's **GRAPHICS_REFERENCE** attribute with the name of the printable part filled out in Reference Property **CAD_PRINTABLE_PART.**

Assembly Properties

- **Set Angle offset**: To define an offset angle for the package to be in. On changing the value, the angle is updated in the 3D view. Save the value if you wish it to be retained and on reloading the offset angle is remembered. There are also options to

  - **Get from view**: change the angle offset based on how the model is turned in the 3D view or

  - **Reset**: Allows the offset to be changed to the original value and

  - **Save**: Saves the value in the CAD_OFFSET_ANGLE attribute in the Assembly Document attribute

- **Simulate View Preset**

  You change the values of the Angle and Elevation while creating packshots. When you change the values of angle and elevation, the 3D viewer changes the camera to this position. You also have additional options to

  Note: Values changed are not saved

  - **Get From View**: Update the fields with the angle that the viewer is currently in

  - **Reset** : Changes to the angle in which it initially opened

Editing Printable Part of the Structured Document

Printable Parts can be split in Front and Back side and can have different artworks on each side of the Structure documents. If only one of the two sides is defined, the other side displays the back of the selected side.

Click on the pencil icon on the printable part shown in the component widget and a pop up is visible.

You can attach or replace the graphics document for that printable part, as well as the Finishing Profile.

Note: Documents are attached for the printable part from the defined sources in the GRAPHICS_REFERENCE attribute of the attribute category of the assembly. Only **Saved Search** and **Current project** document sources and only **Use by Reference** operation are supported.

You can save the changes for it to take effect in the assembly document.

Also note that to edit a printable part, the assembly should have the GRAPHICS_REFERENCE attribute with the following reference properties defined in the rendering configuration:

- CAD_PRINTABLE_PART,
- CAD_PRINTABLE_PART_SIDE,
- CAD_PRINTABLE_PART_NAME,
- CAD_FINISHING_PROFILE.

Also if the attribute Category view contains a "Viewer" view, this view should also contains this attribute and reference properties.

View Graphics with 3D

You can view graphics with 3D files in the viewer. For this link the 3D file to a Graphics Document.

To link the 3D document to a graphics document, use the steps as given in *Linking a CAD with Graphics using document references*.

- Ensure the graphics file has the **CAD_REFERENCE** (Document Reference) Attribute.
- The document is opened in the viewer as a 2D document.
- When there are 3D files loaded in the Viewer, you can link a 3D file to the Graphic Document using the **Structure Document** selector. Read more here *Structure Document Selector* on page 126

Viewing Attributes

If the document in the Viewer has an **Attribute Category** with a Viewer specific View, you will see the **Attributes** widget in the Viewer.

The administrators can create such Viewer specific views. Read in: *Add Viewer Views*

For example, you can create **attribute category** based checklists for different **roles / groups**. When a **user** from that **role** or **group** views the documents with that **category**, this attribute checklist will be visible in the viewer. Read more about this use case in: *https://wiki.esko.com/pages/viewpage.action? pageId=170047115*.

As an another example, you can use this to view your document references in the Viewer. If you have more than one CAD document references associated with your graphics file, you can create a Viewer view for these attributes with specific *source* and *rendering* configurations. Your user will then be able to change a reference from the Viewer and save this configuration.

Note: Only the users with **Project** / **Folder** level **Change Properties** permissions can change and save attributes from the *attributes* widget.

If your document has *document references attributes*, you can view them from the **Attributes** widget. You can also do the *document operations* specified while configuring the document sources for the reference.

Note: The administrators can create a Viewer view for the document reference attributes with specific *source* and *rendering* configurations.

You can change a reference from the Viewer and save this configuration. This is only possible when you have **Change Properties** permissions.
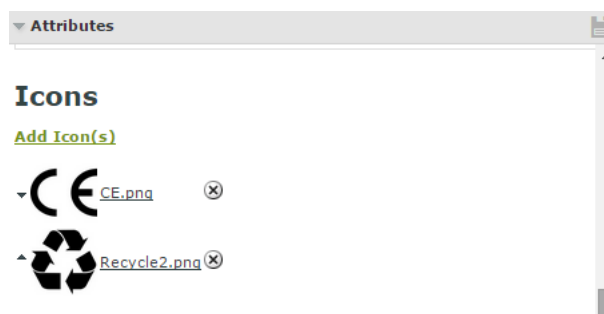
Video Support for files stored in MediaBeacon

Viewer supports video files from the Asset Management Connection, MediaBeacon. Video files can be opened like any other document or image file in the project. You can select the video from the document list in the Project Details tab and select **View and Annotate**. Videos files can be approved in the workflow directly.

Note: To set up MediaBeacon as the Asset Management connection, refer to *Configure Asset Management Connections*

Note: To import any file from the Asset Management, refer to *Document Creation Settings*

Viewing Videos

Opening Video in Viewer
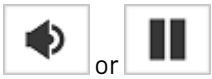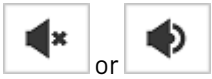
You can open video files by either clicking on the document thumbnail in the document list or by choosing **View and Annotate** for the selected video.
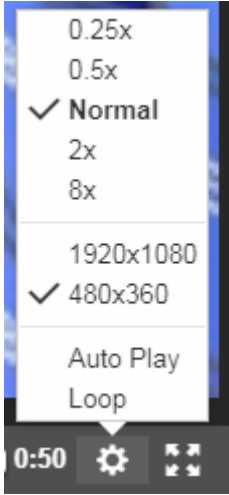
Video Toolbar

Toolbar for video viewer has specific video controls. Detailed description of the other tools can be read at *Top Tool Panel* on page 111

Note: Viewer displays the tools which are relevant for videos.

Controls to View Video and Advanced Video Settings

Select	Button	Performs
🔊 or ⏸	**Play or Pause**	Depending on the video state the button toggles to **Play**/**Pause**
🔇 or 🔊	**Mute / Unmute**	Mute or Unmute the volume in the video. Use the slider to increase or decrease the volume.
0:14 ▭	**Timeline Slider**	Helps to slide through the video and displays the total length of the video at the end. You can slide forward to watch the video ahead.

Select	Button	Performs
	Settings	Videos can be set to play in **Auto Play** which plays on opening of the viewer , or you can start the video manually on opening. **Loop** allows to play the video in loop until manual intervention. Speed can be chosen as .25x , .5x, Normal, 2x or 8x. Quality of the video display can be chosen if the video has multiple display resolutions.
	View Full View / Exit Full View	Toggles to either view full screen or exits from full screen
		Note: Alternatively use Esc key to exit full screen

Options in Viewer for Video files
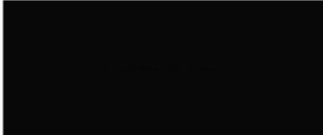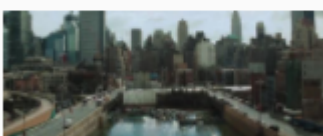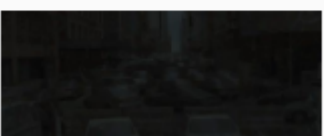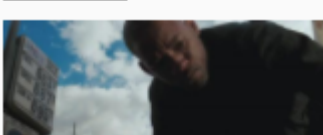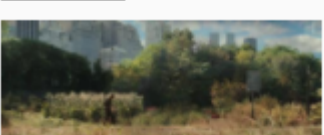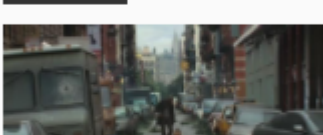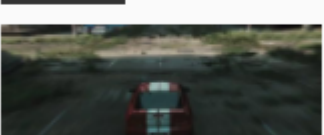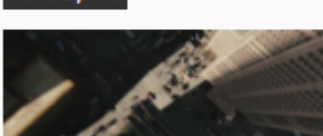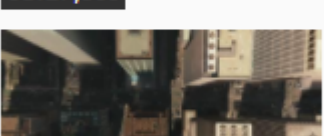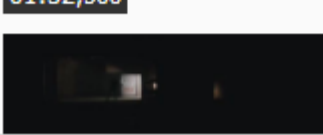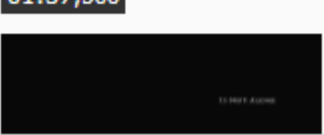
Following are the widget options available for video files

- **Approval Details** widget functions the same way to document approval. Refer to *Evaluate a Document in the Viewer* on page 167

- **Info** has the details of the document viewed. Refer to *Info* on page 134

- **Help** to learn more about the viewer.

- **Key Frames** refer to *Keyframes* on page 206

- **Annotation List** refer to *Annotation List* on page 129

Keyframes

Keyframes widget displays the preview of different frames at regular intervals from the video in sequential order. This helps to easily navigate and locate any frame in the video. You can choose any frame displayed to jump to that point in the video.

Note: If you are viewing an annotation and select a key frame that is outside the range of the annotation, the annotation is deselected. If the key frame is inside the range of the annotation, the annotation remains selected .

Annotations for Video

Add Annotations in a Video

A note or comment can be added to the video file as an Annotation. To add an annotation in a video file, use the **Add Annotation** from the toolbar. For detailed information on **Annotations**, refer to *Annotating in the Viewer* on page 151.

In video files, adding an annotation pauses the video. The **Start Time** and **End Time** of the annotation is taken as the current time in the video. This can be edited manually by modifying the time and saving the annotation.

Note: **Annotation List** in videos also displays the start and end time of the Annotations.

Viewing Annotation

Annotations are displayed only when the current time in the video is within the specified start and end time of the annotation. You can view all the annotation in the video file by selecting Annotation List. Refer to *Annotation List* on page 129 for details.

Timeline Slider

The Timeline slider displays three indicators, representing the Start Time, Time within the Video and the End Time.

You can also edit the **Start Time** and **End time** by selecting the Annotation in the **Annotation List** by dragging the Start and End time indicators in the Timeline Slider.

Colored markers in the timeline slider show all the available annotations in the video. These markers are visible, only when no annotation is selected.

If the start and end time of the selected video are different, then the video is played in loop. To continue playing the video, close the annotation pop up.

Note: If the start and end time is same for an annotation, then the video is paused.

Unified Viewer

View 2D and 3D versions together

Viewer allows to view both the 2D and 3D perspectives in the center pane. You can use toggle buttons to switch between 2D and 3D view. When you choose to view the 3D perspective in the center pane, 2D perspective is displayed on the side panel and vice versa.

When 3D perspectives are opened in the viewer, all the other toolbar elements and other widgets are collapsed in the viewer except for **Document Selector** and **Approval Details**.
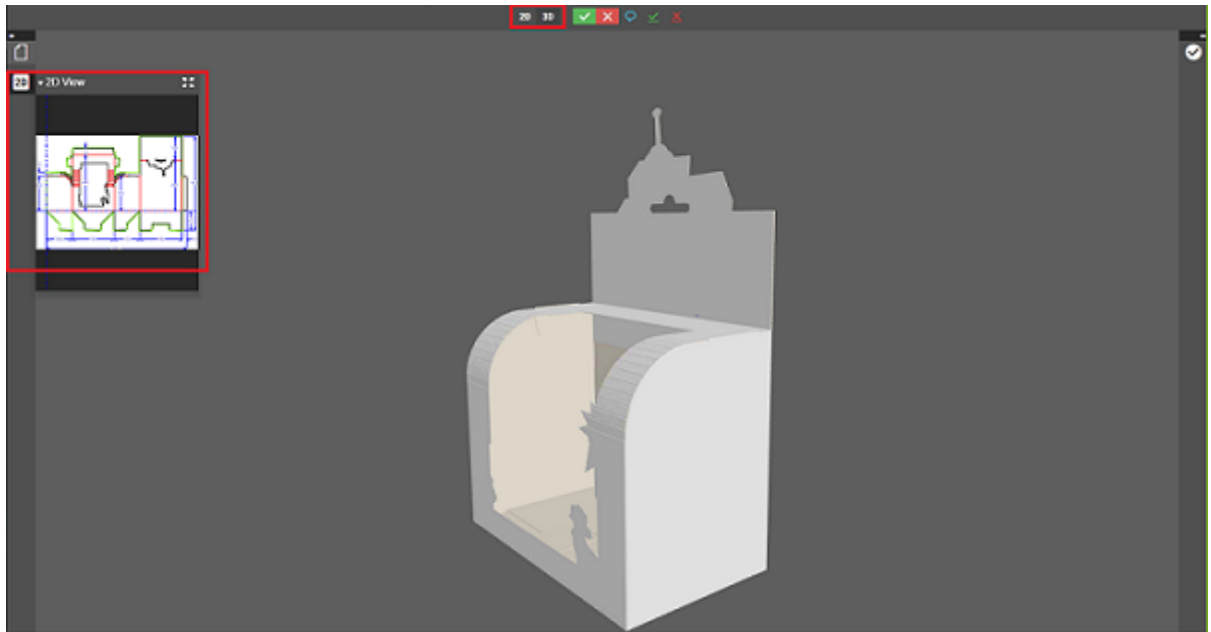
Using toggle buttons, you can simultaneously view both 2D and 3D in the center pane.
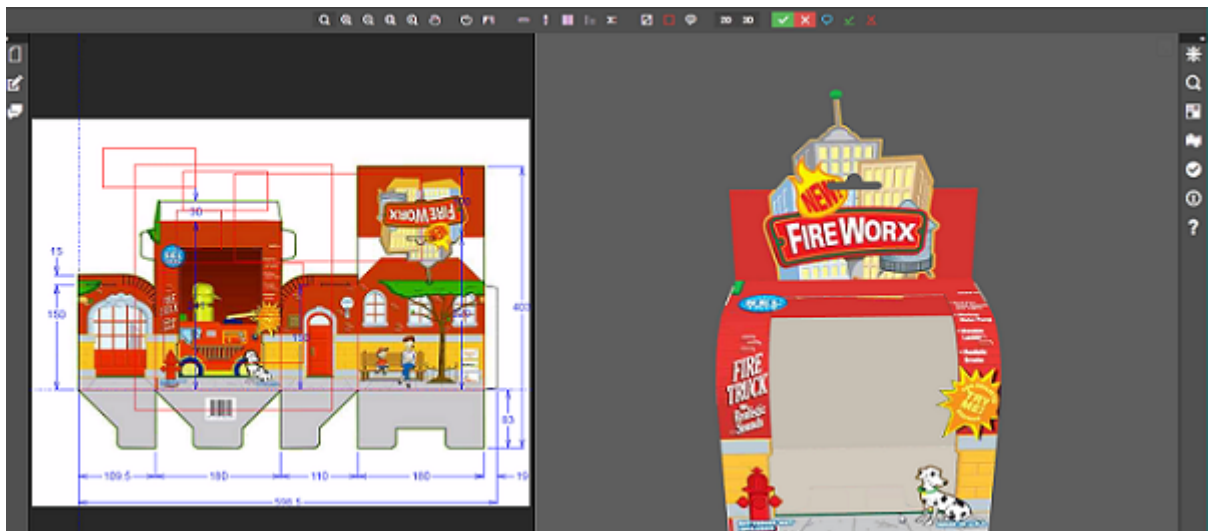
Limitations in the HTML5 Viewer

Following features are not available in the HTML5 Viewer yet:

- Advanced View features such as Seamless View or Advanced Flexo tools for screened data.
- Collaboration mode

See *https://wiki.esko.com/display/KBA/KB90866114%3A+WebCenter+-+HTML5+Viewer+known +limitations* for a feature matrix.

About the HTML5 Viewer

The HTML5 Viewer is a fast and comprehensive viewing tool introduced in WebCenter 14.

From 14.1.1 onwards, the HTML5 Viewer is the default WebCenter Viewer. However, you may choose to work with the Java Viewer (default) by changing it in the **Viewer Preferences**.

What does the HTML5 Viewer offer you?

* Speed: fast viewing for Graphics and CAD files. High speed 3D viewing (14.1 and later).
* Compatibility: high speed performance on the new client browsers.

Browser	Supported Version – Windows OS	Supported Version–Mac OS
Microsoft Edge	Latest	-
Firefox	4.0 or higher	4.0 or higher
Chrome	5.0 or higher	5.0 or higher
Safari	-	5.0 or higher

* Reliability: high accuracy in displaying your data.

* Detail: advanced zoom to see finest details, measuring exact distances. Fast zooming.

* Customizable widgets. You can even restrict access to certain features depending on the user preferences.

* Keyboard shortcuts. To see all of them, press **?**

* Easy access to help and knowledge base. Search in the **Help** widget or press **F1** to access help.

Note: The default Viewer in the WebCenter *Viewer* on page 47s upto 14.1 will be the Java Viewer. You can set the preferred Viewer as the HTML5 Viewer in the General or User Specific **Preferences**. Read more in Preferences.

Note: The HTML5 Viewer does not offer live collaboration or working together at the same time. You can use *annotation threads* for discussions.

Using 3D file as 3D perspective

You can use any 3D file as a 3D perspective of a graphics file in the WebCenter viewer. You can also view both the graphics document and the 3D file next to each other.

To view the files in the viewer, ensure there is a document reference attribute called **CAD_REFERENCE** in the graphics document. Follow the steps below to open a structure document.

You can use the structure document in the Structure document selector.

After selecting a 3D Document as 3D perspective, save the link using the save button next to the Structure Document Selector.

Note: This is only possible if the Document has the Document Reference Attribute **CAD_REFERENCE**, in which the link is stored.

If a printable part is selected and the alignment options are saved, then the 3D widget displays the 3D shape along with the graphic file applied to the specified printable part.

Note: The printable part is saved in the document reference properties **CAD_PRINTABLE_PART** and **CAD_PRINTABLE_PART_SIDE** of the **CAD_REFERENCE** attribute that points to the 3D file.

Viewer

- Select your **Viewer Type**. You can set your preference to the *HTML5 Viewer* or keep at the default (*Java Viewer*).

  Note: You can always switch to *Java Viewer* from *HTML5 Viewer* using the ⬥ button.

- **Viewer and Workflow Applet**: When *opening a document in the Viewer* or when *creating a workflow*, WebCenter will download a Java applet to your computer.

  From Java 1.7.0_21 (for Windows and Mac OS X 10.7 or later), you will get a security warning as the one below when the applet is downloaded. This makes the WebCenter applet look like a security risk for your computer.

  You can adapt how this security warning will look like when downloading the applet. In **Viewer and Workflow Applet**, choose either:

  - **Signed (sandboxed)** if you want to run the applet in a strict sandboxed environment (with no access to your computer's resources). As the applet is signed by Esko, the security warning looks less threatening.

Note:

As the applet is sandboxed, it will also show a warning when trying to print from the Viewer. You will just need to click **OK** to be able to print.

- **Signed (not sandboxed)** if you want to run the applet without restricting it to a sandbox (the applet can request additional access to your computer's resources). This means that you will not get an additional warning when printing from the Viewer.

   As the applet is signed by Esko, the security warning looks less threatening.

- **Unsigned** if you want to run the applet as a default unsigned applet. You will get the default security warning that does not mention Esko, but the applet will be sandboxed. This means that you will have an additional security warning when printing from the Viewer, as for the **Signed (sandboxed)** applet.

> **Tip:**
>
> By default, the applet is set to run as **Signed (sandboxed)**. This will work fine for most users.
>
> More frequent users may want to switch to the **Signed (not sandboxed)** option to avoid always having to click an extra warning away when printing from the Viewer.
>
> Mac OSX 10.6 users running Java 1.6.0 may also want to switch to the **Signed (not sandboxed)** option to avoid getting a warning when closing the Viewer by clicking ⊗.
>
> With the latest versions of Java 1.7 installed, most browsers block unsigned applets by default. In this situation, it is recommended to use one of the signed settings instead.

- **Viewer Style (Java Viewer)** sets the Viewer mode as:
  - **Normal** (Default): All HTML5 Viewer features are available in this mode.
  - **Restricted**: In this mode, the user cannot access features such as *Channels widget*, *CAD widget* and *View widget*.

    The side panels displaying the widgets will be in a collapsed format by default.
  - **Advanced**: In Java Viewer all features are activated.
- **Viewer Workspace**: Select any workspace from the drop down or **Create new Workspace** by selecting the option. Select the gear icon to open the Workspace Configuration pop-up window and view the options available in workspace selected or to edit the configuration in the workspace.

  You can choose to add or delete any tool or widget to the workspace or altogether delete the workspace itself.
- **Unregistered User Viewer Workspace**: A workspace is configured specifically for unregistered users who access WebCenter viewer, when they are shared with a document to view or to approve. Other workspaces or tools/ widgets are not visible apart from the workspace configured by the Admin User. Admin user can also create a new workspace specifically for this purpose.

- **Annotation Color** sets the color in which annotations will be displayed in the Viewer (you can set **Viewer Default** or choose a color from the list).

- **Annotate Approved Documents** sets if and how the users are allowed to annotate documents that are already approved.

  - Select **Enabled** if you want the users to be allowed to annotate approved documents.

  - Select **Warn if Approved** if you want to display a warning before allowing the users to annotate approved documents.

  - Select **Read-Only if Approved** if you don't want the users to be allowed to annotate approved documents.

  - Select **Warn if Approved or Rejected** if you want to display a warning before allowing the users to annotate approved or rejected documents.

  - Select **Read-Only if Approved or Rejected** if you do not want the users to be allowed to annotate approved or rejected documents.

- **Annotate Documents under Approval** sets who can add annotations in the documents under approval.

  Note: A document version is considered under approval as soon as an approval cycle is started

  Choose from the following settings:

  - **All Users**: This is the default setting. All users with view access to a document can annotate that document once the approval cycle has started.

  - **All Approvers and Approval Master**: The Approvers and Approval master defined in the document approval setup (all stages) for the current version can annotate during the approval cycle.

  - **All Approvers**: All approvers defined in the document approval setup (all stages) can annotate the document while it is being approved.

  - **Pending Approvers and Approval Master**: Only an approval master or approvers who can submit an approval state (Approve or Reject) for the current version can annotate the document during the approval cycle.

  - **Pending Approvers Only**: Only approvers who can submit an approval state (Approve or Reject) for the current version can annotate the document during the approval cycle.

- Specify the **Viewer Quality** as:

  - **Best Performance** (Default): In this mode, the Viewer uses less compression to transfer images. These images are transferred faster but may contain small compression artifacts.

  - **Best Quality**: In this mode, the Viewer uses less compression to transfer images. It takes longer to transfer these images. However, you can view them without compression artifacts.

    Note: This setting is applicable to both the HTML5 and Java Viewers.

- **Settings for Automated Artwork**

  Note: The below options are visible only when Automated Artwork license is enabled.

- **Task Type for Bulk Text Replace**: Choose from the list of task types shown. The selected task type is used in the **Files marked for Edit** widget when editing Artworks in the Viewer.

- **Text Replace Library**: Choose from the list of Text Document Saved Searches shown. The selected Saved Search is used in the **Action List** Widget. Read more about it *here*.

  Note: This option requires Packaging Content Management License.

- **PCM Attribute for linking Text Statements**: Choose from the list of document reference attributes shown. The selected document reference attribute is used to attach text content documents (such as .wcc) when saving a graphic file modified with **Action Lists** in the viewer.

  Note: This option requires the Packaging Content Management License.

- **Log out user when inactive** Select this option, to log out the users whose sessions are not active for a period of time. Option is given to log in again and continue when the user returns to the viewer.

- **Stream video through WebCenter proxy** Enable this option to open video files located in Asset management system in the HTML5 viewer.

- **Show Discussions in Viewer** Enable this option to view discussions widget in the viewer and view all the discussion posts about the document viewed.

Note: Project Managers who can Force Approve or Force Reject is not considered an approver. They can add annotations only if the setting is **All Users**.

4.2.33. Editing Artwork in Viewer

Text within an Artwork may have to be edited or modified sometimes or a single word may have to be replaced in multiple artworks to suit the current marketing campaign. In such instances, depending on an Artwork designer to perform the change may delay the flow of work and add to the cost.

You can use the WebCenter Viewer to modify the artwork on the go and instantly save the changes to the artwork. This saves time, effort and dependency on the artwork designer and thus reducing the time taken from the ideation to the product on shelf.

Note: Automated Artwork license is required for this functionality to be enabled in the Viewer.

To enable the edit mode for the document, **Switch to Edit Mode** in the Viewer.

Two new widgets are available in the **Edit** mode namely,

- *Action List* Widget

- *Files Marked for Edit*

Action Widget

You can view the AI (Adobe Illustrator document) or PDF document in the edit mode in Web Center Viewer.

Action widget allows you to create an action list, which performs text replacement actions in the document. The actionlist can be saved to execute on other documents or to do a *bulk operation*.
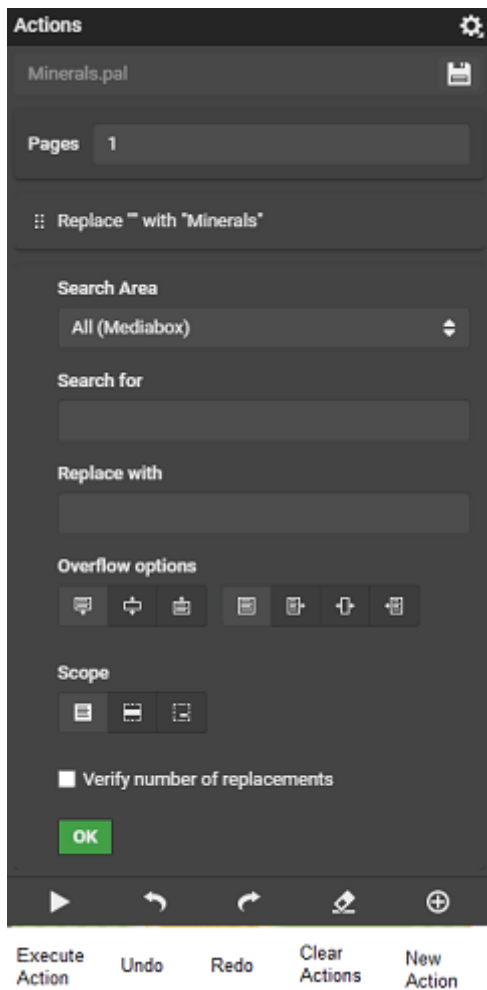
Action lists can be created and saved within the same project as the document or in different projects. Search and Replace Action is available. You can add a **New Action** or **Execute Action** or **Clear Actions List** or **Undo** or **Redo** the previous operation.For each of the Action, edit or delete or reorder of the action is possible.

Steps to create a New Action

You can search for (live) text phrases and replace them with another text phrase. Follow the steps given below to create a new Action list:

1. **Search Area**: You can choose an area of the artwork where the text has to be searched for. You have three options in the drop down namely

   • **All**: All the textboxes in the artwork are included.

   • **Trimbox**: Only textboxes within the trimbox of the artwork are included.

   • **Custom**: Textboxes within the specified region which is indicated by x, y and width and height are included.

   > **Note:** Click the button to select an area on the artwork

2. **Search For** :Type the text which has to be searched for, in the artwork as specified in Search Area.

3. **Replace With**: Type in the text to replace the matches with.

4. **Overflow options**: Sometimes the replaced text may be longer or shorter than the current text. When the replaced text is longer then choose the overflow options to specify how the extra text is shown in the artwork. For example, when the text "fresh apple" is replaced with "Juice and sumptuous apple".

    Overflow can be dealt with

    *   **Vertical Overflow**: When the text is longer than the original text, the textbox can overflow to the bottom, top or in both directions.

    *   **Horizontal Overflow**: When the text is longer than the original text the textbox can overflow to the left or right or in both directions.

    *   **Max Width**: The maximum width of the textbox. Should be set in order to use the horizontal overflow.

5. **Overflow Scope**

    *   **Selected Paragraph**: Applies Overflow options to the whole textbox

    *   **Selected Line(s)**: Applies to the selected lines only and the rest of the textbox remains unchanged.

    *   **Selected Text Fragment**: Applies to the selected fragments of text and the rest of the textbox remains unchanged

6. **Verify number of Replacements**: Select this check box to verify the expected number of replacements. When there are less or more replacements than expected, the action will fail.

7. **Save** : You can save the **Action** created with the above steps as a Document in the current Project or you can specify the name of the document and by default it is saved in the root folder of the Project. The action list is saved as a document with a .pal extension.

8. You can choose to execute the action directly from this widget by selecting **Execute Action** and **Save** the document.

    When you want to run the Action List for multiple documents use the **Files marked for Edit** Widget. Switch back to view mode to navigate back to the original view.

Replace using text statements in Artwork

When a Text Content Search is configured in the **General Preferences** by the Admin user, the user can only replace text with Text Statements. Click the button to select a Text Statement from the Saved Search and select the correct translation of the text.

A saved search of text statements can be configured for the replacing the text in the **Edit Mode** in the **Action List** widget. Read how *here*.
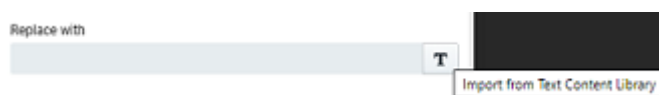
When a saved search is chosen, then the text cannot be replaced manually. When pcm setting is configured it is only possible to select text from a saved search

Selected statements , of which one can be chosen to replace the text

You can select multiple statements in any of the languages available for the statement, of which you can then select a single text statement as a replacement for the text on the artwork. Click on the document to switch.

After the search and replace of the text statement is performed and the modified artwork is saved, the selected Text Statement document can be linked using the Document Reference Attribute configured in the **General Preferences**.

Edit text in Bulk

The **Files Marked for Edit** Widget makes it possible to make small text changes on multiple Documents.

You can choose an **Action (.pal file)** which is created and saved in the Actions Widget.

Select the Graphic files from your Project where you want to execute the Action list. Click submit to execute the Action list (.pal file) on the selected files. A task is created in the project, where the artwork and the action list are attached.

5. Approving and Rejecting Documents

You can see documents waiting for your approval on the **My Work** page, under **My Approvals**.

Note: If you cannot see **My Approvals**, go to **My Work** > **Edit My Work Setup** to add it to your **My Work** page.

You can approve, reject or comment a document:

- from the **My Work** page,

- from the **Viewer**,

- from the document details page (**Approval** tab).

Note: Project Managers have more options when approving or rejecting documents. They can **Force Approve** or **Force Reject** a document. See *Forcibly Accept or Reject Documents*.

Approvals, rejections and comments are shown on the **Action History** page.

Note: If you need to setup an approval cycle to have other users approve or reject a document, see *Defining Approval Settings* on page 273.

5.1. Evaluate a Document in the Viewer

When you evaluate a graphic file or a page list (see *Document Types* on page 58 for information about the supported file types), you can first open it in the Viewer to look at it in detail. You can then approve, reject, or share a document for approving or viewing or add a stage or comment it directly from the Viewer.

1. Click the document's thumbnail or the 🔍 button.

   You can do this from:

   - the **My Work** page (under **My Approval** if you have documents to approve or under **Approvals to Follow Up** if you are an **Approval Master**),
   - the **Documents** tab in the project,
   - the header of the Document Details page.
   - the viewer

2. In the top toolbar, click:

   - ✅ to approve the document,

   - ❌ to reject it,

   - 💬 to comment it,

   - ✅↗ to forward approval request

   - ✓ to force approve it if you are a Project Manager

   - ✗ to force reject it (if you are a Project Manager).

Alternatively these options are also available in the **Approval Details** widget. This is available only if the user has **Change Approval** permissions.

> **Note:** You can view the status of the approval of the document in top tool bar.

3. In the pop-up that opens, do the following:

if you are...	you can...
approving or force approving the document	set a condition for your approval **if the approval cycle allows this** (see *Allow Conditional Approval or Not* on page 281): select **Set Approval Condition** and type your condition in the box.
rejecting or force rejecting the document	type a reason for your rejection in the box.
commenting the document	type your comment in the box.

4. If the user has **Change Approval** permissions, then the user can access the **Approval Setup** in the

Approval details widget. Click to open the **Document Approval Setup** pop-up window. User can perform all actions as specified in

Defining Approval Settings on page 273

5. It is possible to also Edit the approvers when the approval stage is in progress. When you click on the **Edit Document Approval Setup** , you can add a new approver or replace an existing approver based on the permission you have.

You can read about it in *detail*.

6. Enter your password, if your WebCenter server requires it.

In case, the approval cycle is completed and the document is in Approved state, then the user cannot make any changes to the approval cycle from the viewer.

7. Click the **Commit** button.

A warning message is shown, if unsaved annotations are present, when you try to **Approve** / **Reject** /**Comment** on a document.

Once you have approved or rejected the document, you may not change its approval status later (only a **Pending** status allows future changes).

If you have entered an approval condition, a rejection reason or a comment, it will be shown in:

* the **Approval** tab of the Document Details page,

* the **Action History** tab of the Document Details page,

* • the Java **Viewer**'s **Document History** panel.

* the **Approval Details** panel.

To see all the documents you have recently evaluated, go to **My Work** > **My Recently Submitted Approvals**.

Note: If you cannot see **My Recently Submitted Approvals**, go to **My Work** and add it to your **My Work** page.

5.2. Evaluate a Document in the Document Details Page

When you need to evaluate an office file (like Microsoft Word, Excel, PowerPoint etc.), you can first download it and open it in the corresponding application, then evaluate it from the **My Work** or the Document Details page.

To approve, reject or comment a document from the Document Details page:

1. Go to the **Approval** tab.

2. Click:

   - ✓ **Approve** to approve the document,

   - ✗ **Reject** to reject it,

   - 🗨 **Comment** to comment it,

   - ✓ **Force Approve** to force approve it (if you are a Project Manager),

   - ✗ **Force Reject** to force reject it (if you are a Project Manager).

3. In the pop-up that opens, do the following:

if you are...	you can...
approving or force approving the document	set a condition for your approval **if the approval cycle allows this** (see *Allow Conditional Approval or Not* on page 281): select **Set Approval Condition** and type your condition in the box.
rejecting or force rejecting the document	type a reason for your rejection in the box.
commenting the document	type your comment in the box.

4. It is possible to also Edit the approvers when the approval stage is in progress. When you click on the **Edit Document Approval Setup** , you can add a new approver or replace an existing approver based on the permission you have.
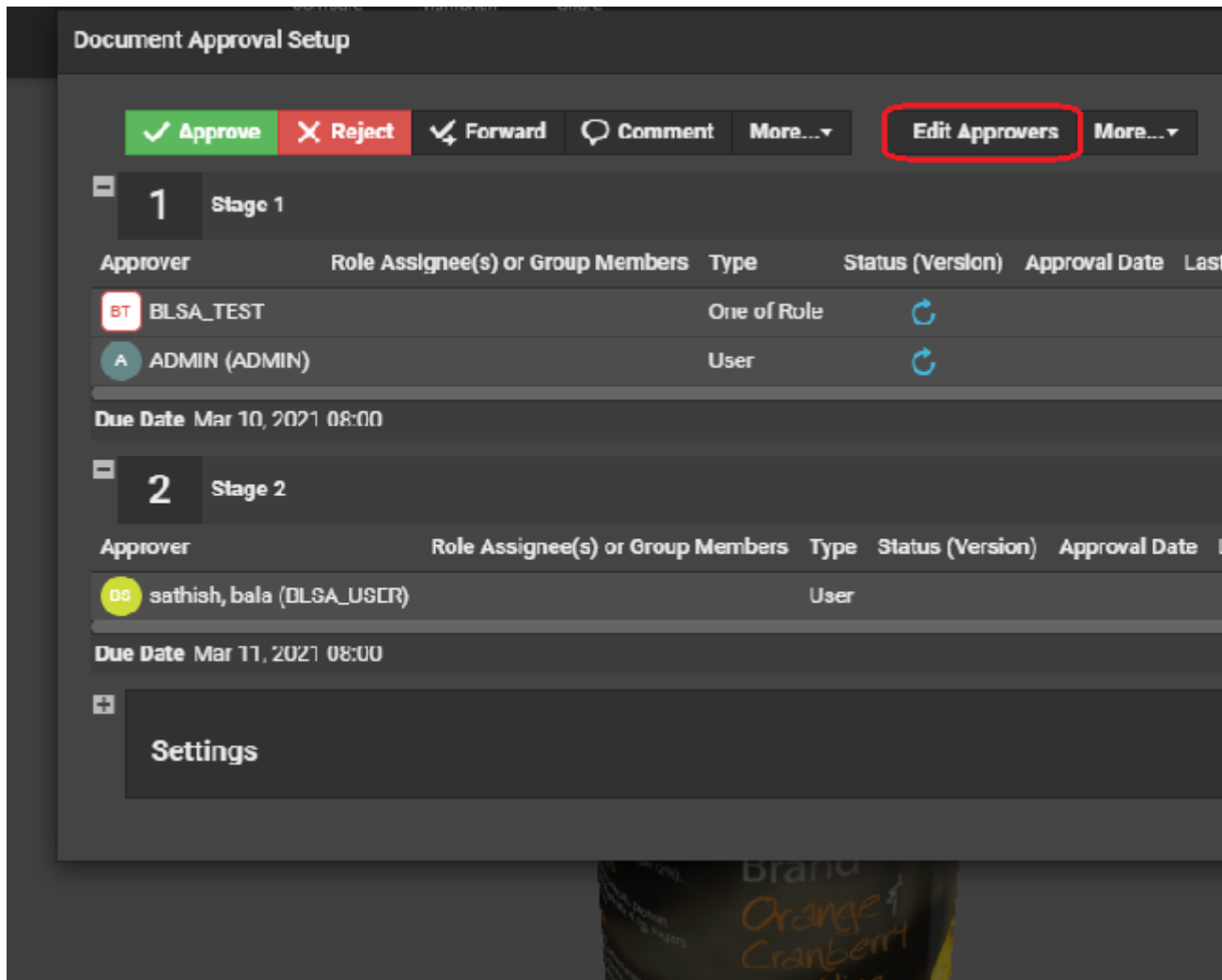
You can read about it in *detail*.

5. Depending on your choice, click **Commit Approval**, **Commit Rejection** or **Commit Comment**.

Once you have approved or rejected the document, you may not change its approval status later (only a **Pending** status allows future changes).

If you have entered an approval condition, a rejection reason or a comment, it will be shown in:

•   the **Approval** tab of the Document Details page,

•   the **Action History** tab of the Document Details page,

•   •   the Java **Viewer**'s **Document History** panel.

    •   the **Approval Details** panel.

To see all the documents you have recently evaluated, go to **My Work** > **My Recently Submitted Approvals**.

Note: If you cannot see **My Recently Submitted Approvals**, go to **My Work** and add it to your **My Work** page.

5.3. Evaluate Multiple Documents at Once

If you have several documents to approve or reject, and you have made the same decision about all of them (you want to either accept them all or reject them all), you can do this in one operation.

1. Go to your **My Work** page.

2. In the **My Approvals** section, select the documents to approve or reject.

   Tip: To select all the documents at once, select the check box at the top of the documents list.

3. At the top of the document list, click:

   - ✅ to approve the documents (you cannot use conditional approval on several documents at once),

   - ❌ to reject them,

   - 💬 to comment them.

   Note:

   - Use the buttons at the top of the list and not the ones beside a document, or you will only approve / reject / comment that document.

   - If you are not Project Manager for some of the documents you selected, **Forced Approve** and **Forced Reject** are not available.

4. If you are commenting the document, type your comment in the pop-up's box.

   If you are rejecting the document, you can enter a rejection reason in the pop-up's box.

5. It is possible to also Edit the approvers when the approval stage is in progress. When you click on the **Edit Document Approval Setup** , you can add a new approver or replace an existing approver based on the permission you have.
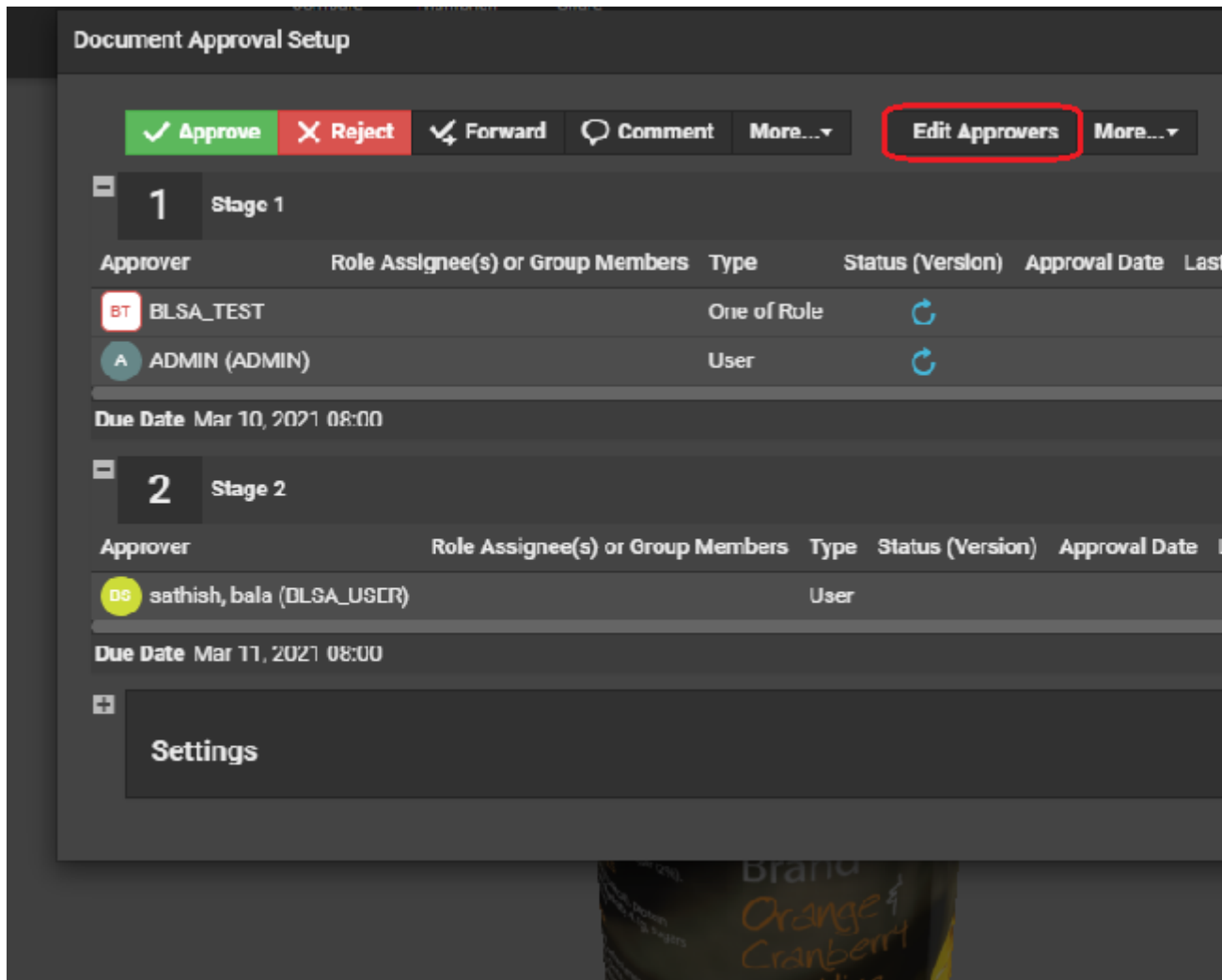
You can read about it in *detail*.

6. Depending on your choice, click **Commit Approval**, **Commit Rejection** or **Commit Comment**.

The status of the approval action is displayed, listing any documents that could not be updated.

Note: You can also do this from within a project (in the **Documents** tab, select the project's documents to approve or reject, then click **Approve / Reject** in the **Actions** menu).

5.4. Sharing Documents from Viewer

WebCenter Viewer now allows documents to be shared to users who are both **Registered** and

Unregistered users using **Share Viewer Link** option.

Registered users are those who are already present in the WebCenter and unregistered users are not part of WebCenter and can be provided temporary access to view the shared document.

When you click on **Share Viewer Link** option, a pop up window is opened. You can choose the users whom you may want to share the document from the drop down.

If you wish to share the document to other users, you can type in their email id in the users field and the option to **Add Unregistered User** is enabled.

Note: When a document is shared to an unregistered user, the email id is remembered and is available in the drop down.
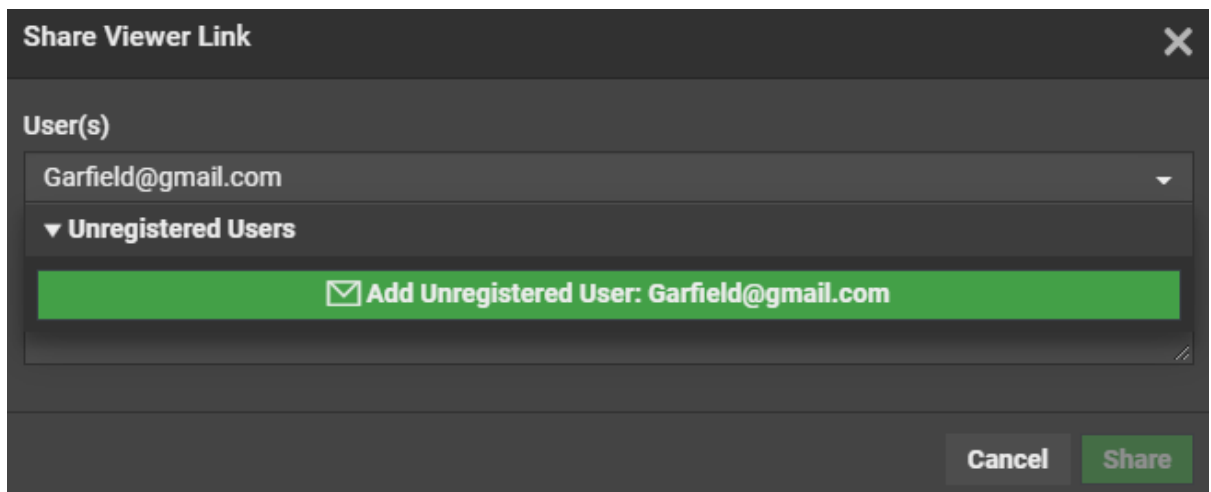
You can share the link to both registered and unregistered users at the same time. When you share, an email is sent to the users with a link to the document and information about the Document name, Version number and comment.

The validity of the link shared for unregistered users is based on the token authentication.

6. Working with Page Lists

6.1. About Page Lists

What is a Page List document?

Page Lists are a special type of multi-page PDF documents in WebCenter that represent imposed books or magazines. As such they are an important tool for commercial printers.

Page Lists PDFs are generated in Automation Engine from FastImpose imposition files (`*.imp`), and uploaded to WebCenter from the Automation Engine production server.

If you are not using a Automation Engine production server, you can also upload Page Lists using the **Upload** feature in WebCenter. You cannot upload imposition files (`*.imp`).

Page List documents have two major advantages over other multi-page PDF files:

- You can **upload either the complete document, or specific pages** only (for example, pages 6-12);
- **individual pages can be approved or rejected** in WebCenter (for example, you can approve pages 3, 5 and 7-16 of a 16-page Page List).

Note: A multi-page PDF file can only be approved or rejected as a whole.

Working with Page Lists

Page List documents are **displayed as a single document** in document lists. Click the Page List name to view its pages and details in the dedicated Page List views.

Tip:

Only FastImpose impositions are recognized as Page Lists in WebCenter. Multi-page files uploaded from within WebCenter (except multi-page PDFs uploaded specifically as a page list), or from Odystar, Nexus, or even other Automation Engine documents will never be treated as Page Lists. Instead, they are considered regular multi-page PDF documents.

6.2. Page List Views

When you want to examine, approve or reject a Page List, you have the choice of a number of views in which to do so:

Page List

Displays the pages in the imposition in a table.

For every page, the Folio, Sheet Name, Sheet Side (for page lists uploaded from Automation Engine), Thumbnail, Page Version, List Version, and Uploaded Date are displayed.

Finally, the approval status per page is listed, and pages that have annotations are marked with a post-it icon.

Page Gallery

Displays the pages in the imposition in a gallery view. This gives you a quick overview of the approval status of the different pages:

- Pages topped with a blue bar and icon have not been approved or rejected yet;

- Pages topped with a green bar and icon have been approved;

- Pages topped with a green bar and icon have been approved with a condition;

- Pages topped with a red bar and icon have been rejected;

- Pages topped with a green bar and icon have been force approved;

- Pages topped with a red bar and icon have been force rejected.

Page List Information

Displays basic information about the Page List (number of pages, binding...). This information is editable for documents that were uploaded using the WebCenter Upload feature.

6.3. Page Lists in the Java Viewer

Page List-specific features

The Viewer has a number of features that make working with Page List documents even more intuitive:

• Reader spread mode
• Page List panel
• Show margins (Trim boxes) option
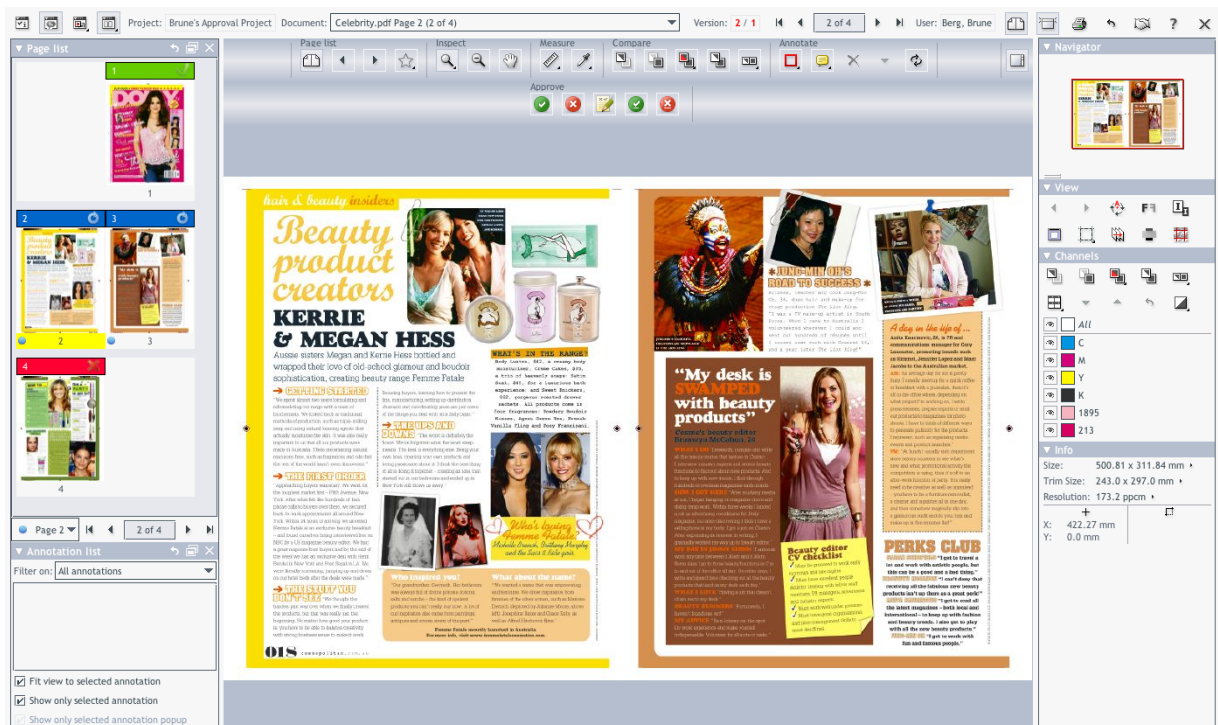
Reader Spread view

Click the **Toggle Reader Spread View** button in the top toolbar to activate the Reader Spread view mode.

Page List panel

Click the **Display Page List Panel** button in the top toolbar to display the Page List panel. This panel shows thumbnails of all the pages in the Page List document. Click on a page in the panel to display it in the viewer.

Tip: You can dock and undock this panel to optimize your workspace in the Viewer.

Show Margins option

Click the **Show Margins (Trim Boxes)** button on the View toolbar on the right hand side of the Viewer to display the trim boxes for the displayed page(s). Trim boxes are displayed in blue.

For more information, see the Viewer's online help.

6.4. Notes on Page Lists and Approval Cycles

Page Properties

Index

Represents the sequential position of the page in the Page List.

Folio

Represents the "name" of the page as it is used in FastImpose.

Page Version

Represents the version of the individual page in the Page List.

List Version

Represents the version of the complete Page List. The List Version is updated every time you upload a new version of the imposition from Automation Engine.

Index versus Folio

For example, the page with Index `7` may have `vii` as its Folio, or the page with Index `1` may actually be page 3 when the cover is not part of the imposition.

List Version versus Page Version

When new versions of a selection of pages are uploaded, the List Version number and the Page Version number of the uploaded pages are incremented.

As a result, in very asynchronous workflows (e.g. magazine printing), you can easily have 15 Page List Versions.

Every update to the Page List increments this version number. However, most of these updates will only affect certain pages: their Page Version will be incremented.

By the time you reach Page List Version 15, many pages will be at version 3 or higher, but some will still be at Page version 3.

Empty and blank pages

Empty pages are ignored for approval.

For example, if you upload a 32-page PDF file as a Page List, but change the Number of pages to 64 afterwards, creating 32 empty pages at the end of the Page List. These 32 empty pages are ignored - you cannot approve or reject them.

Blank pages require approval. WebCenter detects when PDF pages have been added to the imposition that have no visible content. The blank pages need to be approved just like any other pages.

When is a Cycle Finished?

The approval cycle's status is changed to `Finished` when any one of the following conditions are met:

- all Approvers have either approved or rejected it,

- the Project Manager or an Admin has Forced Approved or Forced Rejected it.

Note that in this case, the final status is `Forced Approved` or `Forced Rejected` instead of `Finished`.

A finished approval cycle may not be stopped or started without uploading a new version of the document.

These **status rules apply to each individual page in the Page List**.

Only when **all the pages in the Page List document** have reached their Finished (or Forced) approval status, will the **Page List** get the Finished status.

6.5. Approve or Reject a Page List

To approve the pages in a Page List, you can choose from a number of different methods.

6.5.1. Use the Viewer

1. Navigate to the Page List in a Document list, and click on its thumbnail image. The **Viewer** opens, displaying the Page List.

2. In the Viewer tool bar, click:

   - to approve the document,

   - to reject it,

   - to comment on it,

   - to force approve it (if you are a Project Manager),

   - to force reject it (if you are a Project Manager).

3. In the pop-up that opens:

   a) Choose to approve / reject / comment either the **Current Page**, the **Selected Pages** or **All Pages**.

   b) Optionally:

if you are...	you can...
approving or force approving the page(s)	set a condition for your approval **if the approval cycle allows this** (see *Allow Conditional Approval or Not* on page 281): select **Set approval condition** and type your condition in the box.
rejecting or force rejecting the page(s)	type a reason for your rejection in the box.
commenting the page(s)	type your comment in the box.

c) Enter your password if your WebCenter server requires it.

d) Click the **Commit** button.

For more information, see *Page Lists in the Java Viewer* on page 230.

6.5.2. Use the Page Gallery View

1. Navigate to the Page List in a Document list and click on its name.

   The Document Details page appears.

2. Select **Page Gallery** from the menu.

3. Select the pages you want to approve or reject and then click **Approve Selected Pages** or **Reject Selected Pages**.

   You can also choose to **Approve All Pages** or **Reject All Pages**.

4. In the pop-up that opens:
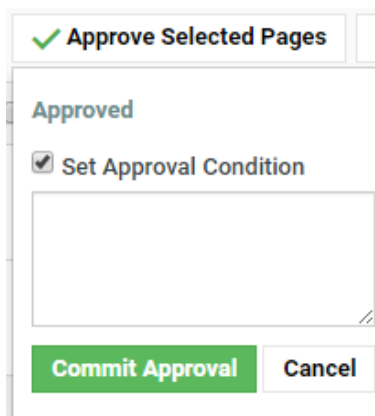
a) Optionally:

if you are...	you can...
approving or force approving the page(s)	set a condition for your approval **if the approval cycle allows this** (see *Allow Conditional Approval or Not* on page

if you are...	you can...
	281): select **Set Approval Condition** and type your condition in the box.
rejecting or force rejecting the page(s)	type a reason for your rejection in the box.
commenting the page(s)	type your comment in the box.

b) Enter your password if your WebCenter server requires it.

c) Click the **Commit** button.

6.5.3. Use the Page List View

1. Navigate to the Page List in a Document list and click on its name.

   The Document Details page appears.

2. Select **Page List** from the menu.

3. Select the pages you want to approve or reject and then click **Approve Selected Pages** or **Reject Selected Pages**.

   You can also choose to **Approve All Pages** or **Reject All Pages**.

4. In the pop-up that opens:

   a) Optionally:

if you are...	you can...
approving or force approving the page(s)	set a condition for your approval **if the approval cycle allows this** (see *Allow Conditional Approval or Not* on page 281): select **Set Approval Condition** and type your condition in the box.
rejecting or force rejecting the page(s)	type a reason for your rejection in the box.
commenting the page(s)	type your comment in the box.

   b) Enter your password if your WebCenter server requires it.

   c) Click the **Commit** button.

6.6. Uploading and Updating Page Lists

6.6.1. Requirements for Page Lists

Page Lists are supported in WebCenter from version 7.1 onwards.

To publish an imposition from Automation Engine to WebCenter, use the **Publish Imposition on WebCenter** ticket.

WebCenter and Automation Engine must be in the same LAN, or use a Tunnel and Approval client.

6.6.2. Upload an Imposition as a Page List from Automation Engine

Only FastImpose impositions are recognized as Page Lists in WebCenter. Multi-page files uploaded from within WebCenter (except multi-page PDFs uploaded specifically as a page list), or from Odystar, Nexus, or even other Automation Engine documents will never be treated as Page Lists. Instead, they are considered regular multi-page PDF documents.

Proceed as follows to upload an imposition file as a Page List from Automation Engine to WebCenter:

1. Start the Automation Engine Pilot and log on to the production server.
2. Browse to the FastImpose imposition file (`*.imp`) you want to upload, or create a new imposition in the Pilot.
3. Right-click the imposition and select **New Task** > **Publish Imposition on WebCenter**.

   If the **Publish Imposition on WebCenter** task does not appear in the context menu, choose **More Tickets** and select the task in the **Select Ticket** dialog.
4. Modify the settings for the **Publish Imposition on WebCenter** ticket (the first ticket in the chain) if needed.
5. Modify the settings for the **Send Book to WebCenter** ticket (the second ticket in the chain):
   a) On the **Destination** tab, select the WebCenter **Site** from the list.
   b) Enter the **Project**, **Folder**, **Document** and **Project Template** names. You can use SmartMarks to populate these fields.
   c) Enter your **User Name** and **Password** for the selected WebCenter site.
   d) Click the **Approval** tab and enable **Approval** if required.
6. Click the **Launch** button to upload the imposition to WebCenter.

   Note: This automatically adds the imposition to the Pilot's **Pages** view at the same time.

6.6.3. Upload an Imposition using the WebCenter Upload Feature

1. Either go to the project/folder you want to upload the document into and click the

   ⬆ **Upload** button, or just click the **Upload** menu from anywhere.
2. On the **Upload** page, select the **Project** and **Folder** you will upload the document into (if you are already in the project/folder, those are filled in automatically, but you can still **Change the Destination**).
3. Select **Browse** in the **Source** list and click the **Browse...** button to open a browser dialog and select your file.
4. Select `Page List` in the **Document Type** list.
5. Type the index number of the first page in the file in the **Index of First Page** field.

   For a new document, this will typically be 1, but it might not be, if you plan on adding additional pages later, or if you are updating a selection of the pages in an existing Page List.
6. The document **Name** is automatically detected. You can still change it if needed.
7. Optionally, specify a **Description** for the document.

8. Click **Upload**.

The Page List is uploaded to WebCenter. You can still edit some properties of the Page List in the **Page Information** view (such as the number of pages, the binding edge, etc.).

6.6.4. Update Pages in a Page List

You can update a specific page of range of pages in a Page List, either from Automation Engine or through the Upload feature in WebCenter.

To Update One or More Pages from the Pilot

1. In the Automation Engine Pilot's **Imposition Gallery**, select the pages in the imposition that you want to update.

2. Right-click one of the selected pages and re-launch the exact same **Publish imposition on WebCenter Chain** ticket you used to upload the original Page List.

To Update Individual Pages from WebCenter

1. Navigate to the folder in which the original Page List resides.

2. Click the name of the Page List to open the Document Details page for the Page List.

3. Click **Page List** to open the Page List view.

4. Click the **Upload New Version** link in the row corresponding to the page you want to update.

5. Browse for the PDF document containing the new version of the page you want to update and click **Finish** to upload the new page.

The **Index for First Page** field is already filled in, because you are only updating a single page (at the listed index).

To Update Multiple Pages from WebCenter

1. Navigate to the folder in which the original Page List resides.

2. Click the name of the Page List to open the Document Details page for the Page List.

3. Click **Page List** to open the Page List view.

4. Click the **More Actions...** button and select **Upload New Version**.

5. Browse for the PDF document containing the new versions of the pages you want to update.

6. Provide the **Index of First Page** information: pages from the new PDF you are uploading will update the existing pages in the Page List starting at the Index you specify.

For example, if you upload a four-page PDF document to a 16-page Page List, and enter 5 as **Index of First Page**, WebCenter will update pages 5, 6, 7 and 8 in the Page List with the newly uploaded versions.

7. Click **Finish**.

7. Working with 3D Files

With WebCenter, you can upload, view and approve 3D files. This is an option available with the **Advanced Approval** module.

This is based on Esko's **Visualizer** technology, and enables you to:

- Communicate the final packaging in all its realism to clients.
- Use WebCenter as an online medium to share 3D mockups.
- Enhance artwork and shape approval with its 3D representation.

7.1. About 3D Files

WebCenter works with **Collada** (`.dae`) and **Zipped Collada** (`.zae`) 3D files.

Collada is an interchange file format for interactive 3D applications. It is an open standard based on XML, managed by the Khronos Group (a not-for-profit technology consortium). For more information, go to *http://www.khronos.org/collada/*.

A Zipped Collada file is a zip file containing:

- a Collada file,
- a `manifest.xml` file with a specified format,
- optionally, other assets such as backgrounds.

Note: WebCenter supports having a preview embedded in the archive file and extracting this automatically as a default thumbnail.

7.2. Creating and Exporting 3D Files

You can create Collada files from **Studio Visualizer** and / or **ArtiosCAD**.

7.2.1. In Visualizer

Studio Visualizer can build 3D models based on the following structural design file formats:

- **ArtiosCAD *.ard** files;
- **Studio Toolkit for Flexibles *.bag** files for flexible packaging such as bags and wrappers;
- **Score! *.vlm** files.
- **Collada *.zae archives** with arbitrary 3D shapes, with printable areas defined (if supplied by Esko products). Collada archives created by non-Esko products can be used in Studio Visualizer but will not have a printable area.

1. Open the **artwork** in Illustrator, ArtPro or PackEdge.
2. Place and align the **structural design file**.

3. Then choose **Open in Visualizer** from the **File** menu.

4. Set the **Substrate** material.

5. Edit your design as necessary:

   • add process and / or spot colors,

   • add special finishes,

   • add an environment (background).

6. Export your 3D design to a **Zipped Collada** (`.zae`) file using the **Export 3D file for Viewing** option.

   You can choose to **Create a preview image file alongside** the Collada file. This will be a `.jpeg` thumbnail image.

   > **Note:** If your model includes graphics, saving to `.zae` and not `.dae` ensures you have everything in one file (WebCenter doesn't support using multiple files for one 3D design).

See the Visualizer manual or online help for more information.

7.2.2. In ArtiosCAD

Since ArtiosCAD 7.6, any 3D file can be output to Collada. The output includes the graphics, floor shading etc.

> **Note:** This might require additional licensing.

1. Create your model using the ArtiosCAD 3D functionality.

2. When it is ready, go to **File** > **Outputs-3D** > **Collada** to export it.

   • Set the **Graphics resolution**.

   • To export a thumbnail with the Collada file, choose either **PNG** or **JPEG** in the **Include bitmaps as** option (you can select the **Quality** for **JPEG**).

   • Save the file as a **.ZAE file**.

   > **Note:** If your model includes graphics, saving to `.zae` and not a `.dae` ensures you have everything in one file (WebCenter doesn't support using multiple files for one 3D design).

See the ArtiosCAD manual for more information.

7.3. Uploading 3D Files to WebCenter

Collada (`.dae`) and Zipped Collada (`.zae`) files can be uploaded to WebCenter using the normal upload functionality available within WebCenter, via Automation Engine or through the WebCenter SDK.

WebCenter automatically recognizes Collada files as the Collada document type.

7.3.1. Working with 2D and 3D Files

We advise using the same name for related 2D and 3D documents, and putting them in the same folder.

7.3.2. Creating a Thumbnail

By default, WebCenter shows the default Collada thumbnail for Collada files: .

To add your own thumbnail:

- use the **Create a preview image file alongside** when exporting the Collada file from Vizualiser (see *Creating a 3D File in Visualizer*).
- choose either **PNG** or **JPEG** in the **Include bitmaps as** option when exporting the Collada file from ArtiosCAD (see *Creating a 3D File in ArtiosCAD*).
- upload your own thumbnail in WebCenter:
  a) in the **Document Details**, go to the **Document Information** tab,
  b) click **Thumbnail** and upload your thumbnail image.

Note: The best sizes for thumbnails in WebCenter are 100x100 and 200x200 pixels.

7.4. Viewing 3D Files

Hyper realistic 3D viewing experience is now available in WebCenter. You can view 3D in Unified Viewer.

- the Java Collada Viewer
- the HTML5 Collada Viewer

- Click the thumbnail of a Collada file to open WebCenter's 3D Viewer. As a regular user, you need to have both View and Download rights to use the Collada Viewer.

Project: DEKE_test_Viewer   Document: 18 Pack.zae   Version: 1   ✕

| ✓ Approve | ✕ Reject | 💬 Comment | ✓ Force Approve | ✕ Force Reject | ℹ |

Note:

If your Collada file contains a background environment (`.env` file), you will see it in the background.

WebCenter supports all the default Visualizer environments.

- The HTML5 3D Viewer launches much faster than the Java based Viewer and it works on mobile devices. You can use your mouse or touch to perform actions. Read about HTML5 3D viewing in *Viewing 3D in the HTML5 Collada Viewer* on page 195.

    - Makes use of 3D capabilities that are built into modern browsers (WebGL) depending on your browser.
    - Supports the same lighting, print and finishing effects as Java version and the desktop Studio application.
    - For Collada files that are written in Studio, the Viewer will show the lighting environment as configured there. For other Collada files, it will use a neutral photo studio lighting (different from the Java-based Viewer).

7.4.1. System Requirements (Java 3D Viewer)

About System Requirements

The following system requirements only apply to the Java 3D Viewer. It is however recommended to use the newer HTML5 3D Viewer (the default 3D Viewer since WebCenter 16.0), since this has better

browser support and offers a better experience. The system requirements for using the HTML5 3D Viewer are the same as WebCenter usage in general, no special additional requirements.

For PC Clients

System	32-bit or 64-bit
Memory	1GB RAM minimum, 4GB RAM recommended
Java version	Java 1.5 or higher
Video card	DirectX9 compatible 3D graphics board from ATI or NVidia supporting fragment shaders and with at least 256MB video memory. For example: • NVidia GeForce FX series, GeForce 6 series, GeForce 7 series, GeForce 8 series, GeForce 9 series. • ATI Radeon 9600, 9700, 9800, Radeon X series, Radeon HD series. **Note:** ATI FireGL boards and Intel embedded graphics are not supported!

For Mac Clients

System	32-bit or 64-bit
Memory	1GB RAM Minimum, 4GB RAM recommended
Java version	Java 1.5 or higher
Video card	For Intel Macs: • NVidia GeForce 6600/6800/7300/7600/7800/8600/8800, Quadro FX 4500/5600. • ATI Radeon 9600/9700/9800, Radeon HD 2400/2600, X600/X800/X1600/X1900. For PowerPC Macs: • NVidia GeForce FX/6600/6800/7800. • ATI Radeon 9600/9700/9800/X800/X1900. For example: Power Mac G5, iMac G5, PowerBook G4 (from 2004 or later).

Browser Limitations

The Collada 3D viewer is currently not supported for use on Firefox 4 for Mac and Chrome for Mac.

With Firefox 3 for Mac there is a known problem when using tabs: when the Collada 3D viewer is open, opening extra tabs will also display the Viewer image in those tabs.

7.5. Using 3D file as 3D perspective

You can use any 3D file as a 3D perspective of a graphics file in the WebCenter viewer. You can also view both the graphics document and the 3D file next to each other.

To view the files in the viewer, ensure there is a document reference attribute called **CAD_REFERENCE** in the graphics document. Follow the steps below to open a structure document.

You can use the structure document in the Structure document selector.

After selecting a 3D Document as 3D perspective, save the link using the save button next to the Structure Document Selector.

Note: This is only possible if the Document has the Document Reference Attribute **CAD_REFERENCE**, in which the link is stored.

If a printable part is selected and the alignment options are saved, then the 3D widget displays the 3D shape along with the graphic file applied to the specified printable part.

Note: The printable part is saved in the document reference properties **CAD_PRINTABLE_PART** and **CAD_PRINTABLE_PART_SIDE** of the **CAD_REFERENCE** attribute that points to the 3D file.

7.6. Approving 3D Files

Collada files can be approved like any other document in WebCenter. You can approve, reject or comment a Collada file from:

- your **My Work** page,
- the project's **Documents** tab,
- the document's **Approval** tab,
- the 3D Viewer (at the bottom left of the window).

7.7. Annotating in 3D Files

When the current document is a 3D file, the 2D annotations are created relative to the view port and are shown in the annotation report. Adding an annotation is not possible during comparison of 3D models or on 3D perspectives that are linked to graphic documents. When the annotation tool is active, you

- Cannot move or rotate the 3D object. To rotate or move the 3D object, turn off the annotation tool.
- Add an annotation, the camera angle of the 3D model is linked to the 2D annotations. Selecting an annotation, will result in the 3D model rotating to the same camera angle where the annotation was added.

An annotation is only visible, when it is currently selected by the user from the widget.

You can read more on Annotations here

8. Working with ArtiosCAD Documents

You can open your document in the ArtiosCAD application directly from the WebCenter server.

Note:

This is possible if:

1. the document is recognized as any of the following types :

   • Design: `.ARD` and other structural design formats supported by ArtiosCAD

   • Manufacturing: `.MFG` and other structural manufacturing formats supported by ArtiosCAD

   • 3D: `.A3D`

2. you have been granted rights to download the native ArtiosCAD files by the system administrator.
3. you have been given the download permission to the project folder where the document resides.

   • From the Document Search Results page, you may see the **Open in ArtiosCAD** link even when you do not have the download permission. When you attempt download, you will receive an error message.
4. *WebCenter Preferences* > *General Preferences* > *ArtiosCAD* > *Open ArtiosCAD documents* is set to either the ArtiosCAD Standard Edition or the ArtiosCAD Enterprise edition.

8.1. Canvas

The ArtiosCAD Canvas type document is a container for designing multi-part displays. These individual parts in the Canvas may differ in the board format.

The parts of a Canvas can be saved as separate design files into WebCenter and then referred in a **document reference attribute** with the name `Canvas Parts`.

Note: This document reference attribute is available in WebCenter by default. Read *Canvas related Attribute Categories*

The Canvas document will also contain the meta-data about its parts.

Note:

• You cannot use the Canvas documents to run a Standard.
• A canvas document cannot be used to create 3D view with aligned graphics. However, you can view the 2D model with aligned graphics in the Viewer.

Canvas Information Tab

The **Document Details** > **Canvas Information** page has four sub-tabs:

• **Geometry** tab containing:

   • Detailed design information
   • Dimensional details

- Board and flute information,
- Print item details
- Design preview

- **Parts** tab displays the information regarding each part. The information displayed on this tab will depend on whether these parts are managed by WebCenter or saved to WebCenter:

Canvas Information	Document Information	Approval	Action History	Annotations	Projects	Attributes

Geometry	**Parts**	2D View	3D View (Collada)	3D Model (VRML)

Parts

Part	Document	Project	Version	Board
Part 1	PRMA_ACAD_CANVAS1^01.ARD	PRMA_ACAD_Canvas_1	1	DECE
Part 2	PRMA_ACAD_CANVAS1^02.ARD	PRMA_ACAD_Canvas_1	1	DECE
Part 3	PRMA_ACAD_CANVAS1^03.ARD	PRMA_ACAD_Canvas_1	1	DECE
Part 4	PRMA_ACAD_CANVAS1^04.ARD	PRMA_ACAD_Canvas_1	1	ql-200

- the **Part** name as defined in ArtiosCAD

- the **Document** file name (when not managed in WebCenter) or a WebCenter document name if it is managed in WebCenter.

  If the current user has the rights to view the document, it will be displayed as a hyperlink to the referenced document's details.

  If the document is not found, you will see a warning listing the possible causes.

- the **Project** name if the document is managed (separately saved to WebCenter). This will be displayed as a hyperlink to the referenced project's details.

  If the project is not found, a warning will be shown hinting at possible causes.

  If the part is not managed in WebCenter, the Project field will be empty.

- the **Version** number for the parts managed in WebCenter.

  The number will be "0" for the documents not managed in WebCenter.

- the **Board** name

- the **Board Description** – details of the board assigned to this specific part.

- **2D View** tab shows a 2D view of the canvas file (default side)

- **3D View (Collada)** tab shows the 3D view of the document with mouse controls.

Note: If 3D view cannot be created, then an error message will be generated.

- **3D Model (VRML)** tab:

  - When you click on this tab, a VRML file (extension .wrl) will open in the browser generating a 3D view.

  Note: The browser needs a plug-in for VRML format (e.g. Cortona) to generate the 3D view of the document. If this is absent, the browser will download the VRML file.

> **Note:** The Canvas documents should have folding angles to be able to render them in 3D. You will see an error message if this information is missing.
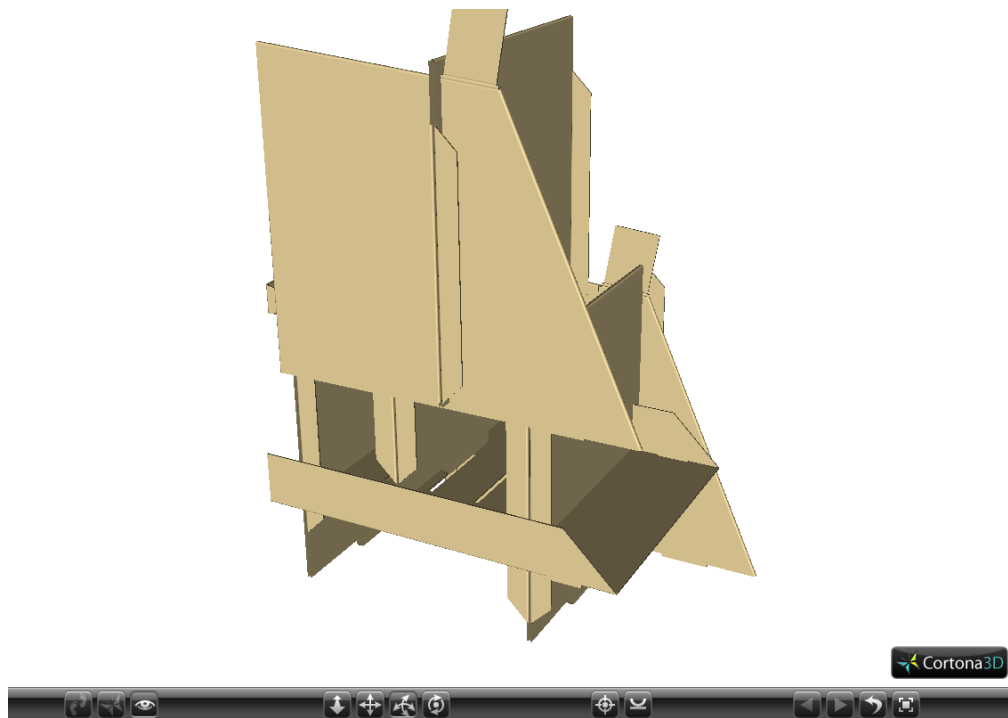
8.2. Opening Documents in ArtiosCAD Standard Edition / Enterprise Edition

Set your **My WebCenter** > **My Preferences** > **ArtiosCAD Preferences** as either:

- ArtiosCAD Standard Edition to download an ArtiosCAD document from the WebCenter site and open it in your ArtiosCAD desktop application.
- ArtiosCAD Enterprise Edition to open the document in the installed ArtiosCAD Enterprise Edition

1. You may open your design / manufacturing /3D file you want to edit in ArtiosCAD desktop application from:

   - the **document details** page using the **Open in ArtiosCAD** button.
   - the **Project Details- Document Overview** page, using the open button.
   - the **Task Execution – Documents section** page, using the open button.
   - the **Document Search Results** page, using the open button shown next to the document name from the list view / grid view, or when you hover over the document in card view.

2. If your preference is set as ArtiosCAD Enterprise Edition, the system will launch the ArtiosCAD Enterprise desktop application. To open documents in ArtiosCAD Enterprise edition, use the same buttons as described. Also enter your login credentials for the WebCenter server.
   The document will be loaded to the ArtiosCAD Enterprise workspace in **manage document mode**. In this mode, you can publish the updated version to the same WebCenter project to which the document belonged.

9. Project Management in WebCenter

Users designated as Project Managers in their profile have a **Projects I Manage** link on their **Projects** menu. In these projects, they have access to a number of additional features that allow them to manage the projects.

Project Managers can:

- Create projects, either blank or from a Template.
- Invite members to the project and uninvite them.
- Create project folders and add documents.
- Set Characteristics and Attributes on the project and its documents.
- Forcibly Accept or Reject documents requiring Approval.
- Set the security on the project.
- Manage Roles in their project.

Note: Only Project Managers who are members of the Admins group can save a project as a Template. See the Administration Guide for more information.

Whenever a project is created, an event is logged in the audit trail and can be viewed in the project history.

Basic information about the newly created project details like the **Project Name**, **Project Description**, **Project Manager**, project was created from template are all mandatorily recorded .

9.1. Creating Projects and Folders

Project Managers and **Project Creator** users can create new projects from a project template, or from an existing project. Project Manager users also have an option to create from zero and they can create new folders inside projects they manage.

Project Creators have to necessarily assign a project manager for the projects they create.

9.1.1. Create a Project from Zero

1. Log in as a **Project Manager** or **Project Creator**.
2. In the **Create** or **Projects** menu, click **Create Project**.
3. Choose **Start from a Blank Project** in the **Create** list.
4. Fill in the new project's **Details**.
   a) Enter the **Name** of the new project.
   b) If you are a **Project Manager** user, by default you are the **Project Manager** of the project you created. If you are a **Project Creator**, you can make another user or user group as the Project Manager for this project by selecting the user name or group name from the Project Manager list.
   c) To make the project active, leave the **Status** on **Active**.

> **Note:**
>
> If you are not sure that the project will be going forward (you need somebody else to decide first), you can either:
>
> • Make the project **Non Active** or **On Hold**,
>
> • Make the project active (if you have the Task Management module), make the decider a project member, and assign him/her a task to confirm/authorize the project as first project task.
>
>   See *Task Management in WebCenter* on page 309 for more information about tasks.

d) If desired, specify a **Customer** for the project, and that customer's **Location**.

e) To use a custom thumbnail, click **Change** beside the default **Thumbnail**.

   Select **Specify New Thumbnail** and enter the complete path and filename in the associated field or **Browse** for it. To use the default thumbnail, leave that choice selected.

f) If desired, enter a project description in the **Description** field.

g) To specify an optional due date, click the calendar at the end of the **Due Date** field and select the desired due date. To set the due time, click the drop-down list to the right of the calendar control.

5. To add **Documents** to the project, click **Add Item** in the **Documents** section and either:

   • **Browse** to the document to add,

   • **Copy** a document from another project (select the project then the document to copy).

   > **Tip:** Use the 🔍 icons to search for a project or document name.

   You can then change the document's **Name** and add an optional **Description**.

6. Invite members to the project: select each member, role or group to invite in the **Invite members** list

> **Note:** You can **Create and Invite New User** to the project from the **Invite Members** drop down list.

To remove a member, role or group, click the associated minus sign.

7. Click **Create**.

This brings you to the new project's details page.

Creating a project adds an event and this is stored in the Project History.

This event will add following information to the Project History:

• The Project/Template from which the new Project is created.

• The name.

• The Project Manager.

• The Salesperson (if there is any).

• The Customer (if there is any).

• The Location (if there is any).

• The description (if there is any).

> **Note:** When a project is created from a template or an existing project, then only the changes (like deletion of attribute values or adding a new document) from the template or existing project is logged in the events.

9.1.2. Create a Project from a Template

1. Log in as a **Project Manager** or **Project Creator**.
2. In the **Create** or **Projects** menu, click **Create Project**.
3. Choose **Use a Project Template** in the **Create** list.
4. Select the **Template** from which you want to create the new project.

   > **Tip:** To view the contents of a Template, click **Show Details**. This opens the Template in another window. Explore the contents as desired and click **Close Window** to return to the **Create Project** page.

   > **Note:** Depending on the template you choose, the fields you need to fill in may vary.

5. Fill in the new project's *Details* and if the project is created by a Project Creator user, then the Project Manager's name has to be filled in mandatorily.
6. If desired, add *Documents* to the project.
7. Add *Members* to the project.
8. If the template has attributes defined, fill them in the *Attributes* section.
9. Click **Create**.

   This brings you to the new project's details page.

   Creating a project adds an event and this is stored in the Project History.

   This event will add following information to the Project History:

   • The Project/Template from which the new Project is created.
   • The name.
   • The Project Manager.
   • The Salesperson (if there is any).
   • The Customer (if there is any).
   • The Location (if there is any).
   • The description (if there is any).

   > **Note:** When a project is created from a template or an existing project, then only the changes (like deletion of attribute values or adding a new document) from the template or existing project is logged in the events.

> **Note:**
>
> The project is created with the same folder structure, documents, discussions, characteristics, attributes, landing page, members, and security as in the template.
>
> Any documents in the template are copied into the new project as new standalone documents, even if they were linked documents in the template.
>
> The list of Approval Users is copied if it is applicable; if there are conflicts, a warning appears and you will have to configure new approval settings.

Fill in the Project Details

In the **Details** section of the **Create Project** page:

1. Enter the **Name** of the new project.

   If the option **Use Automatic Naming** is enabled, then the **Name** field is disabled.

2. When creating a project, you can choose another **User**/**Group** to be the Project Manager. Also, when you copy from an existing project, you can also copy the Project Manager.

   In such cases, you will not have visibility to the project once it is created.

3. To make the project active, leave the **Status** on **Active**.

   > **Note:**
   >
   > If you are not sure that the project will be going forward (you need somebody else to decide first), you can either:
   >
   > • make the project **Non Active** or **On Hold**,
   >
   > • (if you have the Task Management module) make the project active, make the decider a project member, and assign him/her a task to confirm/authorize the project as first project task.
   >
   >   See *Task Management in WebCenter* on page 309 for more information about tasks.

4. If desired, specify a **Customer** for the project, and that customer's **Location**.

5. To use a custom thumbnail, click **Change** beside the default **Thumbnail**.

   Select **Specify New Thumbnail** and enter the complete path and filename in the associated field or **Browse** for it. To use the default thumbnail, leave that choice selected.

6. If desired, enter a project description in the **Description** field.

7. To specify an optional due date, click the calendar at the end of the **Due Date** field and select the desired due date. To set the due time, click the drop-down list to the right of the calendar control.

Add Documents to the Project

1. To add **Documents** to the project, click **Add Item** in the **Documents** section of the **Create Project** page and either:

   • **Browse** to the document to add,

   • **Copy** a document from another project (select the project then the document to copy).

   > **Tip:** Use the 🔍 icons to search for a project or document name.

• Create a document **placeholder** from a document template: select **New** in the **Source** list, select the **Document Template** to use, and fill in any attributes that may be required.

> **Note:** This is only available if your Admin has defined document templates.

See *Document Templates* in the Administration Guide for more information about document templates, and *Assigning Document Attributes* on page 77 for more information about attributes.

2. You can then change the document's **Name** and add an optional **Description**.

Add Project Members

In the **Members** section of the **Create Project** page, you can either:

• Invite members to the project: select each member or group to invite in the **Invite members** list.

To remove a member / group, click the associated minus sign.

• If the template / project you are copying from contains **roles**: you can assign user groups or individual users.

You can see roles the template / original project contains, and are available for assignment at project creation time, in the **Members** section.

• To assign a role to a user group:

1. Select that user group in the **Group** list.
2. Select who in the group will be the **User / Assignee**.

> **Note:** Leave the option **Select User** if you want **any** user of the group, or **all** of the group users (depending on what was set when adding the role to the template / original project) to be **Approver / Task Assignee**.

> **Note:**
>
> If you are using filtering (the role's name is the first word of the name of the group you want to replace it with), you will only see the groups matching that filter in the **Group** list.
>
> In the example below, the role is called `Agency`, and the list shows all groups starting with `Agency` (followed by a space).
>
>
>
> If no group matches the filter you will see the whole list of groups.

• To assign a role to an individual user:

1. Leave **—–Select Group—–** in the **Group** list.
2. Select the individual user in the **User / Assignee** list.

   3. Make sure **Invite Group** is deselected.

> **Note:** You can **Create and Invite New User** to the project from the **Invite Members** drop down list.

• To assign a role to a group with a specific user as assignee:

   1. Select a Group in the **Group** list.

   2. Select the individual user that you want to be the assignee in the **User / Assignee** list.

   3. Make sure the **Invite Group** checkbox is enabled.

• To assign several users and groups to the same role (this option may be enabled/disabled in the parent project or template):

   1. Select a user or group assignee you want to assign to the role.

   2. In the **Actions** column, click the **+** icon to add another row for this role.

   3. You can now assign the same role to multiple users and/or groups, using the **+** every time you need to add a row and using **–** icon to remove a row.

You can also assign roles later if you don't have the user information ready.

Define Project Attributes

• If the template has attributes defined / you copied attributes from the existing project, you can still edit them (if they are **editable**) in the **Attributes** section.

> ⚠️ **Attention:** Certain attributes can be **required**. Those have a red asterisk (*). If the template / project you copied from contains required attributes, you cannot create the new project without filling them in.

For more information about attributes, see *Assigning Document Attributes* on page 77.

Uploading documents in project creation

9.1.3. Create a Project Based on Another Project

1. Log in as a **Project Manager** or **Project Creator**.

2. In the **Create** or **Projects** menu, click **Create Project**.

3. Choose **Copy setup from an Existing Project** in the **Create** list.

> **Note:** This option is not available for Project Creator users

4. Select the **Project** to copy from.

> **Note:** You can only copy from projects you manage. If you are a project manager, you can also copy a project from the project details **More Actions...** menu.

5. In the **Copy setup from an Existing Project** pop-up, select what you want to copy from the old project into the new project (and deselect what you don't want to copy).

For Tasks, you can choose to copy the **Tasks** from the original Template or from another Template by typing in the template name. The default setting is to copy Tasks from the Project that is being copied.

Click **OK**.

6. Fill in the new project's *Details*.

7. If desired, add *Documents* to the project.

8. Add *Members* to the project.

9. If the template has attributes defined, fill them in the *Attributes* section.

10. Click **Create**.

This brings you to the new project's details page.

Creating a project adds an event and this is stored in the Project History.

This event will add following information to the Project History:

• The Project/Template from which the new Project is created.
• The name.
• The Project Manager.
• The Salesperson (if there is any).
• The Customer (if there is any).
• The Location (if there is any).
• The description (if there is any).

> **Note:** When a project is created from a template or an existing project, then only the changes (like deletion of attribute values or adding a new document) from the template or existing project is logged in the events.

9.1.4. Automatic Project Thumbnail Images from Documents

When a new graphics, ArtiosCAD or CHILI document is being uploaded to a Project or Template, the user can have an option to check if the document image needs to be taken as the Project Thumbnail.

If this option is checked, the Project thumbnail will be set as the document image after **checking and registering**.

You have to enable **Make project thumbnail** during the upload of documents to use this feature. You can do so by setting up a document attribute with the exact name 'Make project thumbnail', using a restricted set with values 'yes' and 'no' (to create a checkbox).

> **Note:**
>
> When a document with the **Make project thumbnail** attribute set to "yes" is moved or linked or copied to another project, that project's thumbnail will also be changed to the thumbnail of this document.

> **Remember:** This attribute has no effect when the document's thumbnail is manually changed to another thumbnail.

Notes on Thumbnail Images

When specifying a custom thumbnail, consider the following:

* WebCenter automatically scales the thumbnail as needed to two sizes depending on where it is used. The larger size is 100 x 100 pixels; the smaller, 50 x 50 pixels.

* The maximum file size of a thumbnail is 1 million bytes, whether it is custom or generated. This limit is configurable; contact Professional Services for more information.

9.1.5. Create Folders in a Project

You may only create one level of folders in a project under the **Project Documents** folder.

1. Log in as a **Project Manager** or **Project Creator**.
2. Open the project you manage which will contain the new folder.
3. If it is not selected already, click **Documents** on the **Details** menu.
4. In the **Folders** column at left, click **Add Folder** in the **Actions** menu.
5. Enter the name of the new folder in the **Folder Name** field.
6. Optionally, you can:

   * Select **Workflow Folder (Advanced)** and select a workflow folder from the **Configuration** list.

     This will turn the folder into to a **Push Through Folder**. A *workflow folder* automatically copies the files uploaded into it to another folder (on the same or another server).

Typically this other folder is a hot folder for a workflow application such as BackStage / Automation Engine, Nexus or Odystar.

- Click **Specify New Thumbnail** to use a custom thumbnail for the folder. Enter the complete path and filename in the associated field, or **Browse** for it.

  To use the default thumbnail, leave that choice selected.

7. Click **Create**.

   The folder is created. Project Manager can keep track of any changes made to the Project folders, by enabling the notifications for **Project Folder changed**.

9.1.6. About Workflow Folders

What is a workflow folder?

When creating a folder the Project Manager can define it as a **workflow folder**, using a push-through configuration defined by the Admin.

Any file that is uploaded into this folder will be automatically copied to a location defined in the configuration. For this reason, workflow folders are sometimes also referred to as "push-through folders".

Workflow folders are particularly useful when that other location is a hot folder of a workflow system such as Nexus, Automation Engine or Odystar, so that the file will automatically be processed by the workflow system.

Note: The Configuration for workflow folders needs to be defined by an Administrator.

Project Managers can then select one of the defined configurations when they create a new folder.

Recognizing workflow folders

Workflow folders have a yellow icon with an arrow on it.
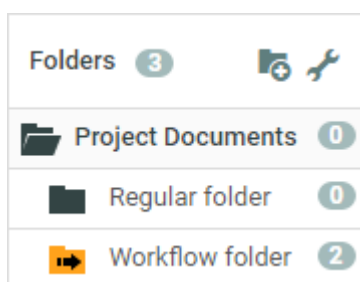
The files in a workflow folder have two extra icons:

- The first shows whether the copy of the file was successful or not.

- The second is a button to copy the file again to the location defined in the configuration.

System History Logs

All Push Thorough Configuration related events like

- **Push Through Configuration created**

- **Push Through Configuration deleted** and

- **Push Through Configuration changed**

are recorded and stored in System History. Read this page on how to access the *records*.

9.1.7. Project Creation from Dashboard

Dashboards are more interactive to edit the data which can be saved and have forms where input can be added. Project creation has been incorporated to enable easier collection of information with specific action driven pages in Dashboard.

Admin users can now choose the Dashboard function as a **Creation Form** in the Project context. Then an option is available to add a **Save** and **Cancel** button.
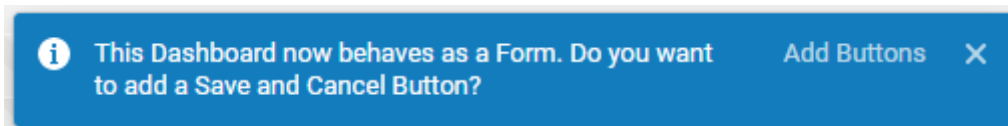
You can create customized Projects from an existing Project or a Template which are available in the drop down. Or when no Project or Template is selected, a blank project is created.

Save and **Cancel** buttons can be formatted with various configuration parameters available for the blocks.

Creating Project from Button Block

Here is an example of a Project created from *Button block*.

You can configure a Button block to open a Dashboard and the Dashboard can be further configured to open a project creation form as shown in the image below.
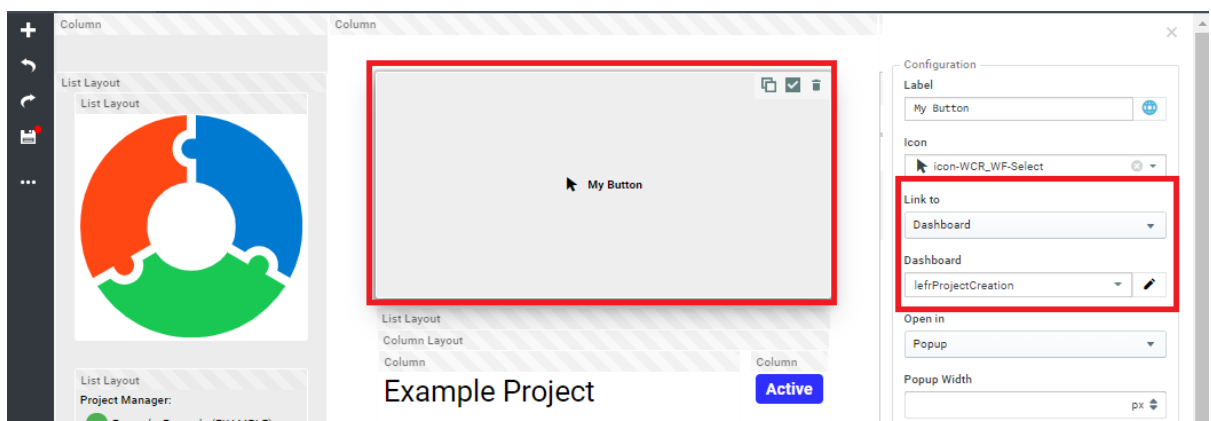
To use the Button with a Project Creation dashboard, follow the steps below.

1. Create a Dashboard with Project as **Context.**
2. Choose the Function as **Creation Form**.
3. Choose the **Project or Template** that you wish to create the Project from.

4. You can optionally choose to navigate to the new Project when it is created or open in the same browser window.
5. Choose your **Styling**, **Padding**, **Background color** options for the **Creation form**
6. You can add the *Document Sources* from which document can be added for the project created.
7. Now create another Dashboard with any context that you need and choose the Button Block and link it to the dashboard created earlier.
8. Save the Dashboard.

Creating Projects from Menu Layout

Similarly in the *Menu Layout*, you can create a Dashboard as stated above. Select the Button block in the Menu Layout (with Bottom or Top or Left option).

Below screenshot shows project created from Dashboard.
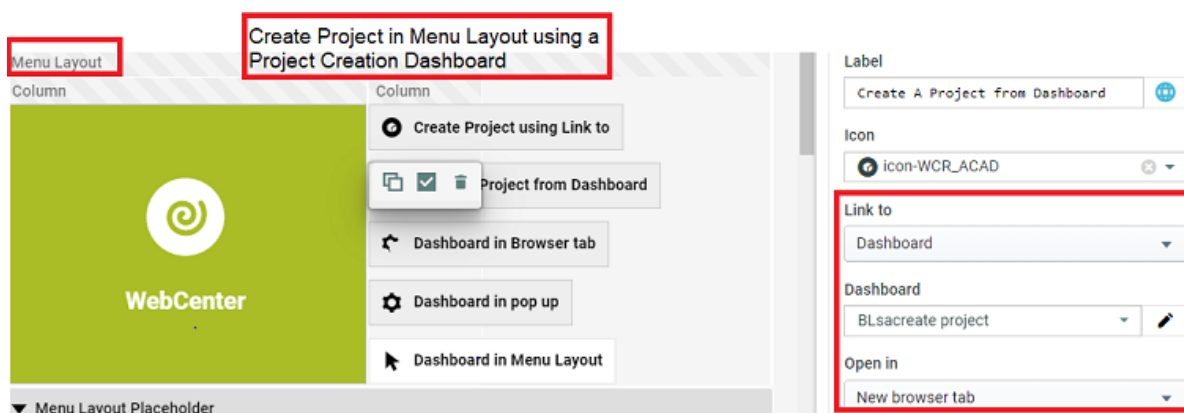
9.1.8. Synchronize the Project with a Workflow Job

If the Admin has defined a workflow connection, you can create projects that automatically create a workflow job (see "Configure Workflow Connections" in the Administration Guide for more information).

The workflow jobs created will be automatically synchronized to the linked WebCenter projects when certain events occur (as defined by the Admin).

However, if the Admin has enabled this possibility, you can also synchronize the workflow job to the linked project (that you manage) whenever you need to.

• To do this, click the synchronization ⚙ icon in the project header.

9.1.9. Create a Project from Automation Engine

With the **Create WebCenter Project** Automation Engine task, you can create an Automation Engine Job and a corresponding project in WebCenter at the same time.

You can also retrieve information from WebCenter (Project Template, Customer Company...) and associate it with the project you are creating, directly from Automation Engine.

This avoids double entries and duplication errors, and can be triggered from an MIS system for even more automatization.

In this task:

1. Select your **WebCenter Site** (it must be defined in the **Configure** tool).

2. In the **Site Logon** area, fill in your WebCenter **User Name** and **Password**.

   You can choose to type in your password (which is then **Encrypted**) or to **Use SmartNames** that resolve into your password.

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

3. Enter the **Project Name** and **Project Description** to give the new project.

   Tip: An interesting choice for the project name is the SmartName [JobName]. By selecting the job name as SmartName for the project you can map the jobs in Automation Engine to the projects in WebCenter.

4. In **Project Manager Username**, enter the user name of the WebCenter Project Manager that will manage the newly created project.

   Note:

   • This user must already exist in WebCenter.

   • This can be the same user as the one you logged on with, or a different one.

   • The user you logged on with must have **at least as much visibility** in WebCenter as the Project Manager you enter here.

5. Click the Refresh [⟳] buttons.

6. The **Project Template**, **Customer Company** and **Customer Location** fields should now contain a list of the WebCenter Project Templates / Customer Companies / Customer Locations visible to that Project Manager.

   Choose the **Project Template**, **Customer Company** and **Customer Location** of your choice.

7. Click **Launch**.

9.2. Editing Projects

Project Managers can:

• edit the project's general information in the **Project Details** > **Project Information** page,

• add specific information to the project, like characteristics and attributes,

• update the links to documents in the Project,
• change the Project status.

Note: Only Administrators can save Projects as a template, so that other Projects can be created based on it. See the Administration Guide for more information.

9.2.1. Add a Salesperson

Project Managers can associate a **Salesperson** with the project. This can be any user in the system, but has no specific rights in the project.

1. On the **Project Details** page, click **Project Information**.
2. Click **Salesperson**.
3. Select a salesperson and click **Finish**.
4. Click **Save**.

    Note: The salesperson does not gain access to the project unless he/she is invited as a user, Project Manager or is part of the Admins group.

It is possible to search for all projects associated with a certain salesperson across WebCenter.

Note: Project Creator user can be set to a Salesperson after the project was created. This is possible only if the Admin user has enabled **Project Creator becomes Salesperson after Project Creation**option in the **Project Creation** page.

9.2.2. View Project Source

Projects can be created in multiple ways, like from project template or from another project or a blank project. When the projects are created from a template or from another project, some of the project properties like the **Documents, Tasks, Attributes, Characteristics, Discussions, Notifications, Members** can be copied to the new project.

In such cases, especially **Tasks** can be copied either from the project template or from the project source.

Project Source is the existing project, which is used to create a new project.

Project Template will remain same for the existing project and any newly created project from the existing project.

Project Template and **Project Source** information of a project is useful for the Project Managers and Admin users to understand the origin of the tasks or documents or attributes.

Example

There are two projects and one template created. The name of the template is T1, the names of the projects are P1 and P2. The projects are created in following order:

• P1 is created from T1
• P2 is created from P1

Following table shows the resulting values of the Project Template / Project source field

Project / Template	Project Source	Project Template
T1	None	None
P1	T1	T1
P2	T1	P1

Whenever a project is created using an existing project, the new project created has the same **Project Template** as that of the existing project.

To view the **Project Source** of any project :

• Navigate to **Project Details** page, click **Project Information** tab.

9.2.3. Specify Project Characteristics

1. Log in as a **Project Manager** or **Project Creator**.
2. Open the Project whose Characteristics you want to specify.
3. Click **Characteristics**.
4. Select the checkboxes of the desired Characteristics. The selected Characteristics will appear in the list of Characteristics. Click the **+** plus sign next to a Characteristic to see its children Characteristics.
5. Click **Change**. The selected Characteristics will be associated with the Project.

To **remove Characteristics from a Project**, do the same as described above, but deselect the checkboxes of the Characteristics to remove them from the list.

9.2.4. Specify Project Attributes

1. Log in as a user who is a Project Manager, or as a user who has the **Change Properties** permission on the root level of the Project.
2. Open the Project whose Attributes you want to specify.
3. Click **Attributes**.
4. Choose the **Attribute Category** and click **Change**.
5. Set the values for the Attributes as desired and click **Change**.

The Attributes are assigned to the Project.

9.2.5. About Exporting and Importing Attributes

To make working with other systems easier, you can export and import project Attributes by using JDF (Job Definition Format) files.

You can export the Attributes, modify them in another system, and then import their changed values back into WebCenter.

Note: You cannot add more Attributes to a project this way; this only lets you change the values for existing Attributes.

Important:

If you want to import Attributes that are not generated by another WebCenter system, you should generate a sample JDF file for the people using the other system to use as a reference, so that they format their JDF file correctly.

The important lines are the ones similar to <eg:SmartName Name="Attribute Name" Value="Value"/>; there must be a Value tag for each Name tag.

Note: Option to Import from or Export to JDF buttons are enabled only when **Allow importing from/ exporting to JDF**is enabled in the WebCenter Security Preferences by the Administrator users.

9.2.6. Export Project Attributes

WebCenter automatically names the exported file `<Project name>_attrs.jdf`.

Note: Any periods in the project name will be converted to underscores.

1. Log in as a **Project Manager** or **Project Creator**.
2. Open the project with the attributes to export.
3. Click **Attributes**.
4. Click **Export**.
5. Click **Save**, browse to the desired location, and click **Save**.

9.2.7. Import Project Attributes

1. Log in as a **Project Manager** or **Project Creator**.
2. Navigate to the project with the attributes to import.
3. Click **Attributes**.
4. In the **Import from JDF file** field, enter the path and name of the file, or click **Browse** and select the JDF file.
5. Click **Import**.

   The values for existing attributes are updated if necessary.

   Note: If there are either too few or too many attributes defined in the file as compared to the project, WebCenter will mention it in a status message.

9.2.8. Update a Project

If you have a document that is linked in many Projects, and upload a new version into only one Project, the links in other Projects continue to reference the prior version.

1. Open the Project to update.
2. Click Update on the Project **Actions** menu.
3. All documents in the Project are updated.

   A list is shown of the updated document(s), the containing Project, the old version number, and the new version number.

Tip: To update more than one Project at once, get a list of the Projects, select them, and click **Update Project(s)** in the **Actions** menu.

9.2.9. Project Statuses

The **Project Status** feature allows you to review the current project standing. This feature can be accessed by an Admin user or a member of the Admin group, Project Managers and an User.

An administrator can add statuses in WebCenter. This works similar to task statuses (whereas the statuses are not shared). A status has a name, an icon and a type. The types are Non-active, Active, Archived and Completed. The WebCenter has the functionality to limit the actions possible in not-active and completed projects. It is most typical to add active statuses, for example: **Briefing**, **Design**, **Prepress**, **Printing**. An administrator can limit the statuses for a project and this can be done for every project individually.

The project status is displayed in the project header (and in available other locations such as search):

Note: This can be set as read only. Read more at *Prevent direct changes to Project Status*

The Project Manager can perform following:

- Set the Project Status.
- View Project Status.
- Search Project Status and Filter projects based on Project Status.

An administrator can limit the statuses for a project and this can be done for every project separately. Go to a project or a template as an administrator and click on the **Configure** tab. By using **Add Project Statuses** and **Remove Project statuses** (select with the check boxes and take remove from the action drop down), you can get a specific set of statuses.

An Administrator can link milestones to project statuses to see the timeline of projects in a *calendar view* by setting up a date/time attribute for project statuses. Each active status can have a date/time attribute linked and the same date/time attribute can be used multiple times with different offsets. The linked date indicates the intended end of the project phase, but will not trigger an automatic project status change. The actual date will depend on the related attribute value in the project context.

The administrator can decide the sequence of the statuses. This sequence is purely used for sorting. When the projects are sorted based on Project Status, this is the sequence used. The sequence is system wide.

Apart from showing the Project Status in many project overview pages (and also in the search results), the project statuses can be used in the Workflows. For example: To decide different operations or assignees depending on the current project status.

Note: By using the **Set Project Status** node in Workflow, you can set the status for the current project.

In the following example, let us consider five statuses allowed for this project. The Project Statuses are set as 01 - Briefing, 02 - Concept, 03 - Artwork, 04 - Prepress and 05 - Closure. The WebCenter has many more statuses, but only these statuses are allowed for this project. The statuses are in this sequence in the entire system.

Note: You can only decide per project whether you can have these statuses, but you cannot change the sequence of the statuses per project.

A new Project Status type has been introduced called **Archived**. You can set this status based on the stage of the project. Archive Project status is visible to users based on the setting specified by the Administrator in the **Security Preference**.

Read more on Project status as Archived *here*.

On archiving the Project, the project is excluded in the Project list and is not shown in the **My Projects** or **Project I Manage** menu items. The Project as well as the Tasks and Documents within the project does not show up in **Search Results** or in **My Work** page.

Trying to access the Project with an URL from a notification for an archived project gives a permission denied message.

9.2.10. Change the Project Status

A project can have different statuses. For example:

- **Active**
- **Non Active**
- **Completed**
- **Archived**

In additional to the standard statuses, custom statuses may have been defined by the system administrator. A project or template can have its own specific set of available project statuses. Every project requires at least one active status.

The project manager can set the project status from the project details header, or in the **Status** list on the **Project Information** page.

When searching, you can search for all projects, or projects that have a specific status like Active, Archived, Not Active, or Completed. It is also possible to search for All Active, All Not Active or All Completed projects or All Archived, and this type of search would include different (custom) statuses of the same type.

9.2.11. Displaying a Project Status

The Project Status can be viewed by an Administrator, Project Manager and a Project Member.

The status of a WebCenter project is displayed in following ways:

- The status is displayed in the project header of each page of the project.
- The status is displayed in the columns of the project overview pages (Project I am Invited to, Favorite Projects and Projects I Manage).
- The status is displayed in project search results if this column is requested to appear in the search result.

If an icon is available, the Project Status is displayed as an icon with its status name. If no icon is available, the project status is displayed as a name only. If the option **hide thumbnails** is active, only the status name is shown. The icon is displayed in true size.

9.2.12. Customizing a Project Status

An Administrator can set allowed statuses for Templates or for Projects. By doing this an Administrator can limit the number of Project Statuses to be used for a specific project. When adding a new project status to the system, this status will be also added to all projects and templates. When a project is created from a template or from another project, it inherits the allowed statuses from its source. This happens only once and does not happen when the template changes later.

1. Log in to WebCenter as an Admin user.
2. Click the **Admin** > **Project Management** and select **Projects** or **Templates**.
3. Click the required Project or Template link from the list.

4. Click the **Configure** > **Project Statuses**. This displays a table with the current allowed statuses for this Template or Project.

5. Select the required Project Status from the list and then click the **Add Project Statuses** link.

    Note: By default a blank Project will get the list of all statuses as allowed statuses.

6. Click the **Save** button to make changes.

    Note: The Project Status cannot be re-ordered here, the order is inherited from the system order.

You can remove allowed statuses for a template or project by selecting the status and select **Remove** from the **Actions** menu.

Set a Project Status using the User Interface

An Administrator or a Project Manager can set the Project Status for the current project using WebCenter UI. A Project Status is changed by selecting a new project status from the status drop down list in the header of the project pages. The drop down only contains the allowed statuses.
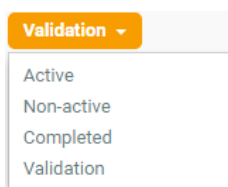
Set a Project Status when creating a Project

An Administrator or a Program Manger can set the Project Status while creating a new Project. When creating a new project through the WebCenter User Interface, there will be a drop-down allowing to set the project's initial status. The drop-down will default to the first Active status.

Note: The Completed statuses are not shown because you cannot create a Project in a completed status. In case the Project is created from a Template (or a copy of another Project) it may be possible that the Project Status field is hidden. If so, the newly created Project will get the first Active status.

9.2.13. Searching based on a Project Status

You can search for projects based on their Project Status. Choose **Search** from the menu bar and select Project or Tasks and Approvals. On the (advanced) Project Search page and the Task Search page, the list box will contain the list of all the Project Statuses.

In addition to all individual project statuses, the list also contains the following:

*   Show All (default): show all projects (or tasks of all projects).
*   Show All Active: show only projects or tasks of projects with an active status.
*   Show All Not Active: show only projects or tasks of projects with a non-active status.
*   Show All Completed.

You can also search on **Project Status Started**, **Project Status Due**,**Project Status Completed**, **Project Status Duration**, and **Project Status Time Left** in the **Project Search** page.

9.2.14. Filtering based on Project Status

In **Favorite Projects**, **Projects I Manage**, and in **Projects I am Invited to**, you can filter on all Project Statuses individually. You can also use the filters to look for a combination of statuses: Show All, Show All Active, Show All Not Active, Show All Completed.

9.2.15. Document creation settings in a project

In a project, go to the **Configure** > **Document Creation** to view the template from which the document upload configuration is taken.

To change this, select the template from the drop down list. You will see a list of templates with a custom document creation configuration. This will update the project document creation settings with the selected template's settings.

9.3. Managing Project Members and Permissions

Project Managers are responsible for managing who gets access to their Projects: they can add members to a Project, remove members from a Project, and set their permissions.

9.3.1. Roles

Roles are created at a global level which the Project Managers (or the selected Project Managers) can use in individual projects and templates. You can invite these **Roles** just like **Users** and **Groups**.

Roles are effective after real members (**Groups** or/and **Users**) are assigned to each of the **Roles**. A project Role assignee will be treated like a standard project member. Once you assign the **Role** to a project, these take over the role's security setup, approval setup and task assignments.

Multiple assignments of **Roles** are possible. For example, if you have a "Designer" **Role**, you can invite this Role to all the Projects that require a designer either after creating a Project or via the Project Template with assigned Roles.

Note: You need administrator rights to create Roles. The visibility of the Roles can also be determined by the administrators.

Read more about Roles in the WebCenter Administration Guide in *Roles*.

Role Assignments in a Project

The Project Manager and all the Members of a project can view all existing Role assignments in a project in the **Project Members** page.

Note: You can filter on the **Users**, **Roles** and **Groups** in the **Members** tab. Alternatively you can search using the Role name in the field.

Role members are displayed in the list as regular members under the **Roles** project member type section.

You can see the Roles assigned to the Users and Groups in the **Role Assignment** column for user and group project members.

> **Note:** When assigning users to a Role, the drop down also shows the deactivated users that you can reactivate while assigning the role. Admin users can activate any users whereas Project Manager and other users with Create User rights can only activate the users they created.

If a User is specified from the Group for a particular Role, this information is displayed next to the Role reference in the **Role Assignment** column as **[Assignee: USERNAME]**.

Managing Roles in a Project

If a project has at least one role among its members its Project Manager can access the **Manage Roles** page to define role assignment within the project.

1. Log in as a user who is a Project Manager.
2. Open the project for which you want to manage the roles.
3. Click the **Members** tab. A list of the current members is displayed.
4. Click **Manage Roles** link in the column header.

Removing a Role Assignment

Each Role assignment is represented as a separate project member on the **Members** page. It can be deleted from the project by uninviting it as in the case of removing a project member.

You can also remove the existing role assignments from the **Manage Roles** page.

Removing a Role from a Project

You can remove a Role from a project in the same way as removing a User or Group. By deleting the entry for the User or Group with the Role combination, you can remove the Roles

> **Note:** When you have Roles assigned to Users or Groups, you have to delete the assignments (assigned regular members) before being able to uninvite the Roles from the project.

1. Login as a Project Manger.
2. Open the Project from which you want to remove Roles.
3. Click **Members**.

   A list of the current members is shown. If desired, use the filter to refine the list.
4. Select the Roles which need to be uninvited from the Project. Select the User or Group entries assigned to these Roles to unassign them from this role, if the Roles are already assigned.
5. Click **Remove** from the **Actions** in the header.

6. Click **OK** to confirm the removal. The selected Role(s) and its assignments will be removed from the Project.

Using Roles in Approval Setup

You can use Project Roles in approval directly as an **Approval master** and/or as an **Approver**. When adding a Role to an Approval setup as an approver the user doing so has to choose between two options for the **Type**:

- **One of Role**: Only one of the role assignees needs to approve on behalf of the Role. This is the default setting.

  Tip:

  It is possible to change Role assignments after starting the Approval cycle if you select **One of Role** option. Use **One of Role** if there is only one role assignee.

- **All of role – One per Group**: All of the User and Group Role assignees will replace the Role as Approvers. When you choose this, for each Group, its representative Role assignee will become the approver on behalf of the whole group.

- **All of Role**: When you select this, all the User and Group role assignees will replace the role as Approvers. In this case all the members of the Role-Groups will become the approvers.

Note: You cannot start an Approval cycle with unassigned Roles in the project. When the approval cycle starts, all the Role- approvers are replaced as their assignees and the Roles will no longer be visible in the **Approval Setup**.

If a Role is set as the Approval master, all the Role-assignees(Users and members of the Group) become the real Approval masters.

Changing Role Assignments

From WebCenter 14 onwards, you can easily change Role assignments within a Project.

1. Go to **Project** > **Members**. Click on **Manage Roles** to get to the Role Management page. You can see the list of **Roles** associated with the Project. You may also access this page from **Project Creation** page.

    In the **Manage Roles** page, you can see the existing Role assignments. You can change or remove the existing Role assignments from here.

2. You can :

    *   add a Group to the Role
    *   create a new assignment for the existing Roles. Use the **User/Assignee** dropdown to choose another User as the new Role assignee.
    *   add /delete members from the same Role. Use the **+** and **–** controls respectively.

    When an existing Role Assignment is changed, all the Role dependent Task and Approval assignments will get transferred to the new Assignee. This transfer of assignments only happens if the current Assignee loses access to the Project by getting unassigned from the Role.

    In situations where a User or a Group is only invited to the Project via a Role Assignment, a Role reassignment will result in that user's /group's removal from the project. Approval and Task related dependencies are checked to prevent leaving the Project workflow in an inconsistent or blocked state.

Delegating Roles

Go to the **Manage Roles** page. If you have been given permissions to assign Members of a Role or to change Role assignments, it will be displayed.

If you do not have the permissions to manage any roles, a message will indicate this.

9.3.2. Add Members to a Project

Users and Groups need to be added to a project before they can access and use it.

1. Log in as a **Project Manager** or **Project Creator**.
2. Open the project to which you want to invite members.
3. Click **Members**.

    A list of the current members is shown.
4. Click **Add Members** in the column header.
5. **Add Project Members** window is opened, where you can select and add new member to the project from the **New Project Members** drop down.
6. Select the role for the newly added user from the **Assign to Role** and click **Continue**.

    Note: You can **Create and Invite New User** to the project from the **New Project Members** tab from the drop down.

7. Set the project permissions as desired. These permissions apply to all members being added in this step. Then click **Finish**.

A successful status message appears along with a list of suggested subsequent tasks.

> **Note:**
>
> If the project already has any number of roles among its members a drop-down list containing these roles is displayed at the top of the 'New Member Selection' step of the 'Add Member to Project' wizard.
>
> By selecting a project role while specifying users/groups to be invited to the project the project manager can at the same time assign the desired new members to the selected roles.
>
> The **Set Project Security for New Members** step fills up the security matrix with the original setup of the selected role.
>
> Take into account that you cannot assign a role to another role in a project – any role objects selected from the list of the desired new project members will be disregarded (they won't even be invited to the project) if a 'role assignment' is specified using the appropriate drop-down list while picking up new project members.
>
> By introducing roles than can be assigned to multiple user or group members it is now possible to have a same user or group member invited into the project via different role assignments (i.e. Joe Designer can be invited into a project both as assigned to DESIGNERS role and independently without any role assignment). Every such combination of a member and its assignment is considered (and presented) as a separate project member.

9.3.3. Remove Project Members

> **Note:** You may only remove Project members who are not Approvers in an active Approval Cycle.

1. Log in as a **Project Manager** or **Project Creator**.
2. Open the Project from which you want to remove members.
3. Click **Members**.

   A list of the current members is shown. If desired, use the filter to refine the list.
4. Select the users, groups and roles to uninvite from the Project. In case you want to unassign a user or group from a role, select the specific entry for this combination.
5. Click **Remove** in the actions menu.
6. Click **OK** to confirm the removal.

The member(s) are removed from the Project.

> **Note:** Project Manager can enable the **Remove Project Members** notifications to ensure an event is saved in project history and also to notify involved people or other members of the project.

9.3.4. User, Group and Role Permissions in a Project

When a user is invited to a project several times (as an individual user through the **Add Members** function, as part of a Group and/or as part of a Role), his/her permissions on the project are calculated as follows:

- As a general rule, all permissions are added so that the user has the most permissions. For example:

  1. The user is invited to the project with the **View** and **Download** permissions.
  2. He is added to a Role that has the **Add** permission on this project.
  3. Then the user will have the **View**, **Download** and **Add** permissions on this project.

- Exception 1: when a user is already invited directly (as an individual user) to a project, re-inviting him/her through a Group doesn't change his/her permissions.

- Exception 2: when a user is only invited to a project through a Role or Group, you can change his/her permissions when re-inviting him/her as an individual user. This allows you to either restrict permissions for a specific user, or give him/her more access.

> **Note:**
>
> In this case, when inviting the user individually, his/her existing Group or Role permissions for the project will be suggested, and you will see a warning explaining that changing the user's permissions at that point may interfere with his/her ability to perform project tasks.
>
> For example if the user has a "Designer" role, and you remove her **Add** permission, she won't be able to upload designs to the project!

9.4. ArtiosCAD Default Projects

You may see WebCenter projects with names starting with `ACadDefaults_`.

Do not modify these projects as they are automatically created by ArtiosCAD (and Cad-X) to store defaults.

They are named with the following patterns:

- `ACadDefaults_<version>_<language-code>_Shared`, where `<version>` can be for example `12.0` and `<language_code>` `en`.

  These projects are created when you run the ArtiosCAD Defaults Installer. ArtiosCAD users should have View and Download rights on these projects.

  Do not delete these projects as this would take away some CAD functionality!

  However, if you want to install new defaults, or in case the defaults installation was interrupted, you will have to delete the corresponding `ACadDefaults_` project before reinstalling the defaults (which will create a new `ACadDefaults_` project automatically in WebCenter).

- `ACadDefaults_<version>_<language-code>_<login_name>`, where `<login_name>` is the login name of an ArtiosCAD Enterprise (and WebCenter) user.

  These projects are created when a WebCenter user logs into ArtiosCAD and defines defaults to work with. ArtiosCAD will update them automatically if that user changes his/her preferences (in ArtiosCAD).

9.5. Defining Approval Settings

Document, Folder and Project Approval Settings

You can define approval settings at the document, folder or project level. You can also define approval settings on a number of documents in a folder or project.

Note: Defining approval settings for a project (or folder) does not mean the project (or folder) itself is being approved. Rather, it means that users adding documents to the project can use these pre-defined settings to save time and reduce the chance for error.

When you want to setup an approval cycle for a document, you can:

- define document-level approval settings, that will only be used for that document (**Setup Approval** or **Setup Staged Approval**),
- load the enclosing folder's approval settings, if the document is in a folder that has approval settings defined (**Load Folder Approval Setup**),
- load the project's approval settings, if it has approval settings defined (**Load Project Approval Setup**),
- use the default approval settings for that document (**Start Default Approval Cycle**). Those are: the enclosing folder's approval settings (if the document is in a folder with approval settings), or otherwise the project's approval settings (if they are defined).

Exceptions

- URL documents may not have approval cycles.
- An approval cycle may not be started on documents in Templates.
- An approval cycle may not be started on linked documents.

Permissions Needed

- You need the **Change Approval** permission to create or edit an approval setup.
- You need the **Start / Stop Approval** permission to start or stop approval cycles. This is the same as the **Lock / Update** permission.

The project manager and the administrator can always define / edit the approval settings (at the project, folder and document level).

For more information about permissions, see *Project and Document Security* on page 297.

9.5.1. Simple Approval and Staged Approval

What is Simple Approval?

When a user or a number of users need to approve your document(s) in no particular order, you can use simple approval.

All approvers are notified at the same time and get the same due date (if a due date is defined).

What is Staged Approval?

When your document(s) need(s) to be approved by several people or groups of people, in a sequential order, you can use staged approval.

The staged approval cycle works with approval **stages**, and each stage only starts when the previous stage is completed.

This allows you to be as close as possible to your company's real life approval process, while taking advantage of WebCenter's automating and tracking capabilities.

For example, if a document needs to be approved by the marketing, finance, and legal departments, you can use three approval stages.

- In the first stage one or several people from the marketing department can be asked to approve the document.
- In the second stage the finance department can approve or reject the document,
- In the final stage the document is sent to the legal department for approval.

9.5.2. Setting Up an Approval Cycle

WebCenter enables you to define a number of approval settings like who can approve the document? , when (due date)? and what happens if the document is rejected? and so on to match your real-life business process as closely as possible.

Note:

You need the **Change Approval** permission to create or edit an approval setup.

To get to the simple approval setup page (for a project, a folder or a document):

1. Go to the **Approval** tab:

For...	click...
a project	... the project page's **Approval** tab.
	Tip:
	If your project has (sub)folders, go to the project page's **Documents** tab first, and click the top-level folder at left (called **Project Documents**).
	This ensures you have selected the project, and not one of its (sub)folders.
a folder	... the folder you want to define approval settings for on the project page's **Documents** tab.
	Then click the **Approval** tab.
a document	... the Document Details page's **Approval** tab.

For...	click...
	Note: You can also get to the **Approval** tab by: • clicking **Setup document approval** right after uploading the document to the project, • clicking the **Setup Approval Cycle** link corresponding to the document on the project's **Documents** tab.
several documents	... **Actions** > **Setup Approval Cycle** after selecting the documents in the project or folder. **Note:** This will start the approval setup from zero, even if some of the documents selected already have an approval setup.

2. Click **Setup Approval**.
   You will see the **Approval Setup** page where you can configure a simple or staged approval.

3. Define **Settings** such as the *due date*, *approval policy for the new version*, *approval master* and *notifications*.

4. Click on the ⚙ **Show Stage Configuration Details** to set up *conditional approval*, *document rejection policy* and *annotation review requirements*.

   To set up a staged approval, you need to *add an approval stage* and specify stage specific *configuration* and approvers.

5. *Add Approvers* on page 284

6. *Save*.

Note:

• You can only set up an approval cycle for a project/folder/document that does not already have a started approval cycle.

Add an Approval Stage

Your approval cycle already has one approval stage by default.

1. Define **Settings** such as the *due date*, *approval policy for the new version*, *approval master* and *notifications*.

2. Click **Add Stage**. Give the stage a name. The names are set by default as **Stage 1**, **Stage 2**, etc.

   Users with change approval permissions, can change the stage name by changing the text in the edit field.

3. Click on the ⚙ **Show Stage Configuration Details** and:
   a) Decide to **Allow conditional approval** or not (see *Allow Conditional Approval or Not* on page 281).
   b)

c) Define what to do **when one user rejects** the document (see *Define How to Handle Document Rejection*).

d) Define *annotation review requirements*.

4. Add **approvers** to the stage (see *Add Approvers* on page 284).

5. Click **Add Stage** to add another stage.

> **Note:** This adds a stage after the last stage. To add a stage before the current stage, click **Insert Stage** above the current stage instead.

6. Repeat steps 2 to 4 for each stage.

7. If necessary, you can drag a stage up or down to reorganize your stages.

To remove a stage, click the minus button in front of it.

9.5.3. Approval Cycle Settings

WebCenter allows you to define a number of approval settings (who is the master approver? when? what happens when a new version is uploaded? who should be notified? etc.)

To define these, use the **Settings** section in the Approval Setup page.

Set the Approval Due Date

For a simple approval, you can set a single due date, which is the same for all approvers. Choose how to define the **Due Date** in **Settings**:

- Choose **No Due Date** if you do not need a due date for your approval cycle.

> **Note:** Approval cycles tend to take longer when they don't have a due date.

- Choose **Fixed Due Dates** if you want to give a fixed due date to your approval cycle.

  Choose a due date from the calendar, or type it using the one of the following formats: `2 May, 2010`, `5/2/2010` or `5/2, 2010`.

  Then choose a due hour from the list.

  When there are multiple stages involved, then the **Due Date Calculation** can be done in multiple ways. Read more about *Due Date Calculation* on page 278 here.

- Choose **Lead Time** to define how much time the approval cycle should take (as a maximum).

  Define the **Lead Time** in **Days** and / or **Hours**. It is added to the date the cycle starts, to define the cycle's due date. For example if the cycle starts on May 2nd and has a 2 days lead time, it is due to be completed on May 4th.

> ⚠️ **Attention:** WebCenter only takes week days into account. So if you start the cycle on a Friday with a 3 day lead time, it will be due the next Wednesday and not the next Monday. By default, Saturday and Sunday is considered as weekend. However, it is possible to switch the weekend days to Friday and Saturday. The due date calculation will ensure that the due date will always be on a weekday.

- Choose **Lead Time with Final Due Date** to give your approvers a lead time and give a final due date for the approval cycle.

If the document has to be re-uploaded and re-approved, it will be given the same lead time again. The final version of the document has to be approved by the final due date.

Link your Approval Due Date to a Date/ Time Attribute

WebCenter enables you to define Project (or Document) Statuses using **Attributes (Date-Time attribute)**. You can link your approval due dates to these Project or Document Milestones, if you have the milestones specified.

If your Project's Attribute Category contains **Date/Time Attributes**, you can choose your approval due dates based on them. You can use these Attributes in **Project/Folder/Document** approvals. The setting also allows you to specify an offset value along with the attribute value. For example. "Final Approval Date" – 2 days.

Date/ time Attributes can be used as the final approval date or as stage approval dates. If you change the attribute value, the linked approval due dates are updated including that of any ongoing approval cycles. A due date change will trigger a notification to the approvers, based on Notifications chosen.

1. In the **settings** section, choose the **Due Date** as either of the following options:

   • **No Due Date**
   • **Fixed Due Date**
   • **Lead Times**
   • **Lead Time with Final Due Date**

2. If you select **Fixed Due Date**, you can specify the Due Date for each approval stage separately. You can specify:

   • a **Specific Date**. In this option, you can select a date from the calendar.
   • or a **Date in Project**. This option lists the Date/Time Attributes, from which you can select. You can specify an offset period in days and/ or hours. The offset is added or subtracted from the Attribute value.
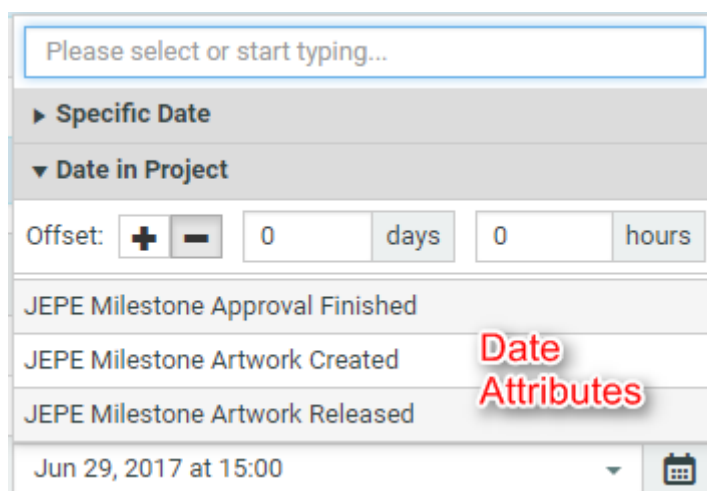
When you save, your approval due date is calculated using the date value given in the attribute and the specified offset. See the example below:

Due Date can also be calculated for all the stages at once if **Specific Due Date** is chosen. Read more*Due Date Calculation* on page 278

3. If you selected **Lead Time with Final Due Date**, you can select the Date /Time attribute +/- **Offset** in the **Final Due Date** drop down. The options are exactly the same as above.

Note:

• If you change your Approval Due Dates, the Milestones do not get updated.
• The Due Date calculations use only working days.
• if you change the attribute value after the completion of the stage, it has no impact on the Due Date of the completed stage.

Due Date Calculation

You can calculate the due dates for the different stages using the **Due Date Calculation** option. Any calculation done on this page is applicable for all the stages.

• **Give Each Stage___ Days and __ Hours:** Specify the exact number of days and hours for each stage in the approval cycle

- **Shift Due Date with __Days and __ Hours:** Shift the due dates specified as fixed or as a Date/ Time attribute to the given number of days and hours

- **Shift Due Dates to have Latest on:** You can shift the due dates specified as fixed or as a Date/ Time attribute to not exceed the number of days and hours

- **Shift Due Date to have First on**: You can shift the due dates specified as fixed or as a Date/ Time attribute to have first on the number of days and hours

- **Distribute Due Dates Evenly** You can distribute the Due dates equally amongst all the stages by choosing this option

Define How to Handle a New Document Version

When a document's approval cycle is started, and someone uploads a new version of that document, the approval cycle may stop or restarted based on the option chosen in the workflow. You can define what happens to the new version of the document.

- In the **When a new version is uploaded** setting, choose either:

  - **Approval Restarts from Beginning** to restart the approval cycle from zero. People who already approved / rejected the document will have to evaluate it again.
  - **Approval Restarts from Current Stage** to keep the approval stages already completed (typically approved) and restart the current stage. Approvers who already approved / rejected the document in the current stage will have to evaluate it again.
  - **Approval Continues** to keep all the approval actions already done. Only approvers who rejected the document earlier will reevaluate to check whether the reason for their rejection was corrected.

Set the Approval Master

In the **Approval Setup** > **Settings** section:

- Choose the **Approval Master**. This can be:

  - **Me** (the person currently editing the approval setup),
  - the **Project Manager**,
  - the document **Uploader**,
  - any project member with **View** access to the document (users, groups and roles).

The approval master is the person who gets the approval follow-up under **Approvals to Follow Up** on his **My Work** or in Dashboard pages.

Notifications are received by Approval master as an information only.

Approval Master can now **Force Approve** or **Force Reject** Approval stages. This is a configurable option in **Security Preferences**. Admin users can configure the **Force Approve** and **Force Reject** to be allowed by either

- Administrator, Project Manager and Approval Master or
- only Approval Master or
- Project Manager and Administrators

Set Up Approval Notifications

Notifications are email messages sent to users involved in an approval cycle when certain approval events occur, like for example **User Rejected Document**, or **Approval Cycle Finished** and so on. You can define the notifications that can be received and when in the **Approval Setup** > **Settings** section.

> **Note:** The system administrator must configure WebCenter to send e-mail for notifications to work. Regardless of the e-mail configuration, the **My Approvals** section on the **My Work** page shows items waiting for approval.

1. Choose the type of **E-mail Notifications** to use:

   - **No Notifications** if you do no't want to notify any user of the progress of the approval cycle,
   - **Default Notifications** if you want to use the project's or the folder's notifications (if the document is in a folder with notifications defined, they will be used, otherwise the project's notifications will be used),
   - **Custom Notifications** if you want to select who to notify (only for this document).

2. If you have chosen **Custom Notifications**, define who to notify for each approval event:

   - the Project **Manager**,
   - the **Involved People** (the people who are involved in a particular event, for example when an approval comment is posted, the **Involved People** are the document approvers).

     > **Tip:** Click on **Involved People** to see a list of involved people for each event.

   - the Project **Members**.

Notification	Manager ☐	Involved People ☐	Members ☐
Approval Stage started	☐	☐	☐
Approval, Rejection or Approval Comment posted	☐	☐	☐
Document rejected	☐	☐	☐
Ongoing Approval Due Date changed	☐	☐	☐
Approval Stage finished	☐	☐	☐
Approval Cycle finished	☐	☐	☐
Approval stopped	☐	☐	☐
Approval Setup changed	☐	☐	☐

Tip: You can use the top check boxes to notify the Project **Manager**, the **Involved People** or the Project **Members** of all approval events.

9.5.4. Approval Stage Configuration Details

You can access this by selecting the ⚙ icon on the approval stage header. This configuration is required when your

- Document(s) need(s) to be approved by several people or groups of people, in a sequential order, you can use staged approval
- The staged approval cycle works with approval **stages**, and each stage only starts when the previous stage is finished

Allow Conditional Approval or Not

Use conditional approval to allow your approvers to give their approval on a certain condition (for example, if a barcode in the document is corrected).

The conditions (like the comments and the reasons for rejection) will be shown in:

- the **Approval** tab of the Document Details page,

- the **Action History** tab of the Document Details page,

- the **Document History** in the Viewer.

- Decide to **allow conditional approval** or not.

Note: This option is hidden if the administrators have turned off the **Admin** > **Preferences** > **Security Allow Conditional Approval option in Approval setup** option.

Note:

When working with an Automation Engine workflow, documents you approve conditionally in WebCenter will go through the **Approved with a Condition** output of the **Publish on Web** task in your Automation Engine workflow.

Use a **Wait for Action (Checkpoint)** task for those documents, so the Automation Engine operator can fix them manually.

Allow Forward Approval Link

The option to **Allow Forward Approval Link** is enabled in Approval setup based on the system settings by the Administrator users in the System Settings.

When the option is enabled, then either an Administrator user or Project Manager or any other user with **Change Approval** permissions can then use this option to allow the approval to be forwarded as a link.

This option is not visible if the Administrator has not enabled the option.

It is also possible that an Approver may want to forward the approval as an email link to other users. It can either be a Registered user of WebCenter or an unregistered user. The approver who forwards, can then choose to either be part of the approval cycle or not after forwarding.

Keep or Revoke Forward Approvals

Keep Forward Approvals

When **Allow Forward Approval Link** is selected for a stage, then the option to **Keep Forwarded Approval** is available. The forwarded approvals for the current stage are retained when a new version of the document is uploaded. If the forwarded users have already submitted their approval status, it is also added to the new version based on the settings.

Revoke Forward Approvals

Any approval forwarded can be revoked by either the Administrator or the Project Manager(s) or the user who forwarded the approval.

Inherit Previously Submitted Approvals

You can inherit the approvals done at a particular stage, if the same stage is restarted. The option is available in the traditional approval as well as in the workflow driven approval. When an Approval Stage is started, a check is made to know

- If there are any already submitted Approvals on this document and
- **Inherit Previously Submitted Approvals** option is enabled.

Inheritance of the Approvals are done only if the previous approval state is either **Approved** or **Approved with Comments**. Approvals in previous stages with status such as **Rejected**, **Forced Approved**, **Force Rejected** or **Force Approved with comments** are not inherited.

Inheritance of an approval is done, irrespective of whether the user is still an Approver. We consider all document versions except the deleted versions, when checking for approval statuses.

> **Note:**
> 1. Notifications are not sent for inheritance of approvals but approvals are tracked in the Documents Action history.
> 2. Approvals with conditions are considered as regular approvals, when they are inherited.
> 3. Version number of the document from where the approval is inherited is also mentioned in the Approval set up.

Define How to Handle Document Rejection

- Define what to do **when one user rejects** the document:

- Choose **Stop approval cycle immediately** if you don't want to bother the rest of the approvers with a document that will have to be corrected and re-approved anyway.

> **Note:**
>
> That document version gets **rejected** as final approval status.
>
> The approval request is removed from the to-do list of the approvers who haven't evaluated the document yet.

- Choose **Stop approval cycle after every Approver decided,** if you want to collect as many opinions as possible before creating a new version (to increase the chances that the next version will be approved).

> **Note:** That document version only gets the **rejected** status after all approvers have decided. The approvers of the next stage(s) don't get an approval request for that version of the document.

- Choose **Continue approval cycle anyway** if you want to use the current stage as a review

  stage (the approvers are just expected to give their opinion on the document, but do not

  have a veto power) and to only start the real approval in a later stage.

Require Review State on all Annotations

In the approval Setup, you can set up a mandatory review on all annotations using the **Require review state on all annotations before approving or rejecting** option.

This forces all approvers to review annotations before submitting an approval status.

> **Note:** This only applies to viewable documents.

- Select **No** if you want all approvers to submit their Approval Status without the condition of reviewing the annotations. This is the default setting.
- Select **Any Viewer** when you want to enforce that all annotations should be reviewed by at least one person before submitting the Approval status.
  A warning message will appear when the Approver tries to submit the Approval status for the document containing unreviewed annotations.
- Select **Current Reviewer** when the Approver needs to review all annotations before submitting an Approval status.
  A warning message will appear when the Approver tries to submit the Approval status for the document containing annotations he did not review.

> **Note:**
>
> • The review status **None** will not be accepted as a valid review state.
>
> • This setting is relevant while submitting an Approval Status from the Viewer and the other WebCenter pages.

9.5.5. Add Approvers

You can add any member of the project as an Approver. You can also add user groups or roles **Invited in the Current Project** as approvers.
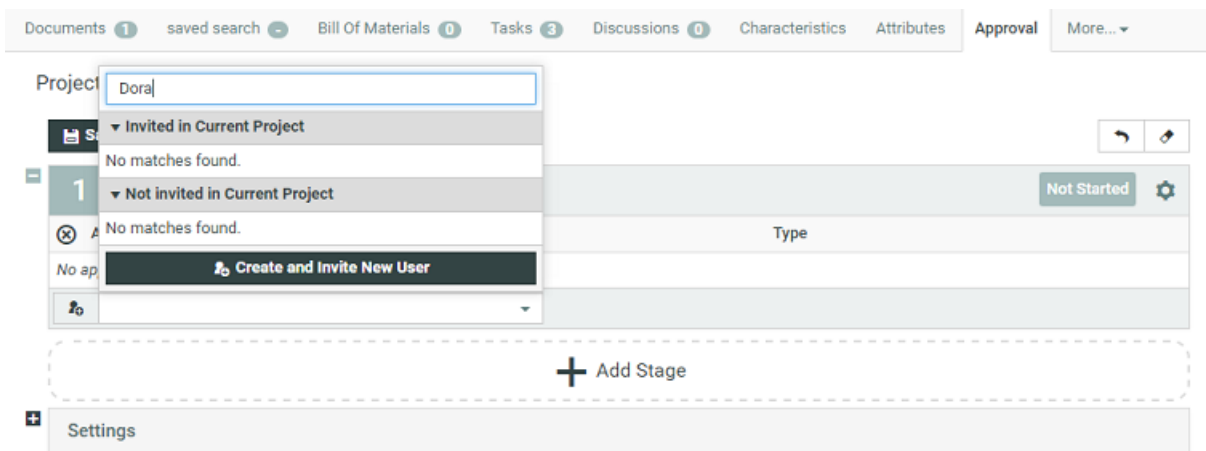
• To add a project member as an approver, select him / her in the **Add Approver** drop-down. Repeat for every user you want to add as approver.

• To add a role as an approver, select it in the **Add Approver** drop-down. After adding the Role, edit the **Type**. Select from:

   • **One of Role** if you want only one of the role assignees to approve on behalf of the role. This is the default setting.

   > **Tip:**
   >
   > It is possible to change Role assignments after starting the Approval cycle if you select **One of Role** option. Use **One of Role** if there is only one role assignee.

   > **Note:**
   >
   > Make sure that the Role is assigned to at least one user/group before starting the approval cycle.

   • **All of Role – One per Group** if you want all users and **one** (any) member per group assigned to the role to approve the document.

   • **All of Role** if you want **all** users and all members of groups assigned to the role to approve the document.

All current assignees of a Role can see the approvals for their Role in their **My Work** > **My Approvals** section.

- To add a group as an approver, select it in the **Add Approver** drop-down. After adding the group, select either:

  - **One of Group** if you want **one** (any) member of the group to be able to approve it for the whole group. (The document will get the **approved** status once one group member approves it.)

    A typical example would be a legal review, which is completed as soon as one member of the legal department has approved the document.

  - **All of Group** if you want **all** members of the group to approve the document. (The document will get the **approved** status once all group members approve it.)

    A typical example would be a management review, which is only completed after all members of the management team have approved the document.

  All the users of a particular group are listed individually in this drop-down. It is possible to select one or members of the group by clicking on the listed members' name.

  > **Note:** When adding a group as **All of Group**, the users who are group members **when the approval cycle is started** become approvers. If you later add or remove users from the group, the list of approvers is not updated.

- To add a non-member as an approver, select him / her in the **Add Approver** drop-down. This will open the **Invite Project Member** dialog.

  a) If there are Roles as members of the Project (with view rights to the folder or document where the approval is being set up), it is mandatory to assign the user to a role. Select the **Role** in the **Assign to a Role** field.

- To add a User who is not present in the system, click **Create and Invite New User** option from the **Add Approver** drop-down. It is possible to set up a default approval user template (in **preferences**) to apply to the newly created user.

  > **Note:**
  > - You need User Creation rights to be able to create and invite users.
  > - You can set up a default **Approval User Template** to automatically apply the **User Preferences** and **User Profile** > **Authentication** settings. Read more in: *User Creation* on page 52
  >
  > Read step by step instructions in: *Create and Invite a User from the Approval Page* on page 285

To remove an approver or a group, use the x sign in front of it.

9.5.6. Create and Invite a User from the Approval Page

Project Managers can create and invite users in the context of an approval page. This allows you (as a Project Manager) to add an external reviewer to the **Approval cycle**. If the user is not in the system, you can add a new user and invite him or her from the approval page. It is possible to create and add users from any approval page (document's, project's or folder's).

- Click **Add Approver** > **Create and Invite New User**.

  User Info in the **Create and Invite New User** wizard appears.
- Type the user's e-mail address. The fields (**Username**, **First Name** and **Last Name** will be filled in automatically from the e-mail address. You can change these fields, if necessary.

  - Username is filled with the part before @ of the e-mail address.
  - First Name is taken as the part before the last dot.
  - Last name is filled with all characters after the last dot (or all the characters before @ if no dots are present).
- Optionally, assign to a **Company** and **Location**. Note that this can be very important to filter the content and users the new user will be able to see.
- If you want the user to log in with a link sent from the approval page, follow the process below:

  a) Set up a *Token* based single sign-on instance and keep it active.
  b) Specify a User as **Approval User Template**. Also remember to allow *link authentication* in the user profile.

     To allow a User to authenticate via a link, configure *Token Authentication* and allow this type of authentication in the User profile page.

     Note: You need to disable all the other types of authentication to make the link authentication active.

     Whenever the token-authenticated user receives a notification with a link, the link contains a token to authenticate without user credentials. This permits the users added to the approval cycle to log in using the approval links from the notification mails.
- If your **default approval user template** has no *Token Authentication setup* or you have not defined a user as the **template**, you need to specify and confirm a password in the **Create and Invite User** wizard.
- If there are Roles as members of the Project(with view rights to the folder or document where the approval is being set up), it is mandatory to assign the user to a role. Select the **Role** in the **Assign to a Role** field.
- Click **Create and Invite User**.

A new user is created and invited to the Project. You will be able to see this user in the Approvers list as well as in the Users list.

- If you enabled link authentication, the user will log on to the system using a link from the notification e-mail. The user will be able to see and approve the document/folder or project.
- If you specified a password, the user would need to know the password to be able to log in.

9.5.7. Add a Deactivated Approver

It is possible to invite deactivated users to the approvers list.

- To add a non-member as an approver, select him / her in the **Add Approver** drop-down.

This will open the **Invite Project Member** dialog. The dialog will warn you that you are activating the user with this action.

- If there are Roles as members of the Project(with view rights to the folder or document where the approval is being set up), it is mandatory to assign the user to a role. Select the **Role** in the **Assign to a Role** field.
- Click **Invite** to confirm that the member should be activated and invited.

Notes

- You won't be able to invite a user who has been deactivated within the past 24 hours. The users automatically deactivated or created as deactivated users do not have this waiting period of 24 hours.
- To re-activate a Project member who is in the Project Members list, click on the name (in the Add Approvers dialog) and in the prompted dialog, click **Activate**.

9.5.8. Save the Approval Cycle

- When you are finished with the setup, click **Save**.

  Note: If you were setting up an approval cycle for several documents and some of them already had a started approval cycle, the approval setup will fail for these documents. You will see a list of failed documents on the **Multiple Document Approval Setup – Info** page.

  Tip:

  From the same page, you can also:

  - **Revert** the approval settings to the last saved version (when editing an existing approval cycle). See also *Editing Approval Settings* on page 288.

  - **Clear** the approval settings (so the project, folder or document has no approval cycle).

    For a document, this also clears all settings inherited from the project or folder.

  - **Start the Approval Cycle** (see also *Start or Stop the Approval Cycle* on page 287).

9.5.9. Start or Stop the Approval Cycle

Note:

You need the **Start / Stop Approval permission** to start or stop approval cycles. This is the same as the **Lock / Update permission**.

- You can **start** the approval cycle from:
  - the document list on the project page (in the **Approval** column),
  - the document details page's header,
  - the **Approval** tab of the document details page,
  - the upload page (click **Start Approval Cycle** right after uploading your document),

- your workflow system (select the **Start Approval Cycle** option before sending your document to WebCenter).
- You can **stop** the approval cycle from:

    - the header of the document details page,
    - the **Approval** tab of the document details page.

9.5.10. Editing Approval Settings

Permissions Needed

You need the Change Approval permission to create or edit an approval setup.

Note: When editing a folder or a project's approval settings, the new settings affects only the documents added to the project / folder after the settings are changed.

Started and Stopped Cycles

You **can** edit the approval cycles while they are started. To edit an approval cycle that is already started, you must first **stop** it. You can do this from:

- the header of the document details page,
- the **Approval** tab of the document details page.

Editing a Simple Approval Cycle

After stopping a simple approval cycle that was already started, you can only edit the approvers (you can add or remove approvers, even if they have already approved or rejected the document).

You cannot change anything else (due date, conditional approval...).

Editing a Staged Approval Cycle

After stopping a staged approval cycle that was already started, what you can edit depends on the stages' status. If a stage is:

- **completed**: you cannot edit any information or remove the stage.
- **pending**: you can only add or remove approvers (even if they have already approved or rejected the document). You cannot change other information like due date, conditional approval or remove the stage.
- **not started yet**: You can remove the stage, or add extra stages or change any other information.

Note: You cannot change the Approval Master.

You can now add or replace or remove an approver(s) when the stage is still in progress. Read more about it *here*.

Editing the Approval Cycle for Next Version

You can also choose to leave the current approval cycle as it is, and only edit the approval setup for the next version of the document. To do this, click **Edit Approval Setup for Next Version** in the document details page's **Approval** tab.

Note: If an approval cycle is **finished**, you cannot edit it. In this case, you can only edit the approval setup for the next version of the document.

9.5.11. Role Selection while approving

In an approval cycle, a user is sometimes part of multiple roles, who are required to approve the document. While approving or rejecting the document, the Approver can choose the approval for each of the role he / she is part of.

> For example, User A is part of Legal Asia, Legal Australia and also Legal South East Asia. When the user approves the document, the user can choose the role for which the approval is made.

Project History and action history pages tracks the approvals with the detail of user roles or groups specifically mentioned.

Note: User can still approve on behalf of all the roles by choosing the option **Default (All)**. This option is not available if reasons for rejections are enabled, as the reasons can depend on the roles of the Approver.

9.5.12. Following Up on Approvals

If you are an **Approval Master**, you will see the approval cycles you are responsible for under **Approvals to Follow Up** on your **My Work** page. This section shows a summary of each document's approval cycle, with all the necessary details (Approval **Status**, Document **Version**, **Due Date**...).

Note: If you cannot see the **Approvals to Follow Up** section, go to **My Work** > **Edit My Work Setup** to add it to your **My Work** page.

In this section, you can:

- Filter the documents:

    - by status (**Pending**, **Rejected**, **Approved** or **Approved with Comments**),
    - by date (**Finished within last 14 days**, **last 7 days** or **last day**).
- Sort the documents list (by **Approval Status**, **Document Name**, **Due Date**...).
- View the documents.
- Get to a document's details page.

9.5.13. When is an Approval Cycle Finished?

The approval cycle's status is changed to **Finished** when either:

- all approvers have approved or rejected it,

- the Project Manager or an admin has Forced Approved or Forced Rejected it (see *Forcibly Accept or Reject Documents* on page 290).

    Note that in this case, the final status is **Forced Approved** or **Forced Rejected** instead of **Finished**.

A finished approval cycle may not be stopped or started without uploading a new version of the document.

9.6. Forcibly Accept or Reject Documents

Project Managers have two special approval status settings available: **Forced Approved** and **Forced Rejected** (unless this is disallowed by the Administrator).

Using either force approval or force reject finishes the approval cycle so that other approval users may not approve or reject the document.

9.7. Delegation

Delegations allows the users you nominate to view, edit, approve, comment, discuss and even reject documents on your behalf. Similar to having an assistant, another WebCenter user(s) chosen by you, can respond to all your pending tasks, approvals in your absence for a period of time specified by you. The delegation can be set up by any user based on permissions granted by the administrator.

Terminology used

- **Delegate:** A person to whom the work is delegated.

- **Delegator**: A person who is delegating his work to someone else.

- **Active Delegation:** Period during which the delegate can take up the work of the delegator.

- **Start Date:** Date on which the delegation becomes active.

- **End Date**: Date on which the delegation expires. When an end date is not specified, the delegation will be permanently active until it is removed.

9.7.1. My Delegated work

Any user in WebCenter can delegate his or her actions to be performed by other users.

When you have active delegations assigned, you can view them when you log in to WebCenter. Work delegated to you by other users are displayed as pop-up in the first screen. In case you have more than one delegator, you can view the work delegated by each of the active delegator along with their comments.

Note: To get this as the log in screen, enable the option **Show this information when logging in**

Log-in as a Delegate

You can either choose to continue your work or can log in as a delegate and complete the work assigned to your delegator. To perform the delegated work, choose **Act as (Delegator)**. Then you are logged in as the delegator in WebCenter and **My Work** page of the delegator is visible. You can now perform all actions as the delegator.

You can also note that the avatar in the navigation pane is that of the delegator and there is a banner indicating that **You are logged in as delegate of (User Name of the Delegator)**.

Return to your own account

Choose **Return to my account** link in the banner or from the drop down option in the avatar to return back to your WebCenter account.

9.7.2. Execute Work as a Delegate

Viewing as a Delegate

When you log in on behalf of the delegator, you can view and perform all the work assigned to the delegator, on top of that your menu will be updated to the menu of the delegator.

As a delegate, following actions can be performed

- *Approvals*

- *Task Actions as a Delegate* on page 291

- *Document actions as a Delegate* on page 291

- *HTML5 viewer actions as a Delegate* on page 291

- *Text Actions as a Delegate* on page 291

- *Discussion actions as a Delegate* on page 292

Approvals as a Delegate

Approving, rejecting or adding comments as a delegate is done similar to normal approvals. If the delegator has rights to change or start the approval cycle, then delegate will also have the same rights when logged in as delegator.

Note: When you are acting as a delegate, enter your own password to approve or reject any documents.

Task Actions as a Delegate

Whenever the delegate logs in as the delegator, he/she will have the same rights as the delegator. This means that if the delegator is allowed to create new tasks, the delegate will be able to perform that action.

Document actions as a Delegate

When you are logged in as the delegator, the same permissions as the delegator are given. The document actions performed by the delegate clearly indicate the owner/ uploader. Delegator is the owner of the document which is uploaded by the delegate, while logged in as the delegator. Similarly when a delegate locks the documents, the delegator can unlock the documents.

HTML5 viewer actions as a Delegate

While access the WebCenter to perform actions for your delegator, delegate can access the HTML viewer to view, annotate and approve the documents.

Text Actions as a Delegate

The delegate can log in as the delegator to approve, reject, comment or edit content of a Text Content language element and perform other Text Content operations based on the PCM permission model.

Discussion actions as a Delegate

In discussions too, delegate has all the access as the Delegator and can execute all actions the delegator can perform.

The actions done by the delegate are visible on the following places:

Action by Delegate	Displayed as
Creating a new Discussion	Delegator is set as the Owner
Post a New Message	author name of the message indicates that it is posted by the delegate who was logged in as the delegator.
Unread messages	**For the delegate**: when logged for the first time, messages not yet read by the delegator are displayed. The unread messages reflect the messages that are not yet read by the delegate since the last login. For the delegator, the unread messages are shown as his previous log in.
Watch/ Unwatch a Discussion	Any updates to Watchlist like adding a discussion to a watchlist or removal done by the delegate are applied to the delegator. When the Delegator logs in again will have the same Watchlist as updated by the delegate.
Online status	• **Delegate**: Shown as logged in (If part of the participant list) • **Delegator**: Shown as offline
Quotes in Discussion	When a user quotes a message posted by a delegate, the author of the quoted message indicates that it was originally posted by the delegate himself.
Mention	When the delegator is mentioned in any discussion, the delegate will be notified, if the notification forwarding for the delegate is turned on. **Note:** You cannot mention a delegate if the user is not already a part of the discussion.

Tracking of Delegate Actions

Actions	Tracked in
Approval	• Project History: "As Delegate of "column • Document Actions History: "As Delegate of" column • Approval Setup: In the "Last Submitted by" column in approval setup and the User column in the comments pop-up, contains a string with following format: "Delegate as Delegator

Actions	Tracked in
Create New Tasks	Project History and Task Details pages
Complete a Task	Project History and Task Execution pages
Check an item in the checklist of a task	Task Execution and Task Details pages
All other events	Project History
Document Upload	Document Action History • Uploader is the Delegate (actual uploader) • Owner of the document is the Delegator
Document Lock	Document Action History • Delegate can lock the document which can later be unlocked by the delegator.
Document Annotations including creating new annotations, Removal of annotations, reply to annotations	Document action history • When a new annotation is added to the document, the author of the annotation is the delegate.

9.7.3. Add Delegate

You can delegate your work to a specific user or users. Follow the steps below to add delegates.

1. To add one or more delegates, go to **My WebCenter** > **My Delegates**.
2. Select a user from the drop-down and click **Add Delegate**.

   To inform your colleague about the delegation, enable the **Notify new/modified delegates** option.
3. If this is a temporary delegation until your return to work, specify a **Start Date** and an **End Date**. There is also a comment field to leave your notes.

   If you leave the **End Date** empty, the colleague can act as your permanent delegate.

My WebCenter > **My Delegates** page lists all your delegates and the respective time periods for which the delegations remain active.

Note: You can modify the delegation fields or delete a delegate from **My WebCenter** > **My Delegates** page.

9.7.4. Modify or Delete Delegate

You can delegate your work to a specific user or users and modify it at a later date. To modify the existing delegation, follow the steps below.

1. Navigate to **My WebCenter** > **My Delegates**
2. You can modify the existing delegates by changing the start date and end date. You can also change the notifications by checking the box to send.
3. Select **Save** to confirm the changes.

To delete a delegation, select the icon in the row for the respective user.

9.7.5. Delegation Notifications

Notifications for Delegator

During the delegation period, some notifications can be received by the delegator and the delegate based on the options chosen in the **My Delegates** page.

• To receive notification when you have delegated your work to another user, select **Receive email notifications during delegation period**. This will ensure you receive all email notifications during the delegation period.

Notifications for Delegate

• On Assignment of the Delegation, select the option **Notify new/modified delegates**to send notifications email to the delegate when added or modified.

• To receive notifications during the delegation Period, choose the option **Forward my notifications.**

9.8. Search on Project Duration

Duration Reporting for a project

You can search for projects based on the Start date, Due date, Completed date, Duration and Time Left of the project. You can save the searches and add it to the dashboard to have an instant view of the progress of all the current projects.

Field Name	What it means
Started	The start date of a project is the first time the project was set in an active status.
Completed	The last date the project was set in a completed status
Due	The due date is shown in the project details.
Duration	The time between the start date and the completed date. Only active statuses are considered to calculate the duration of the project. When the project is not completed, the duration is the time between the start date and the current date/time.
Time Left	This is the time between the actual completion date and the Due Date. When there is no due date, the time left is not shown as it is not relevant. When the project is in progress, the Time Left is the time between the due date and the current date. When the current date/time is still before the due date, the project is not overdue. In this case, the time left is a positive number, indicating that there is still time remaining before we reach the due date.

Field Name	What it means
	When the current time is after the due date, the project is overdue. In this case, the time left is a negative number, indicating how much the project is overdue.

How to find Project Status Duration

You can also find the Duration metrics on the time spent in a given stage of the project. Projects statuses can reoccur multiple times and you can compute the duration of time in each of the given status.

Field Name	What it means
Project Status Started	The start date of a project Status is the first time the project was set in the selected status.
Project Status Completed	The completed date of a project Status is the last time the project was in the chosen status before it was changed to a new status.
Project Status Duration	The project status duration is the time that the project spent in the selected status. It is the sum total of all the time the project was in a particular status. When the project went into the selected status multiple times, the duration is the accumulated time the project spent in the selected status. In this field, you can filter on the duration in days of the selected status.
Project Status Time left	It is the time the project was in the Project Status. When there is no due date, the time left is not shown as it is not relevant. When the project is still ongoing, the Time Left is the time between the current date with the **Project Status Due**. When the current time is before the **Project Status Due**, the project is not overdue yet. When the current date is after the **Project Status Due**, the project is overdue. In this case, the time left is a negative number, indicating how many days the project status is overdue.

For example: Let us assume that

Day 1:Jan 01 00:00 till Jan 02 00:00 => Project was in StatusA.

Day 2: Jan 02 00:00 till Jan 03 00:00 => Project was in StatusB.

Day 3: Jan 03 00:00 till Jan 04 00:00 => Project was in StatusA.

Project Status Started of StatusA is Jan 01 00:00 (first time project was in StatusA)

Project Status Completed of StatusA is Jan 04 00:00 (last time project was in StatusA)

Duration of StatusA is 2 days and Status B is 1 day

10. Project and Document Security

Project Managers secure projects by setting permissions for users and groups on a project as a whole, and on folders within the project. They can set and change permissions at any time.

Permission types

The permissions for folders and documents are:

- **View**: This permission allows viewing the project and the list of files and folders in the top level. All users and groups invited to a project get the **View** permission automatically at the project level. At the folder level, **View** allows a user to see that the folder exists. **View** permission is required for a project or document to be listed in the **Search** results. It takes precedence over all other permissions; if a user does not have **View** permission, nothing else is possible.

- **Add**: This permission allows adding a new document to a project or folder by using **Add**, **Copy**, **Copy as Link**, or **Move**.

- **Change Properties**: This permission allows changing database information about a document or project. Project Managers have implicit permission to change the database information about projects they manage.

- **Delete**: This permission allows the removal of a document from a project or folder. This permission is also needed to **Move** a document out of a project. Only Project Managers or members of the Admins group may delete a project.

- **Download**: This permission allows downloading a project or document from the database to a user's computer. This is also required to open documents other than an Esko ArtiosCAD 2D or 3D view, or those viewable in the WebCenter Viewer.

- **Lock/update**: This permission allows the locking of documents and the subsequent uploading of new versions.

- **Start/Stop Approval**: This permission allows starting and stopping approval cycles.

- **Change Approval**: This permission allows the user to change the approval setup.

- **Change Task**: This permission is only available for WebCenter

  setups including task management. It allows users to create and change tasks. You can only set this permission at the project level, not at folder level.

- **Change BOM**: This permission allows the user to change the Bill of Materials (Administrators and the Project Manager can always change the Bill of Materials). You can only set this permission at the project level, not at folder level. See *Who Can Edit the Bill of Materials?* in the Administration Guide for more information.

How permissions are inherited

Documents that are not in a sub-folder inherit project permissions. By default, folder permissions are inherited from the project, but they may be overridden by the Project Manager as desired.

If a user is invited to a project, and is also a member of an invited group, then group permissions for that user are ignored, and only the individual permissions for that user are considered.

If a user is not invited to a project, but is a member of a group that is invited to the project, the group permissions are used.

If the user belongs to more than one group that is invited to the project, the permissions are combined and the user gets the most permissive security setting available.

Permissions and groups: an example

For example, user USER1 is a member of GROUP1, GROUP2, and GROUP3. PROJECT1 has GROUP1 and GROUP2 as invited members, and GROUP3 is not invited. GROUP1 has Change Properties granted and GROUP2 has it denied, and it is not set for GROUP3 because GROUP3 is not an invited member. USER1 is able to modify database information about PROJECT1 because it is granted through GROUP1.

Project Managers and Admin group members

Members of the Admins group have full permission to access everything.
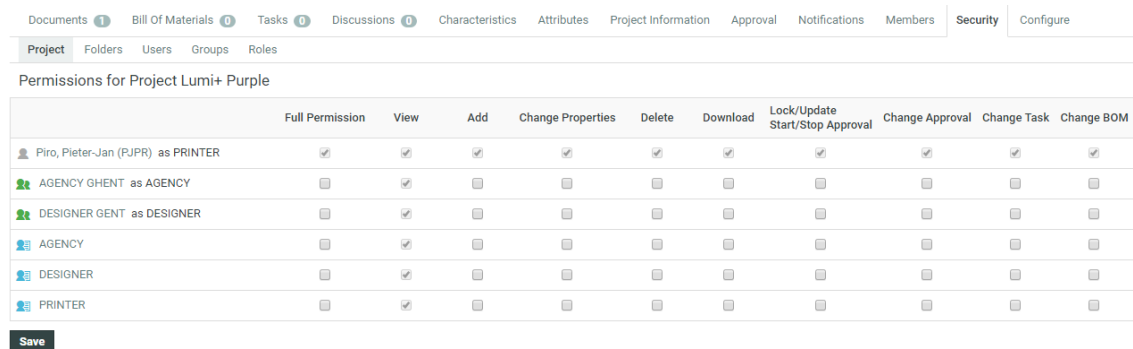
Project Managers have full permission within the projects they manage.

10.1. Set Security on a Project

1. Log in as a **Project Manager** or **Project Creator**.
2. Open the project.

   Note: The project should have folders created and members invited already.

3. Click the **Security** tab.

4. To set/edit the project permissions: choose **Project** from the menu and check or uncheck the desired permissions for specific users, user groups or roles.

   When you first enter a project's security menu, this menu is selected by default. Project level security controls access to the project and whether the contents of the project documents folder are visible and searchable. A checked item indicates a granted permission; no check indicates a denied permission.

   Note: View is automatically granted upon invitation to a project. View permission to the root of a project cannot be denied for an invited project member.

   Tip: To grant or deny all permissions, check or clear the **Full Permission** checkbox. The changes are effective immediately.

5. Set folder level permissions:

a) Click **Folders**.

b) Select the folder to change from the **Permissions for folder** list.

c) Check the checkbox in a column to grant it to the user, group or role in that row; clear the checkbox to deny it. To revert to default project permissions, click **Reset**.

> **Tip:** To grant or deny all permissions, check or clear the **Full Permission** checkbox. The changes are effective immediately.

6. Set the user specific permissions:

a) Choose **Users**.

b) Select the user whose permissions are to be modified in the **Permissions for user** list.

c) For Project and folder permissions, check the checkbox in a column to grant it to the user or group in that row; clear the checkbox to deny it. To revert to default Project permissions, click **Reset**.

> **Tip:** To grant or deny all permissions, check or clear the **Full Permission** checkbox. The changes are effective immediately.

7. Set group level permissions:

a) Choose **Groups**.

b) Select the group whose permissions are to be modified in the **Permissions for group** list.

c) For Project and folder permissions, check the checkbox in a column to grant it to the user or group in that row; clear the checkbox to deny it. To revert to default Project permissions, click **Reset**.

> **Tip:** To grant or deny all permissions, check or clear the **Full Permission** checkbox. The changes are effective immediately.

8. Set role level permissions:

a) Choose **Roles**.

b) Select the role of which you want to modify the permissions in the **Permission for role** list.

c) The changes you make in this section define what the default permssions to be used when you assign a user or group to this specific role. Any changes made here will not affect users and/or groups that have already been assigned to the role.

11. Reassign a Project to Another Project Manager

Projects may be reassigned to other Project Managers as long as the current Project Manager is not an Approver in ongoing Approval Cycles in that Project.

1. Log in as a **Project Manager** or **Project Creator**.

2. Open the project.

3. Click **General Information**.

4. Click **Manager**. WebCenter performs a dependencies check for the current Project Manager being an Approver on ongoing Approval Cycles. If it finds any, click **OK**, stop the Approval Cycle(s), and retry changing the Project Manager.

5. Assuming there are no dependencies, filter or click Go to generate a list of Project Managers.

   This list can also include user groups.

6. Click the name of the new Project Manager or group and click **Finish**. The new Project Manager's name will appear on the General Project Information page.

To reassign more than one Project to another Project Manager, generate a list of projects either by searching or by using an item on the main Projects menu, and then click Change Manager in the **Actions** menu. Filter or click Go! to show the list of Project Managers, select the desired Project Manager, and click Finish.

Admins can change Project Managers for more than one project at a time using the **Projects** menu in **Project Management** on the **Admin** menu.

While they can select projects with different Project Managers, they may only assign all the projects to one Project Manager.

12. Create a User

> ⚠️ **Attention:**
>
> As a Project Manager, you can only create other users if the Admin granted you the **User Can Create User** privilege.
>
> For more information about this privilege, see "*Create a User*" in the Administration Guide.

1. In the **Create** menu, click **Create User**.

   Step 1: User Info in the **Create New User** wizard appears.

2. Type the basic user information into the appropriate fields (**Username**, **First Name**, **Last Name**...).

   Note: Required fields are indicated with an asterisk *.

3. Provide the user's initial **Password** and confirm it.

   Enable the option **Require the user to change the password at first login** to force the user to choose a new password when they first log on to the system.

4. Do you want this user to see custom menus instead of the default WebCenter menus?

   Custom menus allow you for example to simplify the user interface, so the users only see the menus they need to use. For more information, see "Menus Preferences" in the Administration Guide.

   • If yes, choose the menu to assign to the user in **User Menu**.
   • If no, leave **Default** in **User Menu**.

5. Click **Continue**.

6. In **Step 2: Assign to a Company**, optionally select a company to which you want to assign the user. Note that this can be very important to filter the content and users the new user will be able to see.

7. Click **Finish**.

Your user is created.

13. Editing Users and their Preferences

13.1. Edit a User

1. In the **My WebCenter** menu, click **My Users**.

   This shows all the users you have created.
2. On the **My Users** page, filter the list of users if desired, and click the username of the user to edit.

   The **Profile** page appears.
3. Make the required changes:

To edit the user's...	You should...
user info	edit the fields on the **Profile** page.
menu	select a different **User Menu**. **Note:** Users linked to a company will always see the menu assigned to the company, even if they have a different menu assigned to them individually.
company or location	1. Click the **Company/Location** link on the **Profile** page. 2. Select a new company and click **Finish**.

4. Click **Save** to confirm.

13.2. Change the Password for a User

1. In the **My WebCenter** menu, click **My Users**.

   This shows all the users you have created.
2. On the **My Users** page, filter the list of users if desired, and click the username of the user to edit.
3. Click **Password** to show the **Password** page.
4. Type a new **Password** and confirm it.
5. Click **Change** to save the changes.

13.3. Set the Preferences for a User

1. In the **My WebCenter** menu, click **My Users**.

   This shows all the users you have created.
2. On the **My Users** page, filter the list of users if desired, and click the username of the user to edit.
3. Click **Preferences** to show the **Preferences** page.
4. Configure the Preferences as needed. For more information on the settings and options, see General Preferences in the Administration Guide.
5. Click **Save** to confirm.

13.4. Copy Preferences to Users

Use this to quickly copy previously defined preferences to one or several users.

1. In the **My WebCenter** menu, click **My Users**.

   This shows all the users you have created.
2. Select the user(s) whose preferences you want to change and select **Apply Preferences** in the **Actions** menu.
3. In the **Apply Preferences** popup, select the preferences to change, and deselect the preferences to keep.

   Other Preferences are the user preferences not mentioned above (for example: show thumbnails or not, search results layout, etc.).
4. Select who you want to copy the preferences from: in **Take Preferences From**, select another of your users, or select **Default** to use the default settings for the preferences you selected.
5. Click **OK**.

14. Discussions in WebCenter

You can start a discussion in WebCenter, in a **Project**, **Task** or at a **Document** level. It facilitates members of the project to have conversations, which improves collaboration and faster decision making.

You can view the conversations in the **Project** or **Task** or at the **Document** level in the **Discussions** Tab. **Discussions** can be with all the members or private conversations with few or one member of the project.

You can view and respond to discussions on **My Work** and **Search Results** dashboard pages if enabled. You can also view and respond to discussion pertaining to the document in the HTML Viewer.

14.1. Start a New Discussion

New Discussions can be created in Projects, Documents or in Tasks that has discussions enabled. Any user can create new discussions.

*   To **Start New Discussion** in a Project:

    a) Navigate to **Project Details** > **Discussions Tab**. You can view the **Discussions** for **Project**, **Document** and **Task** in separate sub tabs.
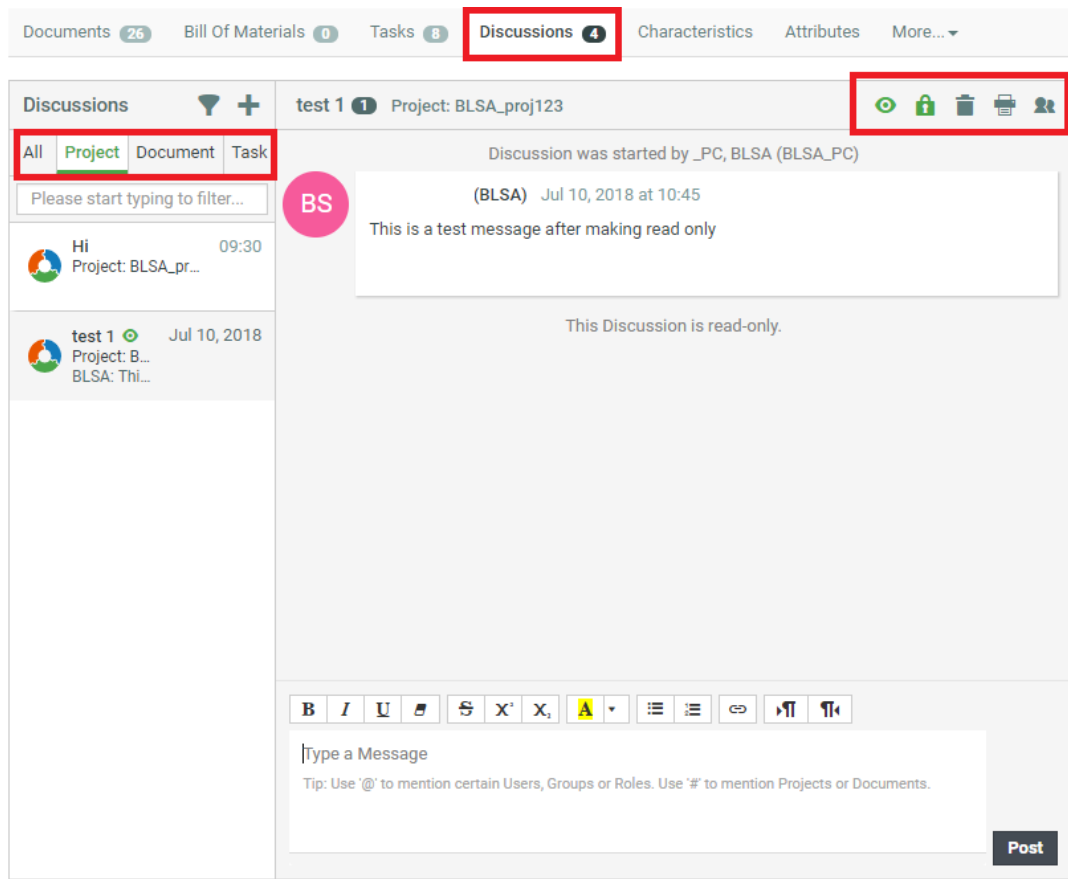
b) In the **Discussions** panel, click ➕ to **Start New Discussion**. A message panel is opened in which you can enter a relevant subject.

c) Add the members to the **Discussion** by selecting from the drop down list in the **Visible To**. By default, the discussions are visible to all members in the project including the Project Manager. Refer to point 4 in the note below.

d) Write a relevant **Subject** line and type the message in the message panel and **Post** the message.

- To start a new discussion in a **Task**:

a) Ensure that the **Task Type** chosen for the task is enabled to have **Discussions**.

b) Navigate to **Project Details** > **Task** .

c) Click **Discussions** > **Start a new discussion**.

d) Add the members required for the **Discussion** by selecting from the drop down list in the **Visible To.** Refer to point 4 in the note below.

e) Type the message in the message box and **Post** the message. Now this message is visible in the **Discussions**.

- To start a new discussion on **Documents**:

a) Navigate to **Project Details** > **Documents**

b) Click **Discussions** > **Start a new discussion.**

c) Add the members required for the **Discussion** from the drop down list in the **Visible To.** By default, everyone allowed to view this document is part of the discussion on the document. Refer to point 4 in the note below.

d) Type the message in the message panel and **Post** the message. Now the discussion is visible in the document to all the users who have permission to view the document.

Discussions on document can have members from other projects, if the document is part of other projects.

Note:

1. Discussions can be deleted only by the Admin User or the Project Manager or the Discussion Owner.

2. Project Manger can view all the private discussions in the Project or in the Documents or in tasks within the project.

3. Any discussion can be made read-only either while creation or any time during the discussion by the owner of the discussion or the Project Manager or the Admin user.

4. When a new Discussion is created, it is possible to have the default participant as the Discussion creator which can later be edited to add the required members. This feature is enabled based on the Admin User's choice in the **Preference** page. You can enable notifications when a new member is added or deleted in a discussion.

14.2. Post a Message in Discussion

Any user who is part of the discussion can post a message.

1. Go to the **Discussions** tab in Project.

2. Select the Discussion, where you want to add a message.

3. Enter the text in the Message box and click **Post**.

When hovering on any message, you can get an option to quote the post and to mark the message as unread. Discussion owners, Project Managers and Admin Users will get an option to delete the messages.

Tip: Depending on the setting for Notifications in the Project, notifications are sent when:

• Discussion Started
• Discussion Deleted
• Discussion Message added
• Discussion Message deleted

Discussion editor is equipped to handle texts from languages which are written from right to left. Enable the right to left or left to right buttons to change the direction of text.
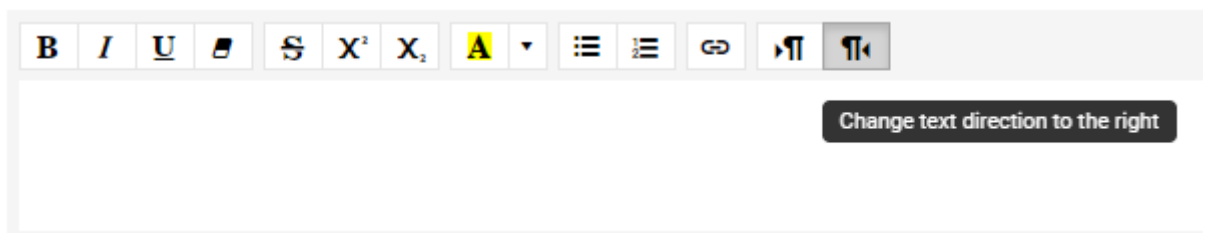
14.3. Viewing Messages in Discussions tab

The **Discussions** tab label displays the numbers of Discussions and on hovering over the label you can view the number of discussions in **Project**, **Documents** and **Tasks**.

Note: When there are unread messages, the badge has a different color.
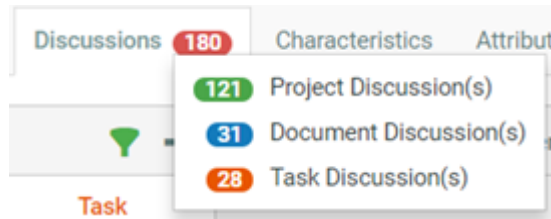
In the **Discussions** tab, you can view discussions filtered and displayed in four tabs on the left for **All**, **Project**, **Document** and **Task** respectively. The Discussion with the most recent message is displayed in the message box.
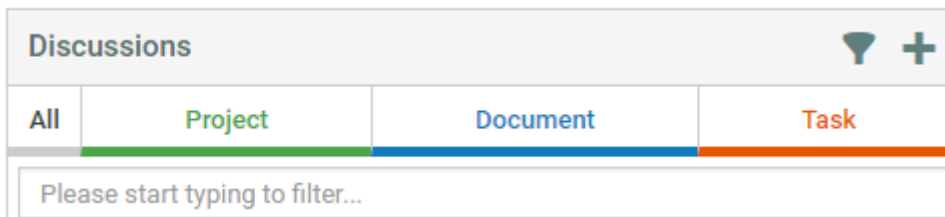
Menu Options in the Discussions Tab

Use	To
	Filter the discussions based on what you are watching, or marked as unread or discussions started by you. You can choose one or more or none of the options to filter.
	Note: You can also filter out using **Show Only** options. You can filter out discussions based on what is being watched or unread or direct discussions or discussion started by the user or as a direct participant.

Use	To
➕	Add a new **Discussion**
⊙ Watch All 🚫 Unwatch All	Watch all Discussions or reverse it.
✔✔ Mark All as Read ⭕ Mark All as Unread	Mark all the Discussions as read or reverse it.
🖨	Print the discussion which is currently visible.
⊙	Watch the current discussion. The discussion subject also displays this icon to indicate the discussion is being watched.
👥	**View Participants** in the current discussion in a sub tab with their online status.

Note: You can filter to view only direct Discussions.

Special characters in the Discussions

Use	To
@	Mention a User, Group or Role in a message. The User, Group or Role will get a notification of the mention in the message.
#	Link to the Project or Document name mentioned

Discussions during Delegation

Users sometimes delegate their work to other users and in such circumstances the delegate can also be part of discussions for the delegator. Read more about delegation *here*. Discussions Read-only

Admin Users, Project Managers of the Project where the discussion is in and the owners of the Discussion can make the discussion read-only. In read-only mode, a normal user cannot add a new messages or quote any message. The owner of the discussion also cannot add or edit the users in the discussion nor delete the individual messages.

15. Task Management in WebCenter

Task management adds a complete time perspective to your Projects. WebCenter facilitates timeliness by adding extensive notifications on the tasks. The task searching and overview pages facilitate follow-up, finding critical and overdue tasks and creating reports.

Task Management allows adding tasks to WebCenter Projects and assigning these tasks to Project members.

Tasks have due dates, start dates and estimated dates. Tasks also have a specification and a checklist. In addition, you can link documents with tasks and organize a discussion forum around a task. Finally, tasks have statuses.

Note:

Task Management is an optional feature of WebCenter. If you did not purchase the Task Management license, you won't be able to create tasks or task types and these features won't appear in your user interface.

15.1. What You Can Do with Task Management

A task is work (or part of the work) that you assign to a project member with a specific due date. A task has a **name**, a **description**, a **status**, **due date**, **estimated date**, **starting date**, a **specification**, a **checklist** and a **discussion forum**. Use tasks to:

*   **assign human tasks to project members, groups or roles**:

    The assignees or group of assignees will get a notification by e-mail and via their To Do list. You can describe the task via the task description (free text), the task specification (structured data) or via the checklist.

    You can restrict the task type to a dedicated **Main Assignee**.

*   **create task sequences**:

    You can connect the tasks in a way to launch the next task automatically on completion of the preceding task. Alternatively, you may set a delay to start the task automatically. This feature allows you to **build automated workflows that flow from one project member to another**.

    You can also set the Project Status to be completed when the tasks are completed.

*   **monitor critical tasks**:

    Use the Gantt chart to view the tasks in their time line. You can monitor the status of the critical tasks according the project delivery time line.

*   **project definition**:

    Define what parts constitute a project. These parts can be human tasks but can often also be physical components to deliver, for example all the parts of a complex box. Each part can have a different due date. You can use the specification to define length, width, depth or any other parameter. You can upload the digital files representing this component to the task representing this physical delivery.

- **Create a project plan according to a project plan template**. This allows making a plan with multiple steps that are shifted in time. You can re-use timings from a previous project to create estimates from where you can start refining.

- **Keep track of quotes or projects in an initial state**.

- **Organize your own To Do list**.

15.2. Basic Concepts of Task Management

Task

A task is a piece of work you assign to a project member to be done before a certain due date. A task has a name, a description, a status, due date, estimated date, starting date, a specification, a checklist and a discussion forum.

Only the name and due date are needed, the rest can be omitted if they are not interesting or needed. Tasks have a task type.

A task lives in a project. A project can have multiple tasks but a task cannot be in more than one project at the same time.

Task Type

Task types are templates for tasks. Task types are global for the WebCenter system. Each task follows the task type from which it was created.

The task type contains:

- Estimated duration of the task.
- List of statuses for the task.
- Specifications. This is a set of parameters you want the task creator or assignee to enter into the system (they can be required, in which case the task will not be completed if they are not filled in).
- Checklist. This is a set of items you want to assignee to check off before completing the task. Optionally, the system can enforce this.
- Documents. This is a set of parameters that defines whether you can add or even have to add a document.
- Discussions. You can allow to start a discussion in your task.
- Workflow. In this section you can create a complete workflow using different task types and other nodes.

Specification

A parameter for a task. Specifications work much in the same way as attributes. The list of specifications is determined by the task type.

Due Date

The date and time by when a task must be completed. Due dates are visible in all task overviews. Due dates are mentioned clearly in the notifications sent to the person to whom the task is assigned.

If the task is not completed on the due date/time, the assignee will get a reminder. Tasks going overdue are flagged in red in the task overviews and search results.

Estimated Date

The estimated date is a date and time filled in by the task assignee. It gives the best current estimation of when the task will be finished.

Estimated dates are allowed to fall before or after the due date, but when they fall after the due date, they will appear in red in the task overviews. Changing the estimated date will normally send a notification to the Project Manager or task owner.

Started date

The date and time when the task changed status from Created to In Progress.

Assigned To

Tasks are assigned to project members. You can assign a task to one project member only (one user or one role or group). You can also assign any task to yourself, which provides a way of notifying the other project members that you will take responsibility for this task.

Tasks can change assignees during their life cycle, in this way handing over the task or responsibility from one person to another.

Allowed Assignee

You can restrict the tasks to have a pre-configured **Allowed Assignee**. This feature allows you to restrict the tasks to a group or a role specified in the Project / Template as the only allowed assignee.

- You can specify a **group** or **role** as the allowed assignee of a task type. This allows you to restrict the task assignment to a member of this particular group / role for all tasks derived from it.
- Alternatively, you can enable this feature in the task type and leave it unassigned (**default to task assignee**). This allows you or the user to specify a particular **group** or **role** in the task.

Note: This feature is restricted to administrator users.

Auto-delete

A task type can be configured with an option to automatically delete the task when it is completed successfully. This option comes in handy when you want to keep the task overview page clean.

This is especially useful in the case of tasks specified in *Rules*. It is best to delete the Rule related tasks automatically once they are executed.

Note: The project history will keep a log of all the tasks that were created, started and completed successfully. History will capture the task details at the time of task creation.

15.3. Getting Started with Tasks

15.3.1. Create a Simple Task

The system comes with only one task type built in: Simple Task. This is a task with no document, no specification, no checklist, and no estimated duration.

Use the Simple Task type to experiment with creating tasks before figuring out how to make task types. Listed below is a procedure for getting started.

1. Open a project (or create one) and click **Tasks**.

> **Note:** If you don't have a **Tasks** tab, you probably do not have the Task Management license.

If this is a fresh project, an empty list of tasks appears.

2. Click **Create New Task**.

3. On the **Create New Task** page, select the **Task Type**. Since this is the first time you are using tasks, select **Simple Task** from the **Task Type** list.

4. Assign the task to a project member or user group using the **Assigned to** list. For this first task, select yourself.

> **Note:** If you assign a task to a user group in WebCenter, all members of this group will see the task show up in their My Work pages, and they will all receive notification e-mails (if set up by your site Administrator). Any member in the group can then take on the task and complete it.

5. Enter a **Name** and **Description** for the task. Fill in other fields as desired.

6. Click **Create**.

You have created a simple task.

15.3.2. Use the Task List, Task Search and My Work Page

- Click **Tasks** to get an overview of the tasks in your Project.
- Create some additional tasks with different due dates and assignees. You'll see a list of tasks building up and you can start experimenting with the **sorting options** in the overview.
- Try a task search: click **Search** in the top menu, click **Tasks** and enter your search criteria.
- Now go to your **My Work** page. You'll see all tasks assigned to you under **My Tasks**.

  You'll see the status and the due date. Due dates in the next 3 days will appear in orange and due dates in the past will appear in red.

  Completed tasks are shown under **My Recently Handled Tasks**.

  > **Note:** If you cannot see **My Tasks** or **My Recently Handled Tasks**, go to **My Work** > **Edit My Work Setup** to add them to your **My Work** page.

15.4. Task Types

Use a Task Type to:

- Set up a template for a large number of tasks.

- Enforce structured specifications for tasks.

- Enforce a checklist for tasks.

- Add extra task statuses.

> **Note:** Task types can only be created by Project Managers with the **User Can Create Task Type** permission, or by Admins.

The task types are also used in creating workflows in WebCenter. Read more in *Workflows* on page 362.

A **Task Type** can be either **Manual** or a Task Type with a **Workflow**. Both types can be added to a workflow from the canvas.

The **manual** tasks require human intervention and they can be used as either individual tasks or as workflow nodes.

Read also

15.4.1. Create a Task Type

Creating a task type demands some initial planning, certainly if you want to use specifications.

> ⚠ **Attention:** All specifications you want to put in a task type must first be defined by an Administrator.

To create a task type, do the following:

1. Click **Task Types** in the main menu bar. You will get an overview of the existing task types.

   > **Note:** If you cannot see **Task Types** in the main menu bar, you either do not have the **User Can Create Task Type** permission set on your user profile, or you do not have the task management license.

2. Click **Add Task Type**. This brings you to a wizard.

3. Enter a **Name**, an optional **Description**, **Estimated Duration** and **Due Date Link**. Click **Create**.

   The Estimated Duration is used to calculate defaults for dates. We advise to only use the **Estimated Duration** for tasks that really have a typical duration (overnight shipping, die creation...).

   Due Date Link is an option to select a **Date/Time Attribute**, which can be set as the task due date. You can also choose an offset value (plus or minus, in days and hours) to the attribute as due date. The due date will always be in weekdays. Changing the attribute value in the project will change the task due date.

   > **Note:** By default, Saturday and Sunday is considered as weekend. However, it is possible to switch the weekend days to Friday and Saturday. The due date calculation will ensure that the due date will always be on a weekday. To enable this in your WebCenter system, contact an Esko Representative.

   Enable **Allow Changing Task Due Date Link** to allow users(with Change Task Permission only) to change the attribute link in the tasks derived from this task type or can provide a fixed date/time as task due date.

4. Optionally add **Specifications** and determine whether they are required.

   > **Note:** If a specification is required, tasks of this type cannot be put **In Progress** before all required specifications are filled out.

   - If the Admin enabled **Attribute is also a task specification** when creating some attributes, they will be in the specifications list. If desired, those can be used both as an attribute in your projects, and as a specification for tasks.

     You can then select **Automatically update project attributes from task specifications** so that when the task assignee updates the specifications' values and completes the task, the corresponding attributes' values are updated in the project.

- You can also select **Assign roles from task specifications**, if you want to use tasks created from this task type to allow non-project managers to select users or groups (for example to invite people, to assign tasks or approvals to users / groups).

  See *Example: Assign a Role using a Task* on page 360 for more information.

> **Note:**
>
> You can also:
>
> - *Add Statuses to a newly created Task Type*,
> - *Change settings related to task documents*,
> - *Change settings related to task discussions*.
> - *Add Custom Document Sources to the Tasks*

Now that you have created a new task type, it is a good idea to try to create a task based on your new task type.

Go inside a project, click **Tasks** > **Create New Task**, and follow the wizard.

Save As Task Type

New Task Types from existing Task Types

You can utilize the existing Task Type by the option **Save Copy As** in the Task Type details page. You can copy all the details of the existing task type and save it with a new name.

> **Note:** Users with permission to create task type can use this option.

System History Logs

All **Task Type** related events like

- **Task Type General Info changed**
- **Task Type Specification changed**
- **Task Type Checklist changed**
- **Task Type Status changed**
- **Task Type Document changed**
- **Task Type Document Creation changed**
- **Task Type Document Rendering changed**
- **Task Type Discussion changed**
- **Task Type Workflow changed**
- **Task Type created**
- **Task Type deleted**

are recorded and stored in System History. Read this page on how to access the *records*.

15.4.2. Edit a Task Type

1. Click **Task Types** on the main menu bar. You'll get an overview of the existing task types.
2. Click the name of the task type. You'll see an overview with the following tabs:

   - **General Info**
   - **Specifications**

- **Checklist**

- **Status**

- **Documents**

- **Document Creation**

- **Discussions**

- **Workflow**

3. Consult the following table to consider the impact of your changes to any existing tasks derived from the task type:

If you change the task type's...	Then...
Name	Existing tasks derived from the type will display the new task type name.
Icon	Each task type can have an icon. This icon is used in the Workflow canvas/gallery and is also used in the task list in Projects. Click the **Select Icon** button to select a required icon. You can also use filtering on the icon name. The files with extensions jpg/jpeg, png, gif, bmp.
Dashboard	Specify a Dashboard that can be used in • **ToDo Feed**, or **Selection Details** blocks in Dashboards for a visual representation of the Task and /or • To view in Focus Layout for Task Search results.
Restrict Task to an Allowed Assignee option	In the **General Info** tab, you can enable the setting to restrict task assignees to a particular role or group. After enabling this option, you can: • select an *Allowed Assignee* role or group. • set **Default to Task Assignee** in the **Allowed Assignee** field. Read more in: *Restricting a Task to Project Roles or Groups* on page 330
Require Password to complete Task	Enable this option in the task type, to get password confirmation for the task completion. Tasks completed with password re-entered, are specifically mentioned in the project history. **Note:** Password requirement can be setup only for manual tasks. When this option is enabled, you can further specify

If you change the task type's...	Then...
	• **Prompt for Password** where only password is to be provided • **Prompt for User name and Password** where both User name and password ha to be provided • **Prompt for username and password once, afterwards only prompt for password** where user name to be given once and thereafter only the password to be provided
Perform full validation of Document Attributes on User Task completion	Enable this option in the task type, to ensure that all the mandatory values required in the task are all validated on completion of the task. If all values are not found in either the task specification or in task document then an error message is given.
Automatically delete Task when successfully completed	This option, if enabled, automatically deletes the tasks when they are completed successfully. This option comes in handy when you want to keep the task overview page clean. This is especially useful in the case of tasks specified in *Rules* where you do not want all the tasks in the Project's tasks page. **Note:** The project history will keep a log of all the tasks that were started and completed successfully.
Estimated Duration	Existing tasks will not be changed in any way.
Specification	Existing tasks derived from this type will be updated as follows: • If you add a specification, all tasks of this type will get an extra specification. • If you make an extra specification required, all tasks not yet In Progress will enforce this specification. Nothing will happen to tasks that are already In Progress, or Completed, or any other state beyond Created. • If you delete a specification, it will be removed from tasks not yet in progress. Information in there will be lost. All other tasks will be kept intact. • Read more in: *Synchronizing Specifications with Project Attributes* on page 321

If you change the task type's...	Then...
checklist items	If you... • Add checklist items: existing tasks derived from this type and not yet completed will also get the new checklist items. Completed tasks are not affected. • Delete checklist items: they will be deleted from all non-completed tasks. Information in these tasks will be lost.
status	If you... • Add a status: it is added to all non-completed tasks. **Note:** Tasks will not change status as a result of this. • If you delete a status: it will not be applied to any created tasks.
Document Creation	Tasks created from this task type are presented with the customized document upload options. Read the details about this option in *Document Creation Settings*.

Each Task Type can have an icon. The Icon gallery stores icons for Task Types, Project Statuses and WebCenter statuses.

You can add your own icons to this library as jpg/jpeg, png, gif or bmp images. The Project Statuses, Task Statuses and Task Types can load icons from the icon gallery.

Icons between 15 and 30 pixels high and between 15 and 130 pixels wide appears without scaling.

The gallery allows filtering of icons by its name.
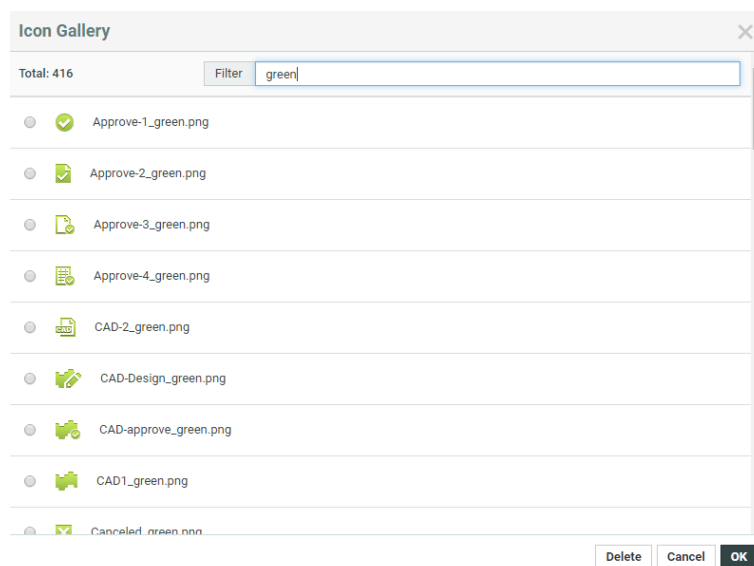
15.4.3. Task Specifications

Specifications work like Attributes and together in a Task Specification page, they act like an Attribute Category. They are used for specifying tasks.

Note: Specifications can be made by an Administrator or Project Managers with **Create Task Type** permission.

System History Logs

All **Specifications** related events like

- **Specifications created**
- **Specifications deleted**
- **Specifications changed**

are recorded and stored in System History. Read this page on how to access the *records*.

Create a New Task Specification

1. Go to **Task Types** > **Specifications**.

   A list of specifications opens (this list can be empty if this is the first time you use specifications).

2. If your specification will be a restricted set (a drop-down list of items to select from), you need to create this restricted set first. Click **Restricted sets** to do this.

   Note: The restricted sets are shared with the Attributes' restricted sets.

3. Click **New Specification** on the top right.
4. Enter information in the fields as appropriate:

In the field ..	Fill In the ..
Name	name of the attribute (for example,Billable).
Description	description of the attribute contents (for example, Indicates whether work on this project should be billed by finance).
Type	the type of the attribute. You can select from the drop down. **Document References** are attribute-links pointing to different document sources. When you select this option, you will have more options. Read more in *Create a Document Reference Attribute*. **Floats** are numbers containing a decimal point (e.g. 3.1415) and integers are whole numbers (e.g. 42). **Rich Text attribute** type allows you in entering long and/or rich text. You can: • add set of least 16 different colors. • set the text bold and italic.

In the field ..	Fill In the ..
	• use bullet and numbered lists. • Heading up to four levels and also add tables. In the **Preview** you will see the Rich Text editor. Click the **Show Rich Text Controls** link to view the broad pallet of text options. The Project Managers with change properties rights can add content from a document to the Rich text editor window. Here, the text (also Chinese, special characters), font types, bullet types, color, tables and headings are preserved.
Values	choose either: • **Prompted** if you want to allow the user to enter any value. • **Calculated** if you want to use an ArtiosCAD formula to calculate the attribute value (enter the ArtiosCAD formula in the field). **Note:** You should set **Calculated** attributes to *read-only* as their values are automatically updated from ArtiosCAD and should not be changed by WebCenter users. To set the value of the calculated attributes during upload, ensure that you have a default attribute category with the calculated attributes for the ArtiosCAD documents. • **Restricted Set** to limit the possible values. **Note:** • To choose a Restricted Set, it must be created before defining the attribute (see *Create a Restricted Set*). • Make sure that the Type of the Restricted Set is the same as the attribute type. • For **Document Reference attributes**, you will have only **Prompted** as the **value**.

5. If you are creating a **document reference** specification:

Options	Description
Values	will be set to **Prompted** by default.
Versions and Revisions	Use this field to point to the exact version of the document you need as the document reference link. This is especially useful when you want to point to an approved version. By default, it points to the latest version, but you can set this to: • **Latest Version**: When you select this, the document reference link will be updated to the latest version of the document.

Options	Description
	Note: When you update the referred document, the document link will point to the **latest version** regardless of the **Change Properties** permissions in the **Project** > **Security** tab.
	• **Selected Version**: Use this setting if your document reference link should point to a certain version always. In this case, the document reference will not be updated to point to the latest version when a new version of the reference document is uploaded.
	• **Selected Revision**: When you choose this, the document reference will always point to the latest version of the selected revision.
	Note: When you update the referred document, the link will source the latest version of the **selected revision** regardless of the **Change Properties** permissions in the **Security** tab.
Reference Category	To apply a **reference category** to the document reference, select from the drop down listing all the **attribute categories**.
	Note: Rich text attributes and **document reference attributes** cannot be used as **reference attributes**.
	You can use a **reference category** (which is an **attribute category**) to assign certain attributes to the document reference link. This is very useful when the property is not linked to the product or the component specifically. You can use **reference categories** to specify properties of the reference links.

Edit or Delete Specifications

- To edit a specification, click **Task Types** > **Specifications**. Click the name of the specification and edit it as desired.
- To delete a specification, click **Task Types** > **Specifications**. Select the specifications you want to delete and click **Delete** in the **Actions** menu.

Synchronizing Specifications with Project Attributes

You can use **Task Specifications** to ask project members to supply values for Project's attributes or to assign Roles.

You can **Synchronize Project attributes with Task specifications** when the tasks are completed.

Note:

- While the task is running, **project attributes** and **task specifications** can be different. This is indicated by the **!** warning.

You can also *assign a role using task specifications*.

1. Enable **Synchronize Project Attributes and Task Specifications** option to:

   - automate the process of filling the Project Attributes if they are empty
   - or to copy the values from Project Attributes to the Task specifications

   Note:

   - This function works without the user having the necessary **Change Properties** right at the Project level. This allows you to give a user temporary permission to change the Project Attributes.

   - If the project attribute is blank, task specifications set in the previous sessions will be saved.

   - The Specification values in the Task Execution Page will be filled with the Project Attribute values when the Specifications are empty and when the Task Specification is read-only.
   - When the task is completed, the changed Specification Values will be copied to Project Attributes
   - When a Task is saved without completing it, the new Specification value will be remembered, but not Project Attribute Value will not be updated.

     Note: A warning sign will indicate that the Attribute values differ from the Specification value. You can choose to change the Attribute value to the new Specification value.

2. Optionally, enable **Update empty values**. This option is only available when the **Synchronize Project Attributes and Task Specifications** option is on.

   This will result in clearing of the Project Attribute values if the corresponding Task Specifications were left empty when the Task is completed.

Task Forms (Task Execution View)

You can fully customize your Task Execution Form (just like *Project Creation Form* in WebCenter. This way you can have a uniform customized look for a Task Execution Page. To configure a custom form, you can combine **Specifications** with Task Properties in a dedicated **Task Execution View**.

1. Go to the Task Type's **Specifications** page and **Add Task Execution View**.
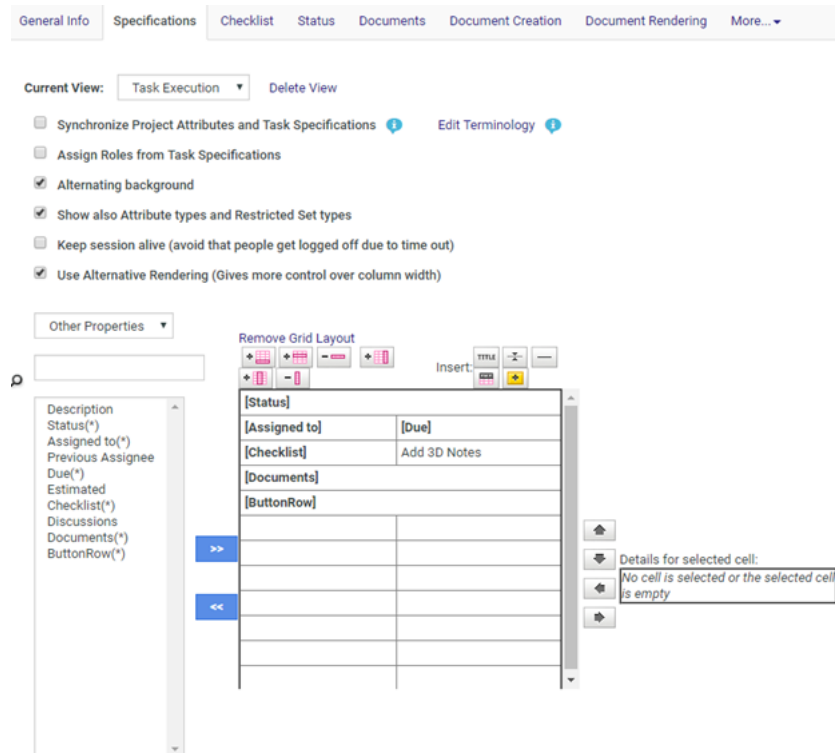
Your Specification page will load all the default Task Properties in the default order.

2. Use << to remove Properties (just like Specifications). It is also possible to remove these properties from the form, add them again or place them between the Task Specifications. You can customize these properties just like **Specifications**. See *Grid Layout*.

Keep the following in mind when customizing Properties:

- You can show and hide fields or sections based on attribute values
- You cannot specify them as Read-Only or Required
- You can customize the label or image including their position (left or top).
- You can add Style to these Properties
- You can define the Column Span for them.

When the Task Execution view is defined in the Task Type's Specification, this view (with custom Task Properties) will be loaded on the Task Execution Page. When this view is loaded the whole page will look like one continuous form.
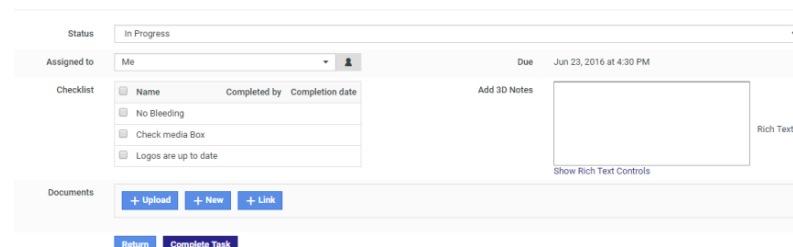
Note: Use caution when configuring a Task form:

- If you remove the ButtonRow from the view, you will not be able to save the Task.
- If certain sections are not enabled, but are configured in the Task Execution View, they will not be shown in the Task Execution View

Edit Terminology

It is possible to change the terminology used in Task Execution page so that it talks about "Designs" instead of "Documents", or "Attributes" instead of "Specifications", for example...

Attention: Your custom terms will not be automatically translated, and will show **as you enter them** for all languages in which you run WebCenter.

You can achieve this by customizing the terminology in the Specification page of the Task Type. To edit the terms:

1. Click **Edit Terminology** in the **Specifications** page

2. Specify the new terms next to the default terms.
3. Click **OK**.

Document Reference Task Specification

You can use a **Document Reference Attributes** as **Specifications** to refer to a document that is located within another project or a document library. You can add documents to tasks this way as references instead of copying them into tasks.

When you create such a **task specification**, select the **specification type** as **document reference**.

Note: You can use your **document reference attributes** as **task specifications** if you have checked **Attribute is also a task specification**.

Read more in:

- *Document References*
- *Create a Document Reference Attribute*
- *Edit a Document Reference Attribute*
- *Copy Document References*

15.4.4. Edit Checklist

Checklists can be added to a task type. Checklist items can be things you want the operator to check off before marking the task as completed. Another typical usage is to list subtasks.

Checklist items have no due dates but the system does track the day and user that checked off the checklist item, in this way enforcing responsibility.

1. Navigate to **Checklist** tab in **Edit Task Type**.

   • If you select **Finish task if all steps from checklist are completed**, it may not be possible to complete a task of this type without having checked off all the checklist items.

   • You can also decide that **Only a task assignee can check off checklist items**.

2. Choose **Add checklist items** to open Add Check Items text box. Enter items and **Finish** to save.

   Note: You can create an empty checklist (with no checklist item) but in this case do not select **Finish task if all steps from checklist are completed**, as otherwise tasks of this type can never be completed!

15.4.5. Add Task Statuses

Tasks have three statuses by default: **Created**, **In Progress** and **Completed**.

Adding more statuses improves the accuracy of task progress. This comes in addition to the estimated date.

The task status is reported in all task overviews. Task statuses can have high-quality icons. This allows making these overviews much more visual.

Note: Only Administrators can create task statuses but the task type owner can select task statuses from the list.

Task statuses have a sequence and this sequence is automatically adopted by the task type.

• To create new task statuses, as an Administrator:

   a) Click **Task Types** > **Statuses** > **Add Status**.

   b) Type names of extra statuses and browse for an icon.

   If you don't add an icon, the name of your status will be displayed in the status column (so avoid long names or use icons). Icons can be jpg/jpeg, png, gif, bmp file type. They are put without any scaling in the task column so you should be careful not to use large icons. Good sizes are between 15 and 30 pixels high and between 15 and 130 pixels wide.

   Using wide icons allows showing progress very visually as in the example below:

   c) Click **Finish**.

• To add task statuses to a Task Type, as a user with the **User Can Create Task Type** privilege:

   a) On the **Task Types** page, click your Task Type.

   b) Go to the **Status** tab and click **Add Status**.

c) Select the status you want to add and click **Finish**.

15.4.6. Document Sources in Task Type

Use the **Document Creation** tab to setup the document creation settings. You can configure custom document upload options (in Tasks) this way.

- **Default**

  The default document creation options will be:

  - **Browse**

  - **Copy**

  - **New** (when a template library is configured)

    > **Note:** **New** document creation is only possible if a **Document Template** library is linked in this template.Read more in: *Create Document Templates*.

- **Custom**

  When you select this, you will see a list of customizable options:

Source	Where the document will be sourced from.
Label	The link description. You can create a custom label, such as Upload a graphic file. • **Standard** • **Simple** • **Translated**
Details	Additional information such as: • **Allowed Extensions** • **Document Template Selector** Here you can select the already specified document templates. Read also:*Document Templates*
Operation	The operation depends upon the **Source** button. For example, if you have chosen **Project+Folder**, the operations would be Copy, Move or Link the document
Sections	The configured upload source is made available in these sections. By default, all the options will be available and enabled. You can deselect the sections to disable some of the locations. • the **Project Creation Documents** • the **Project Creation Bill of Materials**

	•	**Bill of Materials**
	•	**Upload (Copy or Create Multiple Documents)**
		Note: You can also drag and drop multiple files onto an Upload button.
Target Folder	The destination folder	

When a task is created from this kind of a task type, you get custom upload options in the task execution page.

> **Note:**
>
> If the task type does not have a **document creation** setup, the setup defined by the task's project is used as the upload options.

15.4.7. Define Task Documents Settings

Use the documents settings to define the relationship the tasks created from this task type will have with documents.

1. Select **Allow attached documents** if you want to be able to attach documents to the tasks of this task type.

   Selecting this makes the other settings available. You can also customize document upload options in the **Document Creation** tab. Read more in *Create a Task Type* on page 313

2. If the goal of the task is to produce one or more document, you can choose to **Only allow task to complete if it has one or more attached documents**.

   If the document(s) need(s) to be approved, you can also choose to:

   • **Complete task automatically when all documents are approved**,
   • **Only allow task to complete when all attached documents are approved**.

3. You can also select **Start approval cycle on attached documents** to start an approval cycle automatically when documents are uploaded to the task.

   This uses the approval settings defined for the project the task is in (or the folder the document is uploaded into, if it has approval settings defined).

   > **Note:** If neither the folder nor the project has approval settings defined, the approval cycle will not be started automatically.

4. You can also choose to automatically **Assign Attribute Category to uploaded documents**. Select the attribute category to use in the drop-down menu.

   > **Note:** If the task has specifications that are also attributes, you can use this to assign those specifications / attributes to the task documents as well.

   > **Attention:** When linking documents that already have an attribute category to the task, the existing attribute category will not be replaced by the one you select here.

5. If you want the documents to be uploaded to a predefined folder, you can enter the name of that folder in the text field.

> **Note:** This default folder will only be used if there is a folder in the project with that name.

6. If:

- the specifications used in the task are also attributes,
- those attributes are assigned to the document(s) attached to the task,

Select **Automatically update attached documents attributes from task specifications** to update the values of the document(s) attributes with the values that the task assignee fills in for the task specifications.

> **Note:** The update happens once the task is completed.

7. Click **Save**.

15.4.8. Define Task Discussions Settings

To allow project members to start discussions on all task created from the particular task type

1. Select **Allow discussions**. By default, this option is not selected.

2. On selection , **Discussion Context** drop down list is displayed. You can choose one of the following options:

- **Current Task :** This is the default option enabled. The discussions in the task are created and visible in the current task.

- **Parent Workflow**: If the task is part of a workflow, the discussions in the task are created on the parent workflow. The discussions are visible in all tasks of the parent workflow with this setting. The discussions are visible in the parent workflow task if the task type of the workflow has the setting set to "current task" or if the workflow task has no parent.

- **Root Workflow**: If the task is part of a workflow the discussions in the task are created on the top level workflow task of the task. The discussions are visible in all tasks in the workflow that have this setting, and all first level child tasks of the root workflow that have the Parent Workflow Discussion Context.

- **Project:** The discussions created in the task are Project Discussions. All Project Discussion are shown in the task.

3. Choose the requisite option.

4. Select **Show Discussions of Documents linked to the Task** to view the discussion of documents linked to the task.

5. Click **Save**.

15.4.9. Delete a Task Type

1. Click **Task Types** on the main menu.

2. Select the task type(s) to delete.

3. Click **Delete** in the **Actions** menu.

> **Note:** You can only delete task types that are not used in a task.

15.4.10. Copy a Task Type

You can copy an existing Task Type. To do that

1. Click on the Task Type. From the Task type's details page, click **Save as Copy**
2. Specify a unique name.

The following details are copied:

- Basic settings of the task type:
    - Description
    - Estimated duration (days + hours)
    - Restrict Assignees
    - Automatically delete option

- Document settings, including the name of the default document category

- Discussion settings
- Checklist items + settings
- Specifications including the layout and the order
- Restricted Sets used in Specifications.
- Workflow
- Task Status List, including the name of the icons.

> **Note:** The icons are not copied.

- The Document upload configuration setup

- Document Rendering setup

15.5. Working with Tasks

15.5.1. Create a Task

1. Click the **Tasks** tab in your project.

    > **Note:** If you don't have a **Tasks** tab, you probably do not have the Task Management license.

2. Click **Create New Task**.
3. On the **Create New Task** page, select the **Task Type**.

    To know how to create custom task types, see *Task Types* on page 312.

4. Choose a **Status** among the statuses available for that task type.
5. Assign the task to a project member or user group using the **Assigned to** list.

Note: If you assign a task to a user group in WebCenter, all members of this group will see the task show up in their My Work pages, and they will all receive notification e-mails (if set up by your site Administrator). Any member in the group can then take on the task and complete it.

6. Enter a **Name** and **Description** for the task.

7. If this task needs to start after another (already created) task, you can **Add predecessor(s)**: hover over **Add predecessor(s)** and select another one of the project's tasks as predecessor.

   Repeat to add other predecessors if necessary.

   Note: See *Sequential Tasks* on page 339 for more information on tasks' links with their predecessors.

   You can also choose to **Automatically link documents from predecessor tasks when task is started**.

8. Define when the task is due: you can use a **Lead Time** or a **Due Date**.

   Use **Lead Time** if you know how long the task will take, but haven't calculated a precise due date for it (for example for a task in the middle of a project). This calculates the **Due Date** automatically by adding the **Lead Time** to the current date.

   Note: The **Lead Time** only takes working days into account.

   The **Estimated** field will be mostly used by the task assignee to indicate when he/she expect(s) to have finished the task.

   Note: By default, Saturday and Sunday is considered as weekend. However, it is possible to switch the weekend days to Friday and Saturday. The due date calculation will ensure that the due date will always be on a weekday. To enable this in your WebCenter system, contact an Esko Representative.

9. Define when to **Start the task**:

   • Choose **Manually** if you want the assignee to decide when to start the task him/herself.

   • Choose **Automatically at ... (due date minus lead time)** to have the task start automatically a certain number of days (the **Lead Time**) before the due date. This makes sure that the task is automatically started when there is still enough time to finish it.

   • Choose **Automatically after predecessors complete** if the task has predecessors, and you want it to be started as soon as they are finished.

   • Choose **Automatically after predecessors complete and after ... (due date minus lead time)** to have the task start automatically a certain number of days (the **Lead Time**) before the due date, but only after the predecessors are finished.

   • Choose **Automatically after project creation** if you want the task or workflow to be started right after project creation from a template containing this task.

   Note: If you are making the task start automatically, you can still give the assignee the option to start it manually (select **Assignee can start task manually**).

10. If this task is crucial to the project, you can decide to have its completion change the project's status (for example mark it as **Completed**).

    Select **Completion of this task changes project status to** and choose your desired project status.

11. Click **Create**. When the task is created, a log is created in the project history with the Assigned to, Lead time, Due Date, Estimated Date, Description.

15.5.2. Edit a Task

Note: You need the **Change Task** permission to be able to edit a project's tasks.

1. In the project's **Tasks** tab, click the **Edit** link next to a task to go to the **Task Information** page.
2. Edit the task as desired and click **Change**.

Note: You can also edit the tasks assigned to you from the task execution page (see *Working on Tasks Assigned to You* on page 333) by clicking the **Edit Task Details** link (if you have the **Change Task** permission).

15.5.3. Restricting a Task to Project Roles or Groups

1. *Create a Task Type.*
2. In the *Edit Task Type page*, enable the option **Restrict Task to an Allowed Assignee (Group or Role)** in the **General Information** tab.
   • After enabling this option, you can either select an ***Allowed Assignee*** role or group in the task type or leave it as **Default to Task Assignee**.
3. **Save** the **Task type**.
4. Click **Create New Task** in the **Tasks** tab in your project.
5. Select the **Task Type** you created.
6. Choose a **Status** among the statuses available for that task type.
7. Select an **Allowed Assignee** (a group or a role). This will restrict the task to that specific group or role.
8. In the **Assigned To** field, you can specify:
   • the **Allowed Assignee** role or group. This field will list all the project members.
   • the members of the **Allowed Assignee** role or group.

   Warning: If you specify an **Allowed Assignee** in the task type and select a different role / group / project member in the **Assigned To** field, you will get an error while saving.

9. Click **Create** .
   Your task is now restricted to the **Allowed Assignee**.

To change the **Allowed Assignee**, go to **Edit Task** > **Task Information** and select another role or group.

Note: You need to be an admin user to be able to change the **Allowed Assignee** of the task.

> **Note:** If the **Allowed Assignee** role or group is specified in the **Task Type**, you cannot change it in the **Edit Task** page.

15.5.4. Reschedule a Set of Tasks

Often, an entire set of tasks must change its due date. Some possible reasons are:

- The project is delayed.
- The project needs to speed up.
- A set of tasks needs to happen earlier or later in the project.
- The entire set of tasks was copied from a template or another project and it needs to be shifted as a whole to be realistic for the current project.

> **Note:** You cannot change the due date of completed tasks.

To reschedule your project's due dates:

1. Open the project and select **Tasks**.
2. Click the **Schedule Tasks** link.

    You can see all due dates and lead times of the existing tasks but also their **Estimated Finish Date**.

This can differ from the due date because certain tasks are already overdue, or because due dates were chosen without taking the predecessor tasks' due dates into account.

You can view the lead times in **days only** or in **days and hours**. When choosing **days and hours**, you will be able to refine the scheduling to the **hour** a task should start or finish.

3. To change the due dates, you can either:

• Manually change the **Lead Time** of certain tasks (enter the **New Lead Time** and press **Enter**). WebCenter then calculates a **New Start Date** (if the task isn't started yet) and a **New Due Date** (all the dependent tasks are moved accordingly).

  For example if your project is late, you can shorten some tasks' lead times to make sure it still ends at the planned date.

  > **Note:**
  > • The **Lead Time** only takes working days into account.
  >
  > • The fields in yellow show the tasks on the **critical path**. Those are the tasks that directly influence the project's end date (the last task and its predecessors).
  >
  >   To make the project end sooner, you can shorten the lead times of the tasks in the critical path (in yellow).

• Click **Make estimated dates the new dates**: this takes the **Estimated Start Date** and **Estimated Finish Date** as **New Start Date** and a **New Due Date**.

  Use this for example if your project is late and you want to update your planning accordingly.

• **Shift due dates with** a certain number of **days** (select the tasks to change, enter a number of days and click **Try**).

  > **Note:** Selecting a task automatically selects its dependent tasks too.

  You can use this if your project is late, or you can enter a negative number to speed the project up.

• **Shift due dates to have the latest ending on** a certain date (select the tasks to change, enter the due date of the last task and click **Try**). This will calculate how many days the latest task needs to shift (to later or to earlier) and apply the same shift to all others.

• **Shift due dates to have the first one starting on** a certain date (select the tasks to change, enter the start date of the first task and click **Try**). This will look how much the task with the first starting date shifts and apply the same shift to the due dates of all tasks.

  This would be typical for a set of tasks of which just one is started. This starting date allows calculating the rest of the track.

  > **Note:** You cannot move tasks to before **Today**.

• **Re-distribute due dates to start on** a certain date **and end on** a certain date (select the tasks to change, enter the new start and end dates and click **Try**). This will compress the selected tasks' lead times to fit within the given dates.

  By default, the starting date is today, and the end date is the project due date.

  > **Tip:** You can also use this to do **backward planning** by only giving an end date and disabling the start date checkbox, or **forward planning** by only giving a start date and disabling the end date checkbox.

4. If you are not satisfied with the changes, you can click **Reset** to go back to the original dates. You can then **Try** to change the dates using a different method.

   When you are satisfied with the changes, click **Save**. This will send an e-mail notification to the task assignees (if this is configured).

You can also click **Cancel** to return to the task list without saving your changes.

You can also see your tasks in a **Gantt Chart**. You can display them by **Day**, **Week** or **Month**, and you can choose to view the **Original**, **Estimated** or **New** dates.
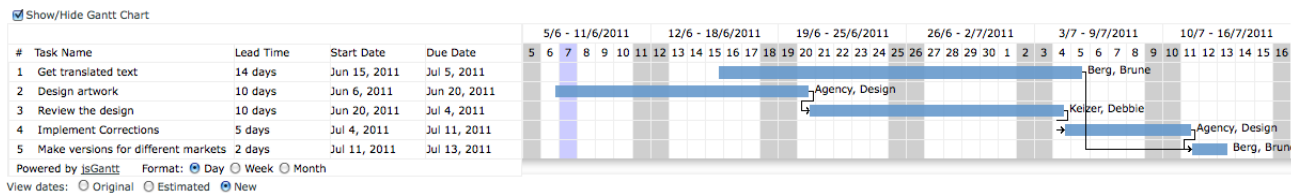
Note: You can also **shift due dates** from the project's **Tasks** page: select the desired tasks and click **Change Due Date** in the actions menu.

15.5.5. Task Discussions

You can start a discussion on a task by clicking **Edit Task Details** then **Discussions**.

Task discussions work in the same way as document discussions.

Read more on how to enable **Task Discussion** *Enabling Discussions in Task Type*

15.6. Working on Tasks Assigned to You

To work on a task assigned to you, you can either:

* click the link to the task in the notification email you received,
* click the task name in the **My Tasks** section of your **My Work** page,
* in the project details page, click the **Tasks** tab then the name of the task.

This opens the task execution page.

15.6.1. Start a Task

- On the task execution page, click the **Start Task** button.

   This sets the task status to **In Progress**.

15.6.2. Upload Documents to the Task

On the task execution page:

1. In the **Task Documents** section, click one of the options in the **Task Documents** section. You can either:

   - Upload a document saved on your computer or network (use **Upload / Browse**),
   - Link a document already existing in the project to the task (use **Link**),
   - Create a document placeholder from a document template (use **New**).

   > **Note:** This is only available if the project has been created from a project/template containing document templates.

   This is similar to the general upload document page. For more details, see *Uploading a Document via Upload* on page 60.

2. Choose the project **Folder** in which to upload the document.
3. Click **Change**.

You can also **Upload Multiple Documents** (see *Copy / Create Multiple Documents* on page 63 for more information).

15.6.3. Download a List of Documents from the Task

To download documents from the task execution page:

- Select the documents to download and click **Download** in the **Actions** menu.

    - If you selected a single document (that you have download rights for), it will be downloaded directly.
    - If you selected several documents, you will get a ZIP archive containing all the documents you selected and for which you have download rights.

    > **Note:**
    >
    > - If you don't have download rights for any selected document, you will see an error message.
    > - If you selected CAD files as part of a multi-document download, they will be downloaded in the native perspective.

15.6.4. Change the Task Status

When you are working on a task, you may want to change its status to reflect the task progression (especially if the task was created from a task type with many precise statuses).

On the task execution page:

1. Choose the **Status** to give the task.
2. If the task contains a **Checklist**, mark some checklist items as done if necessary.
3. Click **Change**.

15.6.5. Complete a Task

Once you have completed a task, do the following to mark it as **Completed** in WebCenter.

On the task execution page:

1. If the task contains a **Checklist**, mark the checklist items as done.
2. If the task contains **Specifications**, fill them in as needed.
3. If the task type allows **Discussions**, you can add a comment if you wish.

    Click **Start a New Discussion** if there is no discussion yet, or **Reply** if there is one, enter your **Message**.
4. Click the **Complete Task** button.

    This sets the task status to **Completed**.

15.7. Overview of My Group's Tasks

My Group's Tasks lets the **Group Manager** quickly view the tasks assigned to their group or group members. It also allows to assign, re-assign, or distribute the tasks among the group members.

If a group member is ill or not available, the Group Manager can re-assign the task to an other group member. A Group Manager can also monitor the progress on a selected Group or Group Member. Using the filter options, the Group Manager can have a quick overview of the workload.

15.7.1. Group Task Manager

Every department has a Department Manager. In WebCenter Department Manager are referrred to as **Group Manager**. A group can have any number of Group Managers including 0. Group Manager is always part of a group.

A Group Manager likes to view the tasks assigned to a selected group or group members, which will assist him in distributing the tasks and also get a quick view on the current status of a task.

The **My Group's Tasks** feature allows Group Managers to:

• View task assignments for a selected group and the workload overview.
• View tasks assigned to a group member and the workload overview.
• Re-assign any task assigned to a group member.
• Review the task overview filtering on status and due date.

15.7.2. Using My Group's Tasks

To access **My Group's Tasks** feature, log in as Group Manager. Click **My WebCenter** > **My Group's Tasks** to view the **Group Tasks for Group** page.

Viewing Task Assignments

You can view the tasks assigned to a selected group and also for a group member within the group.

1. The task list for assigned group appears.

> **Note:** If a Group Manager manages or is assigned to multiple groups, WebCenter displays the list of managed groups. You can only view the tasks for one group at a time.

2. In the **Tasks assigned to** drop-down list box, select the group or group member for whom you want view the task assigned.

3. A task list assigned to the selected group or group member appears. Also in the list are:

   • Task Name
   • Project Name
   • Assigned to
   • Status

- Lead Time
- Due Date
- Created Date
- Started Date
- Estimated Date
- Task Documents

Viewing a Workload Overview

During editing/re-assigning, the Group Manager can have an overview of number of tasks assigned and how many are overdue. The Task Count is the number of assignments assigned to a group member. The Task Count displayed is based on the filtering criteria and tasks with past due-date always appears. The non-active projects do not appear and are not counted.

1. The task list for assigned group appears.

   Note: If a Group Manager manages or is assigned to multiple groups, WebCenter displays the list of managed groups. You can only view the tasks for one group at a time.

2. The workload overview appears for the selected group.

If the task is past the due date, it appears in red.

Reassigning a Task

A Group Manager can re-assign a task to a group or a group member. A task can be re-assigned only to a group member within the same Group. In addition to this when the task is reassigned, the WebCenter UI displays the previous assignee in **Previous** column.

1. **Note:** Ensure to log in as **Group Manager**.

1. The task list for assigned group appears.

   Note: If a Group Manager manages or is assigned to multiple groups, WebCenter displays the list of managed groups. You can only view the tasks for one group at a time.

2. Select the new assignee in the **Assigned** to drop-down list box. This list contains group and group members name.

3. WebCenter shows changed tasks with a yellow background indicating the change.

> **Note:** Even if a task is not initially assigned to a group, the Group Manager has all the rights to re-assign the task to a group member.

4. Click **Save** to commit the changes.

Filtering Based on Task Status and Due Date

A Group Manager manages multiple tasks at a time and this might lead to delay. Using the **Search Tasks Status**, one can see tasks in a more specific status.

For example, you can filter the tasks which are in Completed or In Progress status. By filtering the task, a Group Manager need not re-assign completed tasks or tasks which cannot start because a predecessor is not complete.

Similarly the tasks can also be filtered by **Due Date**. This gives a Group Manager a quick view of the task for the required time line. Using this information Group Manager can view what is due this week or this month to make the required planning.

1.
> **Note:** Ensure to log in as **Group Manager**.

1. The task list for assigned group appears.

> **Note:** If a Group Manager manages multiple groups, WebCenter displays the list of managed groups. You can only view the tasks for one group at a time.

2. In the **Search Tasks Status** drop-down list, select the desired task status.

3. In **Due Date**, select the required due date and then click **Go**.

> **Note:** To set the Due Date filtering, setting a task status filter is not necessary. The Due Date changes to completion date, if the task status is filtered to completed.

The following are the default due dates settings available:

- All
- Today
- Next 3 days
- Next week
- Next 2 weeks
- Next month
- Next 3 months
- Overdue
- Week overdue, all the tasks which are overdue for less than five days.

Filtering Based on Column

By clicking a column header, the Group Manager can view tasks for a selected group in ascending or descending order.

For example, if **Due Date** is selected then the tasks for the selected group appears with the earliest due date. Similarly if **Due Date** is clicked again, then the tasks for the selected group appears with the latest due date.

1. Log in as **Group Manager**.

2. The task list for assigned group appears.

> **Note:** If a Group Manager manages multiple groups, WebCenter displays the list of managed groups. You can only view the tasks for one group at a time.

3. Click a column header, for example **Due Date**, to sort on this column.

   The sorting is indicated by an arrow. For example, if Due Date is selected then it would appear as:

<div align="center">

Due Date ↑

Jan 29, 2013

</div>
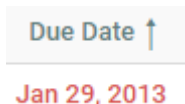
15.8. Sequential Tasks

What is a sequential task?

Tasks can be made dependent on each other. You can define predecessors for a task, which automatically chains tasks to each other.

For example, if you create a "Review the final design proposal" task for a member, and then add a second task called "Implement design corrections" that has the "Review" task as a predecessor, you can make sure that the "Implement design corrections" task starts automatically when the "Review" task has been completed.

Starting tasks: options

Tasks can be set to start:

• Manually (the member changes the task status manually).

• Automatically, depending on the due date and lead time (in working days).

• Automatically, depending on the completion of the predecessor task(s).

> **Note:**
>
> If the **Due Date** is different from the **Due Date** of the predecessor plus the **Lead time** (i.e. the earliest the task can be finished), the **Reset Start Date** button will appear. Clicking this button will set the **Due Date** to the **Due Date** of the predecessor plus the **Lead Time**.
>
> This option is only available if the task is in **Created** status, and if the **Start Task** is set to **Automatically after predecessors complete**.

• A combination of the above options.

Also, task completion can change the project status.

15.9. Linking Documents to Tasks

One of the strengths of Task management is the ability to link documents to tasks.

Documents always sit in a folder in a project. The link to Tasks is optional and comes on top of the positioning inside a folder.

Note: If a default folder was defined in the Task Type setup, new files will automatically be uploaded to that default folder. The user can still change the folder manually in the upload dialog.

You can also attach a document table to your Task Type. This gives you multiple referenced documents in the Tasks. You can use the *Document Rendering* on page 341 tab to attach multiple documents (for example, a copy sheet) to a Task Type's tasks.

15.9.1. Why Link Documents to Tasks?

Linking a document to a task gives purpose to the document. Without task management, the purpose of the documents in a project is implicit. You typically figure out what they represent through their name, through their Attributes, or through the name of the folder they are in.

Most documents linked to a task are one of the following:

- The result of the task. Creation type tasks end normally with a digital asset resulting from the creative work. Good examples are ArtiosCAD .ARD files, or PDF files etc.
- The "current state" of the task. When the task is not yet completed, you can already show what you have by linking the current version of the document to the task.
- A specification as a separate file. Although tasks can have structured specifications, it is possible that you want a complete document to specify the task. You can then upload that document and link it to the task.
- The input for a task. Creation of graphics for packaging demands a definition of the cutting shape. So you can link the .ARD file to the graphics creation task or upload it to the task.
- Collateral information.

Tip: Documents can be linked to multiple tasks. A typical example is where the same document is the result of a first task and the input for a second task.

15.9.2. Documents Tab

In this tab, you can configure how documents are handled in a **Task Type**. See the options below:

- **Allow Attached Documents**: Enable this option to allow attached documents.
- **Show link to Multiple Upload**: This option is to streamline handling of tasks that do not require any documents. It is common when a task is used to fill specified values (specifications) and/or fulfill defined checklist only.

   Upload Multiple Documents : Disable this to hide the button from the task execution page.

   Note:

- **Only allow task to complete if it has one or more attached documents**: When this is checked, you have the extra options:

   - **Complete task automatically when all documents are approved**
   - **Only allow task to complete when all attached documents are approved**

- **Start approval cycle on attached documents**
- **Assign Attribute Category to uploaded documents**
- **Automatically update attributes for attached documents from task specifications**
- **Set default folder for uploaded documents**

15.9.3. Link a Document to a Task

There are multiple ways of linking a document to a task:

- From the documents overview, select the document(s) and click **Link to task(s)** in the **Actions** menu. This allows you to quickly associate multiple documents with multiple tasks
- Within the task details, click the **Documents** tab and then click **Link document(s)** in the grey bar. Select the document(s) to link.
- You can directly upload a new document to a task. In the task details, click **Documents** and then click **Upload Document**. This will give you the well-known upload dialog, but you will immediately create a link to this task.

15.9.4. Find Documents Linked to a Task

- In the task, click **Documents**. This shows what documents are linked to this task and it also shows their version, description and approval state.
- In the tasks overview, there is a **Task Documents** column showing the names of the documents linked to this task. Clicking a document name brings you to the document.
- In the documents overview, there is a **Tasks** column. Clicking a task name brings you to the task.

15.9.5. Document Rendering

You can create **Custom** document rendering options in a Task Type's **Document Rendering** tab.

There are two options in this page.

- Default (this is selected by default). See the example of a **Default Rendering**:
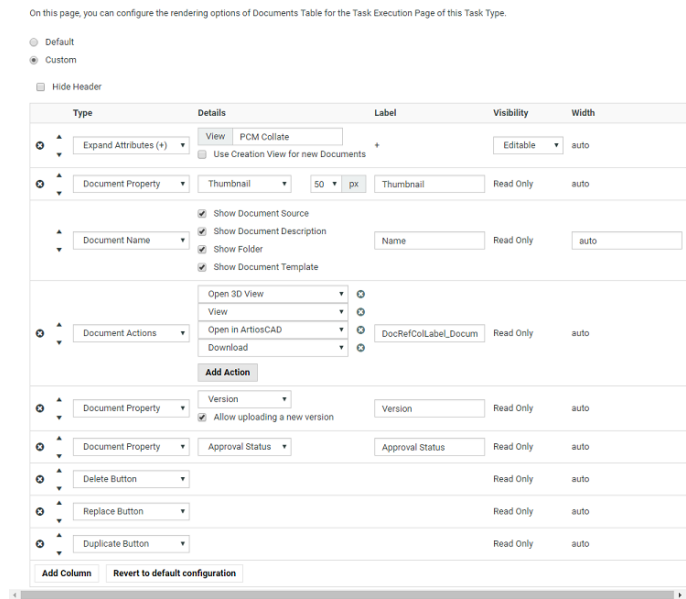
- Custom

To create a customized document table in the Task Type:

- Enable **Allow Attached Documents** in the **Documents** tab. This option is disabled by default.
- Select **Custom** in the **Task Type** > **Document Rendering** tab to configure the document table.

  The options available are exactly the same as Document Reference Rendering. Read details about the options in the *document references section*.
- Configure your table options.

  You can attach a *copy sheet* in a task type this way. This allows you to send a copy sheet to edit, translate or approve in a task (therefore automate it in workflows). If you are attaching a copy sheet, also configure options for *Text Documents*.

  > **Note:**
  >
  > You can configure Master Text and Translation Text widgets to appear in the Text document table.
  >
  > Read more in:*Creating a Copy Sheet* on page 352

- Remember to **Save**. Only then it takes effect.

Documents section of all tasks created from this Task Type (old and new) are affected by the changes saved on this page. See an example of a Task Document Rendering (Artwork with its copy sheet) below.

Create an Advanced Table Rendering

Adding an advanced table of document references allows you to customize the way your document will be shown to users when they are applied (For example, in a template).

It also allows you to configure advanced features such as making an attribute of the document **required** or **read only**.

Note: The document reference attributes will inherit the **style** specified in the **attribute category**. This style is further expanded to the individual document's attributes as well.

• Click **Use Grid Layout** in the **Edit Category** page. Add your document reference attributes.

• Select the **Rendering** as **Table** in the *grid layout*.

In the **Edit Render Configuration** dialog, you can set up the advanced rendering.

Note: You can create *custom tables* for your different views.

- Enable **Hide Header** if you do not want a header row in the document references table. The labels will be displayed in line for each document.
- Enable **Allow Bulk Operations** when any action performed on the document reference is also cascaded to all the references which are made to that particular document reference. Actions performed on the document reference could be to

  - Remove a Referenced document which removes all the document references in the tree structure
  - Replace and Undo
  - Getting document to Local and Undo action
  - Upload a new version and/or edit a text statement
  - Update to the latest version

- Enable **Limit Bulk Operations to Document References with matching Operations configured**, when you want to perform bulk operations on document rows which are filtered based on document sources and actions configured for them. Read more about *bulk operations*.

  User is informed about the number of rows the bulk operation will be really performed (after filtering) in the specific bulk operation modal dialog.
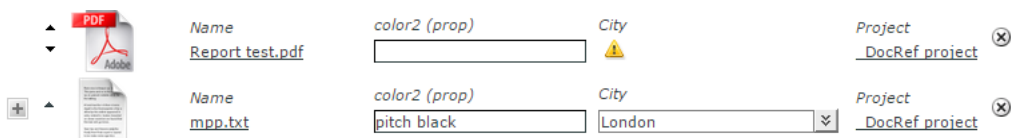
- Enable **Open Links in new Tab** , to open any link in the document reference in a new tab.
- Click **Add Column** to add more columns to the table.

  The rows in the **Edit Render Configuration** pop-up correspond to your document reference columns.

Edit Render Configuration

Name: DocRef3_Default

☐ Hide Header
☑ Open Links in new Tab
☑ Allow Bulk Operations
☐ Limit Bulk Operations to Document References with matching Operations configured

Type	Details	Label	Visibility	Width	Collapse
Reference Property ▾	INSTANCE_SEQUENCE ▾	INSTANCE_SEQUENCE	Editable ▾	auto	☐ ⊗
Up/Down ▾			Read Only	auto	⊗
Document Property ▾	Thumbnail ▾ 50 ▾ px	Thumbnail	Read Only	auto	☐ ⊗
Document Name ▾	☑ Show Document Source ☑ Show Document Description ☑ Show Folder ☑ Show Document Template	Name	Read Only	auto	
Document Actions ▾	Open 3D View ▾ ⊗ View ▾ ⊗ Open in ArtiosCAD ▾ ⊗ Download ▾ ⊗ **Add Action**		Read Only	auto	⊗
Document Property ▾	Version ▾ ☑ Allow uploading a new version ☑ Allow updating to latest version	Version	Read Only	auto	☐ ⊗
Local/Remote Project ▾	Project Folder Name ☐ Copy Text Content Status		Editable ▾	auto	⊗
Replace Button ▾			Read Only	auto	⊗
Delete Button ▾			Read Only	auto	⊗

Add Column **Revert to default configuration**

OK

- Select **Type** as **Document Name** which is a mandatory field. In the **Details** section, you can disable:

  - **Show Document Source**
  - **Show Document Description**
  - **Show Folder**
  - **Show Document Template**

  Your rendering will have a hyperlink to the document depending on the user permissions. These options are additional details added to the document and can be viewed only when a new document is added.

  box_sprint2.ard

  The name will not be a hyperlink for users without document view permissions.

- Depending on how your **document properties** should be rendered, configure the table columns. You can create custom **Labels** for your selections. The properties will be displayed as **read-only**.

Choose Document PropertyDetails as...	The result in the rendering table will be...
• **Description** • **VersionRevision** • **VersionAuthor** • **Project** • **ApprovalStatus** • **ApprovalStage** • **ModifiedDate** • **Thumbnail** **Tip:** • Create custom **labels** • Specify the pixels for your **thumbnail**. • Check the box **Allow uploading a new Version** button	The selected document properties will appear in the table header with the custom **label**. For example: • the current Approval Stage of the document. The user can click to access the approval pop-up. • Clickable thumbnail of the document with the default (50x50) or specified pixels. | Version		estado de aprobación	etapa de aprobación
---	---	---	---
1	⊗	⊕	Stage2
1	⊗	✓	Etapa 3	 • **Upload New Version** ⬆ if you have the rights to upload will be available in the **Version** column.

• You can configure **document actions** in the table rendering of the document references.

   The actions will appear next to the documents listed in the table only when it is relevant.

Choose Document Actions as...	The result in the rendering table will be...
• **View** • **Open in 3D** • **Open in ArtiosCAD** • **Download** • **Upload New Version**	• A 3D ▢ button will be available only when there is an existing 3D perspective. • **Open in ArtiosCAD** option will be available for CAD files. Clicking on it will open the CAD document as set up in the **preferences**

Choose Document Actions as...	The result in the rendering table will be...
• **Update to Latest Version**	• **Download** option will be available when the user has download permission. • **Upload New Version**: This is available when the user has the rights to upload new version. **Note:** The **Upload New Version** ⬆ button can also be placed in the Version column by checking the **Allow uploading a new version** check box. • **Update to Latest Version:** Allows user to update to the latest version

Note:

• If you change the **attribute** values during the upload of a new version, these are only applied on the new version of the document. The previous version will have the old attribute values.

• If a document version is linked in multiple projects, all linked projects will get the new document version.

• If the configured columns do not fit in the table, the table will assign each column its minimum width and show a horizontal scroll bar.

• Configure how your **Document attributes** should be displayed. Select the relevant **attribute** from the drop down as a specific column (with a custom **Label**) in your table.

Specify the Visibility of the attribute as...	The result in the rendering table will be...
• **Editable** if you want the users (with the right permissions) to be able to edit this attribute. • **Required** if you want to make it mandatory	• The selected document attributes will be displayed in the table header and its values in the respective columns.

Specify the Visibility of the attribute as...	The result in the rendering table will be...
for users (with the right permissions) to fill in this attribute. • **Read Only** if you don't want **any** user to be able to edit this attribute.	• The users can type in the values for the editable attributes. Weight	Date 1g	May 26, 2015	13:30 ▼ **Note:** You can configure the **Visibility** also at the attribute level. If your settings differ, the most restrictive setting will be applied.

Tip: Click **add column** and select another attribute to have more attributes listed in your table.

Tip:

You can configure a project's **document reference attributes** to be non-editable and still allow the user to edit the **attributes** of the **documents** referenced.

Your user can do this from the project's **attribute category** tab.

Tip:

Optionally, you can setup the **Project** > **Notifications** > **Project Attribute/Category change** to receive notifications about document references.

Reference category changes will be notified according to the **Project** > **Notifications** > **Document Attribute/Category change** settings.

•
Configure **Expand Attributes** ➕ / **Collapse Attributes** ➖ button for your document references. This allows you to expand or collapse the **document attributes** of your **references**.

Tip: You can configure different **expand attributes** settings for different views. Specify the **view** name here.

Note:

The check box **Use Creation View for new Documents** is switched on by default. As a result, you will get the *creation view* whenever you use **Upload**/ **Browse**, **Copy** or **New** regardless of the view you are creating the rendering for. If this option is disabled, you will see the specific view or the default view.

When you save the view will change to the specified or default view depending on the configuration.

Edit the Visibility as...	The result in the rendering table will be...
• **read-only** • **editable** **Note:** The user needs **Change properties** right to edit attribute values.	Click [+] to expand the document attributes (which may also be document references): **Tip:** Keep this **editable**, if your users have to edit the document reference's attributes. When the document attributes are expanded, you can use [−] to collapse them.

- Select the relevant **reference properties** and specify if you want it to be **Read-only** / **Editable** / **Required** / **Hidden**.

  Reference properties are **attributes** (*reference category*)of the document reference link. You can select one of them from the attribute drop down in the **Details** cell.
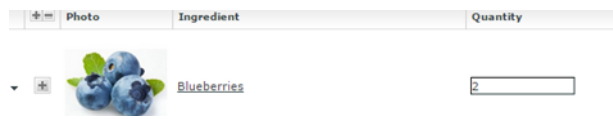

Note: Reference Property field is only available when a *reference category* is specified for the document reference.

Specify the Visibility of the reference category attribute as...	The result in the rendering table will be...
• **Editable** if you want the users (with the right permissions) to be able to edit this attribute. • **Required** if you want to make it mandatory for users (with the right permissions) to fill in this attribute.	• The reference attributes will be displayed in the table header and its values in the respective columns. • The users can type in the values for the editable attributes.

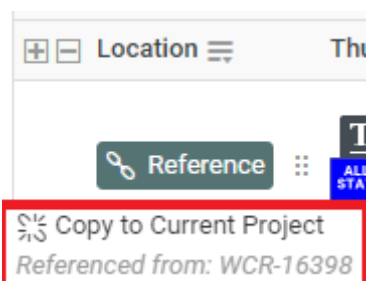| Specify the Visibility of the reference category attribute as...	The result in the rendering table will be...
• **Read Only** if you do not want **any** user to be able to edit this attribute. **Hidden** if you want to specify a Reference Property, but do not want to show it in the table. **Note:** This option is specific to **Reference Properties**.	• No visible **reference attributes** in the table • The values (of the **reference attributes**) are retained when you *duplicate* or *replace* a document reference.

Note:

Choose **Collapse** check box when you choose **Document Property**, **Reference Property**, **Reference Property Filter**, **Document Attribute**, **Project Property**, **Project Attribute**, **Master Text**, **Translation Text**, **Text Language Flags** fields for **Type**, to expand or collapse the column while rendering in the table.

- You can allow the users to move a referenced document into the current project. To set this up, create a column with **Local / Remote** setting. Specify the **visibility** as **editable** or **read-only**. You can move all the referenced documents into the local project by hovering on the **Location** in the header and selecting the option **Copy All References into Current Project**.

You can move any of the referenced document to the local by clicking on the Referenced field of the required document and selecting the option **Copy to Current Project**.

The users need to **Change Properties** and **Add** permissions to move a document to local folder. The document reference will point to the local copies.

The user will be able to specify:

- a new name and description
- document template
- target folder

If the setting is **Read-only**, the user will see indicating remote project.

- When you are creating a Copy Sheet using Text Document References, you can configure text related data to the table. Read more in: *Create a Table Rendering for Text Documents* on page 354
- To configure the rendering with Project related parameters, choose from

- Project Property
- Project Attribute

Read more details in: *Project Properties in Advanced Table Rendering*

- Optionally, add:
  a) a **Numbering** column.
  b) **Up / Down** arrows to let the users change the sequence.
  c) **Duplicate** button which allows the user to duplicate a reference along with its properties. Read more in: *Duplicate a Document Reference*.
  d) **Replace** button which allows the user to replace a document reference. Read more: *Replace a Document Reference*.
  e) a **Delete Button** to let the users delete the document references from the table.
  f) **Row Selector** to let the users select single or multiple documents. Using this, user can select multiple documents from the document table and perform document actions on them.
- Save the configuration by clicking **OK**. To revert from this configuration, click **Revert to WebCenter Default Configuration**.
- **Save** the **Attribute Category**.

If the logged in user does not have permissions to view the document, the document table will have (based on the configuration):

1. **Document name** with **!**. The user will see a warning message.
2. Editable **reference properties** displayed in the specified columns
3. **Up /Down** arrows
4. **Delete** button
5. **Numbering** ("#")

Note: If the settings are not **editable**, the document table will have the document name and its sequence number.

Creating a Copy Sheet

Copy sheet is a term used to describe all the content together which are attached to a particular artwork or printed item. A copy sheet containing aggregated content helps you to:

- validate the copy sheet templates for consistency, accuracy and compliance with the established content management process.
- review, proof-read and approve copy sheet in one place.

You can create a copy sheet using Text Content Document References in an **Attribute Category**. This gives the option to attach this copy sheet to your Projects or artwork documents.

The copy sheet categories allow you to:

- track the content on an artwork.
- easily reuse existing approved content
- configure separate permissions and approval system for each text document.

Tip:

By configuring *Document Rendering* for Text documents, you can attach copy sheets to Tasks. When you configure Workflows with manual tasks for editing or approving, the users can work on the copy sheet directly from their task.

An Attribute Category based copy sheet offers the following advantages:

- the languages. To view a particular translation corresponding to a master, just select that language in the filter drop down.
- the **Instance Sequence**. See more in: *Dynamic Content documentation*
- the option to *replace a text document with another*
- the button to *duplicate a document* with the same reference attributes
- *advanced document reference options*

You can *Edit*, *Start Approval*, *Approve and Reject* actions from the copy sheet depending on your content permission.
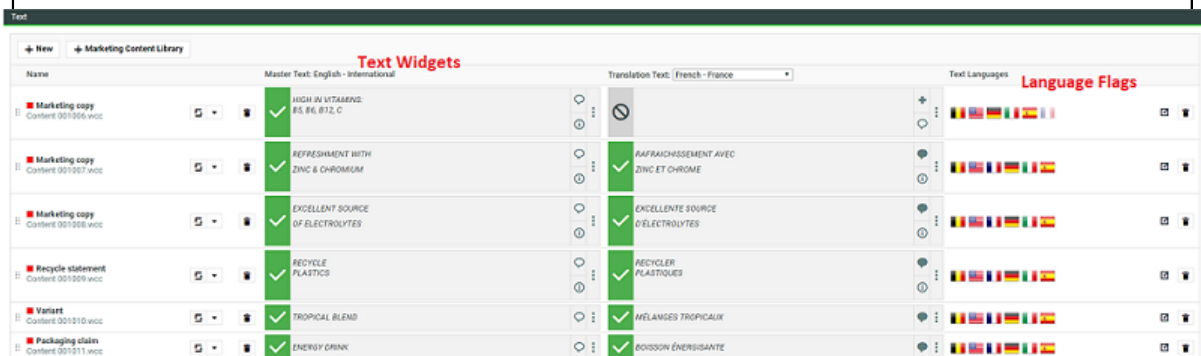
Note:

The text document references are used when you import Dynamic Content into WebCenter. Read about this in: *Import Dynamic Text* on page 395.

See the example screen shot below. The configuration explained here is only an example. You can configure your document references according to your needs.

Tip: You can configure the copy sheet with different **Attribute Views** to provide custom views to your users. For example, a content collator and Translation Language Editors can have different *custom views* of the same text document reference category.

Note: You can also add the languages by clicking on the ✚ displayed in the text statement. On deletion of a language, the ✚ icon is again displayed to enable adding back the language. You can configure the corresponding attribute category to display the languages one by one in a table.

Adding or removing Master or Translation languages from a Project Attribute Category page or Project Creation page or Document Attributes, or in a Task execution pages behaves differently now.

Adding any of the available languages is possible based on permissions on all text content in the page including documents that are from other than current project.

Similarly, it is possible to remove the language when it is added recently but not saved

- Even when text content document is referenced from other than the current project
- Even if it is not empty

- Even if you do not have permission to remove languages

Create a Table Rendering for Text Documents

You can configure a Text statement as document references and add them to a Project or Document Attribute category. The configuration and rendering are similar for Task Specifications.

For each Copy Sheet (Product Content Sheet), which has Text Content documents as reference, you can make different configurations to show text related data using advance table rendering option."

1. *Create a Table Rendering*.
2. In the **Edit Rendering Configuration** pop-up:

Configure	The result in the rendering table will be...
Master Text or **Translation Text**	Master Text Statement or the Translation Text is shown in a text widget along with its content in the edit field and all related text content actions.
	Note: The **Visibility** should be specified as Editable if you want your users to edit the text. One or more columns can be configured for the Master or Translations of the Master Text. Master and Translation languages will either appear in a drop down or you can choose **Show Side by Side** view. You can also restrict the languages that will appear in the drop down, by mentioning the languages (pipe separated) specifically in the details tab.
Text Language Flags	The language drop downs for Master and Translation Text columns.
	Note: The master and translation languages are populated from the project attributes MASTER_TEXT_LANGUAGE and TRANSLATION_TEXT_LANGUAGE respectively.

Tip:

You can specify a default language code for Text statements. The selected language will be the default in the document reference table. If default language is not specified, the first language from the language drop down is selected as the default. WebCenter also supports right to left languages like Arabic and Hebrew for text content.

3. Specify the width for Master Text and Translation Text.By default, the width of every column is set to **Auto**. However, you can configure the width for the Document Name, Master Text, Translation Text and the Translation Languages.


Tip:

To change the width of the columns, specify pixels or a percentage (of the width of the table). If the label of the column is too big for the width specified, the column width will be bigger to accommodate this.

---

1. You can also enable the **Display Options** in the Edit Render Configurations. You have four icons buttons and are active by default.

- **Status Button** Show status column in default manner like basic view page when active. When the button is inactive it shows status in the form of a colored strip based on the status of the content. Green for approved, red for rejected, blue for pending approval and grey for draft.

- **Inheritance Button** Shows the inheritance icon when active.

- **Comments Button** Shows the comments icon button when active.

- **Approval Info Button** Shows the approval info button when active.

  While Rendering of Master and Translation Language, if all the button options are disabled and there is no message to show then more options "Ellipsis" button will also not be visible.

4. Configure the display of **Text Language Flags**. You can configure the **Display** as **Show only Flags** or **Show Flags and Languages**.
These flags will be based on the Project Language Attributes.

   • In the copy sheet view, all the newly created text documents will have the current Project's *Language attributes* as flags. You can read about how to customize flags for languages *here*.

   • All the sourced content (referenced from other Projects) will have the flags based on the source Project's language attributes. To add the current project's languages, select them from the available flags.You can add or delete flags in this view.

5. You can allow the users to move a referenced document into the current project. To set this up, create a column with **Local / Remote** setting. Specify the **visibility** as **editable** or **read-only**. You can move all the referenced documents into the local project by hovering on the **Location** in the header and selecting the option **Copy All References into Current Project**.

You can move any of the referenced document to the local by clicking on the Referenced field of the required document and selecting the option **Copy to Current Project**.

The users need to **Change Properties** and **Add** permissions to move a document to local folder. The document reference will point to the local copies.

The user will be able to specify:

• a new name and description
• document template
• target folder

If the setting is **Read-only**, the user will see [Reference] indicating remote project.

6. If you are configuring **Local / Remote** button to allow copying of documents, ensure that you have enabled or disabled **Retain text document status**.

When this option is turned off, if you copy to **Local**, the approval status of the Text Document is reset to **Draft**.

If **Retain text document status** option is turned on when you copy the document, the document's approval status is retained as it is.

7. Define adequate permissions to view and edit Text Statements.

Whether or not your user can edit or perform approval actions on a Text Element is determined by the following settings and permissions:

• **Visibility** should be specified as **Editable**.

• If your Text Document Reference is a child of another document (for example an artwork), the **Expand Attributes** (+) column of the Parent document should be configured as **Editable**.

• The user should have appropriate Content Permissions. Read more in: *Managing Text Permissions* on page 472.

> **Tip:**
>
> Check these Project level permissions (**Project Details** > **Security**) to troubleshoot editing problems:
>
> • **Change Properties**
>
> • **Start/Stop Approval**
>
> • **Upload new version**
>
> • **Change Task**
>
> • **Download**
>
> • **View**
>
> • **Add**

Note: The Text widgets, related languages and statuses are rendered only for Text Document References.

15.10. Setting Up Task Notifications

The biggest aim of Task Management is to make tasks happen at the right time. As with most production processes, packaging production is a complex process with both sequential and parallel operations.

The critical path is the set of dependent operations defining the total duration of the Project. At each moment, only one task is on the critical path and any delay on that task delays the entire Project. Often, people performing critical tasks are not even aware of the critical nature of their work.

Therefore, it is very **important that people get correctly notified** of what they are supposed to do and that they get **notified again if they cause delay** to the Project.

Currently, WebCenter does not calculate critical paths; it leaves it to the Project manager to set good due dates and it notifies people assigned to a task.

WebCenter also automatically sends **overdue notifications to Project managers and assigned Project members** whenever a task is overdue. Overdue means that the task passes its due date without being completed.

This information assumes that the e-mail environment is already set up. Please refer to the WebCenter Installation Guide for detailed instructions.

15.10.1. Set Up Notifications for Tasks

Task management notifications are set up on the same pages as all other notifications.

The Admin sets system-wide default notifications for all projects at once (see "Notifications Preferences" in the Administrator Guide), but you can change those defaults for the projects you manage.

- To set project-specific task notifications, click the **Notifications** tab in your project. Following Notifications can be set up for task related events.

  - Task created
  - Task Assignment changed
  - Task Due Date changed
  - Task Predecessor changed
  - Task Specification changed
  - Task Information changed
  - Task Document(s) changed
  - Task Checklist changed
  - Task Status changed
  - Task started
  - Task completed
  - Task deleted
  - Workflow canceled

  For example, you can send notifications to the **Involved People**. For task management notifications, the involved people are typically the task creator and the task assignee.

  Tip: On the notification setting page, click **Involved People** for more information about the involved people for each kind of notification.

15.11. Tasks, Templates and Copying Tasks

- When saving a project to a Template, you also save its tasks to this Template. When creating a new project from this Template, you'll automatically have these tasks in your new project.

- You can also create a project as a (partial) copy of an existing project. After clicking **Create New Project**, click **Copy setup from an Existing Project** (see *Create a Project Based on Another Project* on page 252). There you have the option to copy the tasks.

- A third way to quickly create a task from existing tasks is to create a task as a copy of another task.

15.11.1. Copy a Task from Another Task

Note: You can only copy from other tasks in the same project.

1. Go into the task details of the task you want to copy and click **Copy Task** on the right of the screen.
2. Choose if you want to:

   - **Copy Specifications**,
   - **Copy Documents**.

   ... into the new task.

3. Enter the new task's **Name** and an optional **Description**.

4. Change the due date as desired.

5. Assign it to the project member of your choice.

6. Click **Finish**.

15.12. Example: Assign a Role using a Task

Use this to allow non-Project Managers to invite people, assign tasks or approvals to users or groups via a task.

For example, use this if you want Marketing Managers or customers to invite an agency without getting to project management details.

You will need your Administrator's help for this (steps 1 to 3).

1. As an Administrator, create a **Restricted Set** containing the people or groups that will be used to assign the role in the task.

   • Use the **Text Type**.

   • For groups, use the exact group names.

   • For users, use this format: `Lastname, Firstname (username)`. Make sure this is spelled correctly, especially the `(username)`!

   See the Administration Guide for details.

2. Create a **Specification** (from the **Task Types** > **Specifications** menu) with the same name as the role and add the **Restricted Set** you just created.

3. Create a **Task Type** that allows assigning roles with your restricted set values.

   Note: You can do this part yourself if you have the **User Can Create Task Type** permission. It is possible to assign multiple users/groups to the same role in case you use the option **Allow Multiple Values** for your specification.

   In the **Select available specifications** screen of the **Create New Task Type** wizard:

   a) Select **Assign roles from task specifications**.
   b) Add the **Specification** you just created.

4. As a Project Manager, create a task from the task type your Administrator created.

   Assign it to the person who needs to take the decision (who to assign the role to).

   For example, assign it to the Marketing Manager to have him / her choose a design agency for this project.

5. When you run the project, the assignee will get the task on his / her **My Work** page and will assign the role with the appropriate user or group.

15.13. Task Reporting

WebCenter has a number of areas where you can see progress of tasks and sets of tasks.

The most obvious one is the tasks overview within the project. Here you can rapidly see how the project is doing and which tasks are in trouble.

You can also create reports that encompass multiple projects. The way to do this is through the **task searching combined with saved Global Searches**.

A typical task search for a follow-up report

The search pictured here shows all tasks in projects I have access to that need some follow-up.

Completed tasks are excluded and also tasks in non-active projects are not interesting. Tasks with due dates far in the future or a long time ago are also excluded.

The result will show a set of tasks with their due dates. Those overdue will be shown in red and you can rapidly click-through to these tasks and take action.

15.13.1. Step into Workflow

View a Sub Workflow from the Workflow Node

Workflow nodes are sometimes linked to a sub workflow. Viewing a sub workflow from the workflow is simple. Right-click the node and the sub workflow opens up. With the browser backward or forward buttons, navigate in and out of the sub workflow.
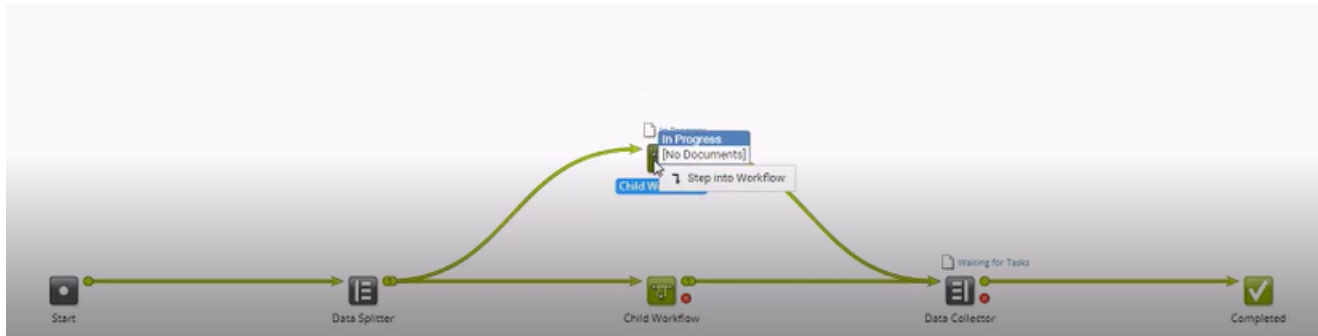
15.14. Workflows

15.14.1. What is a Workflow

A Workflow associated with a task enables you to automate actions and events in WebCenter, reducing the number of human interventions during the project. Use these workflows to execute complex business processes in an automated way. You can create smart workflows by using SmartNames, subworkflows, routing and integration steps.

You can use Workflows in:

- task creation and assignment
- approvals
- communication to and from Automation Engine
- project creation
- setting the project status
- content management: translation
- ...

It uses attributes to decide what happens next (for example, who needs to approve a document, perform a task or manage a project). This reduces the number of templates required and also makes it possible to run many tasks in parallel.

> **Note:**
>
> To enable the workflow feature you need the following license module (depending on the License model):
>
> • the **WebCenter Task Management Advanced** module in the **Named User License** model
>
> • the **WebCenter Lifecycle Management** module in the **Concurrent User License** model

15.14.2. Workflow Basics

Workflow is attached to a Task Type

The workflows are attached to the Task types. Task types are templates for tasks which can be added into projects.

You can create:

• **Manual** Task types where human intervention is necessary. Read more in *Task Types* on page 312.

• **Workflow** Task types where you attach a workflow to perform the automated action sequence.

Workflow Editor

WebCenter has HTML 5 based Editor for workflow.

Workflow Step / Node

A step in a workflow is a **Task** which is configured to:

• perform an action on an input file to produce an output file.
• manage files such as selecting or copying a document using an **Auto Task**

• decide the flow (**Router**) of the workflow or decide about other administrative decisions in the workflow such as **wait for action** check points.

The actual workflow operations take place in these steps which are sequentially connected to each other via "tubes".
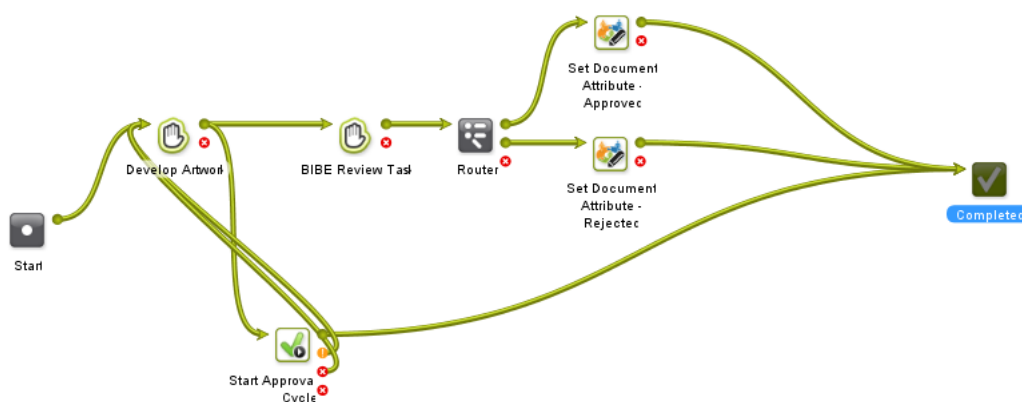
• A **Transition** is the line that connects each step in the workflow. It is a graphical representation of communication of output file or data being sent as the input for the next step.

- By default, each node / step has an OK and an Error **Output Pin**s. If the task ends in the OK state, the output file will be sent to the following step. If it fails, the step connected with the Error output pin will follow.

  Note: You can have more output pins depending on the possible outcomes.

- Workflow constructs can do administrative actions on the workflow, such as in the case of **Router**.

Documents in the Workflow

There are a few ways to attach input documents to a workflow.

- You can upload them to the project where the Workflow task is added to. In this case, these are inputs for the **Start** node.

- You can use a *Select Document node* to pick up documents.

- You can have manual **Tasks** (conventional in the workflow. For example, when a designer creates and uploads an artwork.

Workflow Tokens

Documents and operations processed by the workflow are represented by tokens ⬤ traveling through it. The number indicates the number of tokens. The position of a token indicates what is currently happening (which node is being executed). A red token ⬤ indicates an error.

Using a Router node, you can split a token (and its documents) into multiple tokens based on certain parameters which will follow their own path through the workflow network. After certain workflow tasks, you can use a Data collector to aggregate these into a single token again. Read more in: *Data Splitter and Data Collector* on page 441.

- You can view the Token information while a workflow is in progress. The route that the Token has taken is highlighted.
- **Open in Viewer** is enabled when you right click some of these tokens
- You can **Retry** (in case of error) or **Relaunch** (in case the workflow is stopped or cancelled) a workflow when you right click on a token.

Workflow Feedback in Project Details

You can view a workflow's feedback from **Project** > **Tasks** page. To open the workflow feedback page either:

- hover over the task name and click the **Workflow** 🔲 icon.

  Tip: You can use the **Edit** button to edit the Task Information.

- or click the **Show Active Nodes** 🔲 and **Expand** the mini Feedback view.
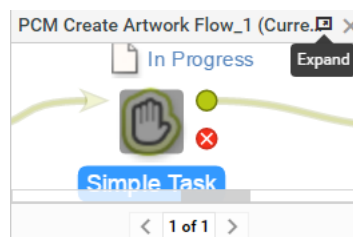
SmartNames

Certain parameters of the workflow nodes are SmartName enabled. This is a variable that will be resolved only when the node is executed. When the value is resolved (for example, an attribute value is found), this will be used as the value during the execution of the node. Click the SmartName ⁺[ ] button in an input field to use this feature.

15.14.3. Building Workflows

Create a Workflow from a Task Type

Creating and Starting a Workflow

To create a Workflow, you need to:

1. *Create a new Task Type* or use an existing Task Type.

    Note: Task types can only be created by Project Managers with the **User Can Create Task Type** permission, or by Admins.

2. In that Task Type, *open the workflow tab* and *create a Workflow by combining workflow nodes*.

    To start the workflow, make the task status active, such as **in progress**.

The Workflow Editor

To open the Workflow Editor, go to **Task Types** in the menu and:

*   Hover over the Task Type Workflow 🔲 where you want to create a Workflow and click the Task Type icon. You can also create Workflows from the 🔵 Manual Tasks directly from the list.

*   Or click the required Task Type. Go to the **Workflow** tab to access the editor.

The workflow editor appears as below. By default, it contains a **Start** node and a **Completed** node. A **node** or **step** represents an individual operation performed in the sequence of a workflow.

1	The **workflow canvas** in the edit mode. By default, this only contains a **Start** node and a **Completed** node.
	After the workflow has processed its files, you will see this canvas in the feedback mode. In this mode, you can monitor your workflow or examine a finished workflow.
2	The Workflow editor *tool bar*. Use it to:
	• **Zoom in**, **Zoom out** or **Zoom to fit**
	• **Maximize** the canvas in your browser window (and minimize it again),
	• **Delete the selected items**
3	• Use the **filter** to select certain workflow node types (see *Workflow Nodes* on page 371). Using this you can choose to display **All** or only:
	• **Auto Tasks**
	• **Statuses**
	• **Task Types**
	• Use the **search field** to search on node names. The search field accepts wildcards.

4	The **Task pane** shows all the Auto Tasks, Statuses and workflow constructs that you can use in a workflow. Drag and drop them onto the canvas. You can easily find tasks by using the filter and the search field.

Read more in: *The Workflow Tools* on page 367

The Workflow Tools

Table: Zoom Tools

Use this Tool or Shortcut...	To...
🔍 tool or **CTRL + Plus(+)** or **F5**	**Zoom In** on the Workflow *Canvas*
🔍 **CTRL + Minus(-)** or **F6** **Note:** Scroll the mouse up or down to **Zoom** in and out on the canvas.	**Zoom Out** on the Workflow *Canvas*
🔍 or **CTRL + Zero (0)** or **F9**	Fit the Workflow on the *Canvas*

Table: Navigation Tools
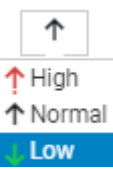
Use this Tool or Shortcut...	To...
🡑 **Pointer**	Select an area in the *Canvas* (including the Nodes in it) and copy, cut or move those Nodes and Transitions marked by the selection.
✋ **Pan** or **Space**	Pan the whole *Canvas* and to move all the Nodes and Transitions within by using the click-drag-release action.

Table: Other Tools

Use this Tool or Shortcut...	To...
↶ or **CTRL + Z**	Undo your actions on the *Canvas*
↷ or **CTRL + Y** or **CTRL + Shift + Z**	Redo your actions
🗑 or **Delete** or **Backspace**	To remove a Node. Select the Node or Transition and click **Remove**. To remove a Transition, select the arrow-head and drag it away. **Note:** You cannot delete the **Start Node**.
Context Menu	Right-Click to access the *The Context Menu* tools

Tip: Use **CTRL + click** or click and drag to select multiple steps.

Table: Workflow Tools and View Tool

Use this Tool or Shortcut...	To...
💾 or **CTRL + S**	**Save** all changes made to the Workflow
⬆	**Import Workflow** from an *XML* file. The import will overwrite the current workflow.
⬆	**Export Workflow** tand save it as an XML file on your computer. It can be used later to **Import** the workflow to the same or another system
✐ **Clear Workflow**	Click **Clear Workflow** to clear an existing workflow from a Task Type. This will make it a Manual Task Type.
↑ High ↑ Normal ↓ Low **Workflow Priority**	The priority of a workflow can be set and is used in the queuing strategy of the workflow engine. Choose one of the priority • **Low**: to execute with lower priority than usual. • **Normal**: the default priority • **High**: to execute with higher priority than usual.
⬈⬉⬊⬋ or **Tip:** Use **Esc** to exit full screen.	To **View** the Workflow in **Full Screen** or **Minimize** the canvas in your browser window.

Node Gallery

It contains all Task Types and Workflow Constructs required to build a workflow. Select using the below filter options:

The Filters...	and what they mean
All	Nodes from all categories
Auto Tasks	Tasks executed without human intervention
Statuses	Task status for the current workflow task type
Task Types	Manual, Auto Tasks and Workflow Task Types
Workflow Constructs	Building blocks for the workflow used for Routing and Token management. Read more in: *Workflow Constructs* on page 440

The Context Menu

Right-click anywhere on the Canvas or on a Node and access the context-sensitive menu.

Context Menu Actions on a Workflow Node/Canvas

See the details and keyboard shortcuts below:

To...	Select this from the Context Menu..	Or use these Shortcut Keys..
Remove Nodes	**Remove Nodes(s)**	**Delete Backspace**
Copy Nodes	**Copy Nodes**	**CTRL + C** (Windows) or **CMD + C** (Mac)
Cut Nodes	**Cut Nodes**	**CTRL + X** (Windows) or **CMD + X** (Mac)
Paste Nodes		**CTRL + V** (Windows) **CMD + V** (Mac). Paste Nodes can be done only by shortcut keys.
Add Sticky Notes on the Canvas	**Add Sticky Note**	*Read more.*
Edit Parameters of a Node	Select a node, right-click and select **Edit Parameters**	
Configure Outputs of a Node	Select a node, right-click and select **Configure Outputs**	
Open Help on Canvas and Tools	Click **Open Editor Help** to view workflow editor help page. Right-click on a Node and select **Node Help** to get help on a specific Node.	
Open a specific Help page about a Node	Click **Open Node Help** to view details of working with each Node type.	

To create a Sticky Note:

• Select **Add Sticky Note** from the Context Menu.
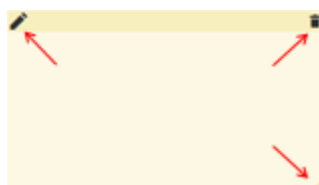
• Click the body or the **Edit Sticky Note** icon in the top-left corner to edit the sticky note

- Type your text and Save using the **Save Sticky Note** ✓ . To edit a Note, just click on it.

- To **Remove Sticky Note**, use 🗑.

- To resize the **Sticky Note**, drag the resize icon at the bottom-right of the **Sticky Note**

- To move the Note, click and drag to anywhere in the Canvas.

15.14.4. Create a Workflow

You can create a workflow from the *Workflow Editor* of any Task Type.

1. Click on the **Task Types** from the top menu items.
2. To open the editor:

   - Hover over the Task Type Workflow 🖼 where you want to create a Workflow and click the Task Type icon.
   - Or click the required Task Type. Go to the **Workflow** tab to access the editor.

     You will get a blank canvas containing only the **Start** and **Completed** nodes.

3. Drag and drop your chosen nodes from the workflow nodes list onto the canvas.

   You can add nodes to create a workflow. There are four types of nodes:

   - *Auto Tasks* on page 375

   - *Manual Task Types*

   - *Workflow Constructs* on page 440

   - *Statuses* on page 456

   See *Workflow Auto Tasks and Constructs* on page 371 for more information about nodes.

   Tip:
   - To find a node quickly, you can either use the filter or the search field on top of the workflow nodes list.
   - To delete a node, right-click and select **Delete**.

4. If desired, click your node names to rename them.
5. Connect your nodes with one another.

   To do this, click a node's green **pin** and drag it onto the next node. This links the two nodes with a green **transition** or tube.

> **Note:**
>
> • You can connect a node's output to several other nodes.
> • To remove a connecting tube, drag its arrow head to a blank area on the canvas.

> ⚠️ **Warning:**
>
> It is not possible to self-reference a node. Self-referencing happens when the error pin is connected again to the input pin of the same node. This will result in an error when you start the workflow.
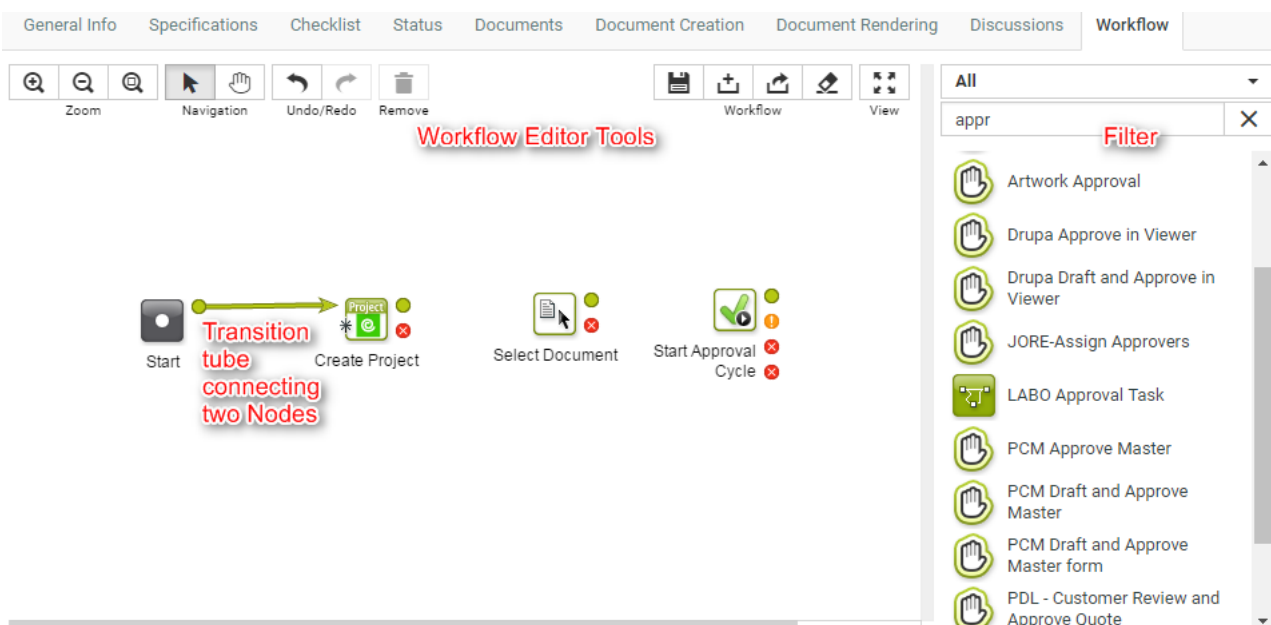
6. Double-click each node and fill in its parameters in the **Edit Parameters** pop-up.

7. When you are done, click the **Save** button to save your workflow.

15.14.5. Workflow Nodes

Workflow Auto Tasks and Constructs

Nodes	Description
Add to Bill of Materials	Adds the incoming document(s) to the current project's Bill of materials.
Assign Document Attribute Category	Allows you to assign an Attribute Category to your documents in a workflow step.

Nodes	Description
Add or Replace Approvers	Allows you to add or replace existing approves in an approval stage
Completed	The workflow completes when all operations for a workflow have finished.
Copy/Move Document	Copies and moves the incoming document(s) to the given project/folder and optionally renames it.
Create Project	Creates or updates projects from your **workflow**. It can also iterate the project creation to create multiple projects at once. For example, using a multivalued attribute. **Note:** This node is only available if you have the WebCenter Advanced license.
Copy Document Attributes Values	Copies all non-empty document attribute values including document references from a source document to one or many target documents.
Create Graphics Placeholders	
Create Color Cert Job	Outputs a CCJ file and a mediastrip
Color Preflight	
Delete Document	Deletes the document when it is no longer required in WebCenter
Delete View Files	Deletes the view files of specified document
Delete Older Versions	Deletes older or unused versions of the document
Execute JavasScript	
Export Chili to PDF on page 391	
Export to GS1 Format on page 390	Exports your text content along with its **Element Type** tagging.
Export to XLIFF Format	Exports your Text statements to be translated into a XLIFF file.
Finish Approval Cycle	
Get Dependent Colors	Syncs the dependent standards belonging to the master colors based on the conditions and shows these colors in the input document attributes in WebCenter.
Import XLIFF Content	Imports your translated Text statements in XLIFF format.
Import Dynamic Content	Extracts the Dynamic Content from your artwork(s) as **Text Content Documents**. You can configure this node to import these Text Documents with a link to specific **document reference attributes** and **document templates**.

Nodes	Description
Import Dynamic Table on page 399	Extracts the **Tables** from your artwork(s) as **Table Content Documents**. You can configure this node to import these Documents with a link to specific **document reference attributes** and **table document templates**.
Import Dynamic Graphic on page 393	Extracts images or symbols from an incoming artwork document and are added to the artwork file as document references.
Import Dynamic Barcode on page 394	Extracts Dynamic Barcodes from an incoming artwork document. For each Dynamic Barcode, a new document is created and these Barcode documents are added as Document References in the Artwork.
Invite Members to Project	Invite a **User** / **Group** / **Role to a Project** in the workflow by the users who can create Task Types.
Merge Text Content	Merge incoming text content documents with matching text content documents into the library project configured
Run Report	Generate a report for the incoming document(s)/ Current project/other reports
Reuse Text Content	Reuse the text content documents that are referenced in the incoming artwork document by matching and replacing them with the library documents or updating the text content document with SmartText that refers to library documents.
Remove Member	Remove User(s) / Group(s) / Role(s) from a project, who have no approvals or task assigned to them
Replace Member	Add and delete members in the project in Work flow execution
Restore from Esko Cloud	Restores the document from Esko cloud to Webcenter location
Select Document	Selects a document based on the folder, project name and name of the document.
Select Children (Document Reference)	Selects the **document references** associated with an incoming document.
Select Parent (Document Reference)	Selects the master documents of the incoming **document references**.
Send Notification	You can send automatic notifications to Project Manager, Sales Person, Workflow Master, Groups, Users, Roles. Here Workflow Master is the assignee of the workflow task. See *Send Notification* for more information.

Nodes	Description
Set Document Attribute	Sets the value of one or more document attribute(s) automatically.
Set Project Attribute	Sets the value of one or more project attribute(s) automatically.
Set Project Status	Automatically changes the status of the current project.
Set Workflow Specification	Automatically sets the value of one or more specification(s) for the current workflow.
Set Workflow Status	Automatically sets the status of the current workflow to a new status.
Start Approval Cycle	Starts an approval cycle on a document and waits for its approval status.
Start Approval Stage on page 415	This node starts an approval stage in a workflow and build a staged approval.
Finish Approval Cycle on page 416	This node finishes the approval cycle of the incoming documents and send e-mail notifications.
Submit Workflow	Launches an Automation Engine workflow that is configured in WebCenter.
Sync Workflow	Synchronizes the project with the configured workflow taken from the project/template setup.
Table Content Preview Report	Generate report of the preview of Table Content
Update Text Document	Specify or Update Text Document properties
Update Table Content	Specify or Update Table Document properties
Upload to Asset Management System	Uploads the document to Esko cloud location or the Asset management location specified
Wait for view files	Wait for view files in the work flow when it is not available
Wait	Workflow waits/pauses for a specified amount of time

Nodes	Description
Data Splitter and Data Collector	If you have two or more documents with two different tasks assigned to each of them, then use the **Data Splitter** node. This node will put each document separately on this tube after which these follow their own path.
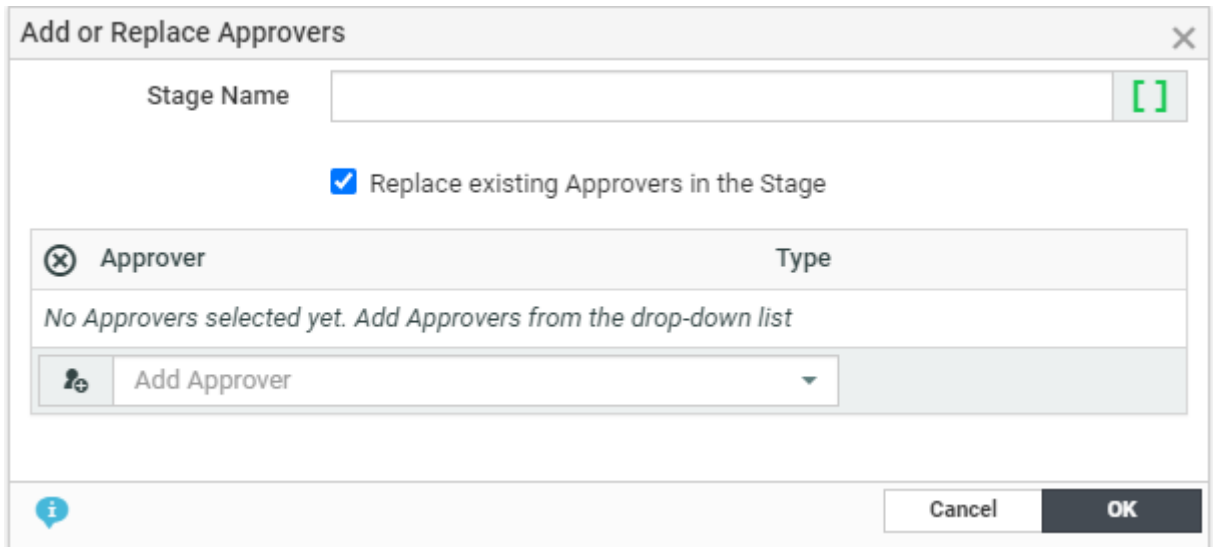
Nodes	Description
	Once the tasks are completed the **Data Collector** will wait until both tasks are completed and then proceed to next node. See *Workflow Example* on page 456 for more information.
Error Handler	Use this to collect failed tokens when other nodes go into failure (make sure the other nodes' error dots are not connected to anything).
Fork and Join on page 443	The **Fork** step automatically tags • every file running through it • and all the files that those files are related to in the next steps The **Join** step then groups all the files with the same tag and outputs it together.
Mark and Select	The Mark node marks the documents arriving to the node with a named tag. For example, main design, original data or admin data. Later, the Select node can pick up the same documents based on this named tag and then route it through the outgoing tube.
Router	Use the Router to build a rule list to meet a result, these rules are evaluated from top to down. The rules can be based on: • Project Properties • Project Status • Project Attribute • Document Name • Document Attribute • Workflow Specification See *Workflow Example* on page 456 for more information.
Stop	Use the **Stop** node to stop the workflow before being completed. When a workflow token arrives at this step, it stops the workflow.

Auto Tasks

An Auto Task is a step in the node which does not demand human intervention. Auto tasks are automatically executed using predefined parameters (the attribute values or SmartNames).

Add or Replace Approvers

You can now add or replace approver(s) like users or groups or roles to a specified approval stage while it is in progress using the Add or Replace Approves node.

Fill in the following in the node to add or replace :

Stage Name: Select the Approval Stage where the approvers are to be added. The stage can either be ongoing or yet to start or stopped.

Replace approvers option: This option allows the approvers in the stage to be replaced by the approvers specified in the workflow node.

Approver : Choose the type of approvers from the drop down like Users, Groups or Roles.

Note: Ensure that the approvers added have view rights on the document.

When there are no approvers selected by the workflow and the option to replace is selected, then all approvers are removed from the stage and an error is generated in the workflow.

When the approvers are replaced while they have already submitted their approval, their approval status is not taken into account when calculating the final approval status. This is similar when the approval is stopped, approvers are removed and the cycle is started again.

Note: After adding or replacing the approval users, the todo list and document history is updated. Search is also updated with the new information.

An email notification to the newly added approvers is sent out if the notification event **Approval Cycle/ Stage started** is selected.

Add to Bill of Materials

Use this node to add documents to the current Project's Bill of Materials automatically.

Parameters

Count: Set the documents' **Count** in the Bill of Materials.

Tip: You can use a SmartName (for example a document or project attribute) to set the count.

Copy/Move Document

Use this node to copy or move one or more document(s) to a new location.

Parameters

Double click a **Copy/Move Document** node to set up these parameters in its dialog box.

- **Copy**: select this if you want to copy a document to a new location, while keeping it in the original location. You can choose to:

  - **Link** the new document to the original document,

  - Create a **New version if the document already exists** in the new location.

  - **New revision if Document already exists**: enable this to raise the revision while copying or updating. This will raise the revision letter (and create a new version) if the document already exists.

    Note:

    The option is visible only if your **Admin** > **Preferences** > **General** > **Allow increment Document Revision when uploading a new Document Version** is on.

  - **Copy Viewer Annotations**: use this option to copy annotations of a document to a new one.

  - **Update Document References** to remove a current document and add a new document to the document reference. A new version/revision of a document is now created in the target project and added in the document reference attribute.

  - **Keep Text Content Element Status** to retain each Text Content element approval status when the document is copied as new version. (by default each element approval status is moved to draft state).

    Note: You can retain the language content approval status only when the Packaging Content Management Licence is enabled.

    Note: You can choose to either copy the comments or can be cleared based on the option chosen by the Admin user in the preference settings for Packaging Content Management. You can read more on the option at *Copy comments from a text document*

- **Move**: select this if you want to move a document to a new location (removing it from the original location).

Project Name: Enter the name of the Project into which you want to copy/move the document.

Folder: Enter the name of the Project's folder into which you want to copy/move the document.

Name: Enter the name to give the document in the new location if desired.

Tip: You can use SmartNames for the **Project Name**, **Folder** and **Name** parameters.

These Copy/Move action have below results:

- When Moving, all document versions move along, including all the related features like approval, history, attributes...
- When Copying, only the latest version is copied along with its view data, attribute... and the Approvals reset.
- For each document, a line is added to the Project History stating that the document is deleted/moved from the source project and added to the target project.

Note: The node fails if the target project/folder does not exist.

Copy Document Attribute Values

You can use **Copy Document Attribute Values** node to copy all non-empty document attribute values including document references from a source document to one or many target documents.

Set up the Parameters as below:

- **General**

  In the **Source Document tag** drop down, choose the source document. This tag is to identify the source document from where document attribute values need to be copied from.

  Select **Only select tagged source Document from the incoming Documents** field to look up the source document from the incoming documents instead of selecting all documents with the given source document tag in the workflow. This allows bulk tagging of documents earlier in the workflow, but when a set of documents reaches this node, the only **Source Document** that is selected from the list of tagged documents is the one that is part of the documents of the incoming token.

- **Document Reference**

  You can use this tab to copy all the document references and other attribute values to the matching attributes. When the same reference attributes are not available in the target document, then document references are copied in the reference attribute chosen in **Copy all unmatched Document Reference to**.

  From 18.0.1 WebCenter, select **Only copy if Reference Properties match target Document Attributes** option to decide whether the document references are to be filtered based on reference properties or not.

When document references are copied from a source document, existing document references in the target documents are removed. Basic attribute's values are copied when matching attribute is found.

Create Project

Creates or updates projects from your **workflow**. It can also iterate the project creation to create multiple projects at once. For example, using a multivalued attribute.

Note: This node is only available if you have the WebCenter Advanced license.

Using this node, you can:

- create or update projects either in the current WebCenter or another WebCenter.
- create *Child Projects* in a Program.

- copy the existing project documents to the new project.
- iterate over an attribute to create multiple projects.
- specify project attributes.
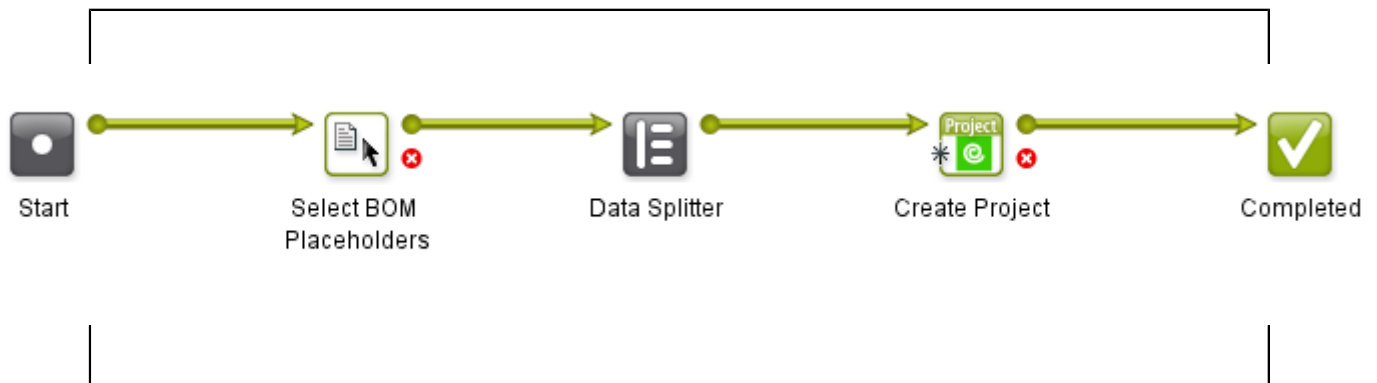
Project Tab

Parameters for creating the project (all smart name enabled):

- **Project Name** is the name of the new project. If not specified, auto-naming is checked in the template or in the**admin** > **general** > **preferences** settings.

Note:

If the field is left empty without auto-naming in the Project Template, you will receive an error message :

```
One or more mandatory parameters were not specified
```

- **Update Project if it already exists, otherwise create a new Project**: Check this option to update a **project** with the specified name if it already exists.

  If it is not checked, a new project will be created. If a project with the specified name already exists, it will result in an error. For copying documents, there is an option to be copied as new versions.

  Project Name Suffix is required when you are using auto-naming with a **Suffix** field as **Edit**.

- **Add as Child Project of the Current Project**: Check this box to create Child Projects in a Program. Use this to create Projects as part of a Program. This option is turned off by default.

- **Template**: The project template on which the new project should be based on. If left empty, a blank project will be created.

- **Project Description**: The description of the new project.

- **Project Status**: The initial status of the new project. This list follows the order of the project statuses as defined in WebCenter and by default, the **Active** status is selected automatically. You can also select **Blank** as an option.

  When a new project is created, the first active status is assigned whereas while updating existing project, the project status is left unchanged. You can configure SmartNames to indicate this initial status to make it context relevant.

- **Customer/Company**: The legal name of the company/customer. By default, it will be the customer/company of the current project.

- **Location**: The customer/company location. By default, it will be the location of the current project.

- **Project Due Date**: The due date of the new project. By default, it will be the due date of the current project.

- **Project Manager**: The project manager of the new project. By default, the node takes the current project manager.

  - Use **SmartNames** to choose a Group, Role, User as the Project Manager of the new Project and an attribute (document / project / task) to automate the setup of the node. You may also manually specify these parameters.

    - When a SmartName for Project Manager is not resolved (for example, you choose an attribute (with Group or User as value) and it cannot be resolved because you forgot to add the attribute to the project's attribute category), an error

      ```
      Project manager not found.
      ```

      is shown.

    - If you choose a role to assign the Project Manager, the current project is checked for the assignment of that role. A unique User or Group should be assigned to that role. If more than one group / user is assigned to then, you will receive a warning.

      - If you assign a Group, at least one of the group members should be a Project Manager.
      - If you assign a User, the user should be a Project Manager.

    - If you choose an attribute to assign the Project Manager, the attribute should resolve to the user name of a user or the name of a group.

Documents Tab

In this tab, you can set options to copy the incoming documents to the project or projects being created.

- **Copy Documents** (default): lets you copy the documents to the new project.

  - **Folder Name**: specify the target folder in this field. If you leave it empty, it will take the root folder as the target folder.

  - **Copy incoming documents as Link**: enable this to copy the documents as links in the new project.

    Note: If you are creating projects in a remote WebCenter, you cannot copy the documents as links.

  - **Copy incoming documents as new version if they already exist**: check this to copy the documents as new versions.

  - **Raise revision if Document already exists**: enable this to raise the revision while copying or updating. This will raise the revision letter (and create a new version) if the document already exists.

    Note:

    The option is visible only if your **Admin** > **Preferences** > **General** > **Allow increment Document Revision when uploading a new Document Version** is on.

  - **Copy Viewer Annotations**: use this option to copy viewer annotations of documents while copying.

> **Note:** This will not work if you are copying to a remote WebCenter.

- **Move Documents**: choose this to move the documents to the newly created Project. You can specify a folder for this document.

> **Note:** It does not work for remote WebCenter projects.

- **Do Not Copy Documents**: choose this option if you do not want to copy the documents to the new project.

Iterate Tab

You can create multiple projects at once using the options in this tab. The default option is **Do not Iterate**.

To create multiple projects over an attribute, choose **Iterate over Attribute**.

You can select this **attribute** via a SmartName or by manually typing in the attribute. Based on the resolved value of this **attribute**, this node will create multiple projects. For example,

- If the SmartNames resolves to a multi-value (text) attribute indicating languages, the created projects will be language variants. You will get the same result when you type in the attribute values.

  For example, if you type in `Dutch | French | English`, the iterator value will be "Dutch", "French" and "English". As a result of running the task in a Project, you can expect three new Projects corresponding to each language.

> **Note:** While iterating project creation, you can send only the related attributes to the created projects by specifying them `iterator value` as the attribute in the **Project Attributes** tab.

- When multiple documents with a multi-value document attribute (for example, `Dutch | Spanish | English` as the Iterator) arrive at this step:

  - In case there are two values for the attribute (e.g. `Dutch` and `English`), this document will be attached to both the `Dutch` and `English` projects.
  - If the documents' attribute value is left empty, they will not be added to any of the projects created.
  - The documents without the specified **attribute** will be attached to all the created projects.
- If the SmartName resolves to an integer or if you type an integer (for example, you type 3), the projects will be created based on these numbers.

  For example, if the value resolves to 3, the iterator value will be 1, 2 and 3. You will get three new projects when the task is finished.

> **Note:**
>
> If the attribute is missing in the Project, you will get an error.
>
> ```
> Attribute not found
> ```

Important:

- Do not aim to create more than a hundred projects using the **Create Project Node** . You will be warned if you do so.

  ```
  Maximum number of projects that can be created at once exceeded.
  ```

Tip: You can use the **Iterator Value** SmartName from the **Iteration** category in the other node parameters such as the Project Name or description.

Project Attributes Tab

For setting project attributes of the new projects, click on the **+**. Add the

- **project attribute** and the corresponding **value**. Enter this value via a SmartName or by manually typing in.

  Note: The attribute values are set regardless the Attribute Category of the new project.

  Note: If the SmartNames are not resolved, it will not fail project creation. However, the attribute value will not be set in the new project.

- You may also assign **roles** via attributes.

WebCenter Tab

In this tab, define the WebCenter on which you want the new project :

- **Current WebCenter**(default): Use this to create the new projects on the WebCenter where the workflow is running.

- **Other WebCenter**: Use this to create the new projects on a remote WebCenter. For this to work, the parameters specified in the node (for example, the Project Manager) should be present on the remote WebCenter.

  - **WebCenter URL**: The URL of the remote WebCenter.

  - **WebCenter User Name**: The user name used to log in to the remote WebCenter

  - **WebCenter Password**: The password used to log in to the remote WebCenter for the specified user name.

    Note: If a user exports a task type containing a node with this option, this field will be blank in the generated XML.

    Note: You may copy the documents remotely, but you cannot add them as links.

For every project created, you will find a log in the **Project History**.

Create Graphics Placeholders

You can use this node to create graphics placeholders to represent print area information available in the Collada document, referenced in the input document attribute called CAD_REFERENCE. Any user with Task Type creating rights can use this node to create graphics placeholders. Placeholders can be replaced with actual printable parts later.

These graphics placeholders are created to represent print areas available in the Collada document. Name of these graphic placeholders will be created with print area id and the side of the print area, like for example "printarea1_front".

Based on the node configuration, each print area is extracted once for the printable side front or twice for the printable side front and back.

Note: When the input document is a component document, then the Thumbnail is updated.

Parameters

- **Template Project:** This is a smart name input field to get project name(s) where document template is available.

- **Document Template:** This is to get document name available in the mentioned **Template project**. This document is copied for creating placeholders documents for each print area available in Collada document. Template document is having hard coded document type of an attribute called CAD_REFERENCE. This attribute will reference Collada document from where print area information is extracted. Two hard coded reference properties namely CAD_PRINTABLE_PART and CAD_PRINTABLE_PART_SIDE are expected to be in the CAD_REFERENCE attribute to hold the print area id and value of front/back.

- **Target Folder:** Name of the folder where new graphic placeholder documents are created.

- **Target Reference Attribute:** Select any one document reference attribute from the drop down to attach graphic placeholder documents as reference in the incoming document. Selected document reference attribute is expected to have one reference property called CAD_PRINTABLE_PART, to hold the name of the print area.

- **Extract printable part for front and back:** An option is provided to decide whether printable parts are expected for printable side front and back both or only for printable side front. Placeholder for back side is only created if the print area information contains printable part for back and this option is enabled.

Create ColorCert Job

ColorCert is a software application which helps you to get accurate, consistent precise colors and print the specifications from pre-press to production process control.

In this work flow node, information that are available in WebCenter like

- Projects, Colors selected from library and assets within WebCenter
- Scorecard rules and profiles (ColorCert profiles, ICC profiles, CGATS profiles) that stored as regular documents in WebCenter .

Note: The documents are tagged with the **Mark** node in the work flow and then referred to by the mark name. For Example, specify the ColorCert rule document, mark it and select the tag in the **ColorCert Rule** parameter

are all called to create a CCJ (Color Cert Job) and a media Strip (PDF file). Along with these, a CCJZ file for debugging purposes is also uploaded back to the current project.

The work flow requires the following parameters in the respective tabs:

1. **Job Details**: Job Name, Job number, customer, business unit, brand, variety, UPC and Product Order Number.
2. **Output**: Artwork Target, Orientation values like surface or reverse, Screen Count, Screen Type like lpi or LCM, Lot Size, Supply As either Roll or Pallet, or Sample, Printer and Separator.

    > **Note:** All the parameters are smartnames and maps to parameters with the same name in the ColoCert job or the Job Details and Output tabs.

3. **ColorCert Assets**: ColorCert Rule which uses the tag for marking the ColorCert Rule document and Substrate file for the ColorCert job.
4. **Color** : Specify the following with the tag used for identifying them

    *   **Profile**: Either colorcert profile, icc profile, cgats profile

    *   **Primary Colors**: Colors that are specifically tagged are picked in this parameter.

    *   **Spot Colors:** Colors that are specifically tagged are picked in this parameter.

    > **Note:** Either a profile or colors need to be selected for a ColorCert job to be created.

5. **Mediastrip**: Smart Name enabled fields including

    *   **Patch Width**: for the width of the mediastrip

    *   **Patch Height**: for the height of the mediastrip

    *   **Strip Type**: Type of the strip, either can be **ScanSingleRow**, **ScanTwoRow**, **ScanInkByInk**
6. **Configuration**

    *   **Cloud Connection** Drop down where we show the available Cloud Color connections

    *   **Folder** The folder in the WebCenter project where the document is uploaded to. When the folder does not exist, it is created. When the document already exists in the folder, the workflow will create a new version of this document. If the document exists already and the folder specified is different than the folder of the existing document, the workflow generates an error.

    *   **Document Name** (CCJ, PDF) This is the name of the resulting CCJ and PDF file. When the document name is not unique in the project, WebCenter will take the document with the given name and will create a new version of the document. In this case, the folder name is ignored.

The resulting CCJ file contains the colors specified by the primary and spot color tag. Color that are in the profile, but not in the list of primary or spot colors are not included in the CCJ file.

Color Preflight

The Color preflight workflow node validates the colors referenced in the actual document against the specifications provided and generates the preflight results in the workflow.

Preflight Results are stored as attribute value(s) of the document(s) which may include preflight status, preflight report or both. Preflight results could indicate whether all the expected colors are found or not and if any unexpected colors are found.

In this node, following information has to be provided in four tabs.

1. **Color Specification**

   • **Color Specification:** Specify the attribute(s) that has specification details for the color.

   • **Palette specification:** Select the Attribute / task specification that holds the direct color specifications in the palette(s).

   Note: Either the **Color Specification(s)** or the **Palette Specification(s)** is required for preflight.

   • **Palette Color** Specify the attribute that has the color(s) information in the incoming document(s).

   For each incoming document, the workflow fetches the referenced color information, and compares it against the specification(s) provided.

   Note: Colors having the attributes with matching condition specified in the **Ignore** tab will be ignored from the actual color list.

2. **Document Colors**: Select the Document Reference attribute, that holds the colors list in the incoming document.

3. **Ignore:** Specify the values for attributes that you may want to ignore from the actual colors from the incoming document(s).

   You can add multiple conditions in this tab, and even if any one condition specified in this tab is true, the color is ignored from the preflight check. To ignore, select the attribute for which you want to validate either by **Matches** condition or **Contains** condition for a given **Value**.

4. **Preflight Result**: Select **Preflight Status Attribute** or **Preflight Result Attribute** or both in the respective drop-downs.

   Preflight Status Attribute: Ensure the selected attribute is available in the attribute category of the incoming document to set the Preflight Status. Resultant values possible for this attribute are:

   • **Additional Colors** when the incoming document has some additional colors than specified.

   • **Missing Colors** when the incoming document has some missing colors from the specified colors.

- **Both Additional and Missing Colors** when the incoming document has both additional and missing colors.

- **Matched Colors** when the incoming document has exactly same colors as the specifications.

Preflight Result Attribute: Ensure the selected attributes is available in the attribute category of the incoming document to set the preflight result provided in the rich text editor field.

Preflight Result Field is to provide data to be set in thePreflight Result Attribute selected.

Note: There are four new SmartName introduced, that can be used to fill in the details for the preflight result:

- **Additional Colors**: To resolve to the names of colors that are available in the incoming document but not in the specifications.

- **Ignored Colors**: To resolves to the names of colors that are ignored from the document colors for preflight check.

- **Matched Colors**: To resolve to the names of colors that are available in both incoming document and specifications.

- **Missing Colors**: To resolve to the names of colors that are available in the specifications but not in the incoming document.

Delete Document

#This node allows you to remove documents from WebCenter##whenever it is no longer required in all the projects it is present (in case of linked documents).

There is an option to **Force Delete Documents used in Document References.** When this option is selected,the node deletes the documents that are used as a document reference in a **Project** or a **Document** or in a **Task** and the document is then removed from the document reference(s) attribute value too.
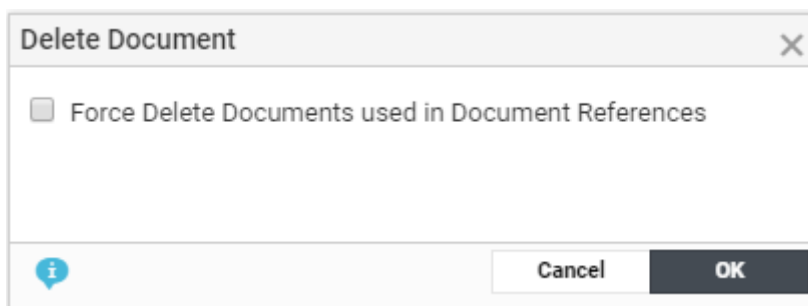
Note: Documents cannot be deleted, when it is locked or pending for approval actions or is part of an inactive projects.

After deletion, the Document is no longer available in WebCenter. Historic information about the document can be found in the Project History.

Delete View Files

This workflow node allows you to delete the view files of the incoming documents. Using this node, you can clear out the view files for all versions of the Documents.

Note: View Files of Page List documents are not deleted.

Delete Older Versions

This node enables you to delete old/unused versions of a Document from WebCenter.

In this node, the older versions of the input Documents are removed, and the remaining Versions have their version numbers reordered.
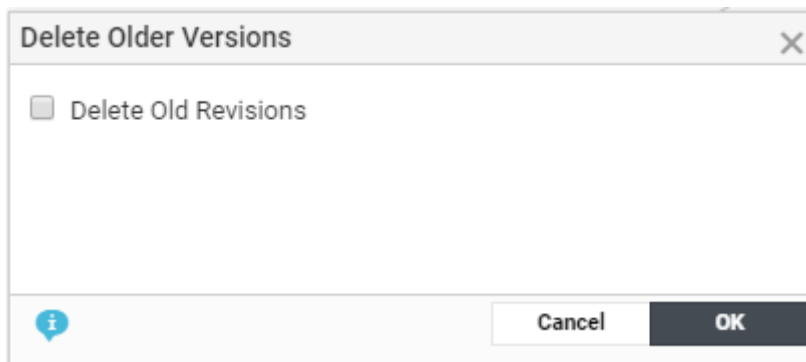
When enabling the **Delete Old Revisions** option, only the latest revision is kept. If the option is turned off, the latest version of each revision will be kept.

The document version is only removed when

1. It is not linked in any project where it is the most recent document
2. It is not used as a value for any document reference attribute
3. It is not used in any cart or task
4. It is not the last version of a revision
5. It does not contain final approval information.

   Note: Document versions will not be deleted when the security settings of WebCenter do not permit users to remove Documents with Approval actions.

Execute JavaScript

Use **Execute JavaScript** step to write and execute JavaScript code in a workflow. To access the JavaScript editor, double-click the node.

You can use the WebCenter JavaScript API by using the API object. For example, API.getProject() returns a project object representing the current Project.

Use **CTRL+Space** to enable auto-completion in the node. You will get pop-up with all possible options related to the typed syntax.

If you type `API` and enter **CTRL+Space**, a popup will list all possible methods of API (in this case 'getProject').

If you type `API.getProject().` and enter **CTRL+Space**, you will see a list of all possible functions of a project.

Note:

- The auto completion does not list options if you nest multiple functions: for example, if you type in `API.getProject().getChildProjects()[0].setName(API.getProject().);` and enter **CTRL+Space** you will not get a list of options.

- By default, a script can be of maximum 100.000 characters.

The screenshot displays a case where the workflow calculates if a Parent Project (Program) is at Risk. In this case, it updates the Parent Project's status to "At Risk" if more than 50 percent of the Child Projects are at risk.

This workflow step executes JavaScript in a sandboxed environment which allows you to execute the java classes of WebCenter API exclusively.

Note: There is a limit of the stack depth (by default, 10,000) to avoid infinite recursions and there is also an instruction count limit (by default, 1,000,000) to avoid infinite loops. The maximum script size is also enforced during execution.

Any JavaScript error puts the token on the error pin with an appropriate error message.

Detailed list of Java Script API's that can be used with this work flow node are available in WebCenter JavaScript API document.

Export to XLIFF Format

Use this node to export your Text statements to be translated in a translation software that uses XLIFF content (e.g. Trados or SDL). After translating, you can *import* them back.

Parameters

- **XLIFF File Name**: Specify the name for your target document.
- **Target Folder**: Specify the folder where the exported XLIFF file should be placed.

  Note: By default, the document is exported to the root folder of the current project. If an XLIFF file (of the specific name) already exists, then exported document will be uploaded to the same folder as a new version. If there are no content to be added for export to XLIFF, then instead of generating an empty file, output is sent to **No Files** pin.

- **Source Language**: Specify the master language of the text content.
- **Target Language**

  Note: You can use **SmartNames** to set these parameters.

- **Export statements only if Master Language is signed off**: Check this to specify that the exported XLIFF should only contain statements if their master is approved.
- **Export statements only if target language is already added to document**: Option to not add statements without the target language. This is unchecked by default.
- **Export Statements only if Target language is not signed off**

This step creates an XLIFF file from the incoming text document (.wcc) and uploads it to the current Project.

Notes

- If the source text is in rich text format, then the exported XLIFF file will have rich text identifiers.
- If a graphics file arrives at the node, it will search for Text Document References. If there are referenced text documents, an XLIFF file is generated.
- Comments added in the text content document will be exported to XLIFF file.

Export to GS1 Format

You can export all of the text content, table content, symbols, images, Barcode attached to an artwork to XML in GS1 format in a workflow.

For example, when a designer creates an artwork in **Adobe Illustrator** with placeholders for dynamic content, they are tagged with appropriate GS1 Element Types (Content Types). Artwork is then imported into WebCenter and Dynamic Content is then processed and approved in WebCenter. You can then use this node to generate the GS1 XML file with the updated information. This node will add the output file to the current Project. You can send this GS1 XML file back to the designer to place the content on the artwork.

Update and configure the following information in the work flow node to export to GS1 format:

- **GS1 File name**: Specify the name for your exported document. It is possible to use SmartNames to generate file names. If the file name is not specified, file name will be generated automatically.
- **Folder**: In this field, specify the folder where the exported GS1 file should be placed.
- Choose **Include Empty Content in GS1** to view all the elements in the **table document** else only elements with content are exported.

- **Note:**

  Default folder location is the root folder of the current project. If a GS1 document (of the specific name) already exists, then exported document will be uploaded to the same folder as a new version.

The node will create a GS1 XML document for the specified languages with Language index mapping. You can add a row for each locale mapping to include the languages in the artwork.

- **Locale Index**: Specify the sequence number referencing the locale index to the language. **Locale Index** represents the GS1 `localeSequence` tag.

- **Language**: Select the language corresponding to the **Locale Index** from the drop-down. The drop-down will list all the master and translation languages listed in the system.

Export Chili to PDF

You can use this workflow node to export Chili documents to PDF format. By default, the exported PDF files are routed to the current project and the root folder with the incoming Chili file name. You can also specify the target location of the exported PDF document including the **Target Project**, **Target Folder** and the **Document Name**.

Specifications

- **Target Project**: Specify the location where the exported PDF documents are to be placed

- **Target Folder**: Specify the folder in the **Target Project** where exported document are to be placed.

- **Document Name:** Specify the new PDF document's name. If left blank, the document name will be same as the incoming document's name with the extension .pdf.

- **PDF Export Setting**: Specify the PDF Export Settings name as defined in the CHILI Server. The pdf document is created using the configuration defined in the XML of the export settings.

Note:

If there is an existing file in the target location with the same file name as the exported pdf, then the node will fail. Alternatively, you can choose the option **New Version if Document already exists**.

Get Dependent Colors

In the ESKO Cloud and/or in Pantone LIVE, there are master/dependent relationship that exists between the colors. Given a master color and conditions, there can be a dependent color linked to the master color. This workflow node syncs the dependent standards belonging to the master colors based on the conditions and shows these colors in the input document attributes in WebCenter.

Input The inputs to the node are the document(s) that contain the master colors. Specify the following information in this tab.

- **Master Colors**: Specify an attribute of the document that contains the master colors.

- **Ink Type** Specify a Smartname that represents an ink type.

- **Printing Technique** Specify a Smartname that represents a printing technique.

- **Substrate** Specify a Smartname that represents a substrate

- **Finishing** Specify a Smartname that represents the finishing profile and it is relevant for Pantone Live colors only.

In the **Output** tab, specify the document reference attributes that you want to be updated for

- **Dependent Colors**This is a mandatory field. The dependent colors to the master colors specified is added to the attribute.

- **Missing Dependent Colors** The masters colors for which no corresponding dependent colors are found are added here

Specify the **Cloud Connection** that has been configured to the ESKO cloud for the Color Service in the **Configuration** tab.

Import Dynamic Graphic

When this node is executed, images or symbols are extracted from an incoming artwork file along with expected number of occurrences from either AI files (pdf) or Chili files and are added to the artwork as document references.

Parameters

Symbol Tab

- **Symbol Library**: Field for providing the Project name(s) where all the Symbols are located. You can either specify multiple project names with a "|" between them or provide SmartName which resolve to multiple project names. Read more on this is *How WebCenter finds previously used images* on page 394

- **PlaceHolder Document Template**: When matching symbols are not found in the Symbol Library, this graphic document is copied into the current project as a placeholder which can be replaced with actual symbol later.

- **Upload Folder**: Folder where the placeholder graphic documents are copied into.

- **Document Reference Attribute**: You can choose the Document Reference Attribute of the Artwork file that has to be used to link the Symbols.

- **Find Previously Used Symbols:** If this option is selected, the node will find if an existing symbol in WebCenter matches before creating a new document. In case the matching symbol was not found, the node will create a new document.

> **Note:** This option is applicable only if the GS1 XML created in the system has been added to Artwork file through Dynamic Content.

Image Tab

- **Image Library**: Field for providing the Project name where all the Images are located. You can either specify multiple project names with a "|" between them or provide SmartName which resolve to multiple project names.

- **PlaceHolder Document Template**: When matching images are not found in the Image Library, this graphic document is copied into the current project as a placeholder which can be replaced with actual image later.

- **Upload Folder**: Folder where the placeholder image documents are copied into.

- **Document Reference Attribute**: You can choose the Document Reference Attribute of the Artwork file that has to be used to link the images.

- **Find Previously Used Images**: When this option is selected, the node will find if an existing image in WebCenter matches with the reference property specified from the artwork before creating a new document. In case the matching image was not found, the node will create a new document. Read more on this is *How WebCenter finds previously used images* on page 394

> **Note:** This option is applicable only if the GS1 XML created in the system has been added to Artwork file through Dynamic Content.

Import of Chili Documents

When the incoming document is a Chili file, then only the Chili variables with the data type as image are imported and stored in the ARTWORK_VARIABLE.

> **Note:** Symbols are also considered as images in the Chili File.

How WebCenter finds previously used images

When an artwork is imported into WebCenter, all its contents are also imported along with its meta data (XML)

Now when the images are imported and if the option **Find previously used Images** is enabled, before creating a new document, search is made on the value in the reference property EXTERNAL_IMAGE_PATH to find if any documents exist with the same name or matching image path.

If no matching document is found, then a placeholder document is copied into the project and its attribute values are set accordingly.

Similarly when symbols are imported and if the option **Find the previously used Symbol** is enabled, before creating a new document search is made on the value in the reference property SYMBOL_NAME to find if any documents exist with the same SYMBOL_NAME. If no matching document is found, then a placeholder document is copied into the project and its attribute values are set accordingly.

Import Dynamic Barcode

When the node is executed, Dynamic Barcodes along with the expected number of occurrences are extracted from an incoming artwork file. For each Dynamic Barcode, a new document is created and these Barcode documents are added as Document References in the Artwork.

Parameters:

- **Document Template Project**: Field for providing Project name(s) where the **Barcode Document Template** is present. You can either specify multiple project names with a "|" between them or provide SmartName which resolve to multiple project names.

- **Document Template:** Template used for creating a new document that stores the Barcode information.

- **Upload Folder**: Folder where the new Barcode documents are created.

- **Document Reference Attribute**: You can choose the Document Reference Attribute of Artwork file that has to be used to link the Barcode document.

- **Find previously used Barcode:** If this option is selected, the node will find if an existing Barcode in WebCenter matches before creating a new document. In case the matching Barcode was not found in the System, the node will create a new document.

Note: This option is applicable only if the GS1 XML created in the system has been added to Artwork file through Dynamic Content.

Import XLIFF Content

In a translation workflow involves third party solutions (e.g. Trados or SDL), you will get your translated content as XLIFF documents (.xlf or .xliff). You can use the **Import XLIFF** step in your workflow to import the translated statements into the WebCenter Text Document (.wcc).

If a particular language is missing in the Text Content document, this step will add that language.

This step will update the document only if the statement is in **Draft** or **Pending Sign off** or **Signed off rejected** state.

Parameters

- **Approve Translation**: If you enable this all imported content will be **Signed off**.

If this option is turned off, the imported text will be in the **Ready for approval** state.

- **Create Translation**: If you check this option, a new translation statement will be created even if the language does not exist in the document.

  If this option is turned off, the languages should exist in the document before the XLIFF content is imported. Otherwise, the imported content will not be added to the document.

Note:

- If the statement is in **Signed off** state, it will not be updated with the XLIFF content.

- This step may update the Text Document partially, if there are reasons for the other statements (parts) to fail. For example, if there are three languages, it is possible that only one language statement is updated.

- Rich Text Support: If source and target languages contents are rich text format, then the same rich text identifiers are added into translation content in the imported text content file.

- When the import of the XLIFF document is failed, the error pin is updated with the reason for the failure.

- Any new comments given during translation is imported.

Warning: This step will update the language statement in WebCenter regardless of the User Permissions.

Import Dynamic Text

The **Import Dynamic Text** node extracts the **Dynamic Content** from your artwork(s) as **Text Content Documents** from either your AI files or Chili files. For AI files, the expected number of occurrences of each text statement is also imported. You can configure this node to import the text documents with a link to specific **Document Reference Attributes** and **Document Templates**.

Note:

1. You need a **Copy Sheet Attribute Category** with Text document references as a pre-requisite to configure this node.
2. If the input is a Chili document, then read this for detailed explanation *Import Dynamic Content from Chili file using Import Dynamic Text node* on page 399

Parameters- Configuration tab

- Specify the **Upload Folder** to store the extracted documents.

- Select the **Document Template Project** at the top of this tab. Enter the name of the Project(s) where you have configured your Text content specific templates. It can either be SmartName that resolves to multiple project names or pipe separated values.

- Specify the **Element Type**. You can create a dedicated row per **Element Type** / **Content Type**. Click **+** to add a row. Read also: *Configure Element Types as a List*.

  Tip: Select **All Element Types** to import content that has no specified **Element Type**.

- Select the **Document Reference Attribute** for each row (per **Element Type**). Select the appropriate **document reference** from the drop-down listing all document references.

  These document references keep the link between the artwork and its Text Content active while allowing you to process them separately.

- specify the corresponding **Document Template**. You can configure document templates for each of the Element Types in this SmartName enabled field.

  Read also: *Creating a New Text Document*
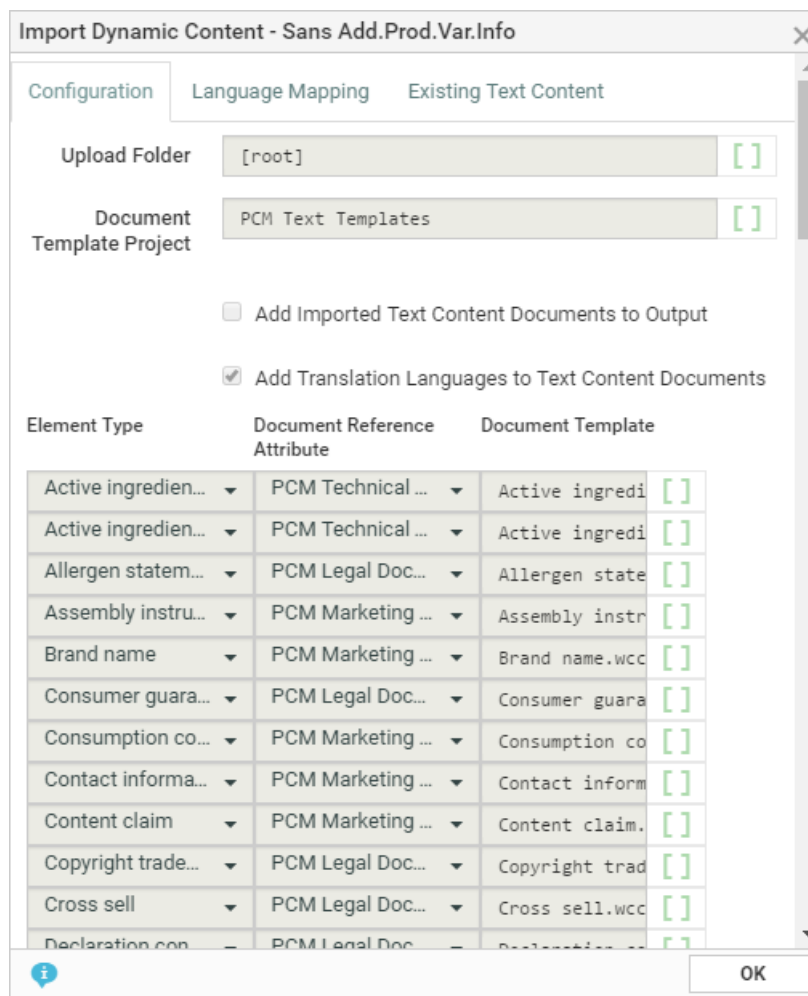
Parameters– Language Mapping tab

You can map the **Locale ID** of the **Dynamic Content** to the corresponding language in WebCenter.

- **Language Index**: When you create the first row, this field will have the value 1 by default. When you create more rows, they will be numbered serially.

- **Language**: Select the language from a list of languages. Or use a SmartName to dynamically assign the languages.

> **Note:**
>
> 1. By default, an imported statement is imported as Translated language if it does not exist as a Master Language in the Project's language attribute.
> 2. If you do not specify language mapping for the imported Dynamic Content, the node will try to find the language in the *Lists* (Master and Translation languages).

–

Parameters–Existing Text Content tab.

You can specify the reuse policy for matching Text Content Documents in this tab. Check **Reuse existing Text Content Documents** to match the incoming text with the existing documents.

Note:

- When you enable this option, the matched Text Documents will be copied to the current Project if it exists in another Project.
- If there is a 100 percent match with regard to the content and languages, the existing Text Documents will not be updated.
- If the incoming document is a Chili file, then the content of this tab is ignored while importing.

If left unchecked, the import will create new documents.

The following settings allow you to handle partial mismatches with regard to content or languages.

If there is a partial text match (with same list of languages), choose from:

- **Replace text and Reset the Status to Draft**: The content will be updated and the document status will become **Draft**.

- **Replace text and Retain the Status**: The content will be updated retaining the current status.

- **Ignore Change**: In this scenario, the changes are ignored and the existing documents will not be updated in anyway.

If document is an Invariant, it will be reset to false.

If there is a language mismatch, then you have the option to:

- **Add language and Reset the Status to Draft** If document is available in different project, make a copy of document to current project, add language and content and reset the status of full document.

- **Add Language and Retain the Status** If document is available in the same project, then add new language and content, and reset the status of full document.

- **Ignore Change**: ignore the incoming language.

Example
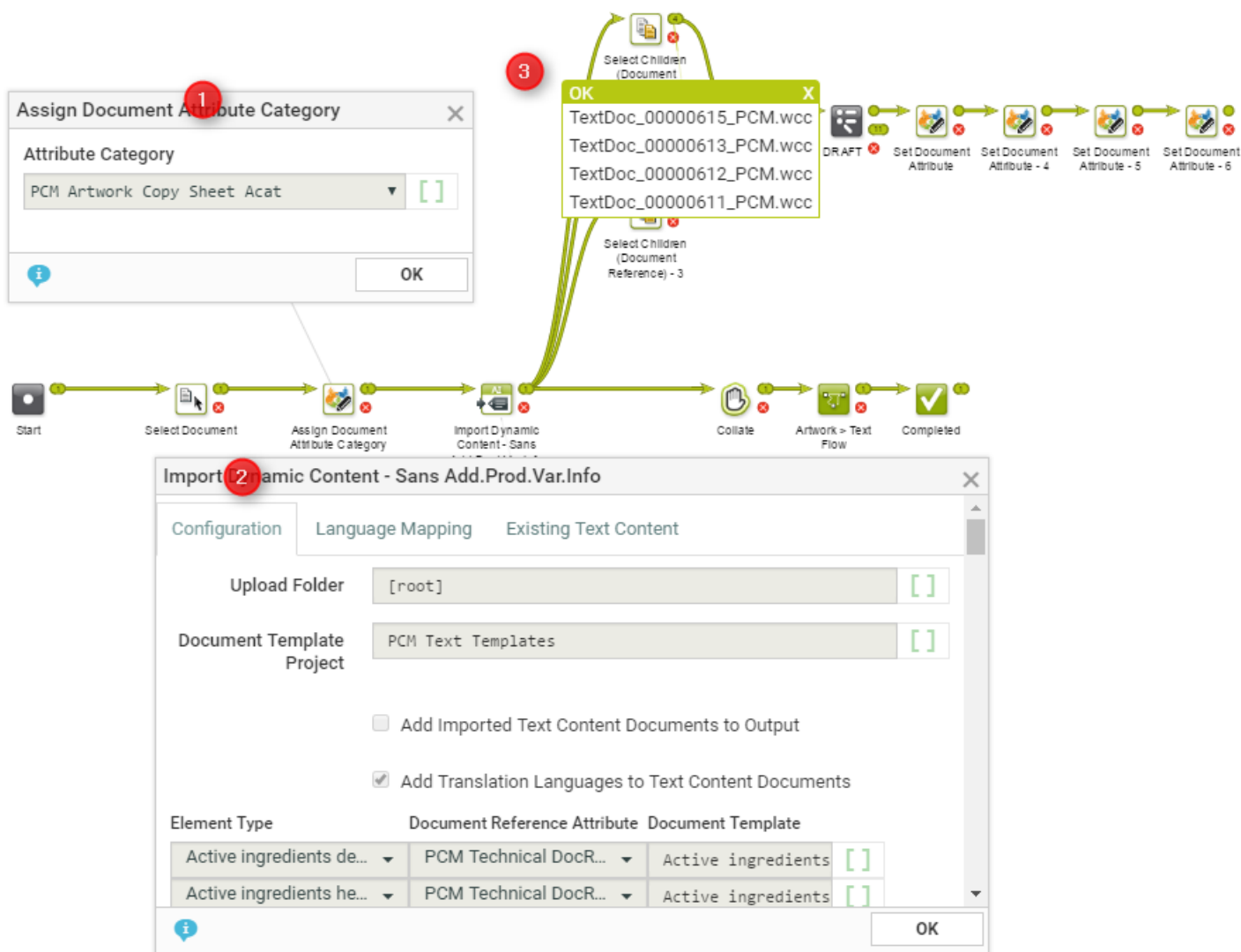
In the example, when an artwork with Dynamic Content arrives at a Packaging Content Management workflow, the following steps happen:

1. The workflow assigns a **Document Attribute Category** to the artwork (parent). This 'copy sheet' category contains the **document reference attributes** to which the text content will be imported.

   Note: If this step is not in the workflow, the **Import Dynamic Content** will use the Project's attribute as the default.

   The category contains the **Document Reference Attributes** for:

   • technical text statements,
   • legal statements and
   • marketing statements

   to serve as the copy sheet template.

2. The **Import Dynamic Content** step maps the various Element Types to appropriate **document reference attributes** as configured.

3. The *Select Children* nodes select the text documents (technical, legal and marketing) separately. These documents can be processed as separate text documents while keeping the link between them and the artwork alive.

Import Dynamic Content from Chili file using Import Dynamic Text node

Import Dynamic Text node handles incoming Chili document in the same way as other artwork files except it ignores any configuration in the **Existing Text Contents** tab.

WebCenter supports the following Chili data types for text content documents

• String, short text, long text, formatted text, unformatted, number for text content documents.

When imported, the imported Chili file is considered as GS1 complaint, if the **Instance Sequence** and **Locale** are already defined in the Chili Variable name.

You can see examples of how Chili variables are handled by the workflow node in the table below.

Before Import		After Import to WebCenter						
Chili Variable Name	GS1 Compliant Var	Derived ElemType	DocTemplate ElemType	Final ElementType	ARTWORK_VARIABLE	Instance	Locale	DocName (if autonaming is not enabled)
MARKETING_COPY	No	MARKETING_COPY	BRAND_NAME	MARKETING_COPY		1	1	MARKETING_COPY.wcc
MARKETING_COPY_I1	No	MARKETING_COPY	VARIANT	MARKETING_COPY		1	1	MARKETING_COPY.wcc
MARKETING_COPY_I4_L5	Yes	MARKETING_COPY	RECIPE	MARKETING_COPY		4	5	MARKETING_COPY.wcc
UNKNOWN_VAR	No	UNKNOWN_VAR	BRAND_NAME	BRAND_NAME	UNKNOWN_VAR	1	1	UNKNOWN_VAR.wcc
UNKNOWN_VAR_I1	No	UNKNOWN_VAR	VARIANT	VARIANT	UNKNOWN_VAR_I1	1	1	UNKNOWN_VAR.wcc
UNKNOWN_VAR_I2_L3	No	UNKNOWN_VAR	RECIPE	RECIPE	UNKNOWN_VAR_I2	2	3	UNKNOWN_VAR.wcc
UNKNOWN_VAR	No	UNKNOWN_VAR	Not Configured		UNKNOWN_VAR	1	1	UNKNOWN_VAR.wcc

Tip: Chili variables should be GS1 compliant so that node can process the data correctly.

Import Dynamic Table

The **Import Dynamic Table** node extracts the **Tables** from your artwork(s) as **Table Content Documents**. You can configure this node to import these Documents with a link to specific **document reference attributes** and **table document templates**.

Note: You need an Attribute Category with Table document references as a pre-requisite to configure this node.

If there are multiple artworks coming into the documents, the node will iterate and extract tables from all of them.

Parameters- Configuration tab

• Specify the **Upload Folder** to store the extracted documents.

- Select the **Document Reference Attribute** for the table. Select the appropriate **document reference** from the drop-down listing all document references.
- **Add Imported Table Documents to Output** . Check this if you want the document sent to the output pin.
- **Reuse existing Table Documents**. The document version specified in the document reference will be reused to store the data instead of creating a new Table Document. If there are no matching tables in the system,new document will be created.

Document Template Tab

- Specify the corresponding **Document Template**. Select the Table Template (either simple or Smart) that corresponds to the incoming Table.

  Select the **Document Template Project** at the top of this tab. Enter the name of the Project(s) where you have configured your table templates. You can either specify multiple project names with a "|" between them or provide SmartName which resolve to multiple project names. Read more in: *Creating a Simple Table* on page 499

- **Add all Document Template elements** Check this to import all statements present in the document template.
- **Set values from Document Template**. Check this to take values from the Document Template for all matching statements. If there are no matching statements, the incoming values will be used in the table document.

Parameters– Language Mapping tab

You can map the **Locale ID** of the **Dynamic Table** to the corresponding language in WebCenter.

Language Index: When you create the first row, this field will have the value 1 by default. When you create more rows, they will be numbered serially.
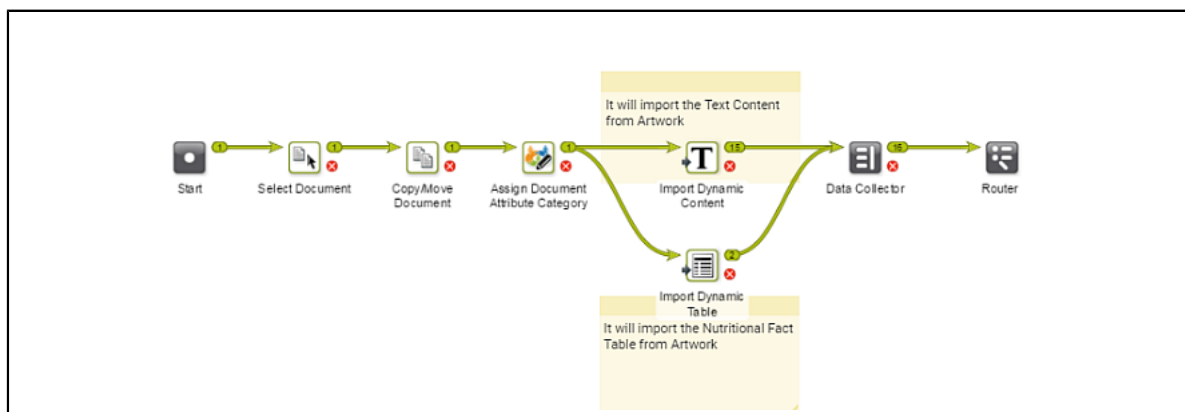
- **Language**: Select the language from a list of languages. Or use a SmartName to dynamically assign the languages.

Note: By default, an imported table is imported as Translated language if it does not exist as a Master Language in the Project's language attribute.

For new Table documents created from this node, the master language table will be added in the **Draft** state, even if that language is not available on the artwork.

Note: If you do not specify language mapping for the imported Dynamic Content, the node will try to find the language in the *Lists* (Master and Translation languages).

–Read also: *Import Dynamic Text* on page 395.

In the example, when an artwork with Dynamic Content arrives at a Packaging Content Management workflow, the following steps happen:

1. The workflow assigns a **Document attribute category** to the artwork (parent). This 'copy sheet' category contains the **Document reference attributes** to which the text and table content will be imported.

   Note: If this step is not in the workflow, the **Import** node will use the Project's attribute as the default.

   The category contains the **Document reference attributes** for:

   • text statements,
   • and nutrition facts table

   to serve as the copy sheet template.

2. The *Import Dynamic Text* on page 395 step maps the various Element Types to appropriate **document reference attributes** as configured.

3. The **Import Dynamic Table** extracts the table matching it to the document reference and the table document template.

After the extraction of the content, the workflow processes the content based on the requirements. You can, as in the example, update the incoming table and text using the workflow.

Invite Members to Project

This workflow node can be used to invite a **User / Group / Role to a Project** in the work flow itself by the users who can create Task Types.

You can specify any active member to be invited to a project based on the **Group** or **Role** or even specify a single user in the **Members** tab. This can also be done using Smart names. When you select a Group, you can further select a member as **Group Assignee**. All the permissions are inherited based on the Role selected to the added member. If no Role is assigned to the user, default(only view) permission is available.

In the **Iteration** tab when iteration is on, each of the member rows are evaluated for each value of the attribute and then the members are added to the project.

You also have an option to choose **Do not iterate**, which is the default option.

Merge Text Content

This node is used to merge incoming text content documents with matching text content documents into the library project configured. For every incoming text content document, library document should match the content for each of the languages in both the documents.

This workflow node has the following configurable fields:

Text Content Library(s) – Enter project names or smart name that resolves into multiple projects.

Ignore Case while matching–Select this field to match only the content, ignoring the case.

Ignore white space while matching– Select this field to ensure that the leading and trailing spaces are ignored.

Approve Content Enable this field to approve the content merged. When the master language of the merged content is not approved already, then the newly added language will not be approved.

Library Upload Folder – Specify the folder, where the copied document should be placed in library project.
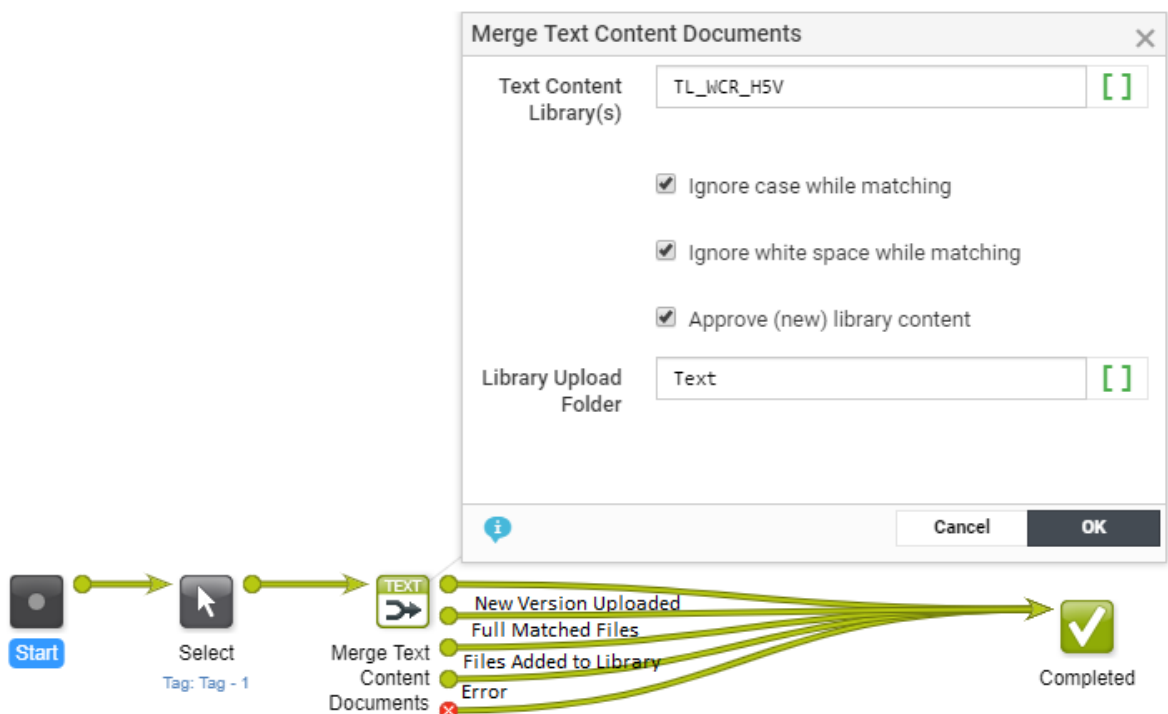
Run Report

Use this node to generate a report for the incoming document(s)/ Current project/other reports according to the setup in the node.

Details Tab

You can **Create Report for**

- **Incoming Documents**: Choose this option to generate a report for the incoming documents into this node. If there are no incoming documents, the node will fail.

  - **One Report for All Documents** option generates a single report for all the incoming documents.
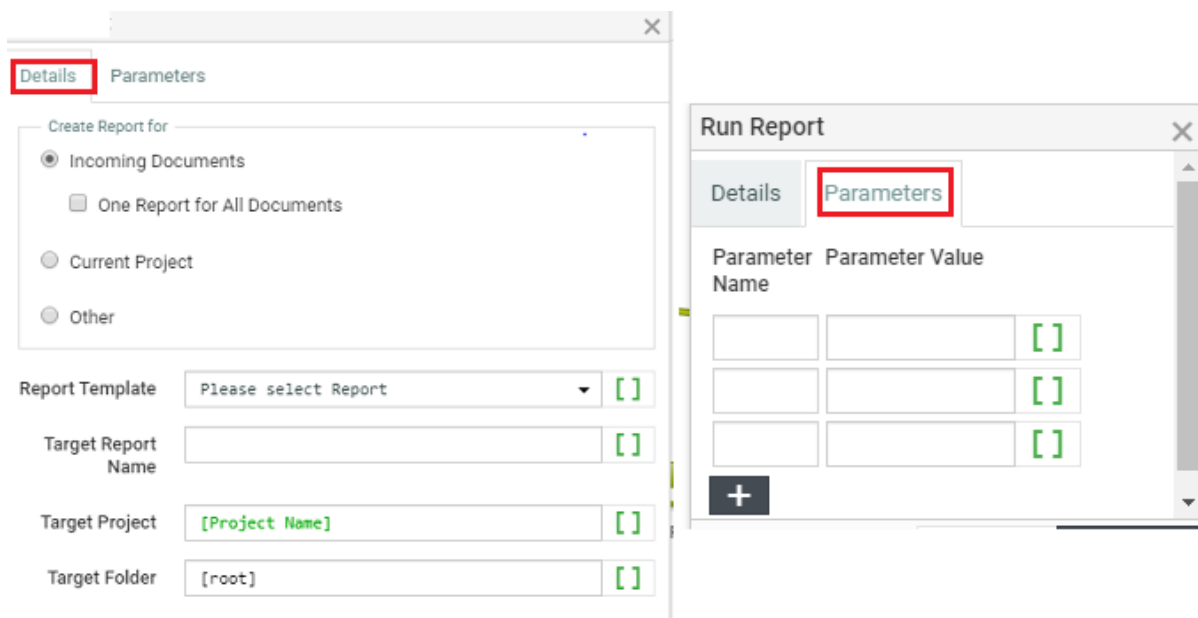
- **Current Project**: Choose this option to generate report for the current project.

- **Other**: Choose this option to generate any other report.

  You can choose the **Report Template**, **Target Report Name** and **Target Project** and **Target folder** or add a smart names for these fields.

  Note: It is mandatory to mention the Report Name.

Parameters tab

You can specify the parameters that are required for the report to be generated in this tab. If no parameters are provided, default parameters configured in the **Report setup page** is considered.

- **Parameter Name**: Should be same as the name configured in Jasper Report. When the parameter name does not match with the report parameter name, the node skips that parameter altogether.

  Note: The name seen on the **Report Setup Page** is a label and is not same as the field in the Jasper Report.

- **Parameter Value**: Define the value for the parameter set and it is a SmartName field.

In case there are wtc(table content) document references in the attribute category where you are creating a report, and if the report template is PDF then the Table Content Preview is merged into the report or else the Preview PDF report will be generated seperately.

Now choose the **Report Template**, **Report Name**, **Project** and the specific **folder** in which the report is directed.

Reuse Text Content node

This node helps you to reuse the text content documents that are referenced in the incoming artwork document. This is done by matching and replacing them with the library documents or the text content document is updated with SmartText that refers to library documents.
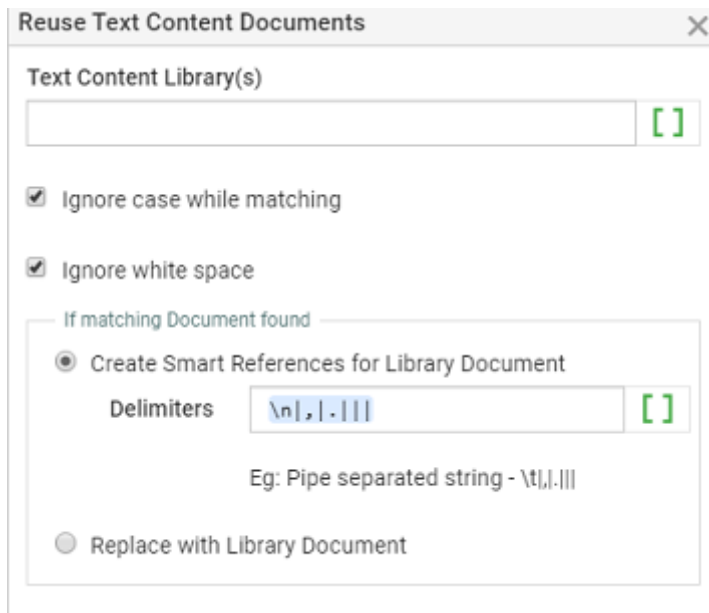
Text Content Library(s) Specify project names or smart name that resolves into projects.

Every text content document referenced in the artwork are searched in the mentioned Text Content Library Project and if matching document is found, then based on the node configuration

- **Create Smart References for Library Document** : Text content document is updated with Smart References to reuse the library document and all language content is also updated with smart reference(s) and are also resolved automatically.

  Delimiters: You can specify the delimiters that allows the workflow to split the available text and search in the configured library. This field is a free text field, but the input is expected in certain format to avoid any wrong match/splitting of string.

  For Example : \n|,|.|||

- **Replace with Library Document:** Referenced text content document in the incoming artwork is replaced with the matching document from the Text Content Library specified.

If the input Text document is inheriting content from another language, then the inherit content settings is respected while updating the text with Smart Content.

Ignore Case while Matching: When enabled, content matching ignores cases. By default, this option is selected.

Ignore white space Select this option is to ignore the leading and trailing spaces. By default, this field is selected.

Remove Member

This workflow node allows you to remove User(s) / Group(s) / Role(s) from a project, who have no approvals or task assigned to them. You can also remove the user(s) or group(s) assigned to a specific role.

Members tab

In this tab, you can choose multiple member rows for removing at the same time.

You can specify to **Remove** from the project , either

- an User
- or a Group where an user is specified
- a Role completely
- member(s) of the Role

Name and the Role fields in this tab are SmartName enabled, and resolves values in the workflow.

Iterate tab

You can choose a Project/Document attribute or task specification via a smart name and **Iterate Over Attribute**.

When iteration is on, each of the member rows are evaluated for each value of the attribute and then the members are removed accordingly.

Note: When the attribute value is empty or cannot be resolved in the workflow, the node fails to remove the member(s).

You also have an option to choose **Do not iterate**, which is the default option.

Replace Member

Many a times members are added to the project for a specific purpose like approval and later are removed, while new members may have to be added for other purposes. To automate the adding and deleting of members at certain juncture in the project, you can use the **Replace Members** workflow node.

Current members of the role within a project can be dynamically replaced with new members using **Replace Members** Workflow node. You can specify the member or groups or member of a group to replace a member or a group or a member of a group already existing within the project. The node has to be specified with the following details in the **Members** tab and **Iterator** tab.

Members tab: You can add as many rows that may be need, to replace the existing members in the current project. You can delete the row if required. A member row requires the following fields :

- **Role**: You can specify the role which has to be replaced from the drop down of available roles in the project or with smart name(s). You have an option to choose a member as a part of **Any Role** to be replaced or a direct member (**No Role**) in the project to be replaced.

- **Current Member:** You can specify the current member type (user/group) in the two optional fields where a drop down is used and a smartname dropdown is used to specify the current member who is to be replaced from the project.

- **Replace by :** You can choose a new member type as either a user or a group from the drop down and you can also further use a smartname to specify the new member or choose from the drop down.

Group Assignee: You can optionally specify a member of the group as a smart name or choose from the dropdown. The user selected in this field will become group assignee. The user should be part of the selected group.

Note: This option is enabled only when groups are chosen to replace.

Iterator tab: You can specify whether there are Iterations or No iteration. When the iteration is on, the member rows are evaluated for each **Iterator Value**. You can

- **Iterate Over an Attribute** You can choose a Project or Document Attribute orTask Specification with a smart name.

- **Do not iterate (default option**)

Note:

1. If the current member configured in the row is not a member in the role/Project, then the replacement of member is not performed.
2. The Tasks and Approvals assigned to the current member is reassigned to the first member replaced.

Restore from Esko Cloud

Sometimes you might want to retrieve an archived document from Esko Cloud back to Web Center filestore. It is possible to restore the Document using the **Restore from Esko cloud**. This means that the Document will be downloaded from the Esko Cloud and saved in the WebCenter Filestore.

In this work flow node, you need to specify a working Esko Cloud Archiving Asset Management connection and the node should receive document(s) that are archived in Esko cloud.

Note: Ensure to choose the right **Asset Management connection** for Cloud Archiving, in which the document is archived.

There is an additional option to retain the archived file in the Esko cloud or not. When the **Remove Document from Esko Cloud after Restore** option is chosen (by default), the Document is removed from the Esko Cloud and it is no longer archived (as per the document status).

Save Document Colors in Attribute

Color Trace solution supports Color Ink Books/ Pantone Standards from the ESKO Cloud.

Save Document Colors in Attribute work flow node extracts the color information from the incoming artwork document (ROMD properties) and saves it as attribute values in the corresponding document in WebCenter's **#COLOR Library** Project.
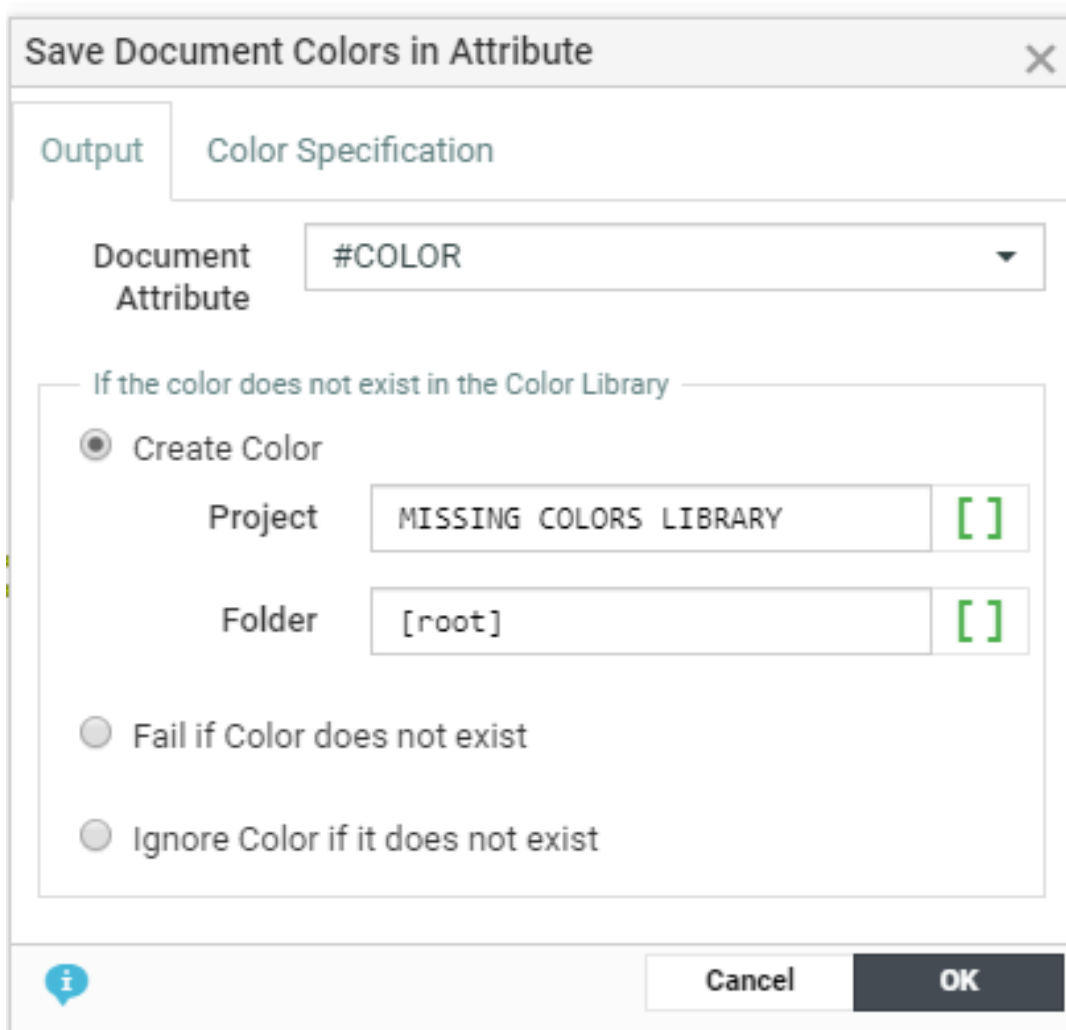
To extract the information from the incoming artwork, you need to define the following

- **Document Attribute** in which the values are stored

- On matching the incoming file with the existing document in WebCenter, the work flow node progresses step by step in an orderly fashion.

  - Firstly, checks if a color with the matching name exists in the specification. The attribute value for **#COLOR Name** is found, when they are matched. If no match is found, then it is checked in the preferred books.

  - If the preferred book is not mentioned or not matched in the preferred book, the #COLOR LIBRARY is searched for the color name.

  - While searching in the **#COLOR LIBRARY**, a search is made to match the attribute "#COLOR NAME" and "#COLOR BOOK". If not found, then only **#COLOR Name** is searched for and it is updated only if only one matching color is found. If more than one color is matched, the node is failed.

- When the option **Create if not exists** is selected, then a new color document is created in the **Project** > **Folder** where the following attributes are specified as the cloud color.

  - **#COLOR NAME**: Name of the color

- **#COLOR BOOK:** Name of the book where the color is present

- **#COLOR RGB**: RGB value of the color

- **#COLOR ORIGIN:** Missing Color

If the **#COLOR NAME** exists in the project, then then same is linked to the document. Also note, that the newly created color has a thumbnail indication that it is not a cloud color.

Select Children (Document Reference)

Using this node, you can select the documents that are referenced in the input document as a document reference attribute value. Read more in: *Document References*.

This node collects the documents referenced in each of the input documents and sends them as the output documents. Based on the settings, this task may output the incoming parent documents as well.

In the following example, the node selects the `artwork document` referenced in a design file.
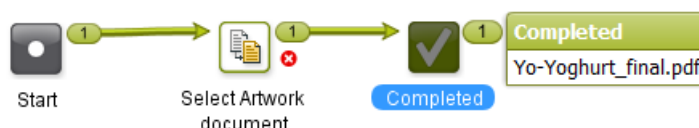

Double-click the node in the canvas to fill in the following options:

- **Attribute**: drop down listing all the **document reference attributes** defined in the system.

  Note: When you select the option **Any Document Reference** from the drop down, all document reference children of the incoming documents are selected and added to the set of output documents.
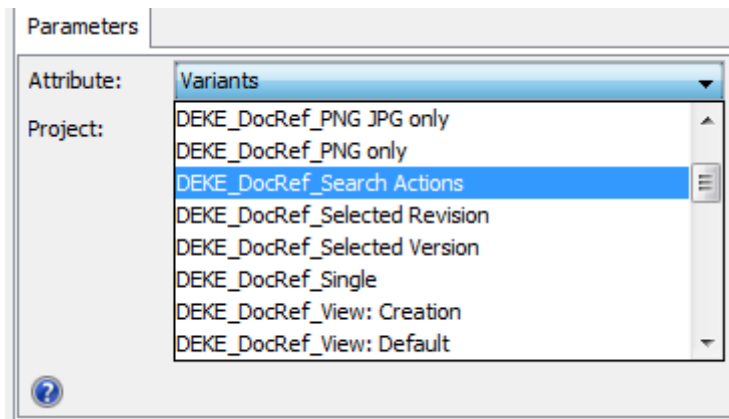
- **Project name**: use SmartNames or type in the name of the project where the referred document is located. This is handy when you want to filter the multi-valued document references located in several projects.

  This field is optional and by default empty.

- **Fail if no Documents found**: check this when you want the workflow to stop if there are no document references for the attribute you selected.

  This option is turned on by default.

- **Add Input Documents to Output**: check this to send the incoming documents (the documents containing the document references) also to the output pin in addition to the selected document references.

  This option is turned off by default.

Select Document

Use the **Select Document** node to choose a document to be processed by the rest of the workflow. When a workflow is started with a human task requiring documents, the **Select Document** node can be used to provide documents.

Parameters

Project Name: The name of the Project containing the document to select (by default, this is the project in which the workflow is launched).

You can select either:

- **Documents in the project**: then define the following:

  - **Name**: The name of the document to select.

  - **Folder**: The project folder containing the document to select. By default, this is the root folder.

  > **Tip:** You can use SmartNames for the **Project Name**, **Folder** and **Name** parameters.

- **From Project Document Reference**

  In 18.0.1 WebCenter release onwards, the documents that are referenced by the selected **Project Document Reference** in the specified project are put on the output pin. You can scroll the drop down list to select the document references.

- **From Task Document Reference**

The documents that are referenced by the selected **Task Document Reference** in the currently executed workflow task are selected. You can either select the Task Document Reference from the drop down or select **Any Document Reference**. When **Any Document Reference** option is selected, all documents that are referenced in the task's specification are selected in the node.

• **Documents in the Bill of Materials**. When this option is selected, all the document(s)(versions) that are in the Bill of Materials of the project specified in the Project Name field, are selected and put on the green output pin as one token.

There is also an option to **Fail if no document found**. This option stops the workflow with a failed state, if there are no documents in the defined Project location/Bill of Materials.

Select Parent (Document Reference)

Using this node, you can select the parent documents where the input documents are being referenced as the attribute value. Read more in: *Document References*.

This node collects the master documents of the input documents (document reference values) and sends them as the output documents.

In the example below, the document `Christmas Bottle.zae` has an ARD file as a document reference value for the attribute `Die Line`.

To select the parent when your input document is the `CAD008.ard`, specify the attribute (`Die Line`) in the node. The node will select `Christmas Bottle.zae`.

Double-click the node in the canvas to fill in the following options:
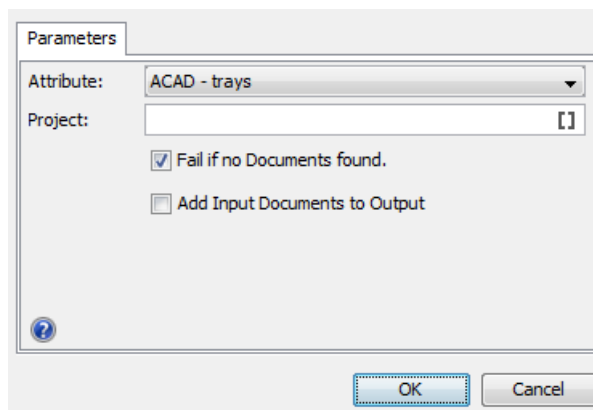
• **Attribute**: drop down listing all the **document reference attributes** defined in the system. Select the attribute name where the input document is the referenced document.

Note: When you select the option **Any Document Reference** from the drop down, all parent document referencing the incoming documents are selected and added to the unique set of output documents.
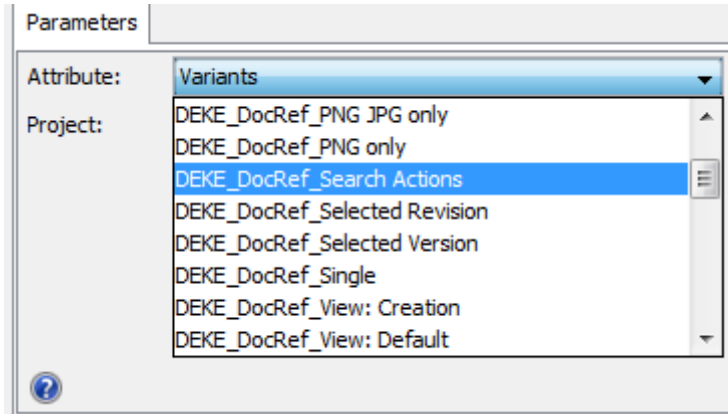
- **Project name**: use SmartNames or type in the name of the project where the parent or master document is located. When the project name is specified, only the parent documents that are in this project are selected.

  This field is optional and by default empty.

- **Fail if no Documents found**: check this when you want the workflow to stop if the parent documents are not found.

  This option is turned on by default.

- **Add Input Documents to Output**: check this to send the incoming document references also to the output pin.

  This option is turned off by default.

Send Notification

You can send automatic workflow notifications using the **Send Notifications** node. These notifications are sent as an e-mail with a configurable subject and body. You can customize this according to your needs.

Parameters

In the **To** field, type the e-mail addresses of the receivers or select them using SmartName **[ ]** . The following SmartNames are supported:

- Project Manager
- Sales Person
- Workflow Master (the project member who is assigned the whole workflow as a task in the project)
- Groups
- Users
- Roles (the e-mail will be sent to the current holders of this role in the project)

Tip: Use ; as a separator between the receivers.

In the **Subject** field, type the subject of the e-mail. The subject can be configured using SmartNames.

In the **Message** field, type the body of the e-mail. You can use the buttons and options at the top of the field to format your message. The e-mail body will automatically contain a link to the first document coming into the node even if the node gets multiple documents.

> **Tip:**
>
> - Click the [*] icon to use SmartNames (for example to add Attributes, a link to a Document, the Project name or a User name).
>
> - In the Links section, You can find a SmartName to generate a Temporary Document Preview or a Temporary Document Download link in the e-mail. The preview link SmartName is only available if the admin has enabled **Allow large Document preview (approval e-mail notifications)** and for download link **Allow Project Members with Download permission to e-mail a link for non-authenticated download of a Document**.
>
> - Select some text and click [pencil icon] to create a hyperlink.

Set Document Attribute

Use this node to automatically add document attributes and their values to the documents processed by the node.

> ⚠️ **Attention:** Your documents should have the attribute category (containing the attributes you add) already assigned, otherwise the workflow will fail.

Parameters

Click **+** to add one of the attributes of the document's attribute category. If this is not the attribute you wanted, click it and select another attribute.

Then double click in the **Value** column to enter the corresponding attribute value. You can use SmartNames.

To remove an attribute, select it and click **-**.

Set Project Attribute

Use this node to automatically add project attributes and their values to the current project.

> ⚠️ **Attention:** Your project should have the attribute category (containing the attributes you add) already assigned, otherwise the workflow will fail.

Parameters

Click **+** to add one of the attributes of the project's attribute category. If this is not the attribute you wanted, click it and select another attribute.

Then double click in the **Value** column to enter the corresponding attribute value. You can use SmartNames.

To remove an attribute, select it and click **-**.

Set Project Status

Use this node to automatically set the status of the current project.

Parameters

Choose the project status in the **Status** list (it contains all project statuses configured in your WebCenter system). You can also use SmartNames to configure a status parameter.

Set Workflow Specification

Use this node to automatically set the value of one or more specifications of the workflow you are running.

> ⚠️ **Attention:** The specifications you want to use should already be added to the workflow task, before starting the workflow.

Parameters

Click **+** to add one of the workflow specifications to the list. If this is not the specification you wanted, click it and select another of the workflow's specifications.

Then double click in the **Value** column to enter the corresponding specification value. You can use SmartNames.

To remove a specification, select it and click **–**.

Set Workflow Status

Use this node to automatically set the status of your workflow (this must be an active status).

Parameters

Choose the workflow status in the **Status** list (it contains all active workflow statuses configured in your WebCenter system). You can also configure SmartNames to set the status parameter.

Start Approval Cycle

Use this node to start an approval cycle on any incoming document, and wait until the approval cycle is finished.

Parameters

Choose to either:

- **Use the default approval setup**: This is the default approval setup of the incoming document. If no approval setup exists for it, the default approval setup of the folder containing the document, or failing that, of the project containing the document, is used.
- **Use the approval setup of another document**. In this case, enter the **Project Name** of the project containing that document, and the **Document Name**.

You can use SmartName for both the **Project Name** and **Document Name**.

> **Note:**
> - If there is no active approval setup in your project or you chose to use a document that has no approval setup, this node will fail.
> - If the approval was already started, it won't change. The node will wait until the document got approved or rejected.
> - If the document was already approved or rejected this node will fail.

Start Approval Stage

Use this node to start an approval stage in a workflow and build a staged approval. You can set up an approval stage in the workflow similar to a stage in the Approval Setup page in **Projects**.

You may have multiple stages of approval required within the same approval cycle. In such cases, you can set up stages within the approval cycle to approve a document from different stakeholders.

Parameters

Stage Setup

The stage starts when the incoming document is received for the stage. The document is sent to the appropriate output pin based on the outcomes defined for the stage.

Note: If a document version is deleted while the node is waiting, the document is sent to the error pin with the message **Document version is deleted**.

Approval stage has to be defined with the required information like:

- **Stage Name**

  Provide a name to the approval stage. This is a mandatory field.

- **Approver**

  Roles for a particular approval stage have to be assigned before the stage begins or else the workflow will fail. Smart names can also be selected for this field. This field supports all possible user options like User, All of Role, All of Role – One of Group, One of Role, One of Group, All of Group and you can also have multiple SmartName fields and also multi- values for this field.

- **Allow Conditional Approval** Tick the check box if conditional approval has to be allowed. Read more about it *here*

- **Allow Forward Approval Link** Tick the check box to allow forwarding the document for approval. Read more about it here.

- **Inherit Previously Submitted Approvals** Tick this check box to inherit the approvals. To know more, read about it *here*

- **Keep Forwarded Approvals** Tick the check box to retain the forwarded approvals when a new version is uploaded. Read more about it *here*.

- **When one User Rejects** Specify how document rejection should be handled. To know more on this option read *here*

- **Require review state on all annotations** Specify how the review on annotations has to be handled by approvers. To know more, read *here*

Due Date

Specify the due date for the approval stage. To know how to set up, read *here*

Approval Settings

Specify the setting for approval in this tab

- **When a new version is uploaded** You can read how to set up *here*

- **Approval Master** You can read on how to set up *here*

- **Email Notifications** You can read on how to set up Email Notifications *here*

When a New Version is uploaded

When a document's approval cycle is started, and a new version of the document is uploaded, then the approval cycle is automatically stopped. You can define what happens when the approval cycle restarts.

In the **When a new version is uploaded** setting, choose either:
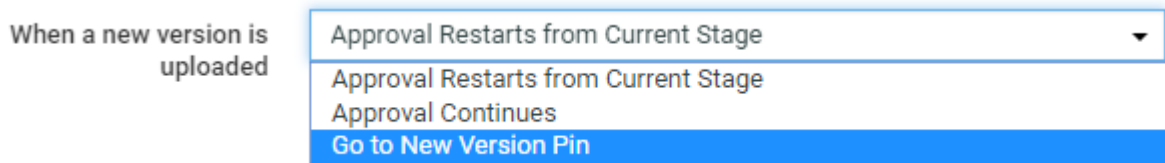
- **Approval Restarts from Current Stage** to keep the approval stages already completed (typically approved) and restart the current stage. People who already approved / rejected the document in the current stage will have to evaluate it again.
- **Approval Continues** to keep all the approval actions already done. Only people who have rejected the document will see it again (to check whether the reason for their rejection was corrected).
- **Go to New Version Pin** redirects the uploaded new version of the document to the **New Version Uploaded** output pin if the approval has already started. When no rule is specified, then the approval of the document is in Waiting for workflow status.

   The approval rule will be initialized, when the workflow starts an approval stage. Depending on the stage that is started next, the inheritance of Stages/ Approvals is determined as follows:

   - **A new stage that was never executed before**: All stages are inherited, except for the stage that triggered the **Go to New Version Pin**.
   - **A previous stage**: All stages are inherited up to the one that needs to be started.
   - **Same Stage**: All previous stages are inherited.

Note:

- It is not possible for a document to go through two **New Version Uploaded** output pins in a row. This is to prevent endless loops in the workflow. **Go to New Version Pin** setting in the second stage will be overruled. In such a case, the stage is restarted.
- The new version can also be uploaded, when the approval is in a **waiting for workflow** state where approval is required, but the workflow is pending completion of a manual task.
- When the document was already in a **waiting for workflow** status and a new version is uploaded, the new version of the document will also be in **waiting for workflow** status and when entering an approval stage node, the **new version uploaded** setting gets executed in this node.

Finish Approval Cycle

Use this node to finish the approval cycle of the incoming documents and send e-mail notifications. Since there could be many stages in an Approval cycle, a workflow step is designed to determine the completion of the approval cycle. The output pin of this node denotes the final approval status of the document.

E-mail notifications:

- **No Notifications**: No e-mail notifications will be sent when the Approval Cycle is completed.
- **Default Notifications**:

  E-mail notifications are sent according to the notifications setup defined in the Document Approval Setup, Folder Approval Setup, Project Notification Setup and System Notifications setup, each time falling back to the next level if that level is set to default.
- **Custom Notifications**: Choice to send an e-mail notifications to the **Project Manager**, **Involved People** and/or **Project Members** when the approval cycle is completed.

Documents with similar approval statuses are directed to the same output pin.

For example, two documents arriving in one token with final approval status as **Approved** would be shown in the Approved output pin. The error output pin is split per document to view the error for each document.

The final approval status of the document shown in the output pin is

- **Approved**: If the final status of the incoming document is approved
- **Approved with conditions**: If the final status of the incoming document is approved with condition
- **Rejected**: If the final status of the incoming document is rejected.
- **New Version Uploaded**: When a new version of the document is uploaded after all the approval stages are completed then the document is directed to this pin.
- **Error**: For example, when there is no incoming document.

Submit Workflow

Use this node to launch a workflow in Automation Engine from WebCenter.

During execution this node will:

- connect to Automation Engine using the specified **Workflow Connection**.
- launch the workflow in the specified Automation Engine **Job / Container**

The incoming documents will be processed according to the **Send incoming Documents** option setting. If there are documents to be sent, they will be copied to the specified Job or container and will be added to the start node of the workflow in Automation Engine.

When the workflow is finished in Automation Engine, the WebCenter node will continue over the green output pin. During execution, the workflow feedback shows that it is running on Automation Engine.

Note: Your Administrator must have configured a **Workflow Connection** of the type **Project/Workflow (JDF)** for this to work. See *Configure Workflow Connections* in the Administration Guide.

Parameters Tab
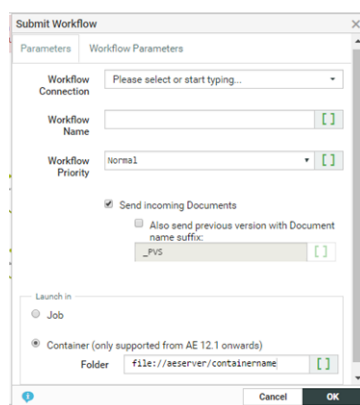
Workflow Connection:

Select the JMF type workflow connection (configured by your Administrator) from the drop down. Read in: *Configure Workflow Connections*

Workflow Name:

Enter the name of the Automation Engine workflow to launch. You can use SmartNames.

> ⚠ **Attention:** The **Workflow Name** is case sensitive.

Workflow Priority:

This parameter allows you to launch a workflow with a Normal, Low and High Priority. The default option is Normal. The value is represented as sw.priority.low, sw.priority.normal or sw.priority.high if you are using SmartNames.

Send incoming Documents (by default):

Check this to send the **incoming documents** to Automation Engine (e.g. because of an earlier submit or a sync operation).

Select the check box **Also send previous version with Document name suffix** to send the previous version of the file as well.

> **Note:** Specify the mandatory suffix when enabling this option. The previous version is submitted only when a suffix is specified. For example, if the name of the file name is file.pdf and the suffix is _PVS, the previous version will be submitted as file_PVS.pdf.

Choose if you want to launch the Automation Engine workflow on the files in:

- an Automation Engine **Job**; in this case, enter the **Orderid** and the **Sub-orderid** of that job.

- an Automation Engine **Container** (only if you use Automation Engine 12.1 or newer); in this case, enter the path to the container in the **Folder** field, in the format `file://aeserver/containername`.

You can use SmartNames in all of these fields.

Workflow Parameters Tab

To map your WebCenter **Project Attributes** to the Workflow parameters in Automation Engine, specify them in this tab.

> **Note:** This is only supported if you use Automation Engine 12.1 or newer. Read also *Add Documents from Automation Engine*
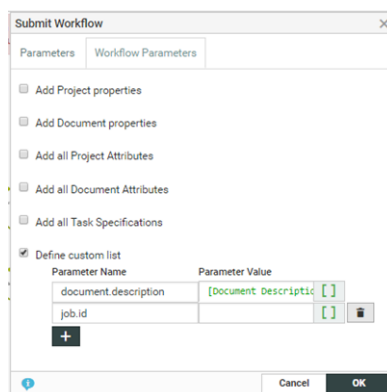
You have the following options that you can enable:

- **Add Project Properties** to add the WebCenter **project properties** as Automation Engine **workflow parameters**.
- **Add Document Properties** to add the project properties as parameters.
- **Add All Project Attributes** to add all the project attributes. They will be available as **project.attributename** in Automation Engine.
- **Add All Document Attributes** to add all the document attributes. They will be available as **document.attributename** in Automation Engine.
- **Add All Task Specifications** to add specifications.
- **Define Custom List** to type in the specific Parameter Name and specify their values manually in the resulting columns below.
  - In the left column, specify the workflow parameter name. It will show up as that workflow parameter name in Automation Engine.

    Note: This list will overwrite the previously added values (For example, **add all project attributes** as "project.attributename").

  - You can type in a text value or use SmartNames to specify the workflow parameter in the right column.

Note:

The default behavior is to send no parameters unless specified. However, if you had enabled the **Map attributes to Workflow Parameters** in a previous version, all the above options except the **Define Custom List** are sent by default.

Manually force the node to an output pin

Any user with **Change Task** rights can force a node to an output pin. To force the node to the output pin, right click on the token of a running workflow node and choose either

1. **Force to Completed pin**: This will put the token on the green completed pin.
2. **Force to Error pin**: This will put the token on the red error pin.

   When one of the option is chosen, a confirmation window appears and the action is logged in the project history.

   This feature is useful, when the feedback from Automation Engine is not received, and you want to let the WebCenter workflow continue after some manual correcting actions are done.

Sync Workflow

Use this node to sync the current WebCenter project with the Automation Engine **job** configured in your *Workflow Connection*. This syncs the WebCenter project data with the Automation Engine job parameters.

This node uses the synchronization settings from the project/template setup by default. However, you can setup alternative synchronization settings in the **Sync Settings** tab.
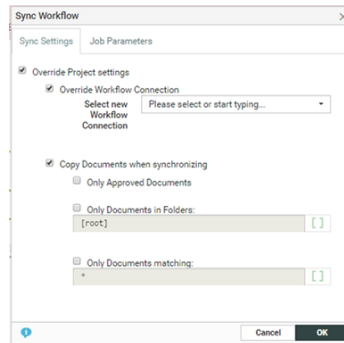
To change the project settings:

- Enable **Override Project Settings** and configure the following settings:

  - To associate the workflow with a different **workflow connection**, select **Override Workflow Connection** and **Select new Workflow Connection** from the drop-down.

    Note: This drop-down lists all the connections listed on the **Project** > **Configure** > **Workflow Connection** page.

  - For overriding the copy document settings, enable **Copy Documents when Synchronizing** and select the specific setting:

    - **Only Documents in Folders**: Select this to specify one or more folders in this editable field. Use ; as the separator. Only the documents in the specified folders will be synchronized.

      Note:

      - If one of the specified folders does not exist in the project, the node will skip the workflow synchronization.
      - To specify the root, leave the field empty or as "[root]".
      - You may also specify the folders using wildcards. For example, A* will match the folders A, ABC, and Amadeus.

    - **Only Approved Documents**: Use this setting to synchronise only the approved documents.

    - **Only Documents matching**: Type in the names of the specific documents that you want to synchronise. This field accepts wild cards.

      Note: If **Copy Documents when Synchronizing** option is not checked, no documents are synchronized.

Specify the WebCenter **Project Attributes** that should be synchronized as Job Parameters in Automation Engine. Configure the settings in the **Job Parameters** tab:

- **Push All (default)**: All the **Project Attributes** from the project attribute category are pushed as **Job Parameters**.
- **Push None** for not pushing any **Project Attributes** to Automation Engine
- **Push Custom List**: When you select this, you see two columns and two buttons:
    - Select from **All Project Attributes** to add one or more attributes listed in the column. The **>>Add All (Filtered) Attributes** adds all attributes listed in the column.
    - Select from **Selected Project Attributes** to remove one or more attributes listed in the column. The **<< Remove All (Filtered) Attributes** removes all attributes listed in the column.
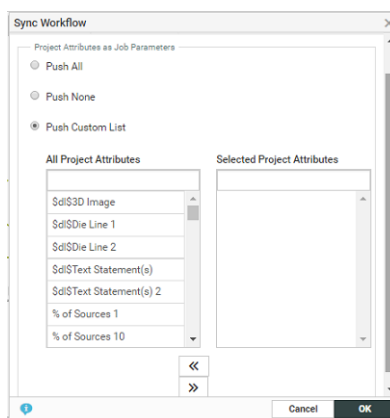
Note: The **Sync Workflow** node will push only the attributes that are assigned to the WebCenter project in which the workflow is executed. If the attributes specified in this node are not assigned to the **Project**, these will not be pushed.

Executing the node results in the project being synchronized with Automation Engine as per the settings from the node and the Project in which the workflow runs. The workflow will wait until the synchronization is finished and show an error in case this fails.

Warning: When you push a custom list of attributes to Automation Engine as job parameters, you may lose some of the existing job parameters. This happens if you are using the old JDF policy on Automation Engine. Read about the JDF policy in: *http://help.esko.com/docs/en-us/ suite-general/14/otherdocs/AE_Job_Parameter_Policy.pdf*

Manually force the node to an output pin

Any user with **Change Task** rights can force a node to an output pin. To force the node to the output pin, right click on the token of a running workflow node and choose either

1. **Force to Completed pin**: This will put the token on the green completed pin.
2. **Force to Error pin**: This will put the token on the red error pin.

    When one of the option is chosen, a confirmation window appears and the action is logged in the project history.

    This feature is useful, when the feedback from Automation Engine is not received, and you want to let the WebCenter workflow continue after some manual correcting actions are done.

Sync Chili Variables

You can use this node to sync the attributes with the chili document.

When the node is executed for incoming CHILI documents, only those CHILI variables with data type **Text** and **Image** are processed.

Ensure that the referenced text content documents in the incoming chili document contains the attribute **ARTWORK_VARIABLE** or the chili variables in the incoming document is in the format

```
<element type>_L<x>_I<y>
```

where x and y are integers.

Basic Attributes are also synced if CHILI Variable name matches exactly with the Attribute Name. For Images, the variable name of CHILI image file should match with **ARTWORK_VARIABLE** present in the attribute category.

A new document version and a new thumbnail of the chili file is created after the workflow is successfully completed.

Table Content Preview Report

This node allows you to generate a pdf report of the Table content document selected in the workflow.

The report is generated based on the preview of the document which is saved in the selected target folder specified in the node. You can also select the **Generate separate report per language** option to generate language specific reports.

When multiple Table Content Documents are received by this node, then separate reports are generated for each input document.
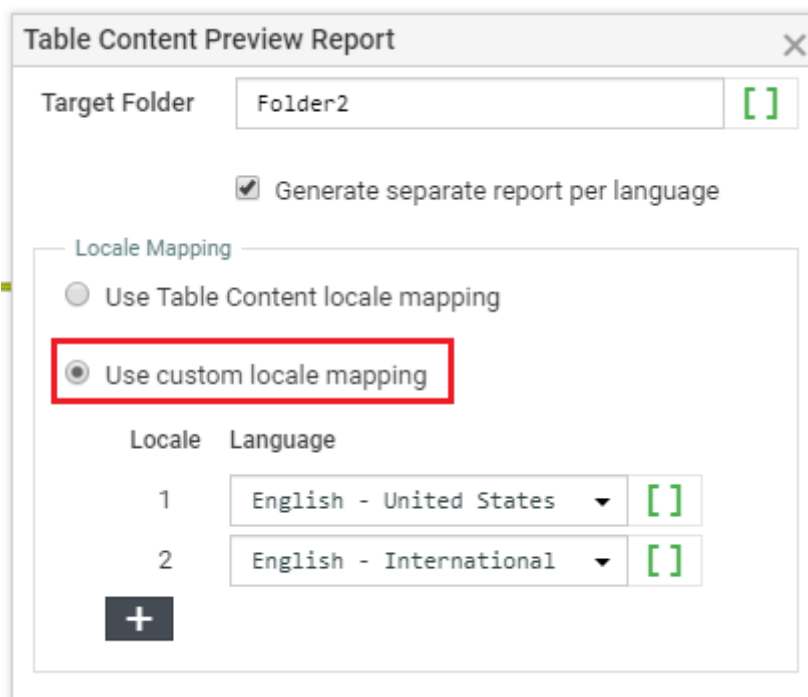
Report generated is named as **<name of input document>_report.pdf**. If the report is already present, then new version of the report is created.

And when the report is generated for specified languages, then it is named as **< name of input document>_report_<language code>pdf.**

By default, **Use Table Content locale mapping** is selected, and the locale mapping is done as per the incoming table content document for which report is generated. You can choose to change the order of language mapping in the incoming table document by selecting **Use custom locale mapping** and choose the languages for each locale number for which report has to be generated.

Update Text Document

This workflow step allows you to specify or update Text Document properties such as:

- Text Content
- Role Mapping
- Languages
- Approval

423
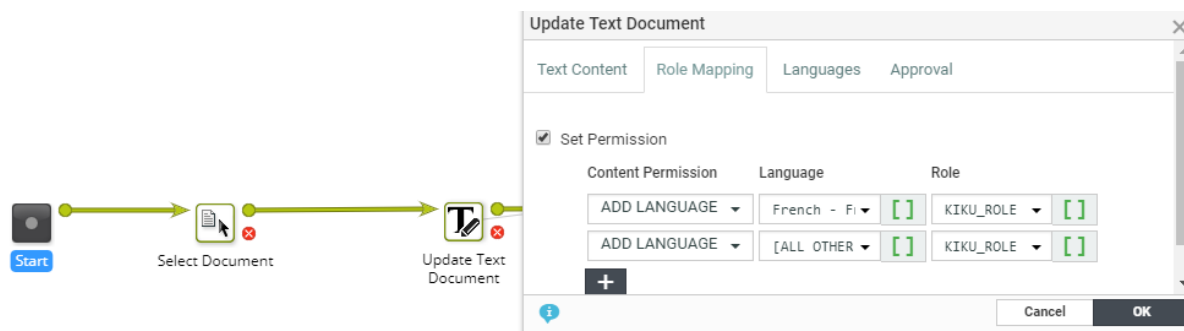
Text Content

In this tab, specify the properties in the **Text Content Field** and the corresponding values in the SmartName supported **Value** field.

You can specify or update the following properties and their values in this tab:

- the **Element Type** of the Text Document. You can select from the list of text content element types supported in the system.

  > **Note:** The **Element Type** drop down is configured as a *List*. Read more in: *Text Content Element Types*

- **Invariant** : Specify this as `True` if translations are not required for a particular Text Document.

  > **Note:** If the Invariant is set as True, then all translation languages will be removed from the incoming document.

- the **Approval Setup**:
  - **Default**: Only one member has to approve. For example, if the Approver permission is assigned to two Roles, only one member (from any Role) has to approve.
  - **One of role**: One member of each Approver Roles (assignees) has to approve to complete the signing off. In case a Role is assigned to several members (groups or users), any Group member or user from that Role can approve.
  - **All of Role – One per Group** : At least one member from each Role-Group has to approve. If there is an individual User, then he or she has to approve as well.

- **Type** of Text: Simple or Rich Text. If the Type changes from the existing type, the document status will become **Draft**.

- **Inherit Content From** :

  You can choose to inherit content one of the options below

  - **Default**: Will inherit the content from the language that is configured to follow in the Language List.

- **None**: Will not inherit content from any language in the workflow node. However the user can manually change the language at the element level in the document.

- **Master Languages**: Can choose any of the languages from the master language list.

By default **Disable** is chosen which will not allow Inherit content.

Role Mapping

This tab allows you to map Content Permissions to Roles. To specify the new set of permissions or to specify permissions in a workflow:

1. Enable **Set Permission**. This will show the Permission Settings.
2. Select the **Content Permission** (Add Language, Editor, Approver or Content Manager).
3. Set the corresponding **Language** from a list of all the text content languages supported in the system.

   Select [All Other Languages] to specify permissions and role mapping to all languages without permission assignment in one go.

   Note: The Content Manager has permissions to all languages by default and cannot be specified per language.

4. Specify the **Roles** corresponding to the selected Content Permissions. The drop-down lists all Roles configured in the system.

Languages

This tab lets you:

- add and remove languages to the document or Inherit content from the language configured in document
- update or create actual text content

To do an **Action**:

1. Select **Language** – You can either select from the drop-down (listing all the languages present in the system) or use a SmartName in this field.

   Note: If your SmartName points to a multi-value attribute, it will resolve to multiple values.

2. Specify the **Action**: Choose from **Add/Remove/Update/Inherit**.
3. You can add a condition where the workflow node can inherit/add/update/remove elements. There may be a combinations of different conditions that may be given.

Condition	Action Possible
Always	Add, Remove, Update, Inherit
New Value is not empty	Add, Update, Inherit
Current value is empty/not available	Add, Update, Inherit
Current value is empty	Remove, Inherit
Current value is not available	Inherit
Current value is empty and new value is not empty	Add, Update

4. Define the corresponding **Value**. This is the field where you can type in the actual text content.

> ⚠️ **Warning:** If a language is specified in more than one row, only the settings specified in the last row will be valid.

Approval Tab

This tab allows you to set **Approval Status** (per language) via workflow.

> **Note:** You can use SmartNames in this step and if your SmartName points to a multi-value attribute, it will resolve to multiple values.

1. Select **Language** – You can either select from the drop-down (listing all the languages present in the system) or use a SmartName in this field.
2. Specify the **Status**. You can choose from **Draft**, **Pending SignOff**, **SignOff Rejected** and **Signed Off**.

Update Table Content

This workflow node allows you to specify or update Table properties and Table values. You can add:

- Role Mapping
- Languages
- Approval
- Add / Remove / update/ inherit elements and set values for nutritional facts elements

Settings

In this tab, specify the properties in the **Field** and the corresponding values in the SmartName supported **Value** field.

You can specify or update the following properties and their values in this tab:

- **Invariant** : Specify this as `True` if translations are not required for a particular Document.

- **Approval Setup**:

    - **Default**: Only one member has to approve. For example, if the Approver permission is assigned to two Roles, only one member (from any Role) has to approve.

    - **One of role**: One member of each Approver Roles (assignees) has to approve to complete the signing off. In case a Role is assigned to several members (groups or users), any Group member or user from that Role can approve.

    - **All of Role – One per Group** : At least one member from each Role-Group has to approve. If there is an individual User, then he or she has to approve as well.

- **Inherit Content From** :

    You can choose to inherit content one of the options below

    - **Default**: Will inherit the content from the language that is configured to follow in the Language List.

    - **None**: Will not inherit content from any language in the workflow node. However the user can manually change the language at the element level in the document.

    - **Master Languages**: Can choose any of the languages from the master language list.

    By default **Disable** is chosen which will not allow Inherit content.

- **Type**: Simple or Rich Text. If the Type changes from the existing type, the document status will become **Draft**.

Values

This tab lets you add / remove /update table statements and their values. Use a single row per **element** or statement.

- **Element** – The table *Element Type* to be added or removed. This field is a smartname dropdown populated with the list of table element types supported in the WebCenter.

- **Instance Sequence** – Specify the instance sequence number. This number indicates how many occurrences of an Element is present in a Table. The default value is 1.

- **Language** – You can either select from the drop-down (listing all the languages present in the system) or use a SmartName in this field.

  If the specified SmartName resolves to multiple languages, then the specified configuration (from that row) will be applied to all of them.

- **Action**: Choose from **Add** / **Remove** /**Update**/ **Inherit** .

- **Condition** You can add a condition where the workflow node can inherit/add/update/remove elements. There may be a combinations of different conditions that may be given.

Condition	Action Possible
Always	Add, Remove, Update, Inherit
New Value is not empty	Add, Update, Inherit
Current value is empty/not available	Add, Update, Inherit
Current value is empty	Remove, Inherit
Current value is not available	Inherit
Current value is empty and new value is not empty	Add, Update

- **Value** – Field where you can specify the actual content. You can enter the data or use SmartNames.

Tip: Use List SmartNames(pointing to an Excel sheet based List) to provide content in a smart way.

Note: If you specified the action as **Add** for an existing value, the value is updated. If the element does not exist in the document, the element and the value will get added. However, if the action is **Update** and the element does not exist, the row is ignored.

Note: If you are updating a SmartName table using this node, the value from this node will replace the SmartName in the table.

Approval Tab

This tab allows you to set **Approval Status** (per element, per instance and per language) via workflow. This allows you an automated way of approving the nutrition fact statements.

Note: You can use SmartNames in this step and if your SmartName points to a multi-value attribute, it will resolve to multiple values.

1. Select the **Element** or the statement.
2. Specify the **Instance Sequence** of the element.
3. Select **Language** – You can either select from the drop-down (listing all the languages present in the system) or use a SmartName in this field.
4. Specify the **Status**. You can choose from **Draft**, **Pending SignOff**, **SignOff Rejected** and **Signed Off**.

Upload to Asset Management System

The *Asset Management* configurations allow you to push a document to the asset management system. The **Upload to Asset Management System** node allows you to specify the Asset Management connection or a cloud connection and their metadata mapping.

Specify the Parameters

Choose the **Asset Management Connection** from the searchable drop-down. You can choose from either

1. **Esko Cloud connection** which has an Archiving service connections that are already set up in the system by the *admin* user.

   Then the Workflow node allows you to configure the following parameters:

- **Only archive old Versions of a Document** when this option is selected, the versions uploaded into the Esko Cloud are limited to all the versions that are no longer being linked to from within a Project in WebCenter.

  For example, if there is a#Document with 3 versions: version1, version2 and version3#and two Projects

  ProjectA and **ProjectB** where **ProjectA**#contains Document version3 and

  ProjectB contains Document version2.

  On executing this workflow node, only the Document version1 (oldest) is uploaded to the cloud.

  When this option is not selected, all versions of the Document are uploaded to the Esko Cloud.

- **Remove Document from#Filestore#after upload to Esko Cloud**: When this option is chosen, (selected by default), the#documents are removed from the#File store on successful upload to the Esko Cloud.

  Note: At a time, only one Document#version can be uploaded to the#Esko#Cloud and an uploaded version cannot be overwriten.

2. **Asset Management Connection**

   Note: If you leave this field blank, the workflow will look from an Asset Management system that acted as the source for the incoming document. This step will fail if it cannot find any Asset Management configuration.

   Define the DAM specific parameters

- Asset Path
- Specify if the zip files should be expanded on the MediaBeacon server on upload.

- Specify if it is a **New Asset** or a **New Version** of an existing asset.

- Specify the **MediaBeacon** Namespace and any parameters with its value.

Wait for View Files

With this node, you can

- have view files available before starting an approval cycle or starting a task
- detect warnings in the view file generation.
- re-generate view files after they are flushed

For example, before starting an Approval Cycle.
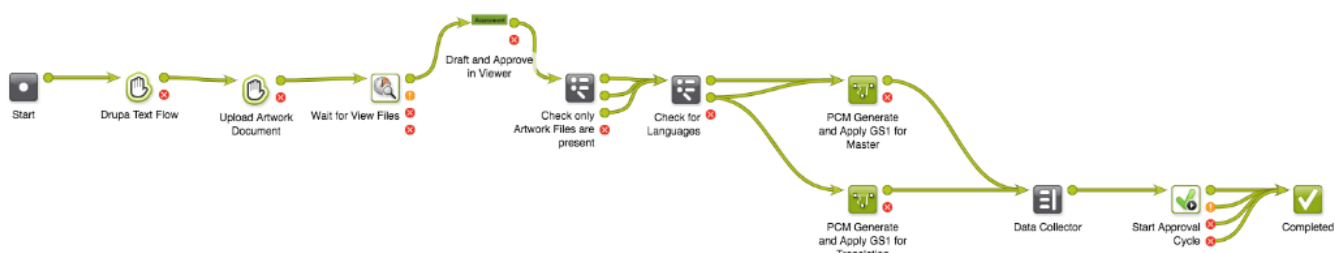
During execution, the node waits for the view file generation of the incoming documents and proceeds to one of the output pins according to the view files status:

- If the view files are available or if the document is not viewable, the document is sent to the **Succeeded** output pin

- If the view files are available but if it contains a warning, the document is sent to the **Warning** output pin

  Note: The Task Details of the view file generation has the text "Task(s) generated warnings"

- If the view file generation failed, the document is sent to the **Failed** output pin.

- If there are no incoming documents, the node fails and the token is sent to the **Error** pin.

If there are multiple documents in the incoming token, the node will wait until the status of all the document(s) is known, and then proceed to the appropriate pins.

Note: If the view files were deleted, the node will re-start the view file generation first before waiting for its status.

Manually force the node to an output pin

Any user with **Change Task** rights can force a node to an output pin. To force the node to the output pin, right click on the token of a running workflow node and choose either

1. **Force to Completed pin**: This will put the token on the green completed pin.
2. **Force to Error pin**: This will put the token on the red error pin.

   When one of the option is chosen, a confirmation window appears and the action is logged in the project history.

Wait

Use this node to pause the workflow for a certain amount of time (for example to wait for a user action). The next node will start processing after the wait time is over.

Parameters

Release date:

By default, this is set to the current date (using the SmartName `[Current Date]`). You can change it using any SmartName that resolves to a date (not only the SmartNames from the **Date** category but also for example an **Attributes** or **Specifications** category SmartName resolving to a date).

Note: When using an attribute or specification SmartName, the attribute category must be set on the project in which you run the workflow, or the specification must be set on the workflow task. See *Project and Document Attributes* in the Administration Guide for more details about attributes, restricted sets and attributes categories.

In **Days offset**, **Hours offset**, **Minutes offset** and **Seconds offset**, you can add a number of days, hours, minutes and seconds to wait after the **Release date**. For example, if you set the **Release date** to `[Current Date]` with an **Hours offset** of 2, the node will pause the workflow until two hours after the workflow was started.

You can use SmartNames in all these parameters.

Select **Count only working days** if you are setting the node to wait a number of days and you only want to count business days. For example, if you set it to wait two days and start it on a Thursday, it will start again on the Monday after that. This is selected by default.

Manually force the node to an output pin

Any user with **Change Task** rights can force a node to an output pin. To force the node to the output pin, right click on the token of a running workflow node and choose either

1. **Force to Completed pin**: This will put the token on the green completed pin.
2. **Force to Error pin**: This will put the token on the red error pin.

   When one of the option is chosen, a confirmation window appears and the action is logged in the project history.

15.14.6. Task Types

A **Task Type** can be either **Manual** or a Task Type with a **Workflow**. Both types can be added to a workflow from the canvas.

The **manual** tasks require human intervention and they can be used as either individual tasks or as workflow nodes.

Editing a Task Type

You can edit a Task Type in a workflow by double-clicking on a node and specifying details in the **Edit Parameters** dialog. This dialog is task specific and has SmartNames-enabled tabs:

* *Parameters*

* *Specifications*

* *Due Date*

* *Iterate*

* *Notifications*

* *Output*

Note: Click the ⟦⟧ icon to use SmartNames in this node.

Parameters Tab

Fields	Description
Name	The name of the task. By default, the name will be derived from the Task Type. When a task is executed multiple times, the task name will automatically get the suffix _1, _2, and so forth.
Description	Type in a fixed description for the task assignee.
Status	The initial status of the node. By default, the drop down will have the following statuses: • **Created** • **In Progress** • **Completed** **Note:** It will list all the **statuses** configured in the **task type**. Read in: *Add Task Statuses* on page 324
Update the task if existing	By default, this is off. The task will create a new a task.

Fields	Description
	Enable this to update the task if it already exists. If this happens, the task will get back from a completed status to an in-progress status.
Assignee	Specify the task assignee: • **Select Role** (Default): • **Select Group** • **Select User** Read more below:

Task Type Assignments

- **Select Role** (default): You can select the assignee from a SmartName enabled drop down with all the roles in the system (visible to the current user):

  - **Project Manager** (default): The project manager of the project containing the workflow.

  - **Project Creator** : The user who created the project.

    Note: In case the project was created earlier than 18.1 or when the project creator does not have access to the project, and the creation of task fails.

  - **Sales Person**: The sales person of the project in which the workflow runs.

    Note: The **Sales Person** should be invited to the project.

  - **Workflow Master**: User/group/role to which the workflow is assigned (task assignee of the workflow task).

  - All other configured roles visible to the current user.

  Use the **Assign To** field to specify the iteration settings for the task:

  - **One of Role** setting for creating and assigning one task for the role.

  - **All of Role – One per Group** setting for creating and assigning individual tasks for each group / user in that role. Only one task is created and assigned per **group**.

  - **All of Role** setting to create and assign individual tasks for each unique user in the role (including users in groups assigned to the role).

- **Select Group**: You can select the assignee from the drop down listing all the visible groups. Specify the **Assign To** field as:

  - **One of Group** to create one task assigned to the group.

  - **All of Group** to create and assign tasks for each user in the group.

- **Select User** from the drop down of all the users visible to the current user. The user should be invited to the project.

Note: The role / group /user should be invited to the project. If you are using a SmartName or free text, the resolved role / group name should be invited in the project.

> **Note:** If the Project Manager or the Workflow Master is role / group, it follows the **Assign To** settings.

If your **Assign To** field settings create multiple tasks, the workflow will wait until all of these tasks are finished to progress to the next step.

Specifications Tab

Use this tab to set the values for the task specifications. These values can be either fixed values or selected using the SmartNames.
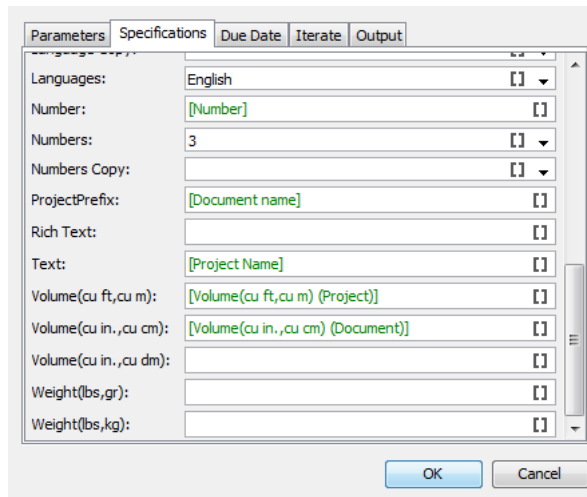
> **Note:**
>
> If you want to see the **specifications** in the **specifications tab** you should add them in the **task type**.

Output Tab

Specify the output documents in this tab. The fields on the Output tab are:

Fields	Description
Add as output	• All task documents: Output all the documents that are attached. • Only new task documents: This excludes all the task documents and the documents that were previously available. This results in the new task documents. **Note:** If there are new versions, these are also considered as new documents. • No documents: Set no documents as output of the task.
Name	Filter the output document by name or document extension. For example, ***_1.pdf** files.
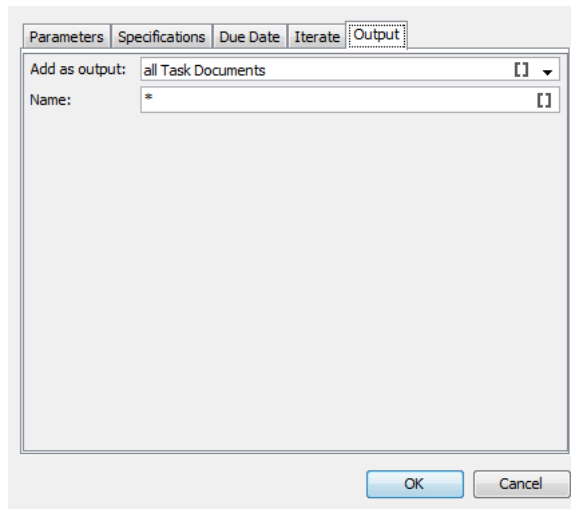
Iterate Tab

You can iterate task creation from a **Task Type** node. The **Task Type** node will create tasks depending on the **Iterator** value.
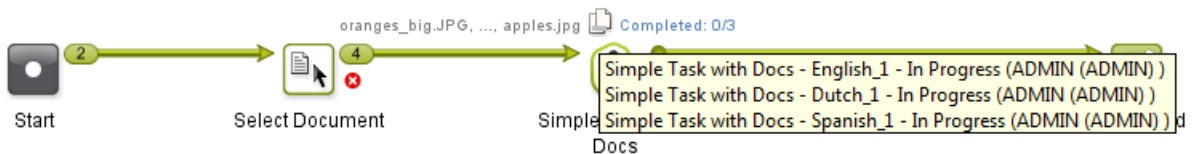
The default option is **Do not Iterate**.

To create multiple tasks over a **Project** /**Document attribute** or a **Task Specification**, select it in the **Iterate over Attribute** field.
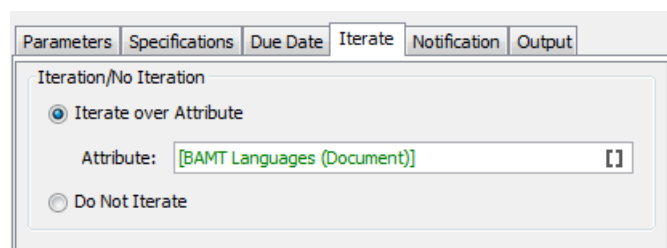
You can select this **attribute** via a SmartName or by manually typing in the attribute. Based on the resolved value of this **attribute**, this node will create the tasks. For example,

• If the SmartNames resolves to a multi-value (text) attribute indicating languages, the node will create tasks based on the language variants. You will get the same result when you type in the attribute values.

For example, if you type in `Dutch | Spanish | English`, the iterator value will be "Dutch", "Spanish" and "English". As a result, there will be three new Tasks corresponding to each language attribute value.

For each **iterator value**, the node will create a task with the value of 'iterator value' filled in as the value for the corresponding parameters.

• If the attribute/task specification is **Integer** type or if the SmartName resolves to an integer or if you type an integer (for example, you type 3), the projects will be created based on these numbers.

For example, if the value resolves to 3, the iterator value will be `1`, `2` and `3`. As a result, this task type will create three new tasks.

Note:

• If the attribute is missing in the Project, you will get an error:

```
Attribute not found
```

• If the resolved attribute is empty, your error message will be:

```
Resolved
              iterate attribute value is empty
```
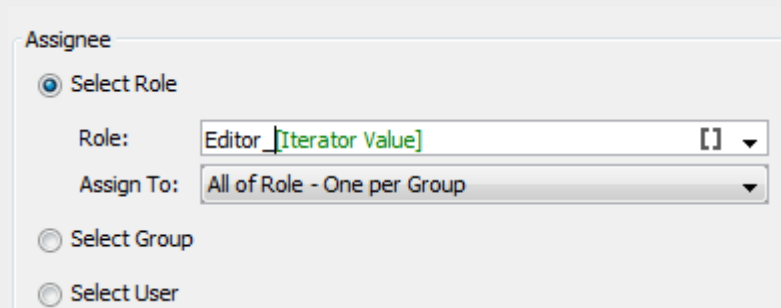
If you iterate over a project attribute or task specification, all incoming documents are added to the tasks.

When you iterate over a multi-value document attribute (for example, `Dutch | Spanish | English`):

• if the incoming document has two values for the `Languages` (the **Iterator**) attribute, `Dutch` and `English`, this document will be attached to the Dutch and English Tasks.

• if you have documents where this attribute is empty, they will not be added to the iterated tasks.

• if you have documents without this **attribute**, they are attached to all the created tasks. However, these documents will be transferred to the output pin (of the task type node) only once to avoid duplication.

Note: The output of this task type node will depend also on the *Output Tab* settings.

Tip: You can use the **Iterator Value** in combination with other node parameters such as **Role**.

If you select multiple assignees (for example, by selecting **All of Role**) for a task, the node will execute the **Iterate over an attribute** function first. Based on the Iterator value and **Assignee**, it will then create tasks for the multiple task assignees (**all of role** in this example).

This allows using the iterator SmartName in the assignee fields for roles and groups. Read in: *Parameters Tab* on page 431.

Notifications Tab

This tab allows you to create and send **Notifications** without adding a *Send Notification* node.

The configuration is almost the same as the *Send Notification* on page 412 node. However, the are extra SmartNames available in this tab to refer to the just created/updated task.

In the **To** field, type the e-mail addresses of the receivers or select them using SmartName [ ] . The following SmartNames are supported:

- Project Manager
- Sales Person
- Workflow Master (the project member who is assigned the whole workflow as a task in the project)
- Groups
- Users
- Roles (the e-mail will be sent to the current holders of this role in the project)
- Current Task Owner (E-mail). Filled in by default.

    Note: This is not available in the **Send Notification** node.

In the **Subject** field, type the subject of the e-mail. The subject can be configured using SmartNames.

In the **Message** field, type the body of the e-mail. You can use the buttons and options at the top of the field to format your message.

Tip:

- Click the [*] icon to use SmartNames (for example to add Attributes, a link to a Document, the Project name or a User name).

- Select some text and click ✐ to create a hyperlink.

- Select the icons ·¶   ¶· to change the text direction from right to left or back when working with languages like Arabic or Hebrew. Use SmartNames **Link to Current Task** from the category **Links** and **Current Task Due Date** from the category **Date**.

Note: This is not available in the **Send Notification** node.

Due Date Tab

Due Date Tab

In this tab you can setup the due date by configuring the following fields according to your needs.

Fixed Lead Time

Specify the **Based on date** as the reference. This field is SmartName enabled and you can use values such as [Current Date], [Workflow Duedate], [Workflow start date] and any date-attribute as the reference.

Also specify the **Planning** as either **Forward** or **Backward**.

The **lead** time is added or subtracted to your reference date depending on this setting:

- If your **Planning** is set to **Forward**, the **Lead** days and hours are **added**.

- If your **Planning** is set to **Backward**, the **Lead** days and hours are **subtracted**.

Percentage Lead Time (Compressing)

Another way to specify the due date is by specifying the lead time in percentage. A percentage of the difference between the current date and the reference date.

The **Based on date** is the SmartName enabled reference date. Use [Current Date], [Workflow Duedate], [Workflow start date] and any date-attribute as the reference.

If your workflow due date is on 27th Thursday and the current date is the 13th,

- The number of days is calculated as 10 working days.
- If your percentage set as 20, the task will add two working days to the current date to calculate the **task due date**.

15.14.7. Workflow Constructs

Workflow constructs are "tools", nodes that help you build the workflow. They help control the flow of data and/or documents through the workflow.

Data Splitter and Data Collector

Data Splitter

Use the **Data Splitter** if you want the next step in the workflow to process each file individually.

You cannot specify parameters for this node. When a *token* arrives with multiple documents, **Data Splitter** will be split them up as separate tokens with a single document.

Data Collector

Use the **Data Collector** workflow control

- to collect all files that travel separately as individual tokens in the workflow and then merge them before sending the group the next step.
- to wait for all files before continuing the workflow.

In the example below, four files arrive at the **Data Splitter** node and are outputted as four tokens with a document each. The **Design** steps (a task per token) collect the design documents and sends it to the **Data Collector**. This step outputs the processed files as a single token to the next step.
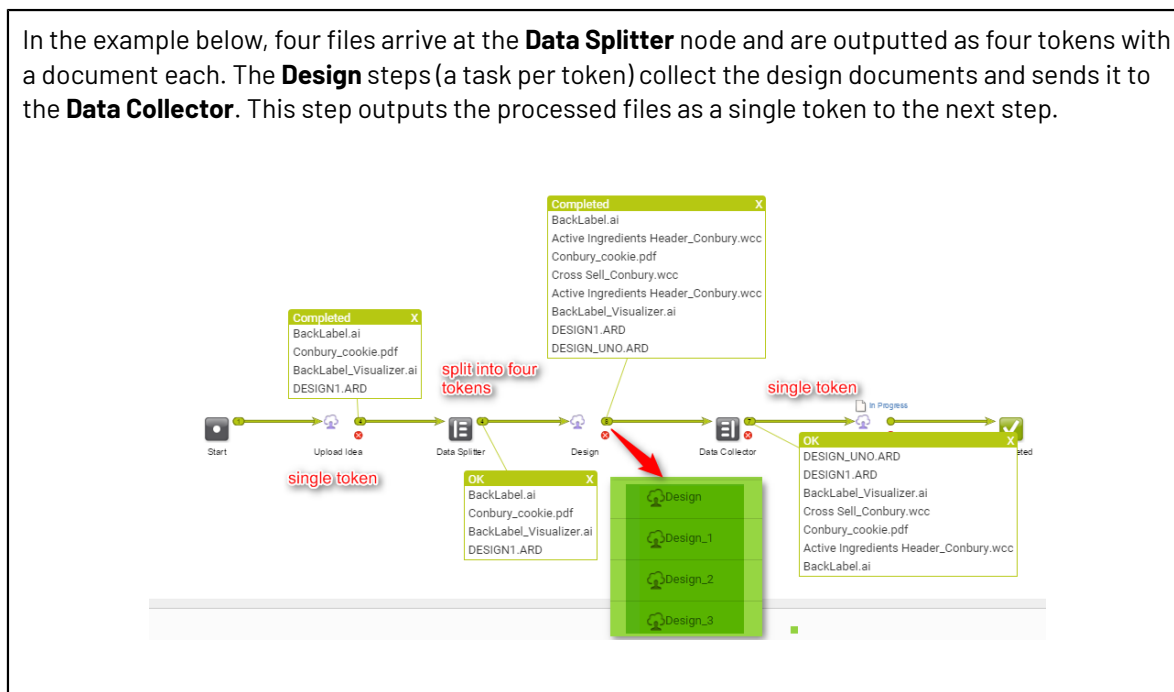
You can set the **Error Policy**:

- to **Fail when errors occur**
- or to **Ignore Errors**

Error Handler

The Error Handler node is a **workflow construct** with a single output pin. You can attach this to any other node.

Note: This node will not accept input connections.

When a workflow node has a failure, the system will check the error dot of the node. If this dot is NOT connected to anything, and there is an error handler node on the canvas, the system will put the token on the output dot of the error handler.

In the example below, if **Start Approval Cycle** fails because there is no approval setup:

- the **Error Handler** will check if the error pin of the node is connected to any other node. When the error pin is not connected to any workflow path, **Error Handler** will receive the error.
- the **Send Error Mail** node will send an e-mail to the person specified in this node.
- after the notification email, the token will be placed on the original node.

The person receiving the e-mail can then take action and retry the approval node.
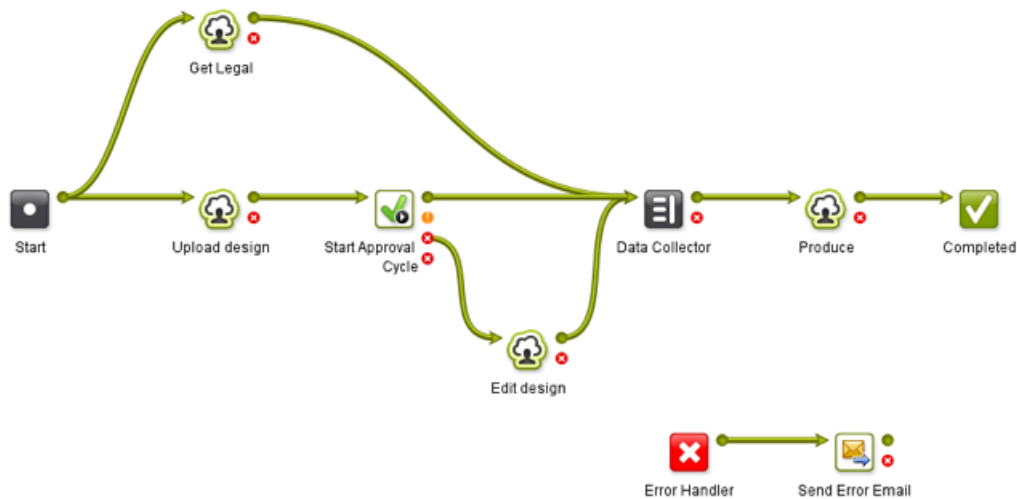
Note:

- Do not connect the **Error Handler** node and its following nodes to the main Workflow to avoid unexpected results.
- You only can add one Error Handler node in your canvas.

Feedback from the Error Handler node

To know the source of the error, click on the output token of the node connected to the **Error Handler**. In the example below, the green output pin of the **Send Error Email** will show the error.

Fork and Join

The **Fork** step automatically tags

- every file running through it
- and all the files that those files are related to in the next steps

This creates a tag for the group.

The **Join** step then groups all the files with the same tag and outputs it together.
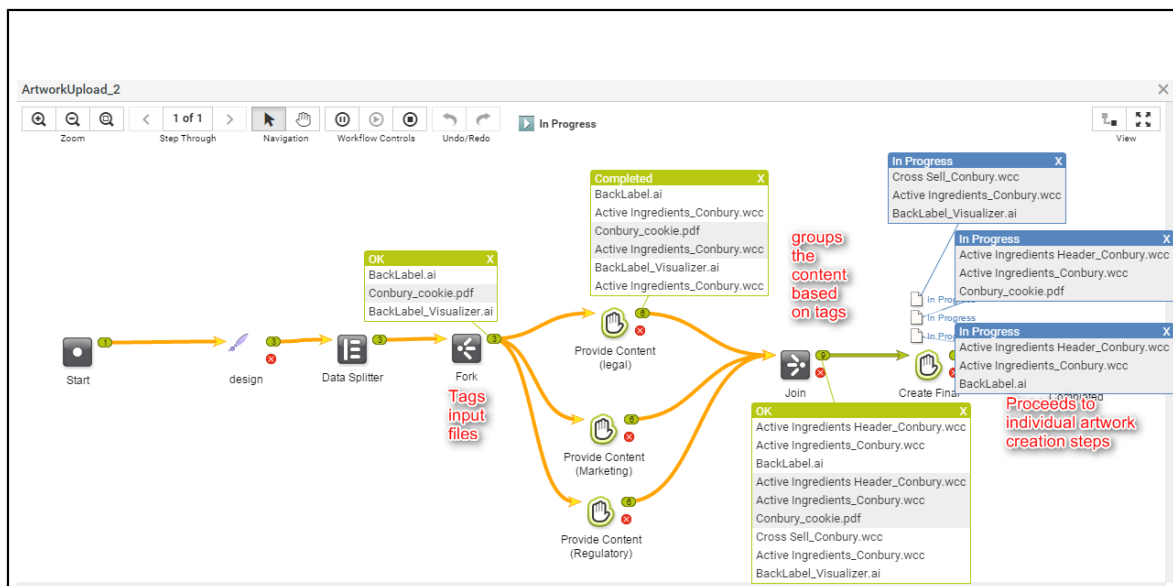
In the example workflow:

- the designer uploads packaging designs (three files). This task will send a single token of three files to the next steps.
- the **Data Splitter** separates them into three tokens
- the **Fork** node **tags** these three files separately
- each design file gets tasks for collecting its own legal, marketing and regulatory content. This results in 9 tasks to gather content.
- the **Join** node groups individual design files with related content using the **tags**. This step will result in three groups of files and three `create final artwork` steps.

Mark and Select

The **Mark** and **Select** nodes are used as a pair. You can use **Mark** to tag files in the workflow and use **Select** to select those files later in your workflow.

You can have several pairs of **Mark** and **Select** in your workflow. By default, the tags will be set as **tag-1**, **tag-2**, etc.

Mark

To specify your own **tag**, double-click the node and enter the tag in **Mark all incoming items with tag** field.

Select

You can use the drop-down in the **Select all items with tag** field to specify the **tag** for this node. The drop-down list will contain tags specified during the **Mark** step.

Router

The **Router** workflow control serves to automatically decide the route that your workflow (tokens) should follow.

When a workflow arrives at this node, the workflow will continue over one of the configured output pins based on the specified rules. You can also create SmartName powered rules for routing.
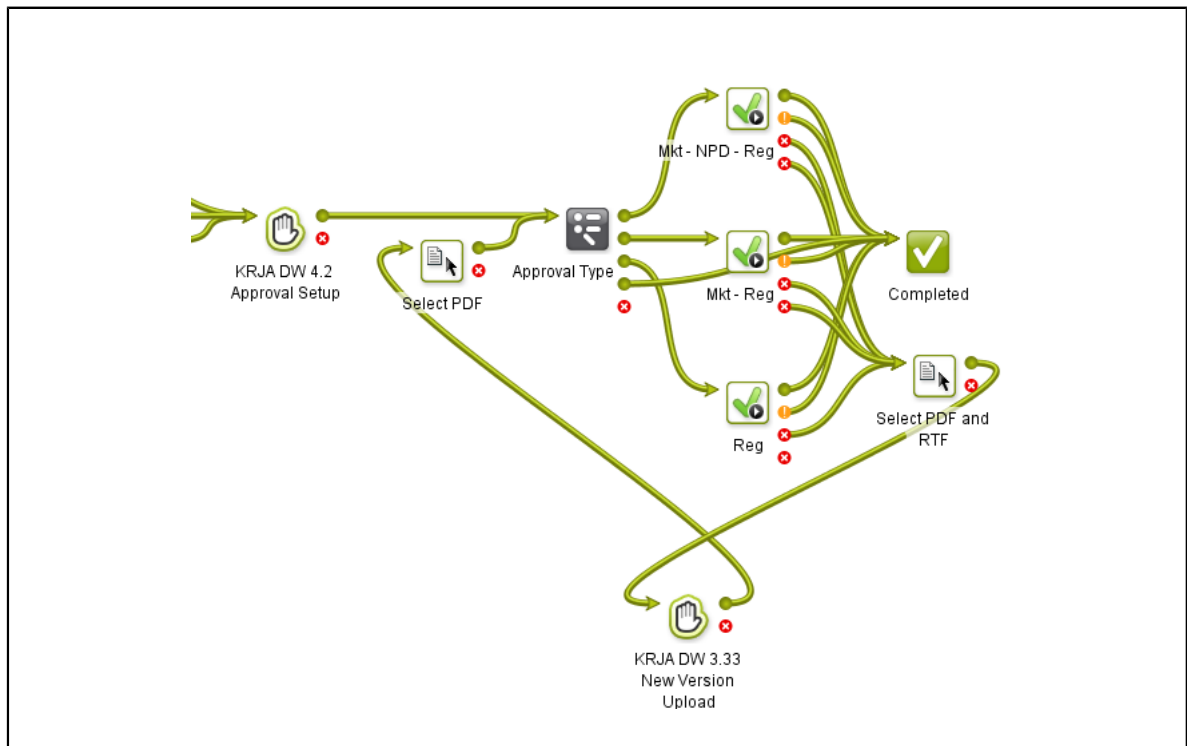
The screen shot above shows how to route a document through different paths depending on its **project attribute**. The router decides which department should approve the document based on this project attribute.

• These are the settings in the Router:

The rules were defined based on the attribute values. The **Route to** names correspond to these values.

Note: The rules are executed from top to bottom. Their order can be changed with **Move Up / Move Down**. The last rule, **no match** will be applied when the other options are not applicable. This will result in **Error** or a custom label.

Routing can be based on many different criteria (see the list below).

You can make all of them except the **Project Status Case sensitive**. Enable this option to match the exact case.

Note: The leading and trailing spaces are always ignored.

Adding and deleting rules

You can **Add** or **Remove** rules. Use the options on the right hand side.

To **Add** a rule:

1. Click the **Add** button. For each additional rule another output dot is added to the node.
2. A new line appears under the current selected row (**no match** always stays at the bottom of the list). Select the operator and value for your rule.

Note: The name of the output will be the same as the matching value by default. However, you can edit the name.

3. You can choose **Move Up** or **Move Down** to change the order of your rules, except for the **no match** rule. The **no match** rule stays at the bottom.

Tip: You can also set the same output token for multiple rules. To do this, select the same from the drop down The node will then have less output dots than there are rules.

To **Remove** a rule:

1. Select the rule you wish to remove.
2. Click the **Remove** button.

It is not possible to delete the **no match** rule.

Routing on Text Content Properties
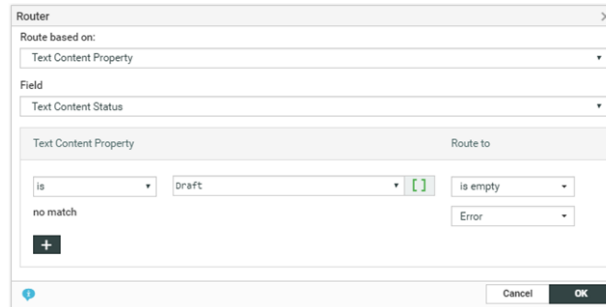
Routing on Text Content Properties can be setup during execution, when setting main routing dropdown on Text Content property, the Field selector allows following values:

Depending on the Text Content property, different options appear in the rule.

The **Text Content Fields** become available only if PCM license is enabled:

- **Text Content Status** : this is the overall status of a Text Content document. Options available are Draft and Signed Off

- **Text Content Element Status**: This is a status of a particular language that needs to be selected from language drop down. Options are Draft, Pending Sign off, Signoff Rejected and Signed off.

- **Element type**: All the Text Content element types supported in the system

- **Approval Type**: Default, All of role, one per group and One of role.

- **Invariant**: True or False

- **Note:**

  Two rules apply to text Content Properties:

  - Is valid if the Text Content Property value equals the value in the drop down field of the rule
  - Is not valid if the Text Content Property does not equal the value in the drop down filed of the rule.

- When a workflow comes in router having Text Content Property rules, the incoming documents will be checked and put on the corresponding output pin as per the routing rules. If you have multiple documents coming in, each of them is routed and put on the right pin.

Anomaly Handling: If there are no input documents, a **No Input Documents** error is put on the error pin. If the Text Content Property cannot be found (for other type of documents), a **Text Content Property not found** error is put on the error pin.

Routing on Project Field

Route based on Project Field

Field list	As an example, use this to...
• Project Name • Project Description • Project Manager • Sales Person • Customer Name • Customer Location	Decide which part of the workflow to follow based on naming conventions of the project name. **Note:** Use SmartNames to make the rules dynamic.

Routing on Project Status

Route based on Project Status

When a workflow comes in a router checking on project status, the status of the project in which the workflow runs is checked at that moment and matched against the values in the rule list.

Field list	As an example, use this to...
Project Status Choose from: • All project statuses (Select from the drop down containing all the statuses including the custom ones.)	assign a different path depending on the status. For example, 'Design' versus 'Correction'.

Routing on Project Attribute

Field list	As an example, use this to…
All attributes in the system	Decide where to go based on the value of an attribute 'Project Type'.

Routing on attribute values

When you configure the routing based on the attribute values, the behavior depends on the **attribute type**.

For **Text** attributes:

- **Is empty**: applies when the attribute is not filled out.
- **Is Equal To**: valid if the **attribute value** equals the value in the input field of the **rule**.
- **Is Not Equal To**: applies if the **attribute value** equals the value in the input field of the **rule**.
- **Contains**: applies if the **attribute value** contains the specified **rule** value.
- **Does not contain**: applies if the **attribute value** does not contain the specified **rule** value.
- **Matches**: applies if the **attribute value** matches the specified **rule** value. This value can contain wildcards and regular expressions.
- **Begins With**: valid if the attribute value begins with the **rule** input.

  Note: Leading spaces are ignored.

  - Example: Attribute value = Sales Belgium and the rule says [Begins with] "Sales".
- **Ends with**: Similar to the **Begins with** option. The rule applies if the attribute value begins with the **rule** input.

  Note: Trailing spaces are ignored.

For **Restricted Sets** and **Cascading Attributes**:

- If the selected attribute is a restricted set, the rule options will be limited to **is** and **is not**. The input field will have a drop down list with the restricted set values.

  If your restricted set is a check box, the unchecked value resolves to **no match** instead of no.
- The **cascading** drop-downs defined by a list will be treated as text attributes, not as restricted set attributes.

For **Numeric Attributes** (integer, float, weight, dimensions…):

The rule drop-down now has the following options:
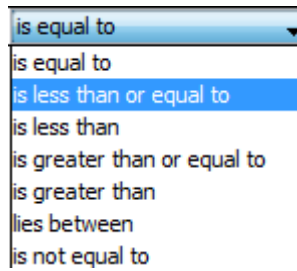
You can specify one or two floating point values in the input field.

Note: When you specify **lies between**, the lower and upper limits will be taken in. For example, 4 lies between 4 and 6. To exclude 4, type in 4.00001 (or 5 for an integer attribute).

When a project does not have the selected attribute (not part of the attribute category), the router will always take the **no match** route.

For **Multi-value Attributes**:

If you are routing based on a **multi-value attribute**, the values are compared individually to the specified rules.

For example, if your "Packaging Type" attribute has values:

• Label | Folding Carton

and the **rules**:

• is equal to Label'
• 'is equal to Folding Carton'

the **router** will have two outgoing pins with tokens.

Using SmartNames:

If your rule value is a SmartName that resolves to a multi-value attribute, the rule is evaluated as "OR".

If your packaging project has a language attribute with multiple values, you may want to use this to filter the documents (language variants with a Language attribute) to direct them through different paths. To do this:

• Configure your **Router** to **route based on Project Attribute** `Languages.`

• Configure your rule to specify `Languages (Document)`

If your **project attribute** "Languages" has the the value "English", the router will select documents with the attribute (a multi value attribute with values as different languages) that resolves to the value "English".

If the **document attribute** values are English and Dutch, the rule will be evaluated as:

- Project "English" is Document "English" OR
- Project "English" is Document "Dutch"

In this example, the router will direct all the documents with "English" to the first output pin and the others with "Dutch" to the **no match**.

Routing on Document Reference Attributes: If you are routing on **document reference attributes**, the router will treat it like text attributes. If you have a multi-valued document references, it is possible to route based on the referred documents. It will route based on the **document name** of the references.

Routing on Reason(s) for Rejection

You can use the router to redirect the workflow based on the reasons selected for rejection.

The Router workflow node can collect information on the reasons for rejection of a document in any (every) stage of the approval cycle. You can choose to enable the **Handle Reasons of All Stages** option in the **Router** workflow node. If the option is not checked, the document is by default routed on the reasons for rejection for the latest approval stage only.

You can choose **Handle Reasons Separately** to ensure each stage is checked against the rules separately.

Reasons chosen for rejection may be in different categories and you can route the documents specifically on a particular category of the reason. To do so, specify the rule as 'reason @ category'.

Routing on Document Name

Field list	As an example, use this to...
Note: Select **Include the File Extension** if the entire document name has to be checked for. Otherwise, the extension is parsed off before doing any comparison.	Decide where to go based on naming conventions of the incoming document. Your incoming documents will be routed and put on the right pin based on the name. Example: If you have three documents "A.jpg", "B.jpg" and "C.png" with two rules "contains jpg" and "contains png", • the two .jpg documents will be in the output pin .jpg. These two will follow the workflow together • and the .png document will be in the .png pin. If you are including the **file extension**, you can check for types of files using **ends with** rule.

Routing on Document Attribute

Field list	As an example, use this to...
All attributes in the system	Decide where to go based on a document attribute such as "Packaging Type" which can have values like Label, Folding Carton, Corrugated Box, etc.. The incoming documents will be checked for the specified attribute and will be moved to the right pin based on the first matched **rule**. If you route on a multi value attribute of the document, that document can occur on multiple output pins (each value is evaluated separately, which is in line with routing on a multi value project attribute or task specification.

Read about using different types of attributes and **SmartNames** in *Routing on attribute values* on page 448

Routing on Workflow Specifications

Field list	As an example, use this to...
All specifications of the workflow task (so not all specifications in the system).	Decide where to go based on decisions taken earlier in the workflow and saved in the workflow's task specifications.
Note: If you want to see the **specifications**, you should add them in the **task type**.	For example, you can use **Set Workflow Specification** node first to set the specification values and use them in the **Router** later on in the workflow.

Routing on Text Content Properties

You can route your Text Content statements according to their **Text Content Property**.

When a workflow arrives at this node, this step will filter the statements and documents based on the Text Content Property and route them based on the rules.

When you select **Route based on Text Content Property**, you have the following options:

Text Content Status

This is the status of the overall document including the individual language statements. You can route based on whether the document is in **Draft** state or is **Signed Off**.

You can add one **Language** parameter in the node. In this example, the `Master Language` SmartName is used.
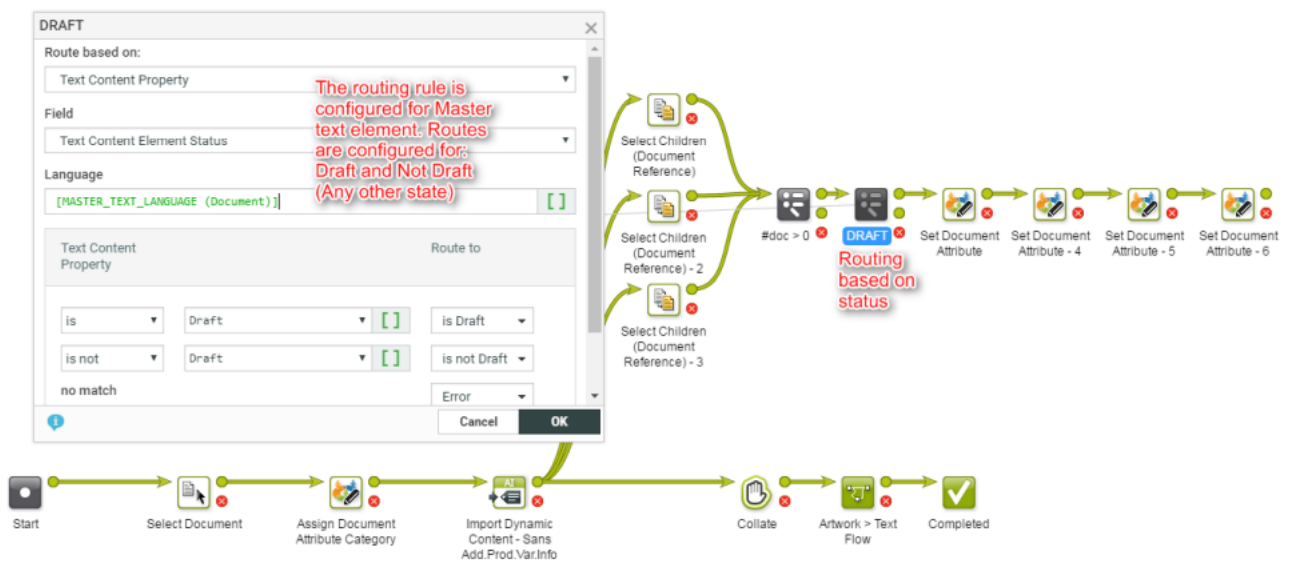
In the example above, the routing step:

• redirects **Draft** documents to `Set Document Attribute` step.

Text Content Element Status

This is status of a particular language Statement that needs to be selected from language drop down. You can route based on:

• **Draft**

• **Pending Sign-off**

• **Sign-off Rejected**

• **Signed Off**

In this example, the **Router** routes the Signed off elements to the next step, whereas the other elements are sent back to the editors.

Element Type

All configured Element Types are available and you can create routing rules based on a type. For example, you can route all `Warning` statements to Legal Approver.

See the example screen shot below.
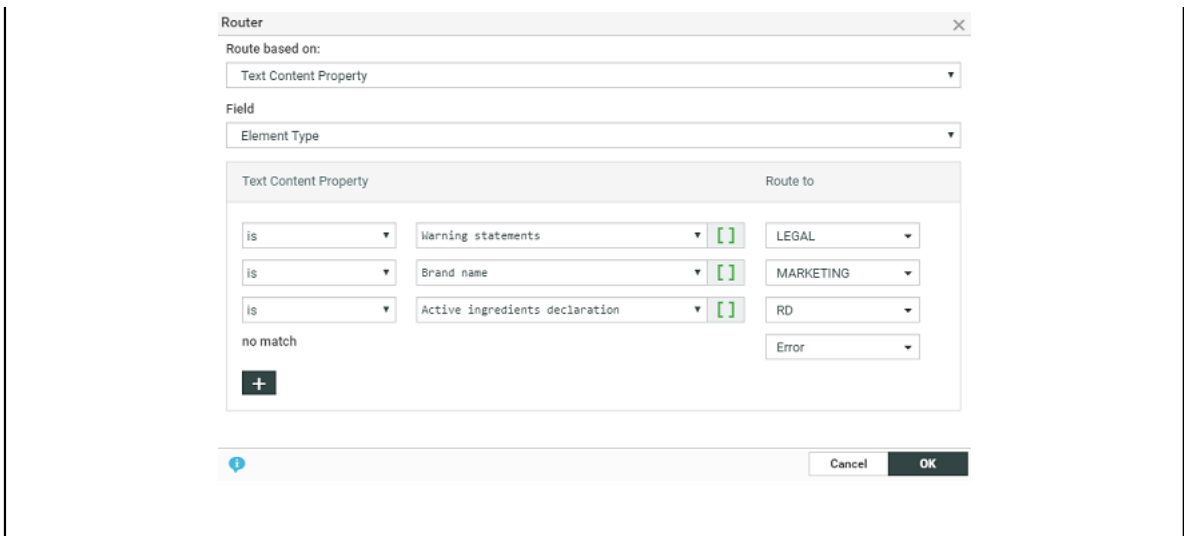
You can route documents based on it's **Approval Type**. Configure the routing rules based on the fields below.

• **Default**

• **All of Role – One per Group**

• **One of Role**

Invariant

To route documents based on whether translation is needed or not, you can use the **Invariant** parameter.
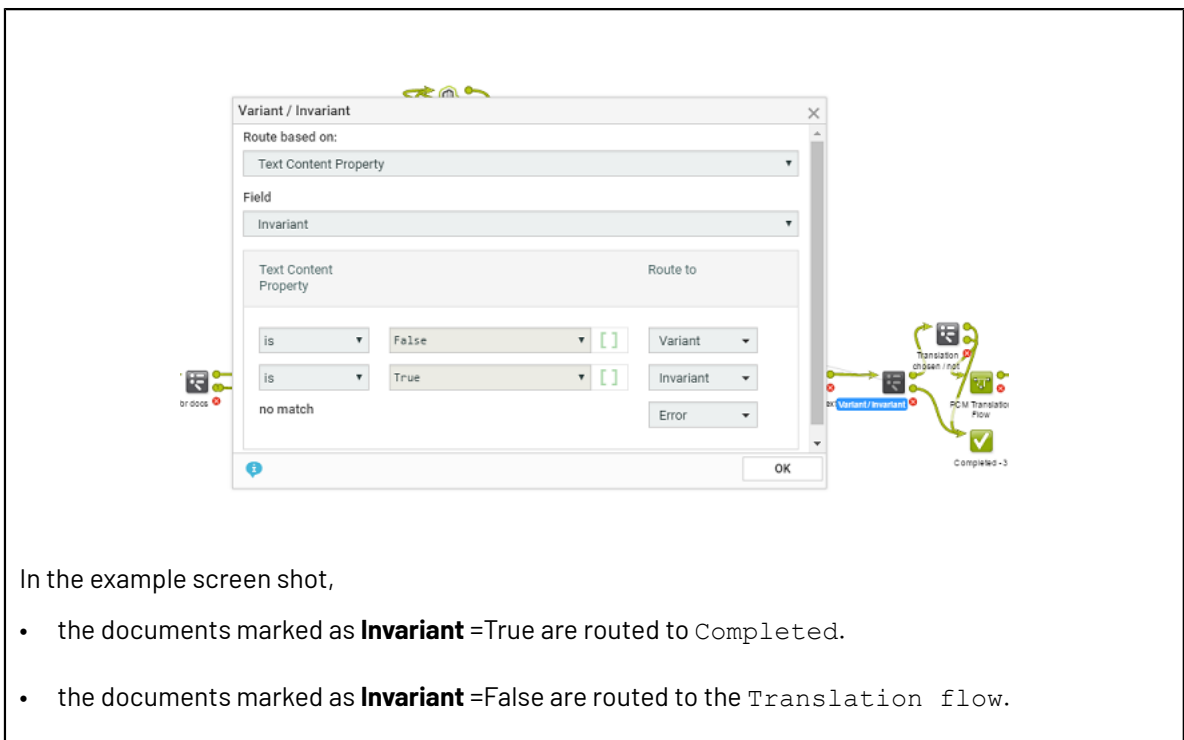
In the example screen shot,

• the documents marked as **Invariant** =True are routed to Completed.

• the documents marked as **Invariant** =False are routed to the Translation flow.

Stop

Use the **Stop** node to stop the workflow before being completed. When a workflow token arrives at this step, it stops the workflow.

Note: The task status will be set as **Completed** if at least one route of the workflow gets completed. If none of the workflow routes are completed, the workflow will end in error state.

15.14.8. Statuses

Use statuses node to give the workflow task in the project the desired status. The workflow task can have any of the statuses defined in the Task Type it was created from.

This means that you need to:

1. think about which statuses you need before creating the workflow,
2. ask your Administrator to create them if they don't exist in the system yet,
3. add them to the Task Type you want to create the workflow from (see *Add Task Statuses* on page 324),

   and then create the required workflow.

If you didn't add any particular status to the Task Type, the workflow will only have the **Completed** status node.

15.15. Workflow Example

The example below describes a workflow from the **Start** node to the **Completed** state.

The *Router* (in the example renamed as `Briefing Complete?`) in the workflow will verify if the briefing is completed.

• It checks if all specified Project Attributes are filled out. If it is all completed, the workflow will continue to the **Conceptual Design** node.
• If the Project Attributes are not all filled out, a manual task **Complete Briefing Data** is created and will be assigned to its assignees.

- In the **Conceptual Design** phase, the workflow takes parallel paths. When one of the tasks is completed its token moves to the **Data Collector** node. The Data Collector node will wait for the two tasks to complete and send the tokens to the **Start Approval Cycle** step.

- Depending on the outcome of the **Start Approval Cycle** step, the workflow moves forward or sends the token back to Design phase.
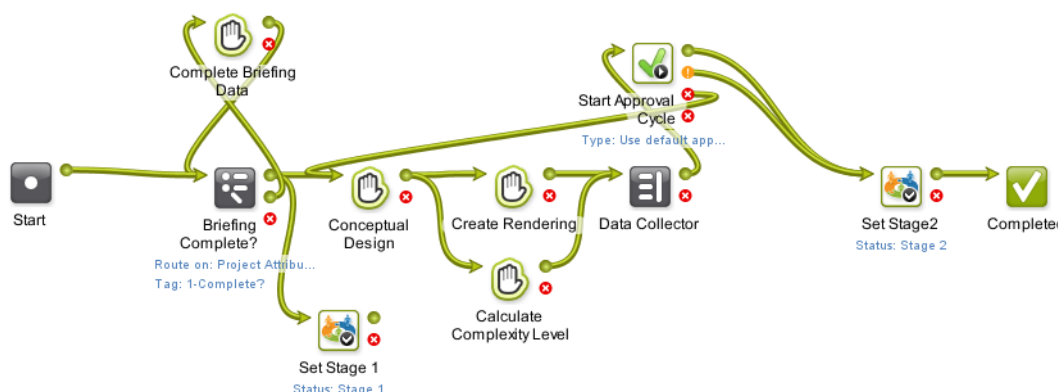
When the workflow is **Completed**, it will show up as completed in the **Project** > **Tasks** list. All tasks that were created during the workflow will show up as subtasks of the workflow task.

15.16. Working with Workflows

Note: A workflow can be started by Administrators, Project Managers and people with the **Change Task** right in the Project.

The workflow starts when its task in the Project (created from the workflow task type) is put in an active status (typically **In Progress**).

15.16.1. Workflow Feedback and Actions

Viewing the Workflow Feedback

You can view a workflow's feedback from **Project** > **Tasks** page. To open the workflow feedback page either:

- hover over the task name and click the **Workflow** 🖼 icon.

  Tip: You can use the **Edit** button to access the *Workflow Editor* and edit it.

- or click the **Show Active Nodes** 🖼 and **Expand** the mini Feedback view.
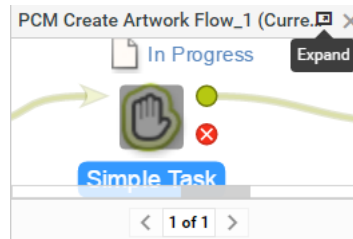
> **Tip:**
>
> **Show Active Nodes** View zooms to the currently active node(s). If there are more nodes use the **Step Through** . Read below in *Troubleshooting tools* on page 459.

> **Note:** When the workflow is not running, all controls are disabled.

In the toolbar of the workflow editor, you will see:

• *some of the workflow tools*,

• controls,

• the status of the workflow,

• the name of the Task Type,

• and view tools.

Read more below:

The following workflow statuses are self-explanatory.

■ Workflow Canceled

Workflow Paused

▲ Created

✓ Completed

✗ Workflow Error

Workflow Controls

Use ⓘ to **Hold Workflow**

Use ▶ to **Resume Workflow**

Use ⏹ to **Cancel Workflow**

Note: These actions can be performed only on Active Workflows.

Read more about *Pausing and Resuming a Workflow* on page 459.

Troubleshooting tools

Use ⌐■ to **Highlight** the Active Nodes and Error Nodes. The workflow fades out everything else.

Use `< | 1 of 3 | >` to **Step Through** all active or nodes in error state by zooming into them one by one.

Stepping into Sub-workflows

When you have embedded workflows, you can step into a sub-workflow from a master workflow's canvas. To do this:

•
•   Right-click on the **In Progress**

Right-click on the token above the sub-workflow node or on the sub-workflow node itself. Select the **Step into Workflow** option from the context menu.

CTRL+Double-click on the token above the sub-workflow's task node or on the node itself.

To access the master, click on the link from the top right corner of your subworkflow.

Note:

•   This is only possible when your master workflow is in progress.
•   You can use your browser's Back and Forward buttons after you step into the sub-workflow.

Pausing and Resuming a Workflow

The administrators, project managers and users who can edit tasks can pause the workflow by clicking the **Hold** ⓘ. The tokens (in a node) that are in progress will be paused after they finish.

Note: The workflow status will change to **in Hold**.

To resume the workflow, click the **Resume** ⊙ button. This control becomes active only when a workflow is paused. This will move the tokens to the next step in the workflow.

Tip:

You can try holding and resuming to get out of workflow "hangs".

After resuming, the workflow status becomes the current status.

Cancel a Workflow

A user with task edit rights (Admin, Project Manager and members with task edit rights) can **Cancel** ⊙ a workflow in progress.

The ongoing workflow tokens will be cancelled and these will be moved to the error pin.

Note:

- Stopping a workflow will delete all the subtasks that are not completed yet.
- The **status** will change to **Workflow cancelled**. This is logged in the Project History. A canceled workflow will always show the task status as canceled regardless what is already completed. You have to enable **Include in Project History** > **Workflow Canceled** to include the cancellation events in the Project History.

Solving a Workflow Failure

When a node goes into failure, you can either:

- *retry* the failed node after correcting the cause of failure,
- stop the **workflow**,
- *relaunch* (first, correct the cause of the failure) the workflow.

Note:

- We recommend you use the *Error Handler node* for troubleshooting your workflow.
- When a workflow has more than 5000 tokens (for example documents traveling through it), it will be canceled and reported in the Project History. This typically happens when the workflow is stuck in an endless loop.

Retry a Workflow Node

If you workflow failed due to an issue (for example a missing approval setup) and you have corrected the problem, you can **retry** the workflow.

Right-click on the failure icon (the red ellipse) and right-click again to **Retry**. Do this after you have fixed the issue that caused the workflow failure.

Note: The **Retry** is accessible when the user has Task edit rights
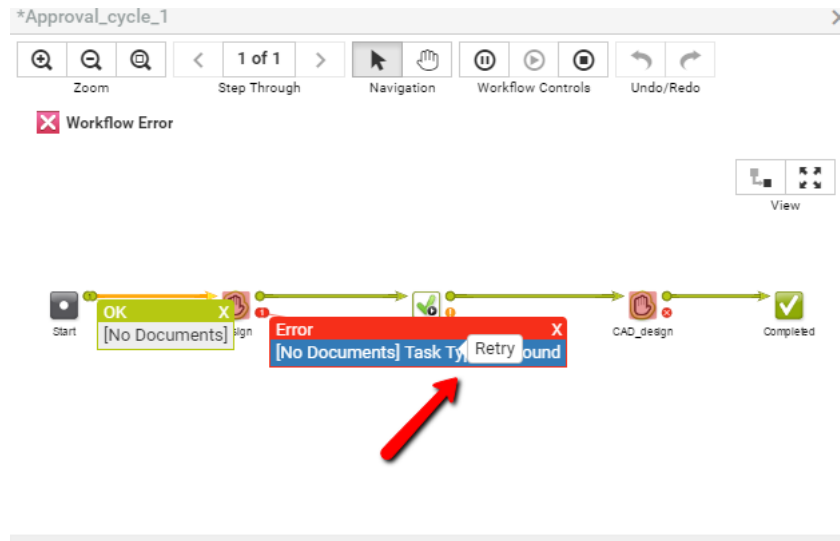
The 🔴 remains to indicate the workflow's history.

Relaunch a Workflow at a Certain Point

A user with task edit rights (Admin, Project Manager and members with task edit rights) can right-click on any output token with a number and **relaunch**.

This will re-create a new workflow task that is similar to the task that gets relaunched.
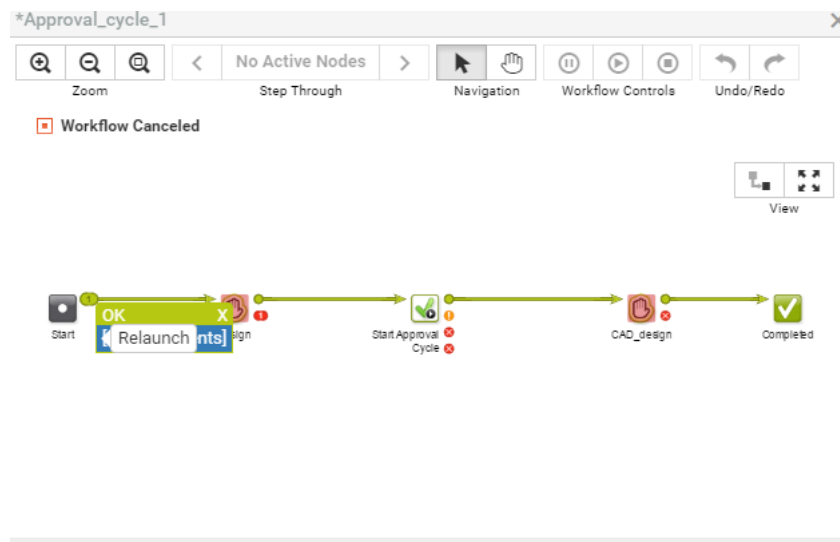
Note:

1. The workflow needs to be stopped first (see *Cancel a Workflow* on page 460).
2. This only works for first-level workflows, not for workflows which are already started from another workflow.

Note: When a workflow is re-launched, WebCenter automatically makes sure that any dependent tasks will depend on the new workflow task, rather than on the cancelled one.

16. Packaging Content Mangement in WebCenter

16.1. Introduction to Packaging Content Management in WebCenter

WebCenter Packaging Content Management offers a simplified platform for creating, translating, approving and managing text / copy assets.

The Packaging Content Management module offers:

- a repository / library for your text content with GS1 tagging
- re-use of your content across multiple projects
- support for a translation based or single language workflow.
- export to and import from industry standard formats
- ability to view and edit your text in the context of your artwork in the WebCenter Viewer.
- a complete approval workflow
- established content rights facilitating the ownership at different stages

16.2. Working with Text Content

With the right *permissions*, you can edit, start approval or approve in all the following pages:

- *Text Information* tab. Here you can only view and perform actions on the single text document and its elements.

- In Copy Sheet (Text Document References) attached to an Artwork or a Project. You will have a view of multiple text documents. You can perform actions on their Master or Translation Elements. Read more in: *Creating a Copy Sheet* on page 352.

- In a Task Document Rendering. Here also, you can view and perform actions on Master or Translation Elements of multiple text elements.

- In the Viewer Text Content Widget. You can perform the same actions, but you can use viewer filters to filter text content. Read in: *Viewing Text Content*

16.2.1. Text Document Details

When you click on a Text Content Document Type icon, the **Document Details** will have the **Text Information** tab with the following sub-tabs:

- **Text Content**

- **Role Mapping**

• *Compare*

Text Content Tab

The **Text Document** > **Text Information** > **Content** tab displays all the content of the document along with its classification and languages. To **Configure Content**, click on the ⚙ (gear) icon to expand and view the following info:

• **Element Type**

• **Approval Setup**

• **Type** of Text

• **SmartText Search**

  • **Auto Suggestion**

  • **Allow only Single SmartText**

  • **Allow Inherit content**

  • **Inherit Content from**

• **Character Limit**

• **Invariant** or not

Note: When you (as the Content Manager) change the text type, the Text Statements affected by this change will be put into **Draft** status.

- **Languages**: The Master and Translation languages will be listed here. You can see the language flags and the respective names. You can customize the language flags by following the steps given in the WebCenter Customisation Guide.

> **Note:** If the language selected is typed from right to left like Hebrew or Arabic, the text is displayed or edited right to left.

Read more about the concepts in: *Basic Concepts*.

Working in the Content Tab

You can perform Text Content related actions in this tab if you are a Content Manager / Editor / Approver or Add Language permission. You can perform the actions for which you have permissions enabled.

If you are a **Content Manager**, you can do the following:

- Select the **Element Type** of the Text Document.

> **Note:** The **Element Type** drop down is configured as a *List* and is only editable by Content Managers. The regular users can see only the specific **Element Type** of the document as a label.

- Select the **Type of text**: Text can be Simple, Rich text, or Smart Name. When you choose the text type as a Smart Name, you can view the **SmartText Search** field.

  - **SmartText Search** drop down displays all the saved searches for the text content document type. This field is optional and can be left blank. Read more in *Create Smart Text in Text Content* on page 467.

    You can resolve the Smart Content (containing both SmartName and SmartText) by clicking ⟳ or saving the document.

  - **Enable Auto Suggestion**: Suggested existing text content is shown, while you type the text content. This option is enabled only if SmartName is chosen as the Type. When you are trying to add text, the suggested text is visible as a tooltip for exceptionally long text statements

for accurate selection. Auto suggestion texts are taken from the results of configured saved search.

- **Allow only Single SmartText**: Restrict to allow only one SmartText in all of the languages present. This option can be used when you have to restrict the content to a Smart Text like a value (weight in grams).

- **Make this an Invariant Text Document**: Enable this, if translations are not required for a particular Text Document. For example, Brand Names.

 Text documents can have only one master language, when the document is marked as invariant.

 Note: Invariant content which existed prior to 18.1 and has more than one master language, will become non-invariant.

- **Allow Inherit Content** : You can choose to either follow the **Master Language** or **Default** to the element type choice or choose **None**.Read in detail about this option *here*.

- **Character Limit**: You can set the number of characters that are visible in the widget. Warning message will be displayed if the limit set is exceeded.

- Define the **Approval Setup**:

  - **Default**: Only one member has to approve. For example, if the Approver permission is assigned to two Roles, only one member (from any Role) has to approve.

  - **One of role**: One member of each Approver Roles (assignees) has to approve to complete the signing off. In case a Role is assigned to several members (groups or users), any Group member or user from that Role can approve.

  - **All of Role – One per Group** : At least one member from each Role-Group has to approve. If there is an individual User, then he or she has to approve as well.

- *Add or Delete* Master and Translation Languages

 This list will contain the document's selected languages. You may have more languages to add from if they are present in the Project's Attribute Category.

If you are an **Editor** or a **Content Manager** with Editor permissions, you can

- Modify text and save changes

- Edit content and start Approval in the text widgets if you are an Editor. Read in: *Editing Text Statements and Starting Approval* on page 478.

- Start Approval or change the status back to Draft.

An **Approver** can:

- *Approve or Reject Text Content*

- *Add new Comments as an Approver/Editor*

A user with **Add Language** permission can add specific languages for which permission has been assigned.

Note:

• It is important to click **Save** after every action to save changes to the status element. A new document version is created after each **Save** action. You can view these changes in the Document's **Action History** page.

• The older versions of the Text Content Document are displayed as read-only (even when you have the right permissions). To **Reload latest version**, click .

• **Tip:** There is no direct way (even as the Content Manager) to change the status of the **Signed Off** Text Documents. Only an Admin user can make this change.

Create Smart Text in Text Content

Smart Text can be created for text contents which are reused frequently. The referenced Smart text content may be within the same project or could be in multiple projects.

Changes made to the referenced text content in any one of the project, creates warning message wherever the document in referenced in other projects. Although the text content is updated, the approval of the text content has to be done in each project. This allows flexibility to retain the old version of the text content or to update to the latest version.

Getting Started with Smart Text

Ensure you have a:

• Saved Search configured with text content which is chosen as a Reference Source.
• Document reference attribute named SMART_TEXT_REFERENCE added to the text content document.

Add Smart Text by Clicking

Smart Text can be created by any user with Content Manger or Editor Permissions.

When user clicks on icon, configured Saved Search results chosen in **SmartText Search** Field is shown to the user in a pop-up.

User can select one or multiple Text Content documents to add. Selected documents are shown as Smart Text in the Text Content editor. If saved search is not configured, or Reference Source is not chosen, then Smart Text cannot be added.

Add Smart Text by typing text in Text Content editor

Select **Enable Auto Suggestion** to get prompts automatically when you type in the text content box. Minimum of four characters should be typed for the search to be performed. You can choose any one of the text content from the list of suggestions shown. Selected Text Content is shown as **Smart Text** in the editor. Auto suggestions are not shown, if no matches are found for the text keyed in. You may add any number of Smart Text in the text content editor.

Note: If saved search is not configured, then auto suggestions are not shown even if the **Enable Auto Suggestion** is selected.

Editors or Content Managers while editing an existing Content Sheet or an Attribute category or creating a project, may want to add a text statement that is not available in the text library.

A new text statement can be created on the go in the same page, and it is instantly added to autosuggest and creates a smart reference even before saving the page.

Resolve Smart Content

The Language statement's smart text will be resolved automatically on save of the document.

Alternatively you can also click ⟳ to resolve the Smart Content that are added to the text content editor.

Note: When Smart Content gets resolved in any language, other statements following that language are resolved automatically.

For Example, if **French** and **Dutch** languages are following **English** language text, while resolving **English** both **French** and **Dutch** language contents are also resolved.

Warning messages will be displayed when the Smart Text:

• added are resolved and it contains no text
• is empty or is broken
• character limit set is reached
• is not resolved although the user has permissions
• are not of the latest version and reference is made to an older version of the text document. You can click on the Smart Text, where the user can optionally update to the latest version.

Copy Smart Content

SmartText Language

When a SmartText is added, by default current language is selected for the SmartText. You can change from current language to any of the Master or Translation language by clicking on the SmartText pop up window.

A language inherits content from another language:

• If the source language in the SmartText language is configured to current language, then the inheriting language will get content for its own language
• If the source language SmartText language is configured to a specific language, then the inheriting language will get the same content of the source language

Approve Smart Content

Smart content has to be resolved before the element is approved.

Delete Smart Text

You can delete Smart Text in the text content editor. On save, the text content is removed from Document Reference attribute also.

Smart Text pop-over

You can click on the SmartText to view the referenced content in a pop-over.

Pop-over contains the following:

• View of the referenced text statement
• Text Document Name along with the Version
• Project Name where the referenced text statement is present

• Language selection dropdown, which allows you to change the SmartText language to any of the languages available.

You can select the languages available in the referenced text statements even though the language may not be available in the current project.
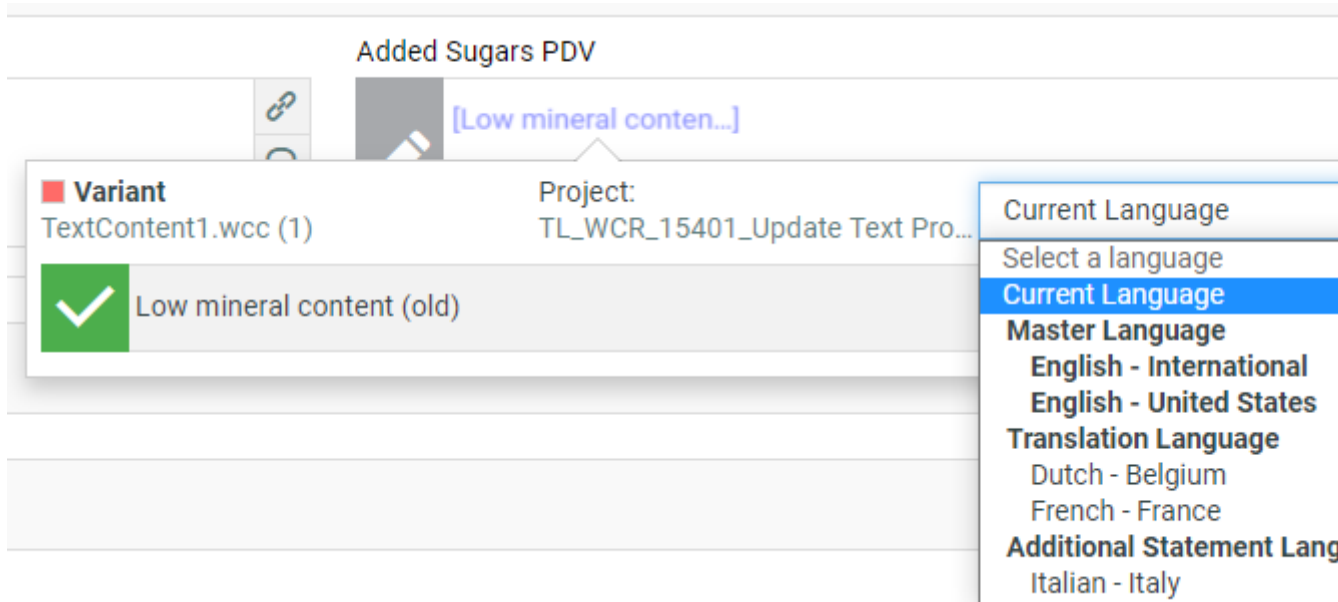
• Warning message if the referenced text is not the latest version and an option to **Update to Latest.**
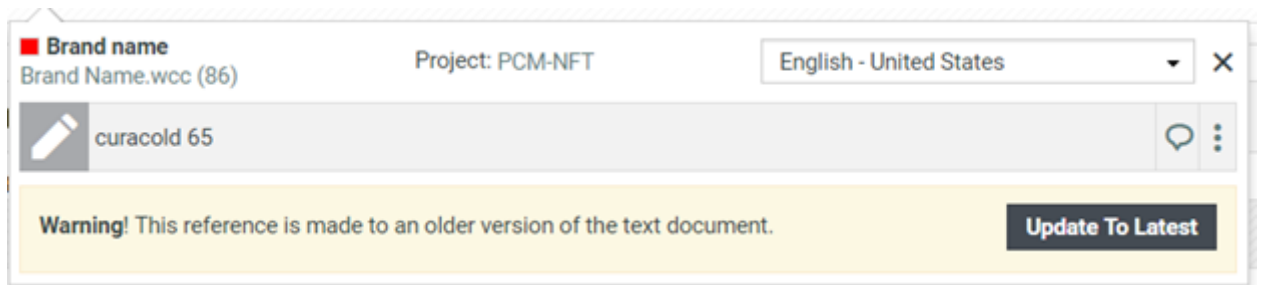
Note: You cannot revert back to the previous version if you update the referenced text.

Editing Smart Reference in popover

When you click on a smart reference, a popover is opened to show the used smart reference text. The referenced text can be edited provided you have the permission. You can then either save the changes or cancel.

A new version is created for the referenced statement with all the changes made.
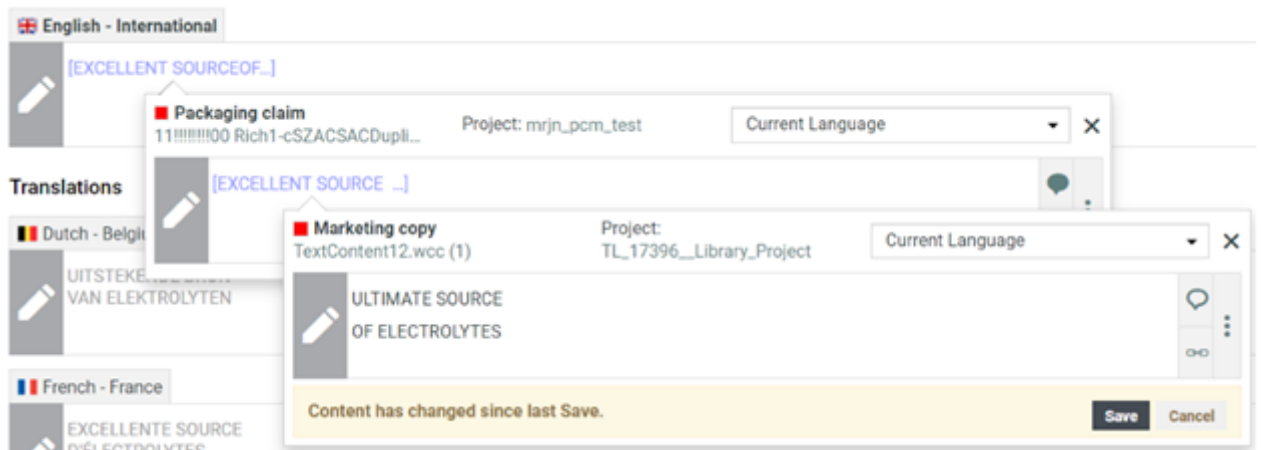
When Latest Version is selected, then the current statement is resolved automatically and you can save the document. When Selected Version is selected, then along with save, referenced statement is also be updated to latest version automatically.

Any change made at any level of the smart text reference, has to be saved at the same level and also in all the levels further.

16.2.2. Role Mapping Tab

Role Mapping
This tab displays all the permissions enabled in the Text document.

In this tab, you can see:

• the **Content Permission**

> **Note:** **Content Manager** is not associated with any language.

• the **Language** relevant for each permission. For the **Editor** and **Approver** permissions, the language is listed.

• the **Role** assigned to each permission. The **roles** will be links if you are a **Project Manager** or an **Administrator**.

> **Note:**
>
> • The **Roles** list will have links only if these roles are invited to the project and exists in WebCenter.
>
> • If you do not see **Roles** as links, check if you are looking at the latest version of the document. In older versions, this data will be read-only.

• the **Assignees** (Groups or Users) assigned to a particular **role** with a certain permission.

16.2.3. Compare Tab

You can now compare different versions of the same document in the Compare tab in read only mode. This allows you to view the differences between two selected versions of the same text content document.

You can navigate from **Document** > **Text Information** > **Compare** . This tab is divided into two parts where, two versions of the text content document is shown side by side. By default, left side block is loaded with the current version of the document and the right side block is loaded with previous version with clear indication of differences.

Note: If the document has only one version available, then the right side block is empty.
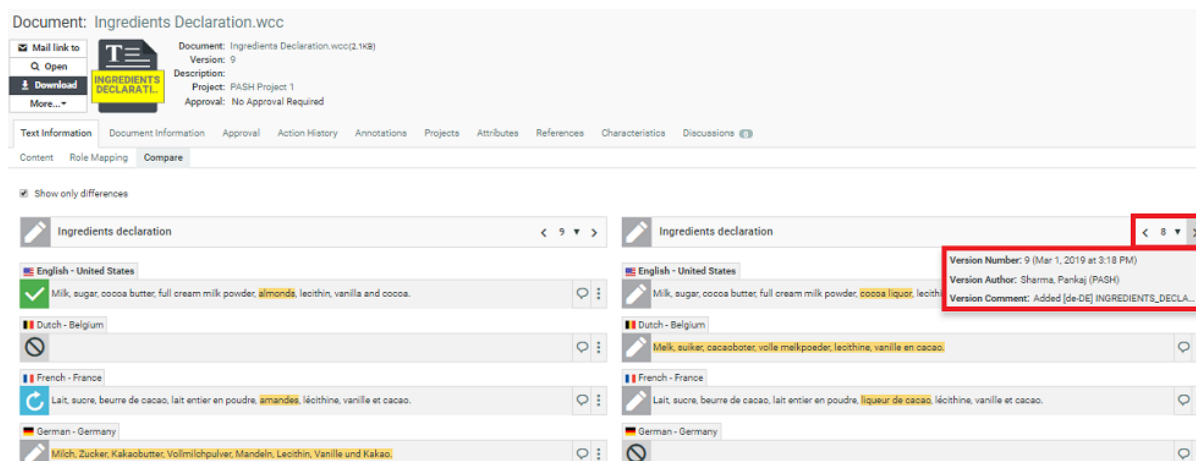
A drop-down is provided on the header of the both blocks to change the version of the document to compare. Navigation arrows are provided to go to the next or previous versions of the document. Hovering on the drop-down option or on the navigation arrows displays the Version Number along with the modification date, Version Author, and Version Comment in a pop up window.

You can expand to view the content properties by clicking on the header and both versions are shown simultaneously.

Selecting **Show only differences** option shows only the languages which have some difference in the text content and languages not having any differences are hidden.

When a language is not added in one of the compared version and is available in the other version, then the language widget is shown as not added.

Note: Compare is done only on the content of the two versions of the document and not on the settings.

16.2.4. Managing Text Permissions

Ensure that:

- you have invited the right **Roles** in your **Project** or **Template** with the Text document.

- you have added the Master and Translation Languages to the Project's Attribute Category to configure Language specific Editor and Approver permissions. It is important to do role mapping in a *smart way*.

- you have enabled the right *Preferences*.

If you are a **Project Manager** / **Admin**, you can manage and assign content permissions.

Note:

A user without any of these permissions can only view (depending on the view permissions) the text content documents.

1. To manage Permissions, go to the **Document details** > **Text Information** > **Role Mapping**.

   When you click on a Text Content Document Type icon, the **Document Details** will have the **Text Information** tab with the following sub-tabs:

   - *Text Content*

   - *Role Mapping*

   - *Compare*

2. Click on **Manage Permissions**. This will open up the **Role Mapping** page.

3. Click **Add Permission**. Repeat this for as many permissions as you want.

4. Choose the **Content Permission** from the drop-down listing:

• **Content Manager**

• **Editor**

• **Approver**

• **Add Language**

5. For the Content Managers permission, define the appropriate **Role**.

Read about the permissions below:

1. **CONTENT MANAGER**:

The WebCenter Role with this permission facilitates the entire content management process to ensure accuracy and compliance. For example, the role Marketing could have this permission where the Marketing has the responsibility of the packaging content. The Content Manager will manage the Master and Translated statements.

Note: The Content Manager Role is not associated with any specific language.

This role will manage all the permissions and the settings for the current document.

Note: Content Manager Role cannot act as an Editor or Approver unless this permission is granted to the same role.

2. **EDITOR**

The Content Manager typically assigns this right to the dedicated roles who will create, edit, revise or translate the text. This can be assigned per language.

An Editor Role (for example, a Translator) can edit when a document is in the **Draft** state, not in **Signed-Off** or **Pending Sign-off** state.

If the Editor also has **Approver** permission, then the documents are directly moved to **Approved** state instead of pending sign off.

> **Note:**
>
> • The **Content Manager Role** has to configure the list of translation languages to make use of multiple language based **Editor** permissions.
>
> • You can configure **Roles** for all languages to which the content should be translated and grant them the **Editor** permission.

3. **APPROVER**: A **Role** with this permission can approve the text content. This permission can also be configured per language. The approver puts the Text Statement to **Signed-Off** or **Rejected** state.

4. **ADD LANGUAGE**:

   Any user with **Add Language** permission can add language to a text or table content document. The users can be assigned with permission to add only specific languages.

Manage Permissions

Content Permission	Language	Role	Assignee(s)
CONTENT MANAGER		PCM_CONTENT MANAGER	MRJN
EDITOR	English - International	PCM_CONTENT MANAGER	MRJN
EDITOR	English - United States	PCM_CONTENT MANAGER	MRJN
EDITOR	Dutch - Belgium	PCM_CONTENT MANAGER	MRJN
EDITOR	French - France	PCM_CONTENT MANAGER	MRJN
APPROVER	English - International	PCM_CONTENT MANAGER	MRJN
APPROVER	English - United States	PCM_CONTENT MANAGER	MRJN
APPROVER	Dutch - Belgium	PCM_CONTENT MANAGER	MRJN
APPROVER	French - France	PCM_CONTENT MANAGER	MRJN
ADD LANGUAGE	English - International	PCM_LEGAL	MRJN MRJN_USR2
ADD LANGUAGE	Dutch - Belgium	PCM_TECHNICAL	MRJN MRJN_USR3
ADD LANGUAGE	French - France	PCM_CONTENT MANAGER	MRJN

ESKO

WebCenter

> **Note:** You may choose to give more than one permission to a Role. For example, the Content Manager can have Editor and Add Language permissions as well.

6. Define the **Editor** permission and assign it to a role. Select the corresponding **Language** from the drop-down.

You can automatically create **Editor** and **Approver** Roles for all languages in one go. Read about *Smart Role Naming* on page 476. To do this for the editor permission:

a) Make sure that the **Admin** preference section has the right Prefixes. Read *here*.

b) Next to the **Editor** permission, select **All Other Languages**.

Manage Permissions		
Content Permission ⓘ	**Language**	**Role**
EDITOR	🇬🇧 English - International	👤 LANGUAGE ENGLISH - INTERNATIONAL EDITOR
EDITOR	🇧🇪 Dutch - Belgium	👤 LANGUAGE DUTCH - BELGIUM EDITOR
EDITOR	🇫🇷 French - France	👤 LANGUAGE FRENCH - FRANCE EDITOR
APPROVER	🇬🇧 English - International	👤 PCM APPROVER
APPROVER	🇧🇪 Dutch - Belgium	👤 LANGUAGE DUTCH - BELGIUM APPROVER
APPROVER	🇫🇷 French - France	👤 LANGUAGE FRENCH - FRANCE APPROVER
ADD LANGUAGE	🇬🇧 English - International	👤 LANGUAGE ENGLISH - INTERNATIONAL ADD
ADD LANGUAGE	🇧🇪 Dutch - Belgium	👤 LANGUAGE DUTCH - BELGIUM ADD
ADD LANGUAGE	🇫🇷 French - France	👤 LANGUAGE FRENCH - FRANCE ADD

Prefix and Suffix in Role Names

7. Define the **Approver** permission and assign it to a role.

Select **All Other languages** to create Approver roles with default names in one go.

> **Note:** You can configure Editors and Approvers individually for some languages and choose the Smart Role Naming for the rest of the languages by selecting **All Other languages**.

8. To edit Content Permissions, click **Manage Permissions** and edit or change the assignment of a permission.

• The **Role Mapping** page will list all the Content Permissions, respective languages, Roles and their assignees (individual or Group).

The Roles will be clickable if they exist in the system and are invited to the Project.

• The Master Language of the Project will be highlighted in bold.

If you would like to give content editing and approving permission during Project Creation, assign Editor and Approver permission to the `_REQUESTOR` role.

For example,if you assign Editor permission to the `_REQUESTOR` role, the Editor can draft the text during project creation.

EDITOR	🇺🇸 English - United States	👤 _REQUESTOR	👤 BO, Manager (BO_MANAGER)
			👤 Keizer, Debbie (DEKE)

475

> ⚠️ **Warning:** During a Project's creation, you can assign another user as the Requester. If this happens, the permissions defined for the `_REQUESTOR` role does not get transferred. In this scenario, some updates done during the Project creation may be lost.

Smart Role Naming

When your content workflow contains translations into different languages, you can have **Editor** and **Approver** permissions assigned to **Roles** (text authors/editors and approvers such as legal or marketing) associated with these languages. To automate the naming of such Roles, you can specify prefixes for these placeholder **Roles**.

The names of the Roles will have the specified **prefix** and **Suffix** (In the example screenshot, Language Editor) and the respective language code.

16.2.5. Adding and Deleting Languages in a Text Content Document

Go to **Projects** > **Attributes** page and assign the Master and Translation Language Attributes. This will make them available in your Project's text documents.

In the **Text Content Document Details** > **Text Content** tab, you can view and add / delete the Master Text Language and Translation Language(s).

It is also possible to view, add and delete these Languages in the *Copy sheet* view. Read also: *Creating a Copy Sheet* on page 352

> **Note:** You can add or delete this only if you have **Content Manager** or **Add Language** Permissions.

• To add a language, hover over the blurred flag indicators and click **+** on the flag image to add a language.

The languages that are added in the list have clear flags. Only four of the selected Translation Languages (Flags) are displayed. Click on the ellipsis **...** to view the expanded list of the other selected languages and ▲ to collapse the list. Languages are displayed in the order of the Language Index specified in the language list irrespective of the sequence it has been added.

- Hover over and click **x** on the flag image to delete a language. You can add or delete multiple languages in one go by clicking multiple language flags.
- In the basic view, to delete a language of the text content from either the master languages or the translation languages, click on ellipsis

After deleting a language, you get ✚ icon to add the language again in basic view. Similarly in attributes, if the translation languages is not added to the text content, then ✚ is displayed. You can also add back the language by clicking twice on the widget.

- To delete a language that is not present in the Project Attributes, and is available in a text document, click 🗑.

The language is marked for deletion in the element status. Click ↩ to revert the action.

Ensure that you save the modifications.

Adding any of the available languages is possible based on permissions on all text content in the page including documents that are from other than current project. Similarly, it is possible to remove the language when it is added recently but not saved.

The following conditions apply when you delete Master Text Languages:

> **Note:**
> - If only one Master Text Language is present, it cannot be deleted.
> - If two or more Signed Off Master Text Languages are present, then any one of them can be deleted. But if there is only one Signed Off, that language cannot be deleted.
> - If none of the Master Text Languages is Signed Off, then any of them can be deleted.
> - A language can be deleted even if the Text Content document is linked with multiple projects.

16.2.6. Editing Text Statements and Starting Approval

Editing Content

With the Editor permission:

- You can edit a document in Draft state.
- Auto-Approve. If you are assigned the role of an Editor and an Approver, you can approve the content you created immediately.

Approving after Editing (Auto- Approval)

For example, Marketing can create and approve Master Text of certain statements. Essentially, you can skip **Start Approval** and **Approve** actions. To do auto-approve:

- Hover over **Draft** state next to the Text widget. You see options to **Approve** or **Start Approval**.

- Approve and **Save**. The document status is now **Signed Off**.
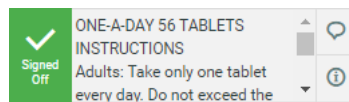
> **Note:**
>
> If saving fails, check if:
>
> - your Editor permission is revoked.
> - there is any conflict from another user regarding content update.

You can **Start Approval** by clicking (even after you auto-approve).

> **Note:**
> - You cannot **Reject**, when a document is set for Auto approval.
>
> - You can auto-approve from all the pages where you have the Text widget (Text Document Details, Task Execution Page, Document Attribute Category, Project Attribute Category, Project Creation Page and Viewer).

Starting Approval or Reverting to Draft

Hover over **Draft** status to view and click **Start Approval** to kick start the approval process.
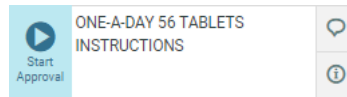
To put the status back to **Draft**, hover and click the **Revert** button.

When you save, the status changes to **Draft**.

> **Note:** After starting the approval process, users with Editor permission can revert the status back to **Draft**.
>
> On clicking on the Reject button, the element will be marked for reject and the Approve/Reject/Revert to Draft button will disappear and replaced with a Revert button. Content won't be editable, even if user has editor permission for this statement.

Approval Information

You can click on the **Approval Info** icon for a Text Content element, and it opens a pop-up which displays approval cycle information.

This pop-up window provides information on

- Language on the header
- Element type
- Approval type

• Approval Information along with user details and date of the action.

16.2.7. Approving or Rejecting Text Statements

Approving Text Content Statements

To **Sign-off** text statements (as an Approver), hover over the **Pending SignOff** icon next to the Text statement and **Approve**. When you save, the status changes to **Signed Off** or **Pending SignOff (You Approved)** when there are more approvers.
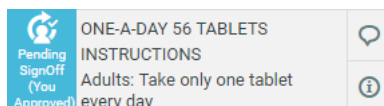
You can revert your action (before you **Save**) by clicking **Revert** ↩.

Note: Once **Signed Off**, you cannot makes changes to the text content or the text status. Translation languages can be edited even if the master language is not yet signed off.

Rejecting Text Content Statements

To **Reject**, hover and click ✕. When you save, the status changes to **SignOff Rejected**.

If there are more approvers, status remains **Pending SignOff (You Rejected)** until all Approvers approve or reject.
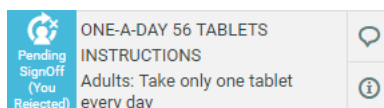
Note:

If the Admin user has enabled **Required password for Approvals/ Rejections** in **Preferences**, your **Approve/Reject** actions requires a password.

Other tools

Use this	To...
🔗	**Inherit Content For**
ⓘ	View the **Approval Overview**. It will show • The last updated state along with the date of change done with the user associated with the change • Element type and Approval Setup (All of Role, or One of Role or Default) • Language for which approval was done

| Use this	To...
	Inherit Content For
	View the comments associated with a text statement. It allows you to view earlier comments and also add a new comment.
	Adds a new comment. This button indicates that there are no comments. Clicking it enables you to add comments, to hide and show existing comments.
	Note: In case the user has delegated the tasks, any comment updated by the delegate will mention the same.

16.3. Text Document Actions

You have additional Project Documents Actions for Text Documents. These actions allow you to

- Export text documents
- Import XLIFF files
- Copy documents with their Approval State

16.3.1. Importing and Exporting Text Documents

Export and Import XLIFF

You can export your text documents to be translated into XLIFF files. Once translated, import the XLIFF files back to WebCenter.
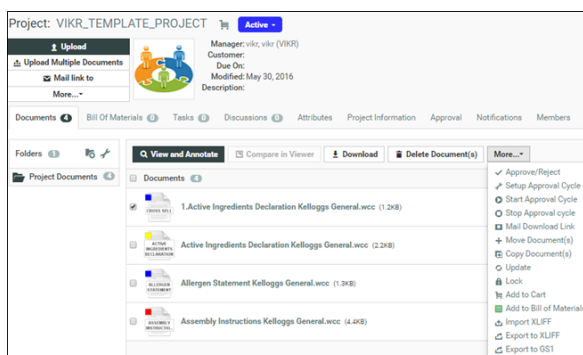
How to **Export to XLIFF** from a Project:

- Select the Documents and click **Export to XLIFF** in the **Actions** menu or bar.

  > **Note:** You may have these actions in the **More** drop down menu depending on your menu configuration.

- In the resulting **Export to XLIFF** pop-up, select **Source Language** and **Target Language** and click **Download**.

- There are other options which can be selected.

Export to XLIFF   ✕

Source Language *

| English - United States   ▼ |

Target Language *

| --select language--   ▼ |

☑ Export Statement(s) only if the Master is signed off

☐ Export Statement(s) only if Target language is specified in the Document

☐ Export Statement(s) only if Target language is not signed off

                                                    Cancel   **Download**

- **Export Statement(s) only if the Master is signed off** By default this option is checked. When checked all the text statements which are signed off are exported and other statements are ignored.

- **Export Statement(s) only if Target language is specified in the Document** By default this option is unchecked. When checked only the text statements that has translations are added and rest of the text statements are not exported.

- **Export Statement(s) only if Target language is not signed off** By default this option is unchecked. When checked, only that statement for which translation language is not signed off is added to xliff file.

  > **Note:** If there are no text content documents to export to XLIFF, then a warning message is displayed that **No text content document(s) available to Export to XLIFF**

The downloaded file contains the approved source language text and an empty statement of the target language. Comments added in the text content document will be exported to XLIFF file.

To **Import XLIFF** files after translation:

- Click **Import XLIFF** in the **Actions** menu or bar. Click **Browse** to select the file for importing. The translated XLIFF file are added to the corresponding Text Content Document(s).

- When you import the XLIFF file, you can directly **Approve Translation** by enabling the option.

- You can view the **XLIFF Import Report** which gives the status of the import. If the import of the document(s) fails for any reason, then the reason is updated in the **Warnings** column.

- Any new comments given during translation can be viewed in the XLIFF Import Report.

Note: When you configure translation Workflows, you can use the *Export* and *Import* XLIFF content nodes.

16.3.2. Exporting to GS1 XML

You can download a GS1 XML file containing all the **content documents** (**Dynamic Content**) including text, table and Artwork files. In the Artwork creation process, this GS1 XML file can be sent to the designer to place the content on the artwork in Adobe Illustrator with **Dynamic Content**. The **Dynamic Content** plug-in will match the placeholders in the artwork with the GS1 XML content.

Note: Any **User** with download permissions will be able to generate and download GS1 XML content.

Generate GS1 Export function supports below Text or Table Content and Artwork file types.

To generate a GS1 XML, follow the steps below:

- Go to the **Project** where the artwork or **Text content document**(s) or **Table document** is stored and select the document to be exported
- Select **Actions** > **Export to GS1**.
- If the selected artwork document contains reference property filter values either at the Document Attribute level or at the Project Attribute level, then the **Export to GS1** pop up window display the filters, from which you can select the **Reference Property** filters and **Languages** along with Locale. Reference property filters are used to filter the content to be downloaded to the XML format.
- Choose **Include Empty Content in GS1** to view all the elements in the table document else only elements with content are exported.
- The locale mapping values are pre-populated from the Document or Project attribute in the pop-up window, which holds unique values and these values are editable. When the locale mapping is not available in both the Project or in the Document attributes, then you can manually provide locale mapping and locale value will start with zero. Order of priority to pick locale value is Document attributes followed by the Project attributes.
- Specify the **Target Language** (one or more) in the **Export to GS1** pop-up window.

  The **Target Language** drop-down lists the master and translation languages specified in a project.

  Note: If the project does not have specified language attributes, this drop-down then lists the system wide language lists (Master and Translation).

- Click **Download**.

The GS1 XML will contain the dynamic content of the specified **Target Language(s)** including:

- the approval **status**

- the **Instance Sequence** value

> **Note:** If the instance sequence number is not available, then unique instance sequence is auto generated and exported. When a GS1 document, if the referenced documents have EXPECTED_NUMBER_OF_OCCURRENCES (hard-coded) reference property, then the GS1 file will export this data for every dynamic element (Text Content, Table, Bar Code, Graphics). If this reference property is not available, then GS1 will have "1" as value for this field.

• The generated GS1 XML will include only content for which the user has read permission.

In 18.1 release we worked on "EXPECTED_NUMBER_OF_OCCURRENCES" while exporting to GS1 XML. But in that documentation we didn't mention what should be the value (format) so while exporting, right value is exported.

The value of this field should be JSON format {"locale_Id":"value"} where locale_id is the mapping integer to language. This locale_id should be same as what is used when we export to GS1.

16.3.3. How to get Attribute Category Report for Text Content

You can get a report of all the attributes present in a Project or in a Document Attribute Category. Attribute Categories report can be downloaded and accessed by any users who has the permission and the Admin user has configured the report and uploaded it. Read more about it *here*.

Users who have access to the report, will have the report icon in the Attributes page of the Document or the Project. Labels defined to the attributes while creating are shown in this report for all attributes except the document reference type.

Note: If the attribute name is derived from SmartName or if internationalization is done for the attribute, then the label name is not considered and only the attribute name is shown.

While generating the report you can further filter the report based on the languages and the reference properties.

Download Attribute Category   ✕

Report

[mrjn_pcm_scope(D) EXCEL ▾]

Languages

[   ]

PCM Scope Flavour

[   ]

PCM Scope Size

[   ]

PCM Scope Output

Spring
Winter

[|]

                                                        [Cancel]   [**Download**]

To know more about configuring Attribute Category report, read this *section* in the Admin Guide. An example Attribute Category report is shown below.

Master Text			
PCM Table Reference			
Document Name	Instance	Text	Last Modified
Content_0001687.wtc Nutrition facts	1		
PCM Text Reference			
Document Name	Instance	Text	Last Modified
Content_0001692.wcc Active ingredients declaration	958	Coconut And Berries	4/21/20 12:44 PM
Content_0001673.wcc Additional product variant information	1	Create new document Update is being Done **Be careful, you'll have to join the Avengers**	5/8/20 7:23 PM
Content_0001674.wcc Product features	1	*ENERGIES DRINK ; IMMEDIATE SUSTAINED ENERGIES ; ENERGIES DRINK ENERGIES DRINK* *ENERGIES DRINK*	3/10/20 6:01 PM
Content_0001675.wcc Net content statement	1	*100gm*	3/3/20 3:12 PM
Content_0001676.wcc Packaging claim	1	*ENERGY DRINK!!!*	3/2/20 3:18 PM

16.3.4. Copying a Document with Status

You can copy a Text Content Document to another project along with their status.

When you select one or more documents in a Project (Signed Off, Pending Sign off..) and choose **Copy Documents(s) Action**

- You have the option to **Copy Text Content Status**. If you do not select this, the copied document will be in **Draft** state.
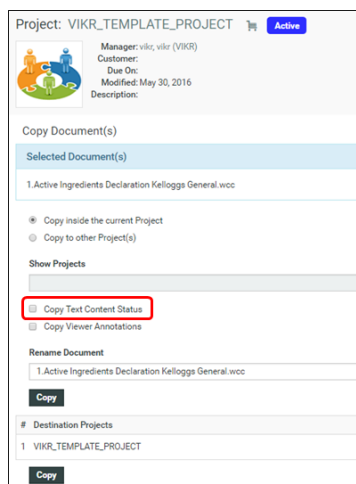
If you are copying from the Document Details Page, you can:

- Enable or disable the **Copy Text Content Status** option. If this is disabled, the copied document will be in **Draft** state.
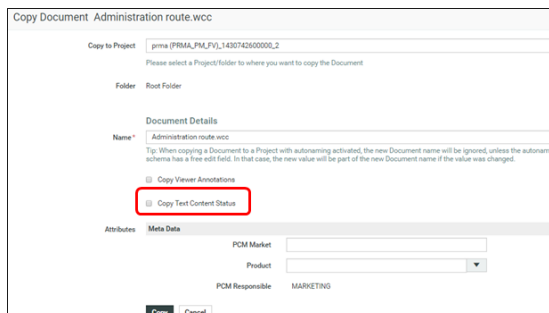
16.4. Nutrition Facts Tables

The **Nutrition Facts Table** (also known as the **nutrition information panel**, and other slight variations) is a highly regulated and required component in food and beverage packaging.

WebCenter Packaging Content Management offers a platform for data management of your nutrition facts, review in the context of artwork and reuse.

The solution will address the following:

- Complying with regulatory requirements. For example, FDA and USDA requirements in the USA and complex, multilingual Nutrition Facts Tables with predefined templates.
- The complexity of data management. SmartName can pull data from your data system for use in your nutrition fact tables.
- Established table rights facilitating the ownership at different stages. For example, who can fill in the data and who can approve, etc.
- Integration with Adobe Illustrator®
- Automation of Nutrition Facts Table creation. A content manager can pick a template which already has the SmartName mapping to point to the right data.
- Smart content reuse. You can use our template system to create different tables from the same pool of data. This is supported with a repository / library for your Table content.
- Support for a translation based or single language workflow.
- Export to and import from industry standard formats
- Approval workflow

Table

A Table in WebCenter is a collection of statements. The table is treated like a single document with multiple statements. A Table has Content Permissions mapped to certain Roles, and specified Languages.

Tables are created based on a Templates (Document Templates). An administrator user can import Table Templates into your system. For example, an FDA approved template with pre-selected nutrition fact statements. The best practice would be that the content manager adapts a series of table

templates with specified table statements and permissions and other users create tables based on these templates (and localize them).

Table Statements

A **Table** contains statements with a text label and an editable field. You can define different approval processes for these statements. While the Table Templates contain a pre-determined set of such statements (based on FDA regulations, for example), it is possible to add and delete statements.

- **Element Type**: This indicates what the value of the element represents (e.g.: "Calories", "Vitamin A", "Saturated Fats", ...).

  Note: Although it is possible to use your custom Types, the Templates come with GS1 nutrient element types.

- **Instance**: This will be a number indicating the numbered occurrence of a particular **Element Type** in the table. By default, it takes the value "1" except when there are multiple occurrences. If you have three daily values for every nutrient, their individual instances will be "1", "2" and "3".

- **State**: The statements can be in one of the following states: **Draft**, **Pending Signoff** and **Signed Off**. Users with corresponding permissions can change the state of each element.

- **Value**: The actual value of this element that will be displayed in the table (e.g. "230", "10 g", "2%", ...)

- **Static and Variable part:** The text part of the table is treated as static and the numeric fields as variables. This means that users won't be able to edit or adapt the design components of the layout. There are exceptions to this rule: for example, the "Serving Size" in "cups".
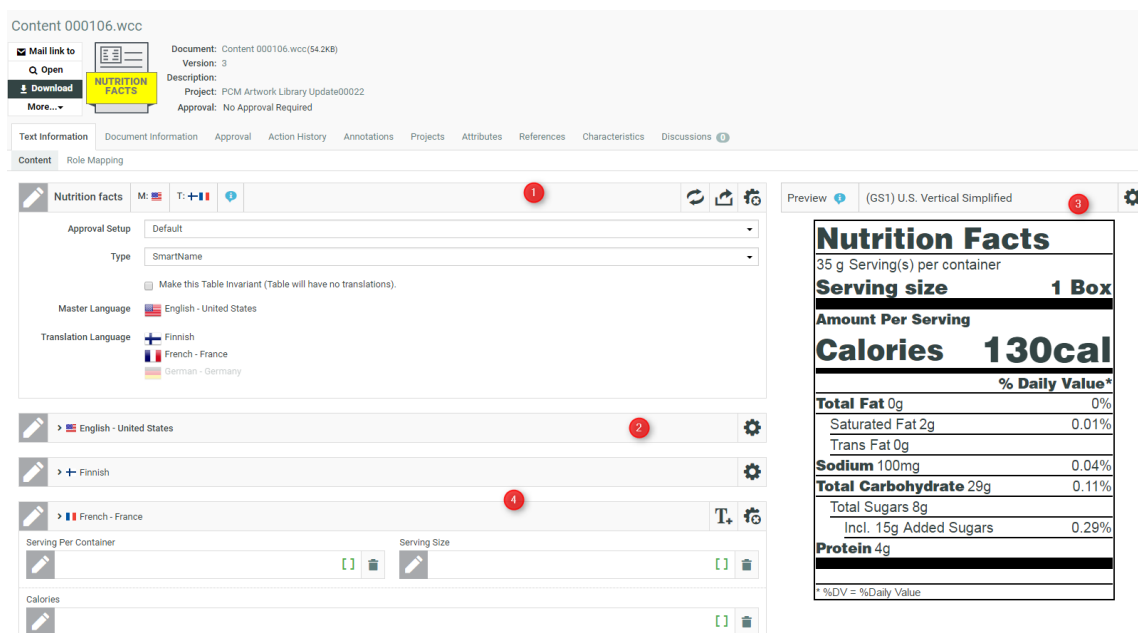
16.4.1. Table Content Document in WebCenter

Table Content Document

A Table in WebCenter is a collection of statements (either nutrition fact statements or text statements). The table is treated like a single document with multiple statements in it.

The WebCenter Table Content Document (`.wtc`) is an XML file that has the following features:

- Table Content that goes on in the Artwork. You can manage the values of the table.

  This includes both the master and the translated content of the table

- Approval states for individual Table statements as well as for the whole Table.
- Clearly defined ownership rights for the Table.
- Stores the Layout type as either Grid or Default. If the layout chosen is Grid, then the layout information additionally also captures the indentation, column span and Instance ID.
- Element Type for text statements within the table.
- Revisioning
- Download rules
- Attributes
- Document references from other documents. For example an artwork can refer to various text content documents.
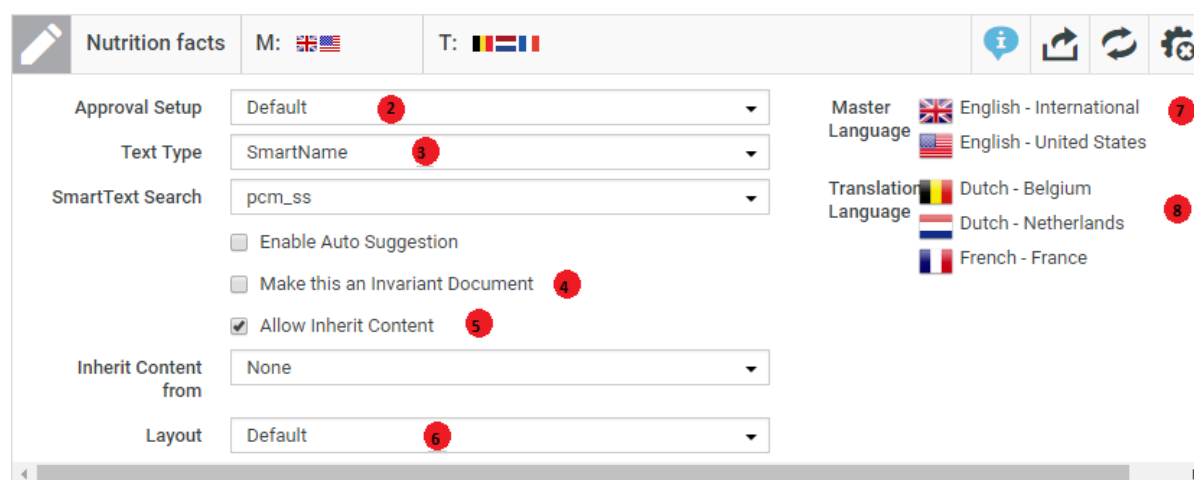- Can be streamed through a workflow

1. *Table Properties Widget*
2. *Table Widget* on page 491
3. *Preview*
4. Translation Widgets

Table Properties

The content manager of the table can modify the table properties such as:

- add or delete translation languages
- make the table invariant
- choose the text type
- choose the layout of the table

Click the **Configure** icon to define the properties such as:

1. The tool bar with Configure icon and tools to:

- **Resolve SmartName** (only if the table is of SmartName Type)

- **Export to GS1** tool to export the table in GS1-XML format.

2. *Approval Setup*
3. **Type**: Select from **Simple**, **Rich Text** or **SmartName**. If you choose **Smart Name**, you can choose the **Reference Source** from the drop down.
4. Translations: Enable **Make this an Invariant Document** if translations are not required for the table.
5. Choose the **Allow Inherit Content** option to follow a particular language for all the elements in the table. You can either choose **None** where no language is selected by default or **Default** to follow the language chosen at the element level or one of the **Master language** in the project.
6. Choose **Layout** as Grid to customize the Language Layout view. If you have chosen the Grid Layout, you can perform the following actions in the language widget:

   - Define the number of columns and rows for a table
   - Drag and Drop support for rows and column
   - Add or delete rows

   Note: If no option is chosen, default layout remains. When you export table content documents to GS1, layout information of the document like indentation, column span, and concatenation strategy are all included in the XML only when the layout chosen is grid.

7. **Master Language** is specified in the Project's attribute category.
8. **Translation Language** : This list will show the document's translation languages. You may have more languages to add from if they are present in the Project's Attribute Category. Add more languages by hovering and selecting the language.

Text Approval

The Packaging Content Management module offers separate approval processes for the Master and its translations. All the Approval information with regard to the Master and Translations stay within the Text or Table Content Document.

Note: This approval process is different from the regular WebCenter approval process.

The Approval process starts when a content Editor *starts approval* on a text statement or a table element.

When you have configured the right *permissions*, the users who has the **Approver** permission can perform the approval actions. To automate the approval, you can configure manual tasks in a workflow and assign them to the relevant **Roles**.

Once approved, the master and the translated text remain locked for the regular users.

Note: Only the Content Manager has the rights to change the text element to draft.

The text element can be in one of the following states:

- **Draft**: The initial state of the Text Document where the content is still being worked on.

- **Pending Sign-off**: When drafting is complete, and the status is ready for its approval cycle. An approver can review and approve or reject the document.

- **Signed-off:** When the approval cycle is completed and the content drafted in the document is 'Signed Off'.

- **Sign-off Rejected**: When the approval cycle is completed and the content drafted in the document is 'Rejected'.

> **Note:** Approver will be requested to re- enter the password before approving or rejecting any text content document, provided the option is enabled by the Admin user.

Approval Types

Content Managers can set up the **Approval Type** for Text Content Documents. There are three Approval Types:

- **Default**: Only one member has to approve. For example, if the Approver permission is assigned to two Roles, only one member (from any Role) has to approve.
- **One of role**: One member of each Approver Roles (assignees) has to approve to complete the signing off. In case a Role is assigned to several members (groups or users), any Group member or user from that Role can approve.
- **All of Role – One per Group** : At least one member from each Role-Group has to approve. If there is an individual User, then he or she has to approve as well.

Table Approval Status

The approval process can be done at two levels: approval of each nutritional fact statement and as a composite table.

The status of the Table widgets (Master and Translation) depends on the approval state of the table statements. If all the elements are signed off but one is still in the **Draft** state, the widget status will also be **Draft**.

It is also possible to bulk approve all the statements within a particular language for both the Master and Translation languages. During bulk approval of statements, if the status is reverted before saving the change, previously signed off statements are not affected.

> **Note:** This option is available only for users with Editor and Approver permissions.

See the approval states below:

1. Signed Off
2. Ready for Approval
3. Draft
4. Rejected

The **Approver** user can approve the entire table (per language) in one go. To do that, hover over the status icon and click **Approve**.

In the case of individual statements, the Approver can change the status to the next possible Approval State. For example, if a statement is in **Draft** state, the user can put it to **Ready for Approval**. Translation languages can be edited even if the master language is not yet signed off.

> **Note:** If **Require Password for Approvals/rejections** option is enabled, then the Approver is asked to enter the password for approval or rejection. The same information is also updated in the **Action History**.

Table Widget

The Master Language Widget contains the Statements or actual table content. The Editor users can enter data in the specific fields.

If the table has translations, they will appear as widgets below the master table.

Table Tools

In the **Configure** tool bar:

- you can add *Table Elements*.

- change the *approval state* of a document. After the data entry, you can approve or start the approval process.
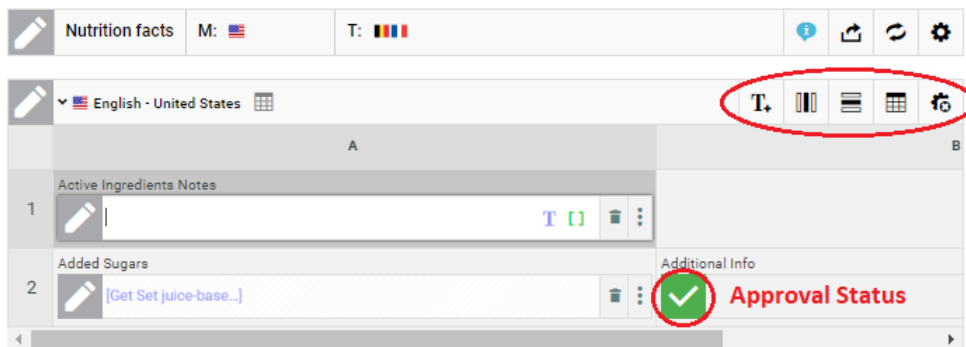

Table Statements

The individual statements or elements can have it's own approval state. The statements have a name label(for example, serving size) and an editable field. Read about adding more elements in the table in: *Table Element Types* on page 494.

Language Widgets

If you have added Translation languages to the document, you will have translation widgets below the master table.

Click on the configure ⚙ icon and T+ to add table elements to your translation widgets. You can add all or some of the Table Elements present in the Master language.

However, you cannot add elements that are not in the Master language. Each Language has it's own approval process and approval can be done at the language level or as individual elements.

Content Manager or a user with **Add Language** permission can add a empty Master or Translation languages widget into the Table Content document. This allows the Content Manager to plan the languages required for the document ahead, although the elements can be added later as per the requirements.

Rows and Columns

Add or Remove columns / Rows in Grid Layout

You can easily add or delete Rows by clicking on any cell in the Grid layout by selecting the context menu for the table documents. This can be done only by the users who have the **Content Manager** or **Editor** permissions on the particular table document.

Rows can be added above or below the selected row, using the options available in the language header.

Similarly, the columns can also be added to the left or the right of the selected column using the options available in language header.

Context Menu in Master Languages

When the master language is configured, you can easily access the context menu by a simple right-click.

You can merge or split cells in a table document. When you want to merge any cell in the language section and if the next cell is empty, then the selected cell is merged with next cell.

If any widget is present in the next cell, then it shows an alert message. Similar functionality is followed inversely for split cells. You can add cell level indentation up to ten levels of indentation. Row (A, B, C....) and column (1, 2, 3...) headers cannot be indented. Indentation is shown in preview but not inside the cell. Indentation is applicable only for Grid Preview and is not available for the standard/default Preview.

Row Header Icons

Column Header Icons
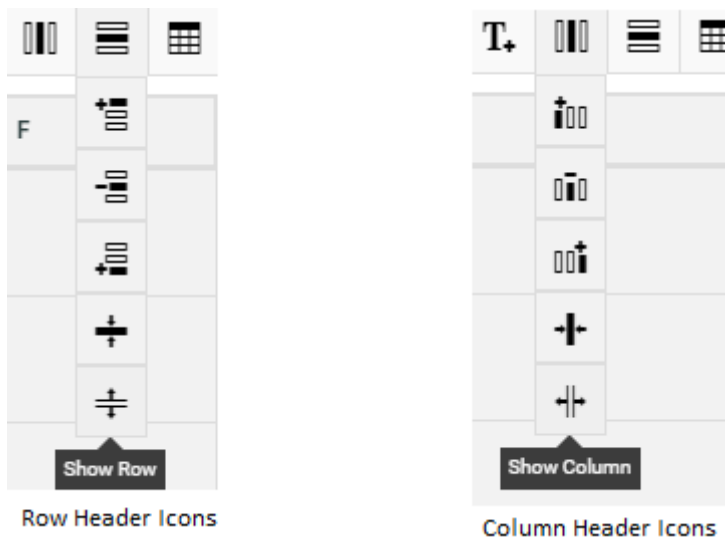
Reorder Table Rows and Columns

Rows and columns in the Table document can be reordered by drag and drop. You can also re-size the width of a column by using the column re-size handler.

Hide and Show Rows and Columns

Rows in the Table document can be hidden by selecting any cell in the Row and selecting the **Hide Row** option in the language header. To show the hidden row, select the row and choose the **Show Row** option in the language header.

Show and Hide columns also function similarly by using the Show Columns or Hide columns in the language header.

Layout configuration in Master Languages

When there are multiple master languages in the table content document and if the layout is configured in one of the master Language, changes made impacts the other master languages as well.

Table Element Types

The individual Table statements can have a particular Element Type. The default Table Types have Element Types corresponding to the GS1 standard. However, you can add custom fields to suit your particular needs.

You can add multiple instances of one Type and it will be indicated with a suffix number.

Note: You can add elements to the Master Table and the Translations have the same fields as the master. You cannot add custom types to the translations.

As a Content Manager, you can add or delete fields.

•
  Click on the configure ⚙ icon.
• To add an Element Type, click T+
• When you have selected a particular Standard, the corresponding table element types are available.

  If your template is a Standard, you can add more from the **Add Preview Fields ...**section.
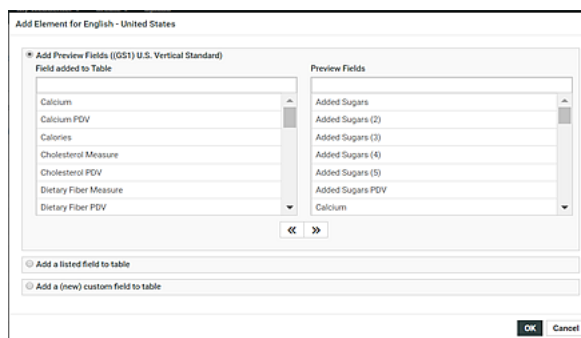
- You can choose from:

Options	Description
Add Preview Fields	To add Element Types of the particular Standard you selected, just click on the field. Use << to take all elements out of the table and use >> to add all fields to the table.
Add a Listed Field	To add one, click on that specific Field. Read *below*.
Add a custom field	To add a custom Field. Read *below*.

- You can store your GS1 (or custom) Table Element Types in a *List* and use them in a Table.

    a) Create a List with the Nutrition Fact Element Types with the name `TABLE_ELEMENT_TYPES`. These Types will be available to you in your Table Documents

    b) To add one field from the List, select **Add a listed field**.

    The gallery lists all the types from the List.
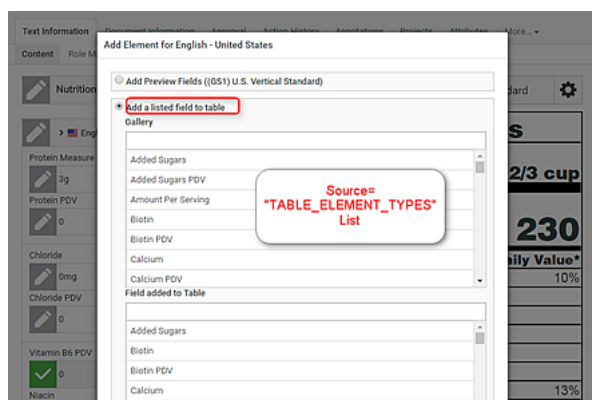
- You can also add custom fields that are only relevant in one Table. To create such a field select **Add a custom field** option. You can use this option when you have to create Custom fields in some tables or when you are using the *Custom Templates* on page 501.

    a) Enter the **Element Type Code**, the code that will be used for a the added element type. This is used to highlight the field in the custom previews.

    b) Also specify the **Instance Sequence** to identify each instance of the same element in a table.

    c) Click **Add**.

• After modifying the table Elements, remember to click **OK** and to **Save** the table.

> **Note:** The Element Types are used when Dynamic Content Tables get imported into WebCenter.

Text Content / Table Ownership via Permissions

Text Content Ownership

offers established ownership for different phases of the text and table creation and the approval process. You have four default content permissions:

• **Content Manager**
• **Editor**
• **Approver**
• **Add Language**

These permissions, when mapped to the WebCenter roles, allows their assignees to perform specific functions on the document.

> **Note:**
>
> • To configure these permissions, the project manager needs to assign at least the **Content Manager** rights to a relevant Role.
>
>   For example, you can configure a **Role**, **Marketing** to have the **Content Manager** function.
> • The Content Manager can then activate the **Editor, Approver** and **Add Language** permissions by assigning them to relevant WebCenter roles.
>
>   If you do not assign a role to a specific permission, the specific permission will remain inactive for the document.
> • The permissions are set at each text/table document (.wcc or .wtc) level and will be passed on along with the document and its versions when copied or moved.
> • It is not possible to add custom permissions.

Four Types of Permissions

1. **CONTENT MANAGER**:

   The WebCenter Role with this permission facilitates the entire content management process to ensure accuracy and compliance. For example, the role Marketing could have this permission where the Marketing has the responsibility of the packaging content. The Content Manager will manage the Master and Translated statements.

   > **Note:** The Content Manager Role is not associated with any specific language.

   This role will manage all the permissions and the settings for the current document.

   > **Note:** Content Manager Role cannot act as an Editor or Approver unless this permission is granted to the same role.

2. **EDITOR**

   The Content Manager typically assigns this right to the dedicated roles who will create, edit, revise or translate the text. This can be assigned per language.

   An Editor Role (for example, a Translator) can edit when a document is in the **Draft** state, not in **Signed-Off** or **Pending Sign-off** state.

If the Editor also has **Approver** permission, then the documents are directly moved to **Approved** state instead of pending sign off.

> **Note:**
>
> • The **Content Manager Role** has to configure the list of translation languages to make use of multiple language based **Editor** permissions.
>
> • You can configure **Roles** for all languages to which the content should be translated and grant them the **Editor** permission.

3. **APPROVER**: A **Role** with this permission can approve the text content. This permission can also be configured per language. The approver puts the Text Statement to **Signed-Off** or **Rejected** state.

4. **ADD LANGUAGE**:

   Any user with **Add Language** permission can add language to a text or table content document. The users can be assigned with permission to add only specific languages.

Manage Permissions

Content Permission	Language	Role	Assignee(s)
CONTENT MANAGER		PCM_CONTENT MANAGER	MRJN
EDITOR	English - International	PCM_CONTENT MANAGER	MRJN
EDITOR	English - United States	PCM_CONTENT MANAGER	MRJN
EDITOR	Dutch - Belgium	PCM_CONTENT MANAGER	MRJN
EDITOR	French - France	PCM_CONTENT MANAGER	MRJN
APPROVER	English - International	PCM_CONTENT MANAGER	MRJN
APPROVER	English - United States	PCM_CONTENT MANAGER	MRJN
APPROVER	Dutch - Belgium	PCM_CONTENT MANAGER	MRJN
APPROVER	French - France	PCM_CONTENT MANAGER	MRJN
ADD LANGUAGE	English - International	PCM_LEGAL	MRJN MRJN_USR2
ADD LANGUAGE	Dutch - Belgium	PCM_TECHNICAL	MRJN MRJN_USR3
ADD LANGUAGE	French - France	PCM_CONTENT MANAGER	MRJN

_REQUESTOR Role

To create new Text/Table Documents, edit, approve or to reuse content during the Project Creation phase, you need to grant the relevant permissions to the **_REQUESTOR** role. You can give these permissions in the libraries of Text/Table Document Templates, or Projects with approved Documents.

Delegation of Approvals in Text Content and Tables

An user can delegate his WebCenter tasks to another user. The delegated user can perform all actions on behalf of the delegator. When the delegate approves text or table content, the password validation is done on the delegate's password.

When a user has logged in on behalf of another user, and approves any text or table content, the same can be viewed by clicking **Approval Info** in the ellipsis. Alternatively, it can also be viewed in the **Document** > **Action History**.

Nutrition Facts Preview

The **Preview** lets you view the data being edited and it adapts according to the changes you make in the nutrition fact statements. You can see the preview of the table document.

Note: The preview is an approximate representation of how it would appear in the artwork. It does not support editing the design elements.

Configuring a Preview

The **Preview** is configurable and you can select from different Nutritional Facts table formats. To specify a Preview:

• click **Configure Preview**

• select a **Type**

• specify the **Standard**
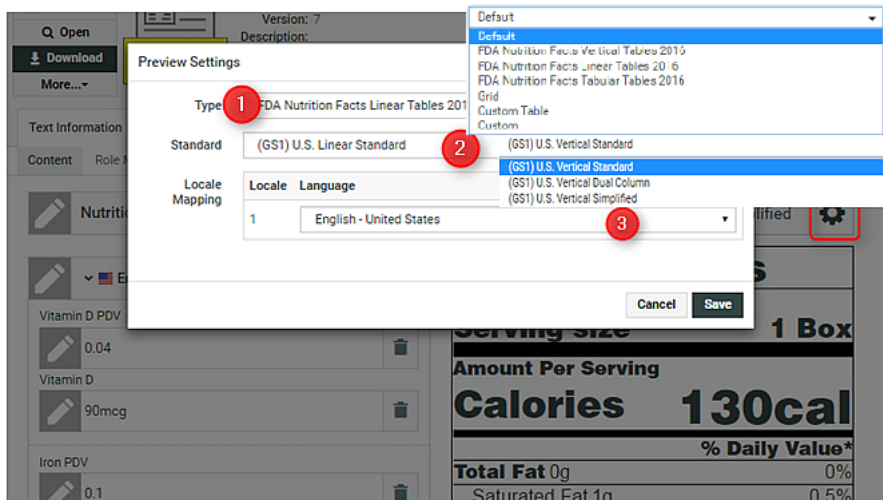
1. Available preview templates (default and *custom*). The following templates are available by default:
   • FDA Nutrition Facts Tabular Tables 2016
   • FDA Nutrition Facts Linear Tables 2016
   • FDA Nutrition Facts Vertical Tables 2016
   • Grid
   • Custom Table
   • Default
2. Standards available for the selected template.

3. The language of the Preview (If you select French, your preview will be updated to show the French content)

You can also add or delete table elements to the master language table to update the document. Read in: *Table Element Types* on page 494. Position Preview ▭ icon allows you to configure, where the preview is displayed.

> **Note:** To know more about Grid layout of the table, read here *Table Properties* on page 489

Download Preview

You can download the preview of a Nutritional Facts table in pdf format. PDF downloaded document contains all the mandatory elements and other elements which has values in the same format, font and styling as shown in the Preview.

If any custom fonts are used, then add the fonts also in the application server `pcm/TablePreviews/custom/fonts` folder location to view and download the preview.

> **Note:** Download PDF option is not available if Default type is selected.

16.4.2. Creating Tables

Creating a Simple Table

You can create Tables for your artwork from scratch and store them in WebCenter. These tables can be exported in GS1-XML and use it to communicate between different systems during the artwork management workflow. You can involve various stakeholders through an approval process.

An intuitive preview section adjacent to the edit fields displays the data in the context of the table design. The changes you make are highlighted on the go to give you a very visual data entry process.

> **Note:** You need Table Templates in the system to be able to create a new Table. An Administrator or Project Manager can *import Text or Table Document Templates* into the system.

• Import a Project or Template with Table Templates and adapt the settings. When users will create documents from this document template, they will inherit these settings.

   a) Go to **Document Details** > **Text Information** > **Content** tab of the Template to modify the *Table Properties* on page 489. You can specify the *Approval Type*, Table Type, Languages etc.

   b) In the **Role Mapping** tab, assign the *Content Permissions* to have Roles mapped as Editors, Approveres and Content Manager.

   > **Note:** Specify _REQUESTOR as a Content Manager of the template if you want to create Tables during Project creation.

   c) Optionally, adapt the settings of a template to make it a SmartName based table. Read more in: *Creating Smart Tables* on page 500

• To create new tables from these Templates, plug these as a Document Source in your Project Template. Follow the steps below:

   a) In the Template's **Project Details** page, **Configure** > **Document Templates**.

   b) Select **Project** or Template and select the Project your created in the first step and **Save**.

- Create an Attribute Category for your Template.
  a) Add *Language Attributes* and restrict them to Language Lists.
  b) You need Document Reference Attributes. Create and add them to this Category.
  c) Configure the **Document Sources** and Rendering of this attribute.

  > **Tip:** Use a Saved Search configured to search for Table Templates as a document source for better user experience. You can, for example, add a Search Panel.

- Optionally, create and add workflows for approval and translation. You can also create a Library for your approved tables.
  When creating a Project from this Template, the user can click **New** and select a **table template** from the Templates library to create new documents.
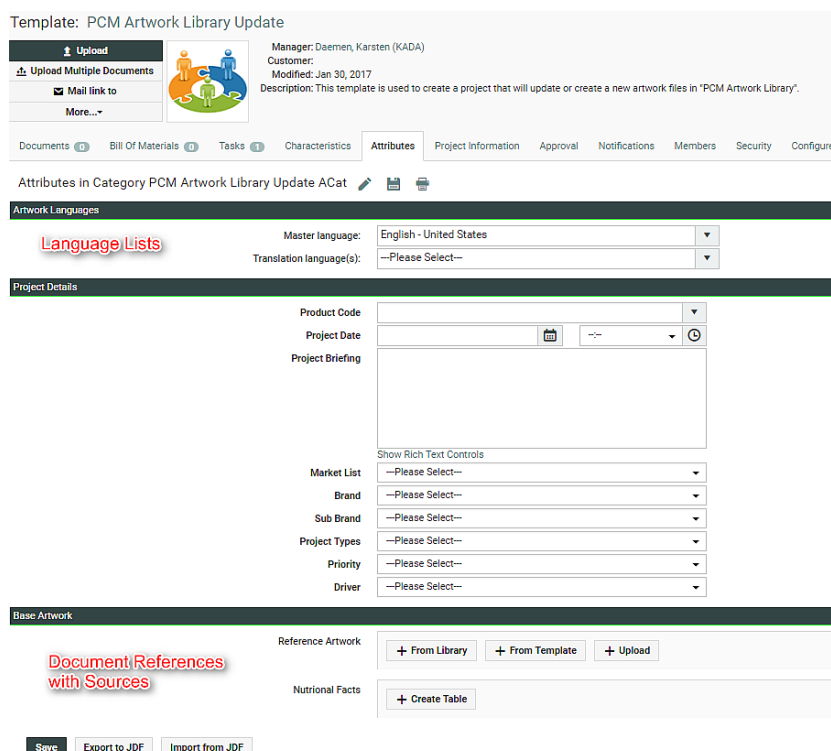
After creating a new simple table, you can enter the data either as a workflow step usting the *Update Table Content* on page 426 node. The users (Editors) can also enter the values manually and send it through the approval process. You can export this table in *GS1 XML* format (either using an action or a workflow *step*) for merging it to the artwork in Illustrator with Dynamic Content.

Creating Smart Tables

You can automate the data collection process required in creating or updating the nutrition facts tables. The process starts with a *Table Template* with dynamic data fields (SmartNames). These fields can be constructed to point to an Excel based List or any WebCenter SmartName such as Attributes.

SmartNames are resolved as actual entries in the context of a Project. This way, you can source the data instead of typing in the data manually. This approach helps you to avoid data entry errors in

nutrition facts. Also, when you require corrections to any of the data fields, you can just edit a single data source instead of updating all related tables.

To set up a SmartName based Template, follow the steps below:

1. In the **Table Document Template** > **Text Content** > **Content** tab, open the *Table Properties* on page 489 widget.

2. Specify the **Type** as **SmartName**.

3. Specify WebCenter SmartNames for each field. For example, you could point the SmartName to an Excel based WebCenter List. You can also select Attributes as the SmartName.

   The Content Manager can approve the SmartNames to lock these fields. It is also possible to delegate the approval to specific Roles based on permissions.
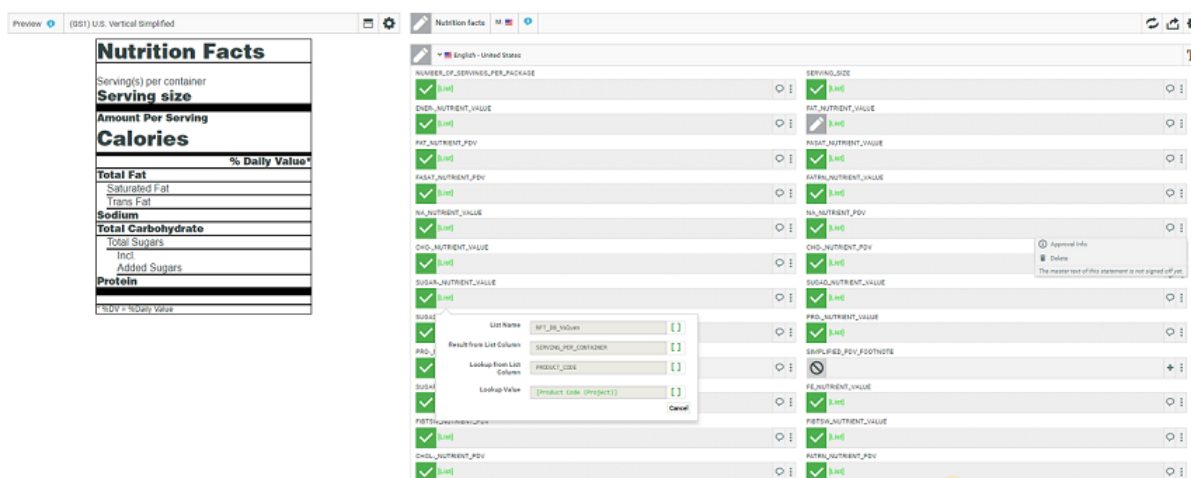
4. Plug the smart table as a document source in a Project template to create a new smart table. Read more from: *Creating a Simple Table* on page 499. SmartText Search drop down lists the Text Saved search.
   After creating a new Table in the context of a Project, the Content Manager can click **Resolve SmartNames** to update the table with numerical values.

   In the example screenshot, the SmartNames are from a List based on the specified Product Code of the Project. You will also be able to see the original SmartNames when you hover over the values.

   > **Note:** If one or more element of the table content has unresolved Smart Content, you will not be able to approve the table nor the elements.

After the approval of the resolved table, the content remains locked. You can export this table as GS1 XML and finalize the table in Illustrator.

Custom Templates

To install custom preview templates, follow the steps below.

1. Place the HTML templates in `WebCenter\WebServer\tomcat\webapps\WebCenter_Inst\custom\pcm\table_layouts` folder and also in `pcm/TablePreviews/custom/` folder of the application server. If any custom fonts are used, then add the fonts also in the application server `pcm/TablePreviews/custom/fonts` folder location.

Register the custom preview template in a "list.xml" in both the above mentioned folders.
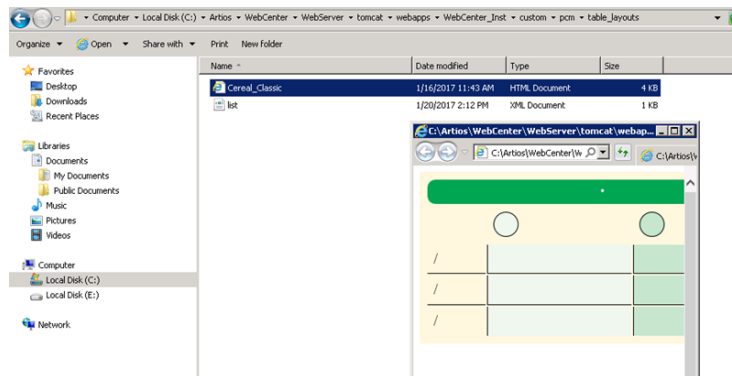
2. For each HTML Preview, create a `layout` entry in the `list.xml` file. This XML file has to be placed in the same folder as above.

See the format of the entry below:

```
<layouts>
  …
  <layout>
   <type>Name of the Table</type>
   <name>Type of the Table</name>
   <path>Path to the Preview Template</path>
  </layout>
  …
</layouts>
```

Note:

The **Type** and **Name** fields will be used in the user interface drop-downs. If a Type is not specified, it will be called "Custom".

Read more in: *Table Preview*

The custom templates will be available in the Preview selector and you can use the **Type** and **Name** fields in the interface to select a Preview.

16.4.3. Workflow Tasks for Tables

Import Dynamic Table

The **Import Dynamic Table** node extracts the **Tables** from your artwork(s) as **Table Content Documents**. You can configure this node to import these Documents with a link to specific **document reference attributes** and **table document templates**.

Note: You need an Attribute Category with Table document references as a pre-requisite to configure this node.

If there are multiple artworks coming into the documents, the node will iterate and extract tables from all of them.

Parameters- Configuration tab

- Specify the **Upload Folder** to store the extracted documents.

- Select the **Document Reference Attribute** for the table. Select the appropriate **document reference** from the drop-down listing all document references.

- **Add Imported Table Documents to Output** . Check this if you want the document sent to the output pin.

- **Reuse existing Table Documents**. The document version specified in the document reference will be reused to store the data instead of creating a new Table Document. If there are no matching tables in the system,new document will be created.

Document Template Tab

- Specify the corresponding **Document Template**. Select the Table Template (either simple or Smart) that corresponds to the incoming Table.

  Select the **Document Template Project** at the top of this tab. Enter the name of the Project(s) where you have configured your table templates. You can either specify multiple project names with a "|" between them or provide SmartName which resolve to multiple project names. Read more in: *Creating a Simple Table* on page 499

- **Add all Document Template elements** Check this to import all statements present in the document template.

- **Set values from Document Template**. Check this to take values from the Document Template for all matching statements. If there are no matching statements, the incoming values will be used in the table document.

Parameters- Language Mapping tab

You can map the **Locale ID** of the **Dynamic Table** to the corresponding language in WebCenter.

Language Index: When you create the first row, this field will have the value 1 by default. When you create more rows, they will be numbered serially.
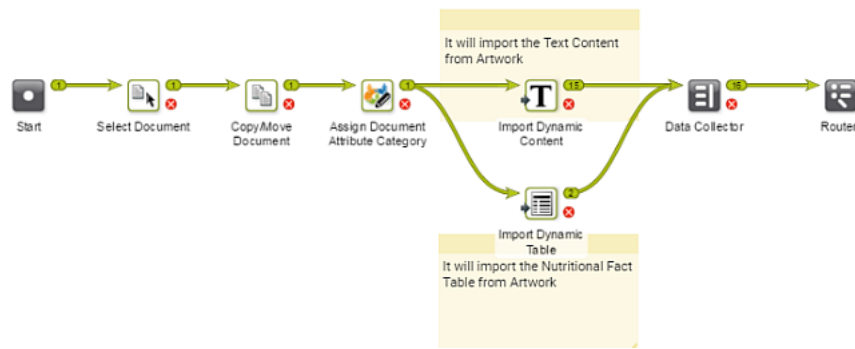
- **Language**: Select the language from a list of languages. Or use a SmartName to dynamically assign the languages.

Note: By default, an imported table is imported as Translated language if it does not exist as a Master Language in the Project's language attribute.

For new Table documents created from this node, the master language table will be added in the **Draft** state, even if that language is not available on the artwork.

Note: If you do not specify language mapping for the imported Dynamic Content, the node will try to find the language in the *Lists* (Master and Translation languages).

–Read also: *Import Dynamic Text* on page 395.

In the example, when an artwork with Dynamic Content arrives at a Packaging Content Management workflow, the following steps happen:

1. The workflow assigns a **Document attribute category** to the artwork (parent). This 'copy sheet' category contains the **Document reference attributes** to which the text and table content will be imported.

   Note: If this step is not in the workflow, the **Import** node will use the Project's attribute as the default.

   The category contains the **Document reference attributes** for:

   • text statements,
   • and nutrition facts table

   to serve as the copy sheet template.

2. The *Import Dynamic Text* on page 395 step maps the various Element Types to appropriate **document reference attributes** as configured.

3. The **Import Dynamic Table** extracts the table matching it to the document reference and the table document template.

After the extraction of the content, the workflow processes the content based on the requirements. You can, as in the example, update the incoming table and text using the workflow.

Update Table Content

This workflow node allows you to specify or update Table properties and Table values. You can add:

• Role Mapping
• Languages
• Approval
• Add / Remove / update/ inherit elements and set values for nutritional facts elements

Settings

In this tab, specify the properties in the **Field** and the corresponding values in the SmartName supported **Value** field.

You can specify or update the following properties and their values in this tab:

• **Invariant** : Specify this as `True` if translations are not required for a particular Document.

• **Approval Setup**:

- **Default**: Only one member has to approve. For example, if the Approver permission is assigned to two Roles, only one member (from any Role) has to approve.

- **One of role**: One member of each Approver Roles (assignees) has to approve to complete the signing off. In case a Role is assigned to several members (groups or users), any Group member or user from that Role can approve.

- **All of Role – One per Group** : At least one member from each Role-Group has to approve. If there is an individual User, then he or she has to approve as well.

- **Inherit Content From** :

  You can choose to inherit content one of the options below

  - **Default**: Will inherit the content from the language that is configured to follow in the Language List.

  - **None**: Will not inherit content from any language in the workflow node. However the user can manually change the language at the element level in the document.

  - **Master Languages**: Can choose any of the languages from the master language list.

  By default **Disable** is chosen which will not allow Inherit content.

- **Type**: Simple or Rich Text. If the Type changes from the existing type, the document status will become **Draft**.

Values

This tab lets you add / remove /update table statements and their values. Use a single row per **element** or statement.

- **Element** – The table *Element Type* to be added or removed. This field is a smartname dropdown populated with the list of table element types supported in the WebCenter.

- **Instance Sequence** – Specify the instance sequence number. This number indicates how many occurrences of an Element is present in a Table. The default value is 1.

- **Language** – You can either select from the drop-down (listing all the languages present in the system) or use a SmartName in this field.

  If the specified SmartName resolves to multiple languages, then the specified configuration (from that row) will be applied to all of them.

- **Action**: Choose from **Add** / **Remove** /**Update**/ **Inherit** .

- **Condition** You can add a condition where the workflow node can inherit/add/update/remove elements. There may be a combinations of different conditions that may be given.

Condition	Action Possible
Always	Add, Remove, Update, Inherit
New Value is not empty	Add, Update, Inherit
Current value is empty/not available	Add, Update, Inherit
Current value is empty	Remove, Inherit
Current value is not available	Inherit

Condition	Action Possible
Current value is empty and new value is not empty	Add, Update

- **Value** – Field where you can specify the actual content. You can enter the data or use SmartNames.

Tip: Use List SmartNames(pointing to an Excel sheet based List) to provide content in a smart way.

Note: If you specified the action as **Add** for an existing value, the value is updated. If the element does not exist in the document, the element and the value will get added. However, if the action is **Update** and the element does not exist, the row is ignored.

Note: If you are updating a SmartName table using this node, the value from this node will replace the SmartName in the table.

Approval Tab

This tab allows you to set **Approval Status** (per element, per instance and per language) via workflow. This allows you an automated way of approving the nutrition fact statements.

Note: You can use SmartNames in this step and if your SmartName points to a multi-value attribute, it will resolve to multiple values.

1. Select the **Element** or the statement.
2. Specify the **Instance Sequence** of the element.
3. Select **Language** – You can either select from the drop-down (listing all the languages present in the system) or use a SmartName in this field.
4. Specify the **Status**. You can choose from **Draft**, **Pending SignOff**, **SignOff Rejected** and **Signed Off**.

16.5. Product Content Sheet

Artwork design involves coordinating information from many different sources and stakeholders. There could be many possibilities for errors and hence it is important to keep all the assets related to a product saved at one place.

Product Content Sheet (PCS) or a copy sheet in simpler terms is a high level document that describes the contents of multiple related products. The PCS will be a repository of all the constituents that are going to be used on the products, like recipes, text, bar codes, symbols, images, nutritional tables and so on. PCS are stored in a file type called Components. Components are unique file which has no physical presence but acts a placeholder for all the documents related to the product. Read more about component file type here *Component File Type* on page 59.

With Product Content Sheet, you can:

- Specify the constituents, and also list the usage of these elements.
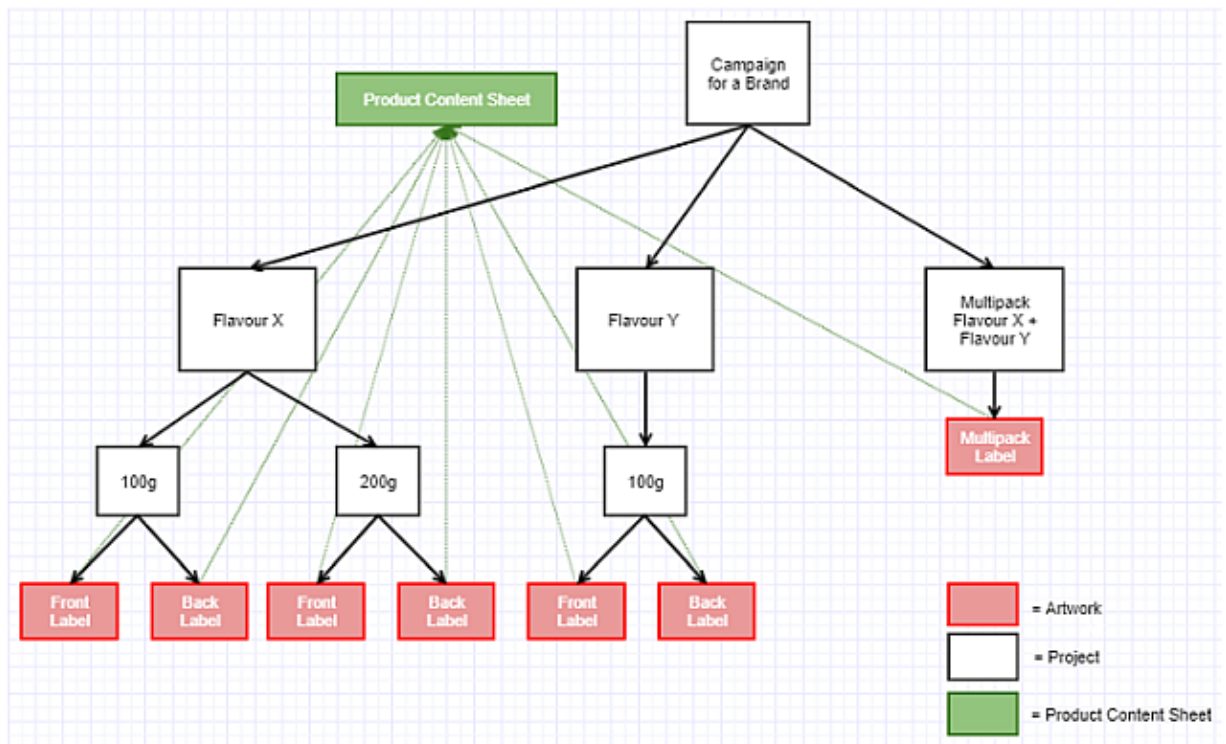
For example, to ensure that a certain recipe is only applicable to the Flavor X of the product or that a certain text statement should only be applicable for a certain serving size.

• Extract all the applicable content elements for a certain artwork, provided you specified the correct usage for the artwork.

For example, when creating the artwork for a multipack, you could specify the requirements as the contents of the PCS that are tagged with "Flavor X" and "Flavor Y". When creating the artwork for the enclosed single flavor product, you would specify that the artwork is only applicable for either the "Flavor X" or "Flavor Y".

Using Reference Property Filter in a Product Content Sheet

For example, Artwork 1 has the Reference Property Filter 1 (RFP 1) which has some of the content extracted from Product Content Sheet. Similarly, Artwork 2 has the Reference Property Filter 2 (RFP2) with some of the content extracted. You can notice that Symbol 1 has both RFP 1 and RFP 2 defined and hence are part of both the Artwork 1 and Artwork 2.
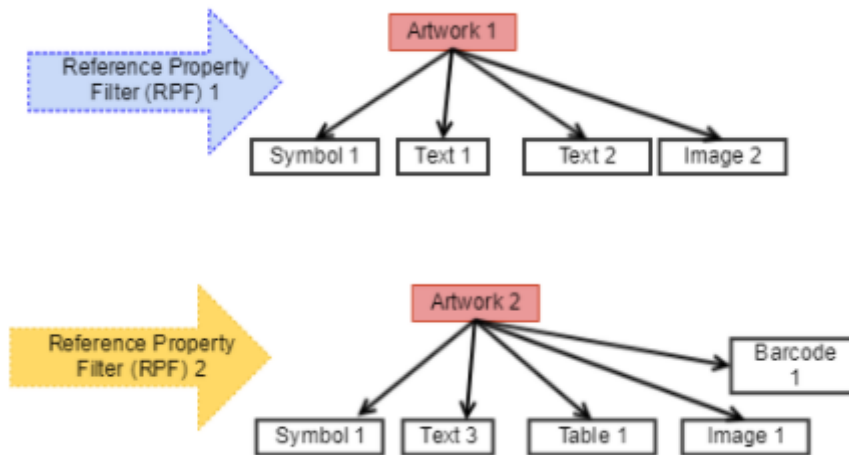
It is now possible to compare the Dynamic Contents in Artwork to actual content referenced to the Artwork in the **Content Widget** in the WebCenter Viewer. Details on how Artwork comparison works in Viewer *here*.

Dashboards are also enabled now to view the content sheet and Dashboards can be configured to compare content sheets in them. More information on Content sheet in Dashboards can be found *here*.

16.6. Comparing Content Sheets in Dashboard

Dashboards are now enabled to view the content sheets and also compare two content sheets using **Content Sheet** block. You can compare any of the two different

* content sheets or
* versions of the same artworks or
* artworks which has the same attributes

When you choose to compare a document with another document, the **Delta** column shows the status whether the contents have **Changed** or **Removed** or **Added**.

The differences are shown specifically in each of the content for changes as follows

- **Text**: Color coded highlights on the exact location of the change on the text content itself for each of the language present.

- **Table:** Changes to the values of every element type is compared and status is shown.

- **Images:** Change of values to the EXTERNAL_IMAGE_PATH are shown.

- **Symbols:** Change of values to the SYMBOL_NAME are shown.

- **Barcode:** Change of values to the BARCODE_BASECODE *and* BARCODE_COMPOSITE_COMPONENT are shown.

    Note: EXTERNAL_IMAGE_PATH , SYMBOL_NAME, BARCODE_BASECODE and BARCODE_COMPOSITE_COMPONENT are all hard coded attributes.

Apart from the changed and unchanged statuses, the content **Removed** from the Source document and content **Added** to the source document are shown specifically in the each of the tabs.

16.7. Compare Artwork with the requirements In Viewer

Many a times, there is a challenge to compare the requirement provided to the Artwork designers tand the actual artwork that is created. The new features in the **Content Widget** in Viewer shows the comparison for Dynamic Contents in Artwork to actual content referenced to the Artwork in WebCenter, in a click of a button and bridges this gap.

The planned requirements are also visible in the viewer in the Content widget and can easily identify the Dynamic Content that are newly added or removed with color-coded visual feedback. This saves a lot of time and effort in performing this action manually.
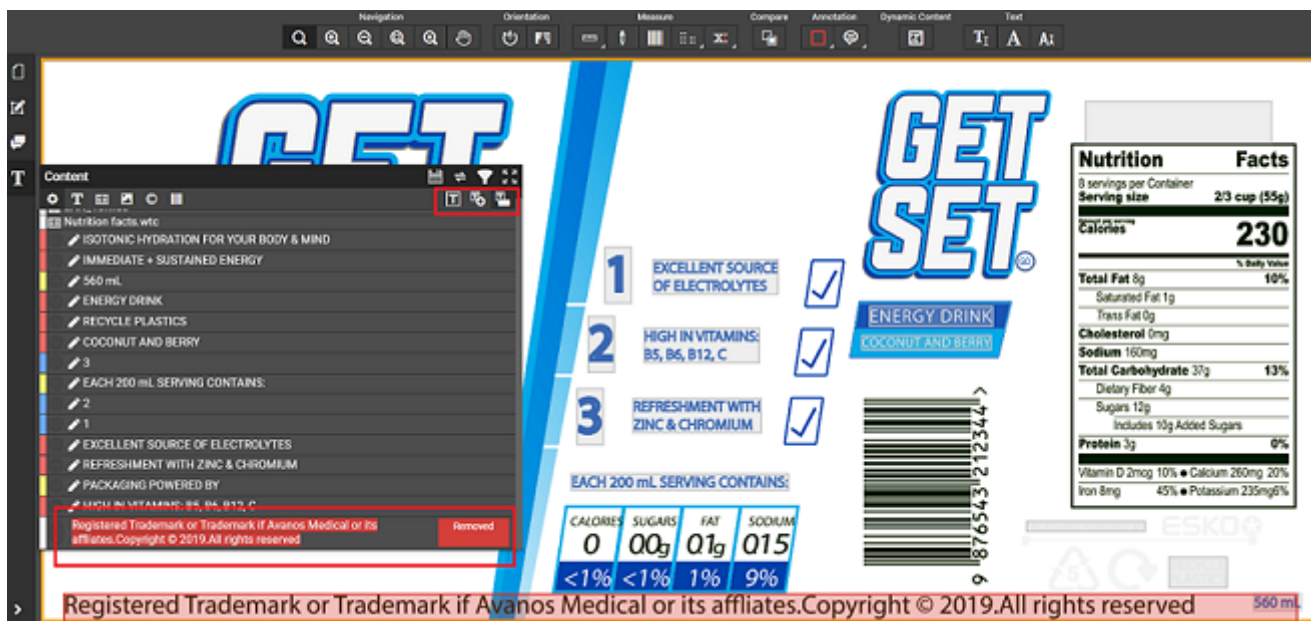

Compare Mode in Text Content Widget

Three options are available to view the changes of the Dynamic Content in the Artwork with the Attribute Category namely

- **Collate Content**: Shows all the Dynamic content in the arwork and referenced contents. In this mode user can edit Text Statements.

- **Compare Content Icon**: Shows the compared status in icon if content has changed/added/removed.

- **Compare Content Label**: Shows the compared status in the label, if content has been changed or added or removed. You can view the changed status as shown in image below.
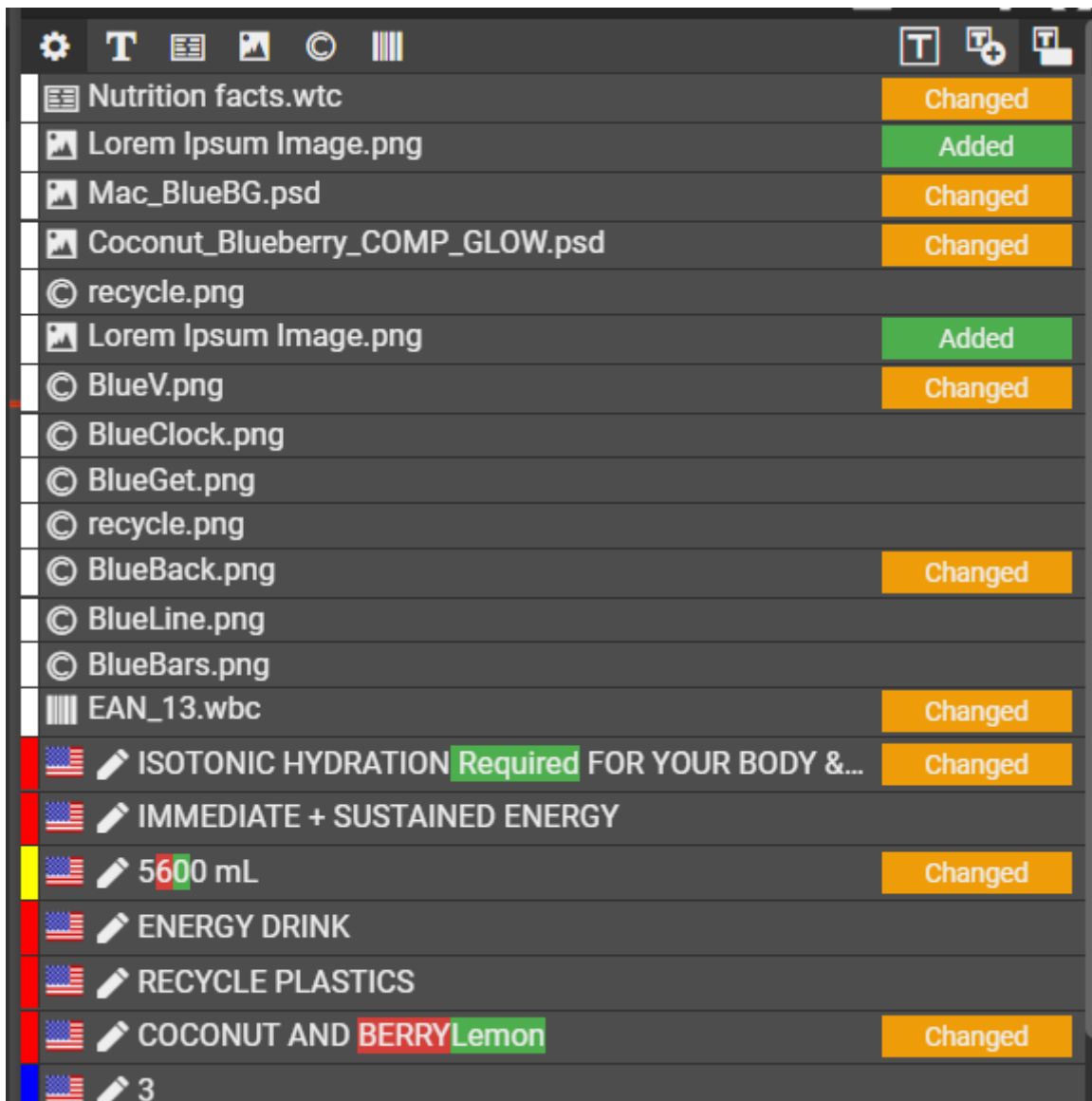
Hovering on the content in the Compare Content Icon or Compare Content Label mode, presents the detailed information about the compared document based on the Dynamic Content selected. For example, a Barcode document is shown below.
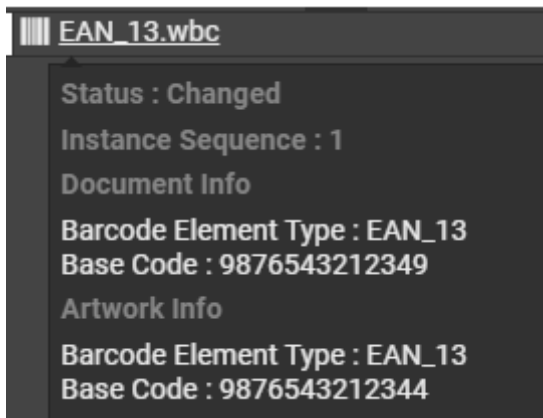
Below image shows an example of how Text Compare is viewed in the Viewer.