

WebCenter Tasks Plug-in 22.11

User Guide

11 - 2022

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2. Introduction to WebCenter Tasks Plug-In

Content creators and Artwork designers use both Adobe® applications and WebCenter for their content creation, editing and approval tasks. The most critical approvals required for the artwork is done in WebCenter whereas the creation of the artwork and editing based on the approval feedback are performed within Adobe® applications like InDesign®, Illustrator® or Photoshop®. This disconnect leads to time lapse and delays which is well addressed by the WebCenter Tasks Plug-in.

Enabling a communication mechanism between WebCenter and the other applications reduces the causes of errors and also speeds up the time taken for artwork creation and approval of packaging design.

3. Supported Platforms and Applications

Supported Software Operating Systems

- macOS 10.15 (Catalina), 11 (Big Sur), 12 (Monterey)
- Windows 10, Windows 11

Supported Applications

- Adobe® Illustrator® 2021, 2022, and 2023
- Adobe® InDesign® 2021, 2022, and 2023
- Adobe® Photoshop® 2021, 2022, and 2023

4. Installation of WebCenter Tasks Plug-in

WebCenter Tasks plug-in consists of two components.

1. Server plug-in
2. Client plug-in

Both the components must be installed to use the WebCenter Tasks plug-in.

Server Plug-in Installation

WebCenter Tasks plug-in is included in the WebCenter installer. Plug-in server component is automatically installed when you install WebCenter.

- **Upgrading Server Plug-in**

If a new version of plug-in is available, then the WebCenter plug-in can be upgraded.

Ensure that you end the current sessions which are in progress, before you upgrade to the new version of the plug-in.

- **Uninstalling Server Plug-in**

Uninstalling WebCenter automatically uninstalls plug-in server component.

Client Plug-in Installation

Install client plug-in to connect to WebCenter from Adobe applications. Client plug-in can be downloaded from WebCenter using the following URL:

[http\(s\)://<domain>/<WebCenter_Inst>/plugin/client/download.html](http(s)://<domain>/<WebCenter_Inst>/plugin/client/download.html)

After successfully installing WebCenter Tasks client plug-in, the extension will be available in all the supported Adobe hosts in the menu option **Window > Extensions > WebCenter Tasks**.

Uninstalling Client Plug-in on Windows

Follow these steps to uninstall client plug-in on Windows:

1. Open Windows Settings panel and then click **Apps**
2. Select "Esko WebCenter Tasks Plug-in".
3. Click uninstall.
4. Restart Adobe applications if they are already opened.
5. Go to menu option **Window > Extensions**

If the "WebCenter Tasks" is not listed, then the uninstalling was successful.

Uninstalling Client Plug-in on macOS

Follow these steps to uninstall client plug-in on macOS:

1. Go to the directory where client plug-in is installed. Typical installation path would be `/Library/Application Support/Adobe CEP/extensions/WebCenter Tasks`.
2. Right click "WebCenterTasks" and select "Move to Bin".
3. Move the following folder to Bin `/Library/Application Support/Esko-Graphics/DeskPack Plug-In Repository/WebCenterTasks`
4. Restart Adobe applications if those are already open.

Go to menu option **Window > Extensions**. If "WebCenter Tasks" option is not listed, then the uninstalling was successful.

5. Licensing

WebCenter Tasks requires a plug-in license. This license must be configured in the WebCenter server where the plug-in was installed.

6. Connect to WebCenter

To open a file from WebCenter in Adobe applications like Illustrator or InDesign, a connection has to be established with WebCenter.

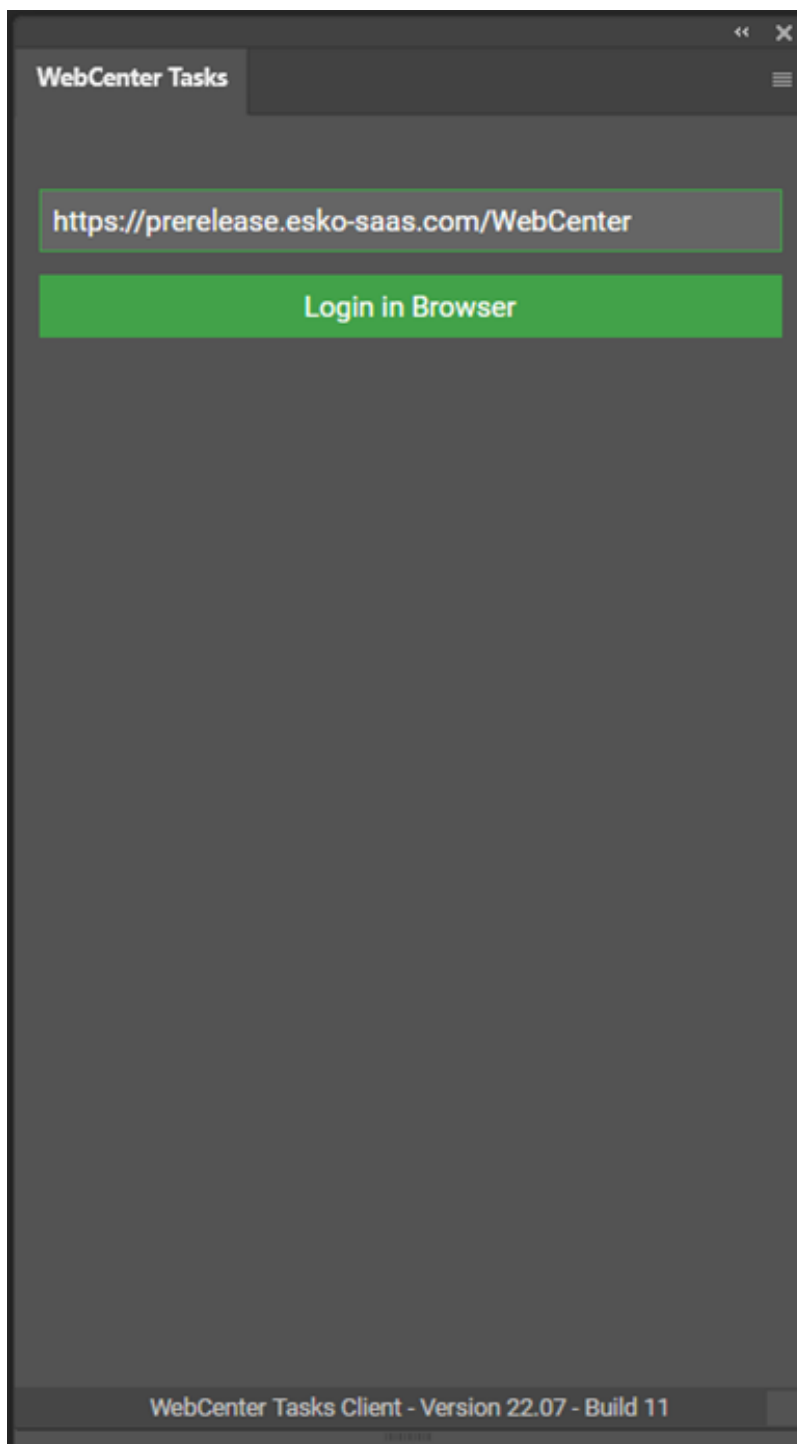
To create a connection with WebCenter follow the steps given below:

1. Open any of the Adobe applications like Illustrator or InDesign, in which you want to edit the graphic file.
2. Navigate to the menu option, **Window > Extensions > WebCenter Tasks**. This opens a WebCenter Tasks palette window.



Note: On ARM-based mac follow these steps to load WebCenter Tasks extension in Photoshop:

1. Go to Applications/Adobe Photoshop 2021/Adobe Photoshop 2021
 2. Right click Photoshop application and select **Get Info**.
 3. Check **Open using Rosetta** option.
3. Enter the WebCenter URL.



Version information of client-side plug-in is displayed at the bottom of the WebCenter Tasks Plug-in panel before signing in.

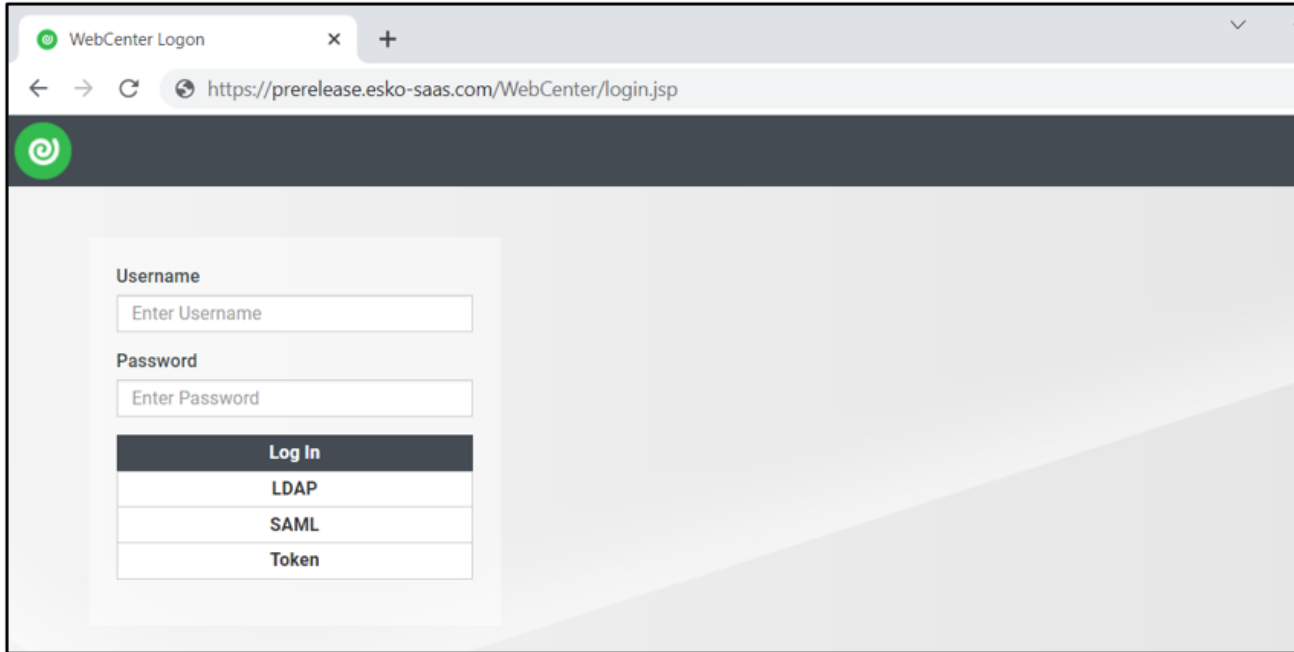
When connecting for the first time, enter the URL of the WebCenter Instance you wish to connect to.

4. Click **Login in Browser** to connect to WebCenter.

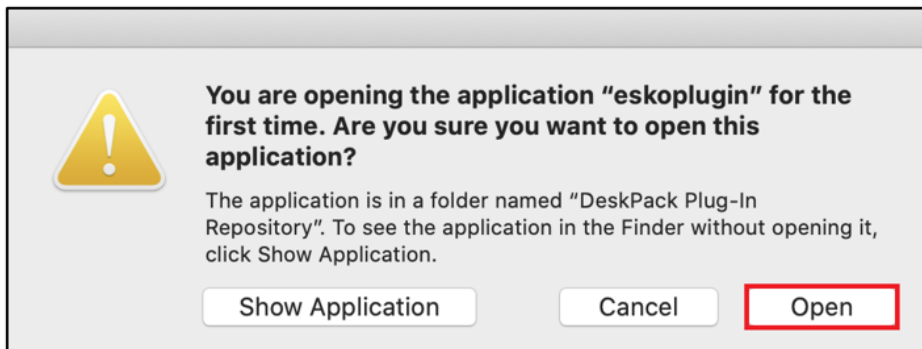


Note: Login in Browser button is enabled only if the URL is correct and there is a server installation of the WebCenter Tasks Plug-in is already installed.

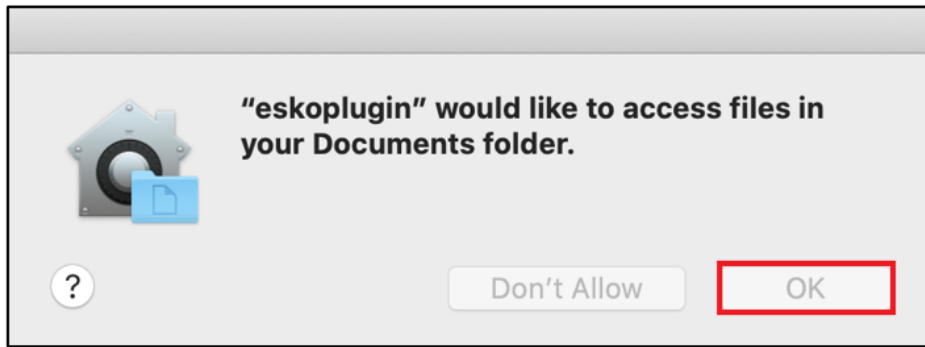
5. WebCenter Login page opens in default browser. Login with your credentials.



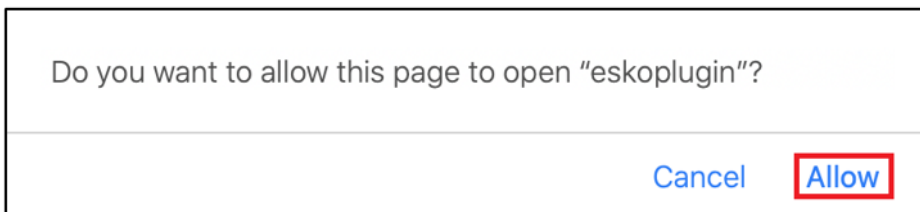
6. On macOS below pop-ups are shown after login:
 - a. Click Open.



- b. Click OK.

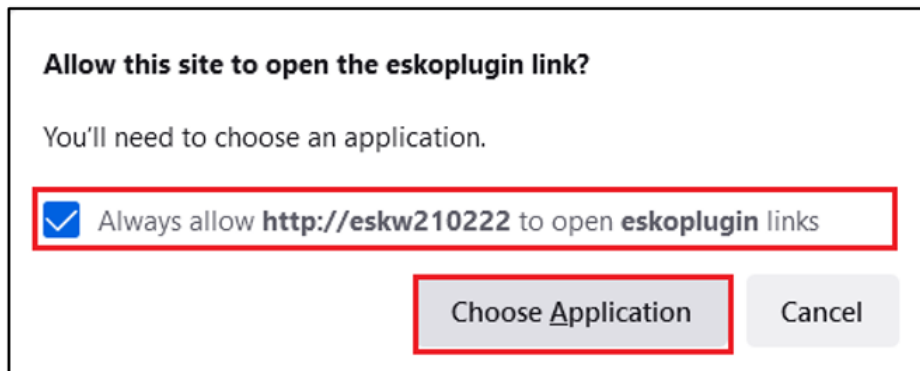


7. If your default browser is **Safari**, below pop-up is shown. Click Allow.

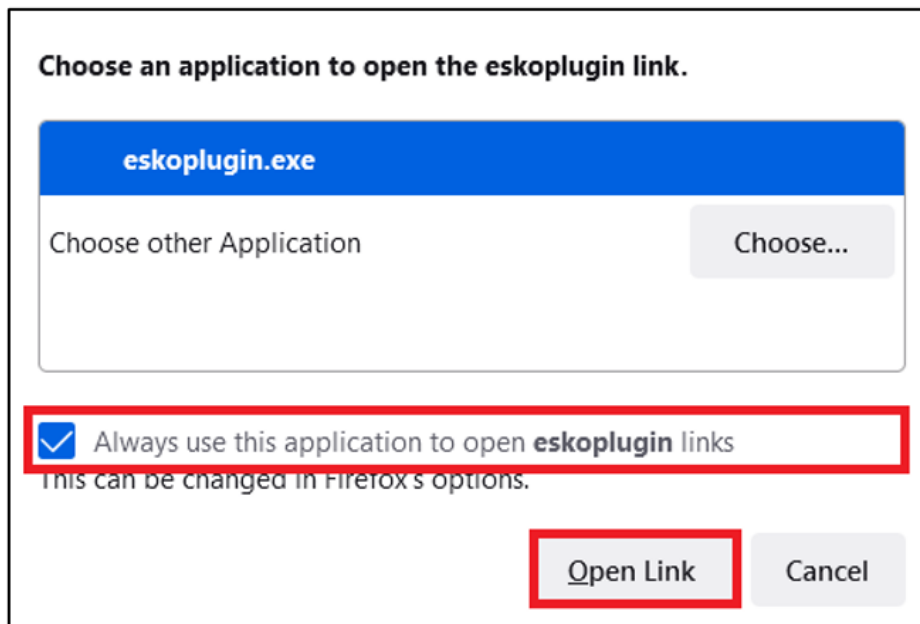


8. If your default browser is Firefox, below pop-ups are shown:

a. Check "Always allow ..." check box and click "Choose Application".



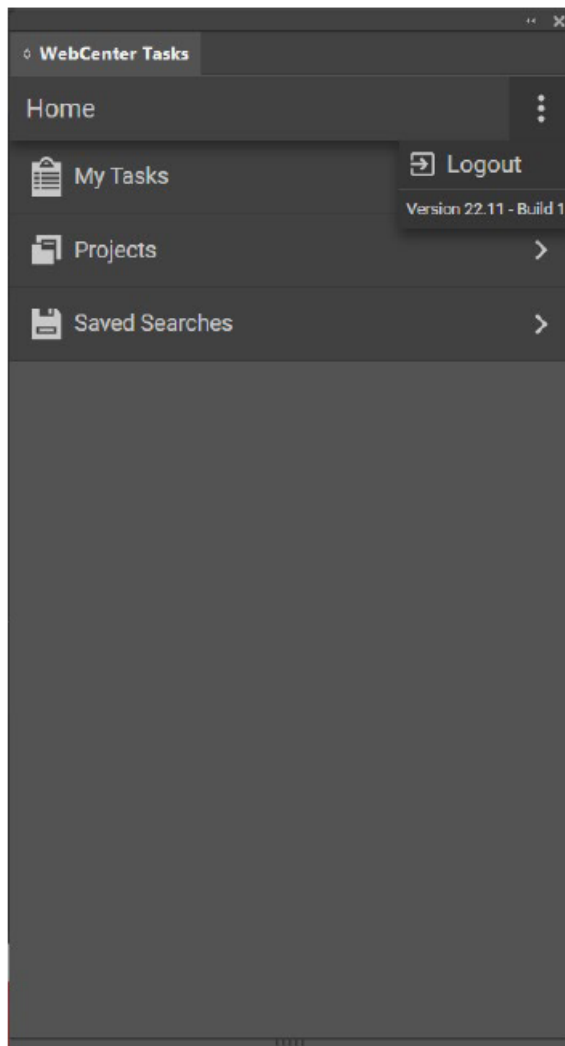
b. Check "Always use this application ..." check box and click "Open Link".



9. After successful login, go back to the Adobe application. Home view or Tasks view loads based on plugin preferences.

7. Home View

Home view will have options to browse either **My Tasks** or **Projects** or **Saved Searches** (based on preference set at server-side plugin) and access to logout and view server-side plugin version.



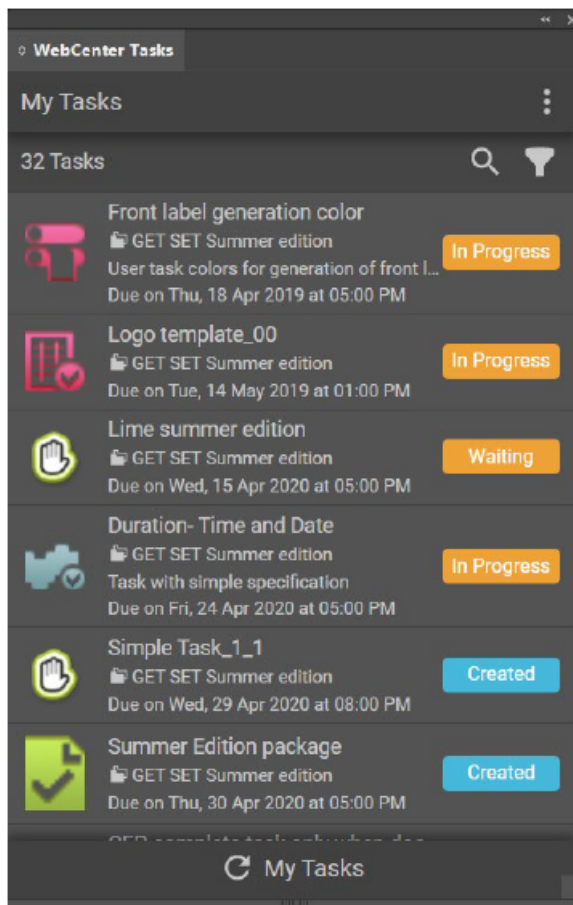
8. View WebCenter Tasks in Adobe Applications

Tasks Plug-in can be effectively used, when the designers work on a graphic document in the Adobe applications and want to use the information already present in the WebCenter tasks.

My Tasks view becomes first view if there's no Projects and Saved Searches plugin preference is disabled. Hence will have Logout option and info regarding Server-side plugin version.

When the connection is established with WebCenter, **WebCenter Tasks** palette window shows the list of tasks that are assigned to you. Tasks list shows the Task name, Project name, Due Date and the current Status of the task. You can open the tasks to view the documents, download documents or complete the task.

You can search for the tasks by name or Description or the Project name in the search option or filter them based on assignment.



The tasks can be filtered based on assignments:

- **Me**
- **Me or Group I am in**

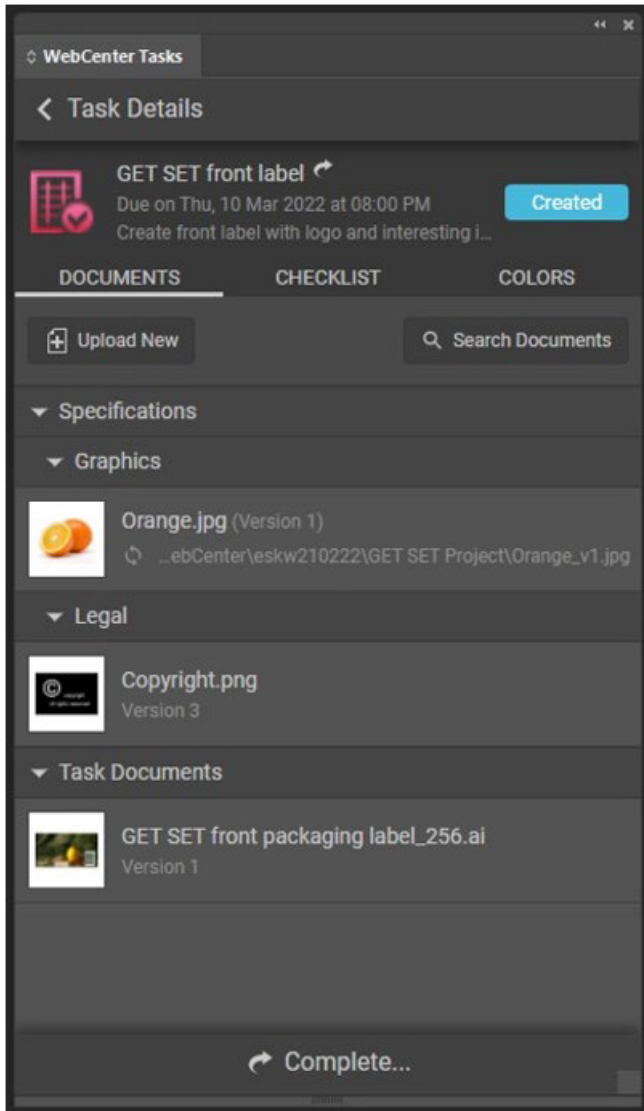
- **Group I am in.**

You can choose to view all tasks by selecting **Show Non-Started Tasks** option or choose **Show Workflow Tasks** to view only the tasks from workflow.

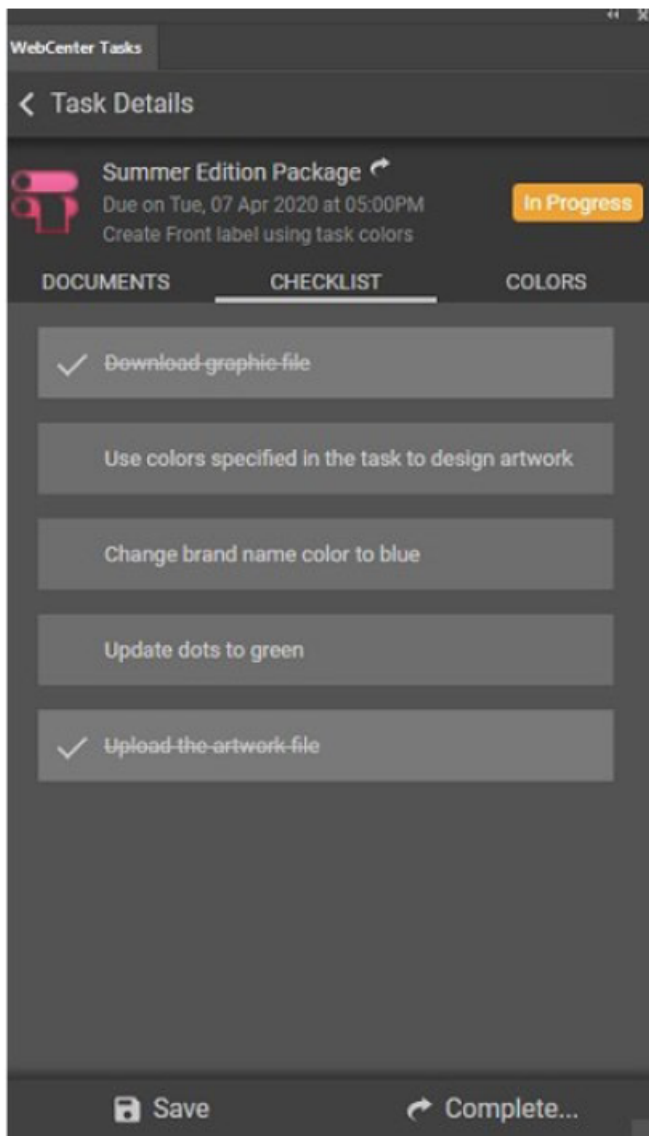
Task Details

You can click on the task, to view the details. Task Details are shown in different tabs like **DOCUMENTS**, **CHECKLIST** and **COLORS**, if they are present in the Task already.

Task Specification document references and Task documents are displayed in the **DOCUMENTS** tab.



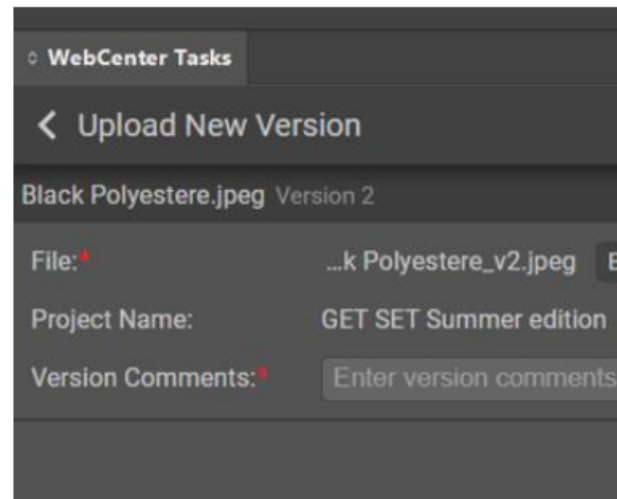
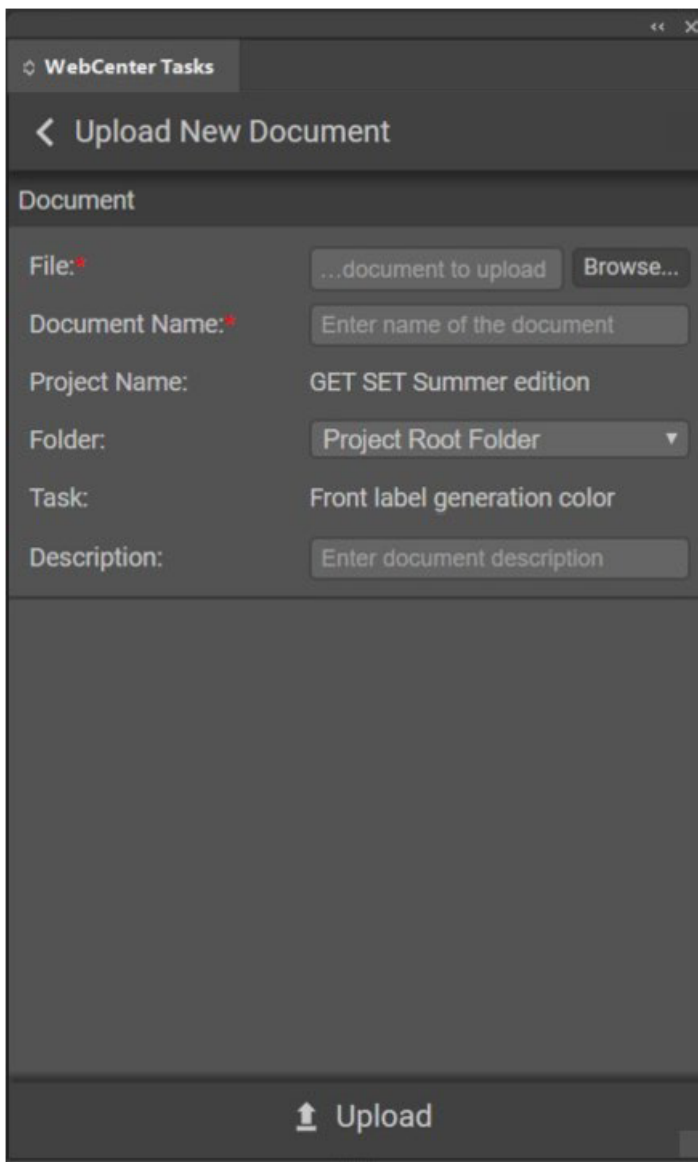
CHECKLIST and **COLORS** tabs are only visible if the Checklist and Colors are already present in the task. You can click on the checklist to check it and remember to save the changes.



You can search for any specific document already present in the Task in the **DOCUMENTS** Tab.

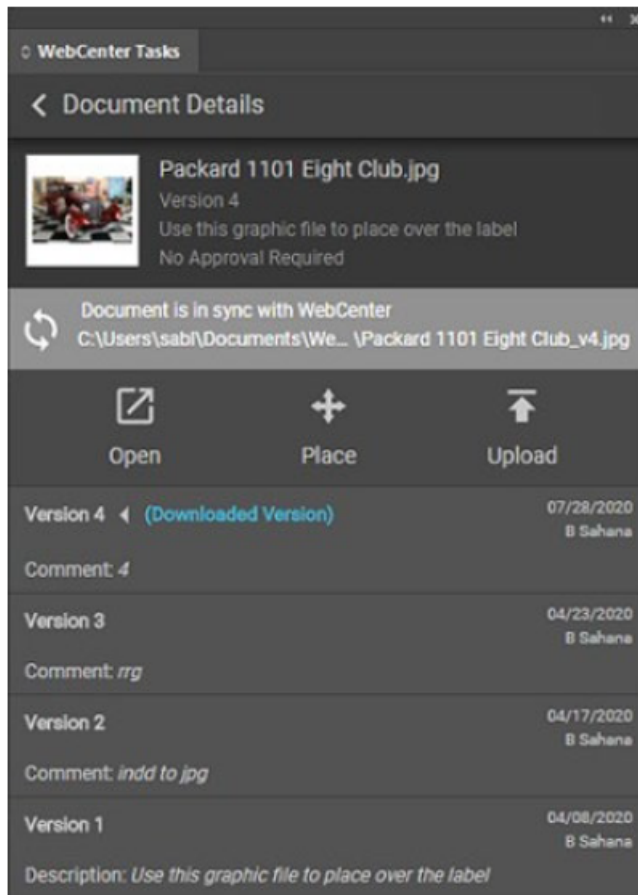
Upload and Download of documents in the Tasks

You can upload a new document to the Task by clicking **Upload New** button.



When a document is selected to download, the latest/selected version of the document present is downloaded. You can view all the details of the document by clicking on it and **Document Details** view is shown.

- You can open the document in the Adobe Application from the **Document Details** view.
- Place it within another document that is currently open in the application by either choosing the **Place** option or by dragging the document from **Task Details View**
- **Upload** a new version of the document.



When the document version present in WebCenter is different, then you will see the option to **Download** the document.


When the document is downloaded, the local path of the document usually is `C:\Users\<user name>\Documents\WebCenter\<host_name>\<project_name>\<document_name>_v<version number>.<extension_type>`.

Document Details displays following tabs:

- In the **INFO** tab, you can download the document if the version present is WebCenter and the artwork are not the same .
- If both have the same version of the document, then "Document is in sync with WebCenter" is shown along with the path of the document where it was downloaded last.
- Images linked in the document are displayed in the **LINKS** tab.
- **CONTENT** tab is shown if document has text statements or referenced images.
- **ANNOTATIONS** tab is displayed if document has annotations.

WebCenter Tasks
⌵

⏪ Document Details




Red Wine Front_2022.ai
 Version 2
 Updating template for new release
 No Approval Required


INFO
LINKS
CONTENT
ANNOTATIONS


↻

Document is in sync with WebCenter

C:\Users\sabl\Documents\We... \Red Wine Front_2022_v2.ai


 Open


 Place


 Upload

Version 2 ◀ (Downloaded Version) 07/06/2022
Sahana B

Comment: Updated new logo

Version 1 05/20/2022
Sahana B

Description: Updating template for new release

9. Projects

This section consists of project browsing support available in plugin. On navigating to Projects from Home view, Projects view loads with list of projects user has access to according to the applied project filters.



Note: `showProjectsNavigation` should be configured in preference.json file at server-side plugin to **true** to view Projects option in Home view.

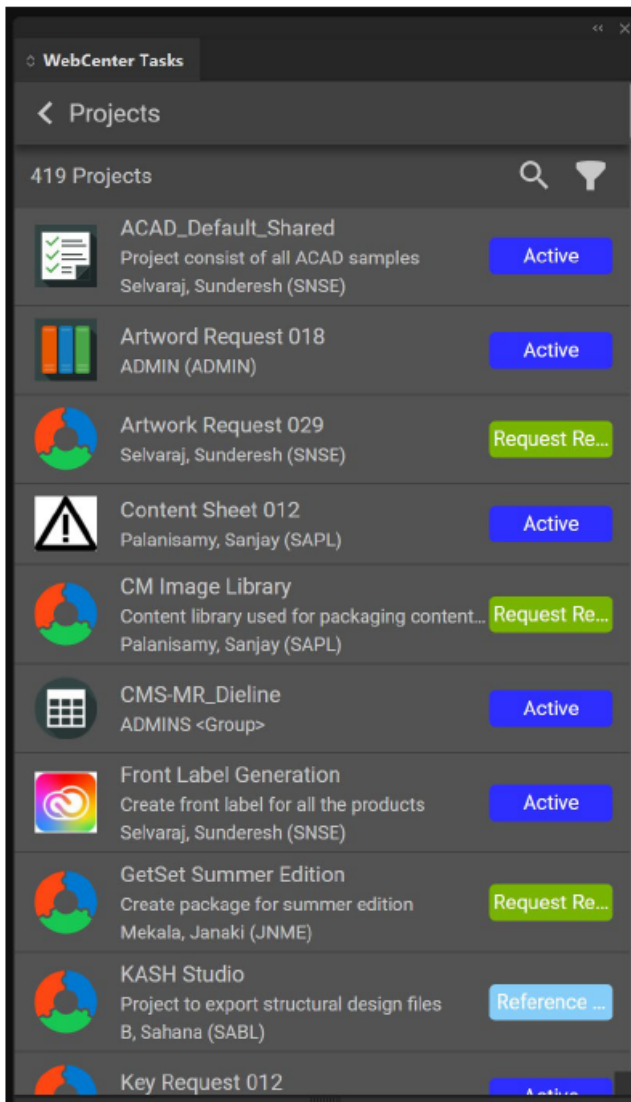
Projects list shows Project thumbnail, Project Name, Project Description, Project Status and Manager information. Project can be opened to view project documents to download and upload new project documents.

If projects count exceeds 200, then **Show More** button is available at the bottom of the view which on click loads next set of 200 projects in the view.

Projects can be searched based on project's meta information and its attributes using search option or filter the projects based on project status.

Projects can be filtered based on project status:

- Active
- Completed
- Archived
- Non-active



9.1. Project Details

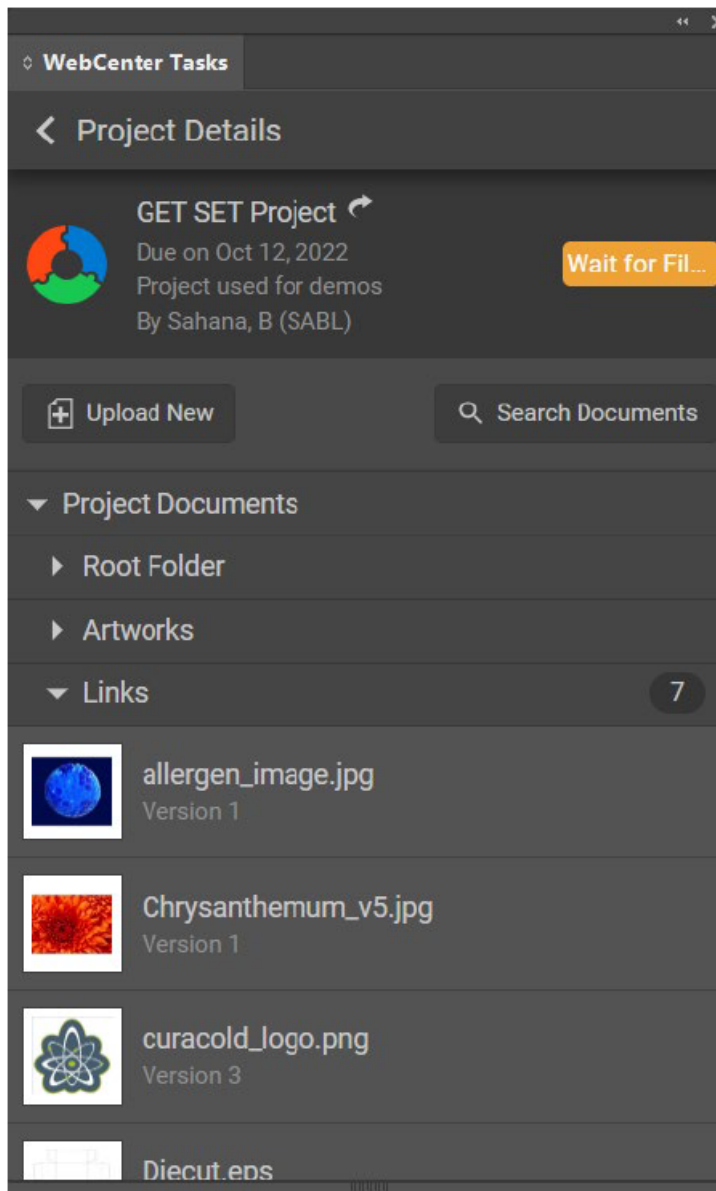
You can click on project, to view the details. Project Details has meta information and lists down all the project folders user has access to and lists down respective project documents within each folder.

Project Details view has meta information such as project thumbnail, name, description, due date, project manager and status.

On expand of project folder project documents are listed down with its count beside the folder name.

If document count exceeds 200, then **Show More** button is available which on click loads next set of 200 documents within the folder.

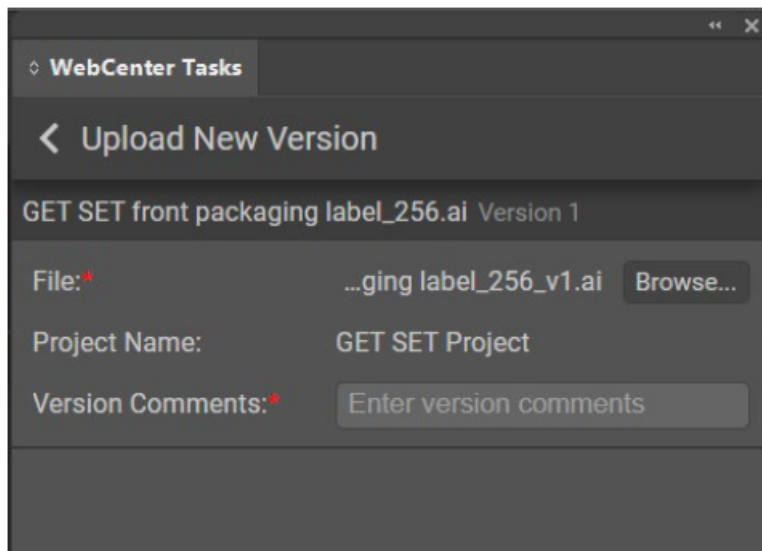
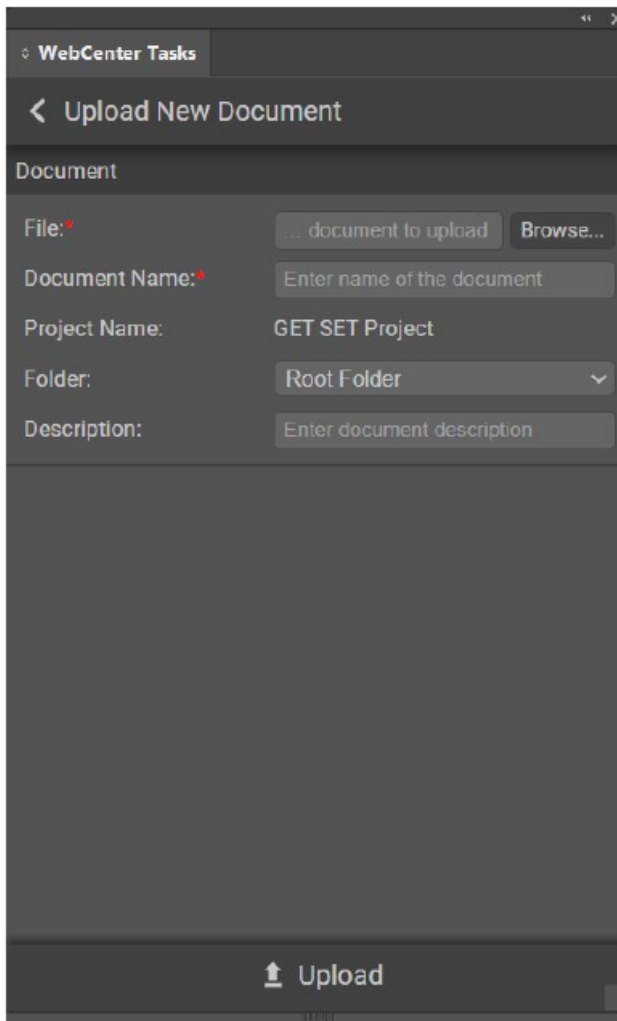
User can search for any specific document available in project using **Search Documents** option which can be searched based on document's meta information and its attributes.



Upload and Download of Project Documents

When no documents are present in the Project, then only an **Upload New** button is shown when you view the Project details. New documents can be uploaded only to the project that user has access to add documents. Documents will be uploaded to chosen Project folder and listed in Project Details view after upload.

Project Documents download is same as Task Documents download behavior. On selection of any Project Document, **Document Details** view loads in the view.



10. Linked Assets

This section details upload and download of linked assets.

10.1. Upload Linked Assets

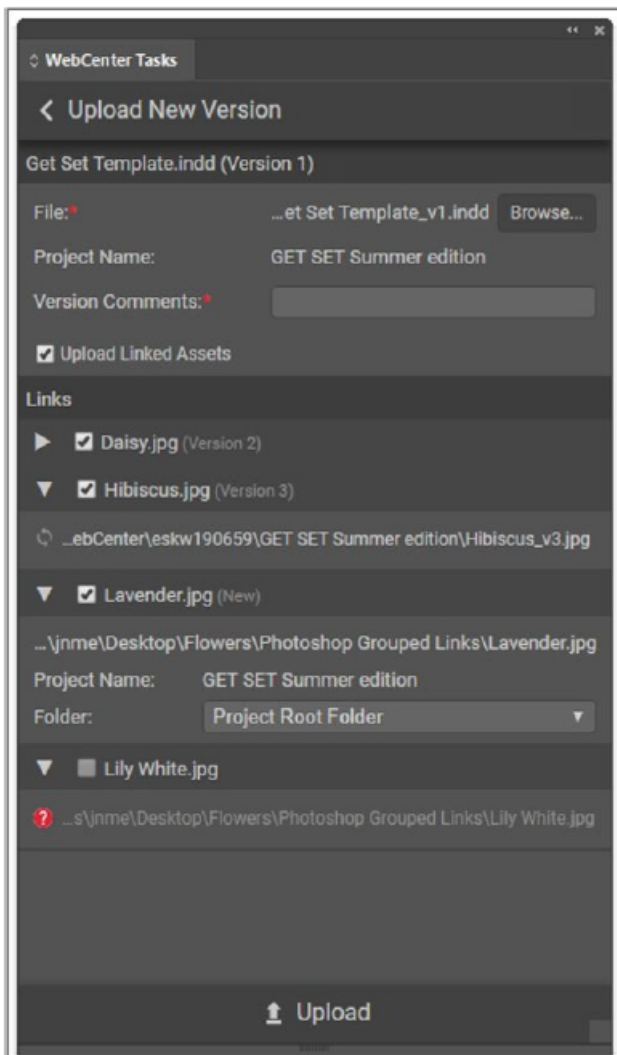
Images linked in an artwork can be uploaded along with the artwork from the plug-in to WebCenter. The upload links are supported only for the following native document types:

- Illustrator: AI, PDF
- InDesign: INDD, IDML
- Photoshop: PSD, PDD

Any document downloaded or uploaded from the plug-in is considered as a WebCenter asset. User can choose to upload linked assets by checking/un-checking **“Upload Linked Assets”** check-box available in Upload view. Linked images which are WebCenter assets, are uploaded as new versions. Links which exist locally on your machine and are not available in WebCenter are uploaded as new documents to the project.

After the successful upload of artwork and linked images, the images are added as document references in the artwork, if **“LINKED_ASSETS”** attribute is specified in the attribute category in the artwork.

You can specify default attribute category for document types in WebCenter. If **“LINKED_ASSETS”** attribute does not exist in the document, then the artwork and linked images are uploaded, but the images are not added as document references in the artwork.



10.2. Download Linked Assets

The images linked in an artwork can be downloaded from LINKS tab in Document Details view. LINKS tab is displayed only for the following native document types:

- Illustrator: AI, PDF
- InDesign: INDD, IDML
- Photoshop: PSD, PDD

LINKS tab has two sections :**Remote Links** and **Local Links**.

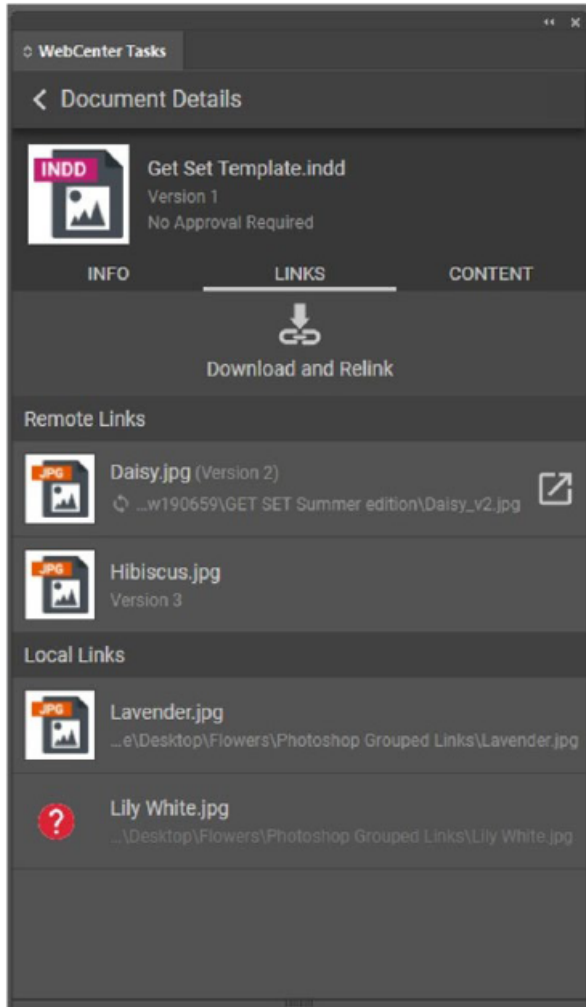
Remote Links

The images referenced with “**LINKED_ASSETS**” document reference attribute in the Task document are displayed in the Remote Links section. Links which are WebCenter documents (downloaded/ uploaded from plugin) but not referenced with “LINKED_ASSETS” attribute in the artwork are also displayed in Remote Links section.

Local Links

Links to which references are available on your local machine and not available in WebCenter are displayed in Local Links section. Missing link is the link for which linked file path does not exist on your machine. In Illustrator, missing links are not displayed in the plugin due to known technical limitation.

By clicking **“Download and Relink”** button in the LINKS tab, all the remote links are downloaded and the links in the Task document are relinked with the downloaded images, if matching links are found (Links are matched based on link base name). In Illustrator, images can only be downloaded, relink functionality is not supported in the plug-in.



11. Annotations

Annotations created for an artwork on WebCenter are shown in ANNOTATIONS tab in Document Details view in the plugin. Annotations are supported only in Adobe® Illustrator® for AI and PDF documents. You can highlight annotations in an artwork by clicking **Show All** or **Show Selected** buttons in the plugin.

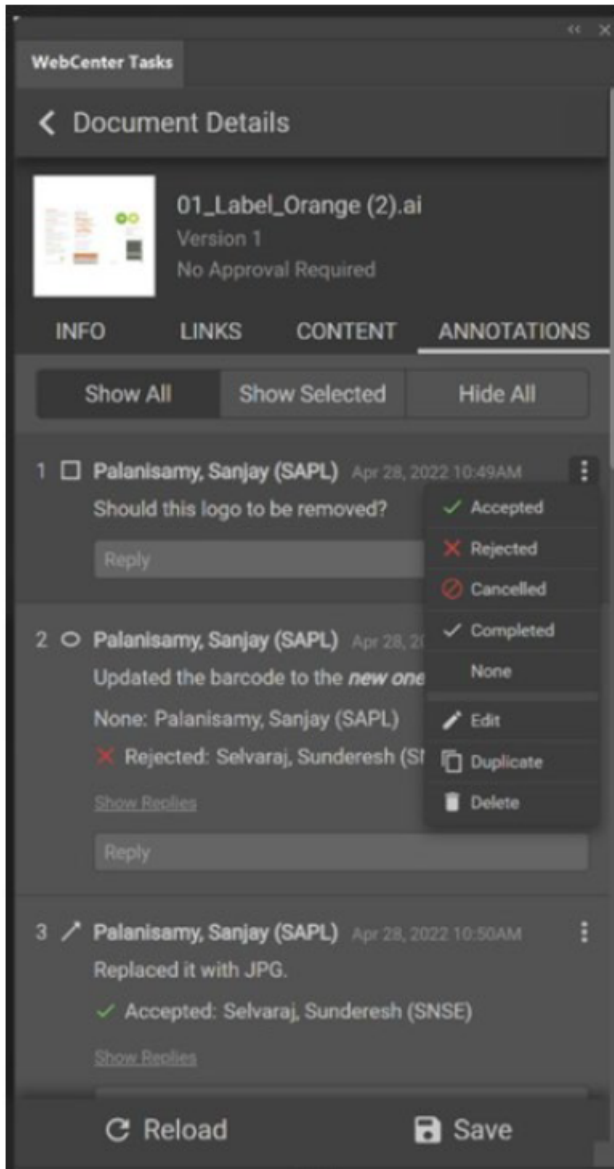
**Note:**

- Annotations are always highlighted in rectangle shapes regardless of their actual annotation types.
- **Note** annotation type is not highlighted.
- Annotations are not supported for multi-page documents.

You can set review state and reply to the annotation from the plugin. You have to explicitly click **Save** button to save changes in annotations to WebCenter. Click **Reload** button to fetch latest annotations from WebCenter.



Note: Esko Data Exchange plugin is required to highlight annotations in the artwork in Adobe® Illustrator®. This plugin is included in WebCenter Tasks plugin installer.



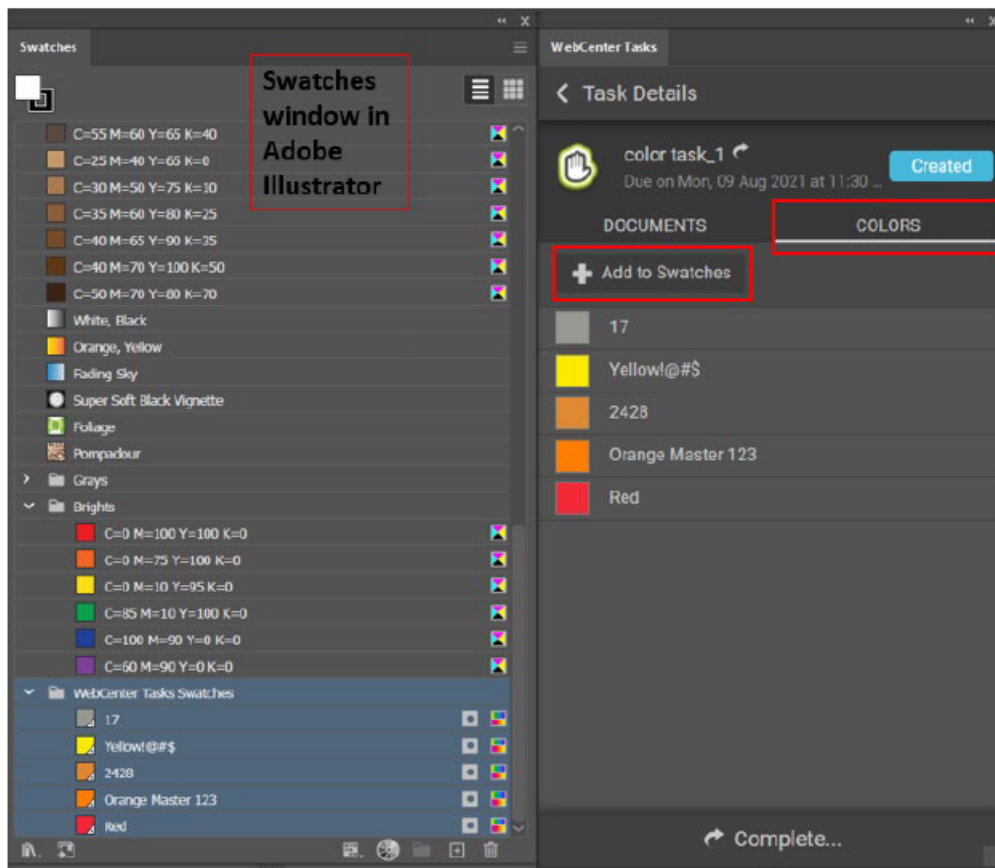
12. Add Colors from WebCenter

You can add the color information that is available in WebCenter into the artwork using WebCenter Tasks plug-in.

Task with color specifications are displayed in the **Tasks Details** view. All the colors of the task are listed under the **COLORS** tab with color thumbnail followed by color name .



Note: The color tab is visible only if the connected WebCenter is configured with basic or advanced Color options license.



Swatches is an Adobe host palette which has set of colors which you can use directly by clicking on it or can add colors to it.

You can add colors to the Swatches present from the **COLORS** tab in the Adobe application and use the colors in the artwork.

How to add Colors to Swatches

You can add the task colors to the swatches by clicking on **Add to Swatches** button. You can either choose to add task colors or Replace the colors in the swatches.

Please note each of the Adobe applications functionality for **Add to Swatches** is slightly varied.

For both **Add** and **Replace** options, a new swatch group is created in **Swatches** within which the task colors are available as spot colors. When you import colors to Swatches in Adobe Illustrator and in Adobe InDesign, following actions occur.

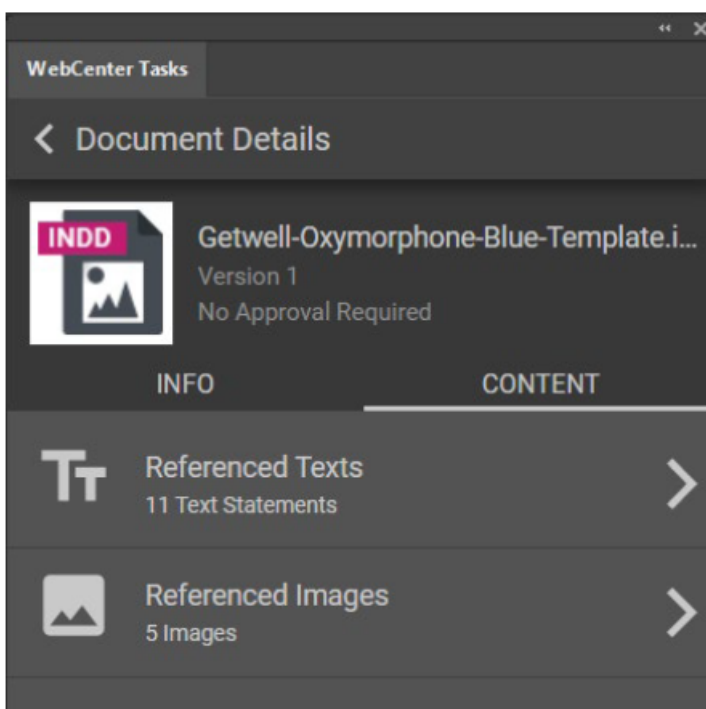
- **Add:** Appends the Task colors at the bottom of the already existing colors in Swatches.
- **Replace:** Clears the existing colors from the Swatches and then adds the Task colors.

In case of Adobe Photoshop, for both **Add** or **Replace** options, task colors are always added at the bottom of the existing colors as spot colors to the swatches without any new swatch group creation.

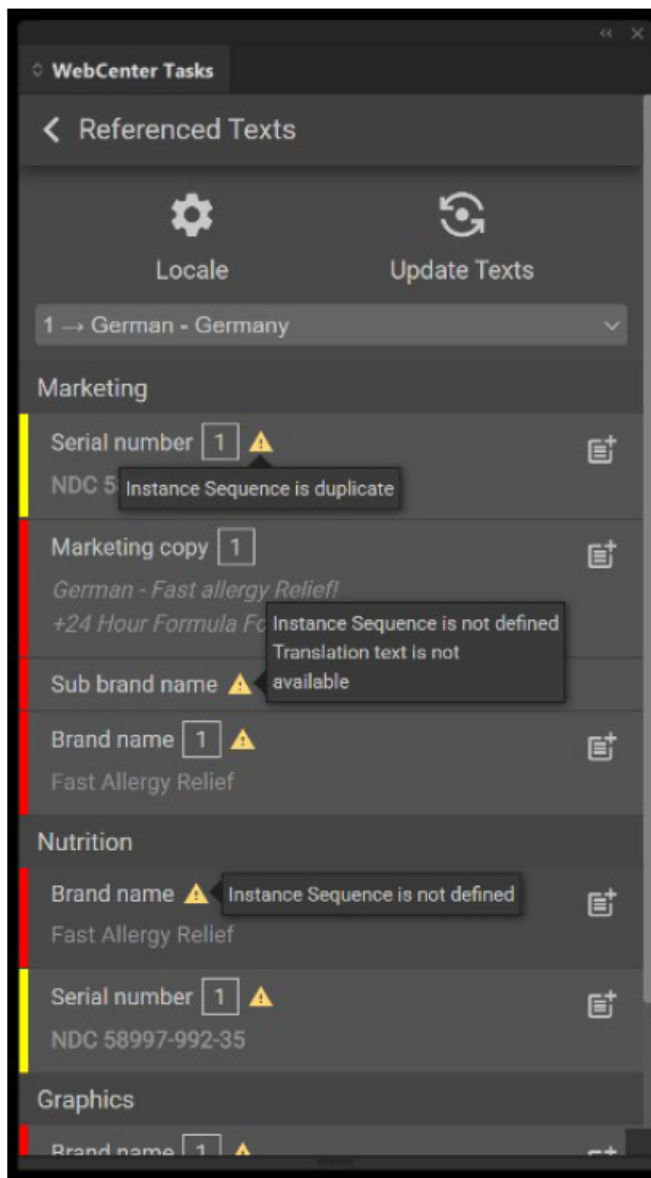
13. Content Handling in WebCenter Tasks Plug-in

Text statements can be created or added by the Content Editors or Content managers in WebCenter using PCM (Packaging Content Management). You can add the text content to a graphic document in the Adobe host using the WebCenter Tasks Plug-in. This plug-in ensures the inserted statements are added accurately in the artwork at the right frame or location.

To open the task with the text statements in the WebCenter Tasks Plug-in, navigate to **Task Name > Document > Document Details > CONTENT**



Note: Content tab is only visible if PCM license is available in the WebCenter instance that is connected with the WebCenter Tasks Plug-in.



You can click **Referenced Texts** to see the PCM Text content in the **CONTENT** tab,

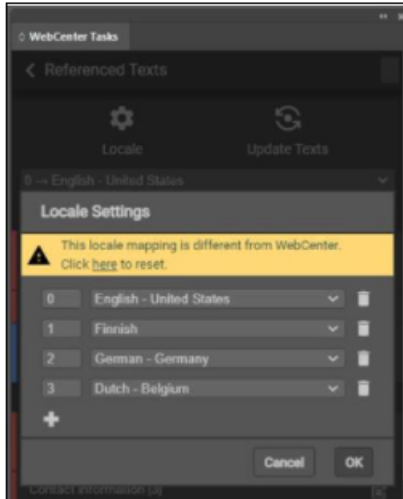
Header shows the locale mapping defined, **Locale Mapping settings** gear icon and **Text Content Language** drop-down with list of Text Content languages which are added to the document. Text Content language drop down contains both the master and translation languages defined in Document, Task and Project as per the sequence of Locale mapping defined in the WebCenter. Locale mapping is an attribute value (numerical) defined for the particular language.

To view the text statement in a different language, change the language selection in the dropdown. A warning is shown if translation for the selected language is not available, or instance sequence is undefined or duplicate.

Modifying Locale Mapping

Locale mapping can be changed in the WebCenter Tasks Plug-in, but the changes are not reflected in WebCenter.

You can modify the Locale Mapping from the current settings in WebCenter. Add new locale mapping languages by clicking on plus icon and selecting language from the drop down which consists of languages which are added to the document and are not defined as a locale mapping language. You can add, delete or edit an existing locale mapping but all the changes are reflected only locally.



If no locale mapping language is defined in the WebCenter, default mapping is generated in WebCenter Tasks plug-in for all the document languages from locale #1 onwards and is displayed in the dropdown.

How it works in Illustrator and Photoshop

To add or replace the text statements present in the Artwork, select the text statement and click on **Place Text** button.

How it works in InDesign

When you place text from the plug-in, the text is tagged with the name ELEMENTTYPE_I<INSTANCE SEQUENCE>_L<LOCALE. If the tag doesn't already exist, the tag will be created. Ex: BRAND_NAME_I2_L2. Placed text is not tagged if instance sequence is undefined or duplicate.

Element types are displayed in same order as defined in Document Attributes in WebCenter. You can choose to select any one of the text statements present with the Place Text button and add it to the artwork's text frame selected in the InDesign document or at the cursor position. Matching of the attributes are done for the tags present in the InDesign document and the statements are updated to the respective tags. To ensure that the text statements are not added at the wrong locations, it is not possible to add the text statement in a different tag in Adobe InDesign.

Creating template document in InDesign using content from WebCenter

Designers create template in InDesign for updating artworks with many types of content like texts, images, bar codes etc. At this point, placeholders are created and identified for each type of content.

When content is imported from WebCenter to InDesign using WebCenter Tasks Plug-in,

- Whenever the location is identified for a content and tags are already created, on pushing the content from the WebCenter Tasks plug-in, the tags are updated with the content.
- When no tags exist in the text frame and cursor is placed in a location for updating the content, a tag is automatically created only for the placed text statement and the content is pushed from WebCenter Tasks plug-in to the InDesign document.
- Whenever a text frame with no tags is selected, when the text statement is placed from the WebCenter Tasks Plug-in, a tag is created for the text frame if the tag does not exist.

Updating Texts

Update Texts button allows you to replace all content for which tags are matched in the InDesign document with the text statements defined in the document in WebCenter.

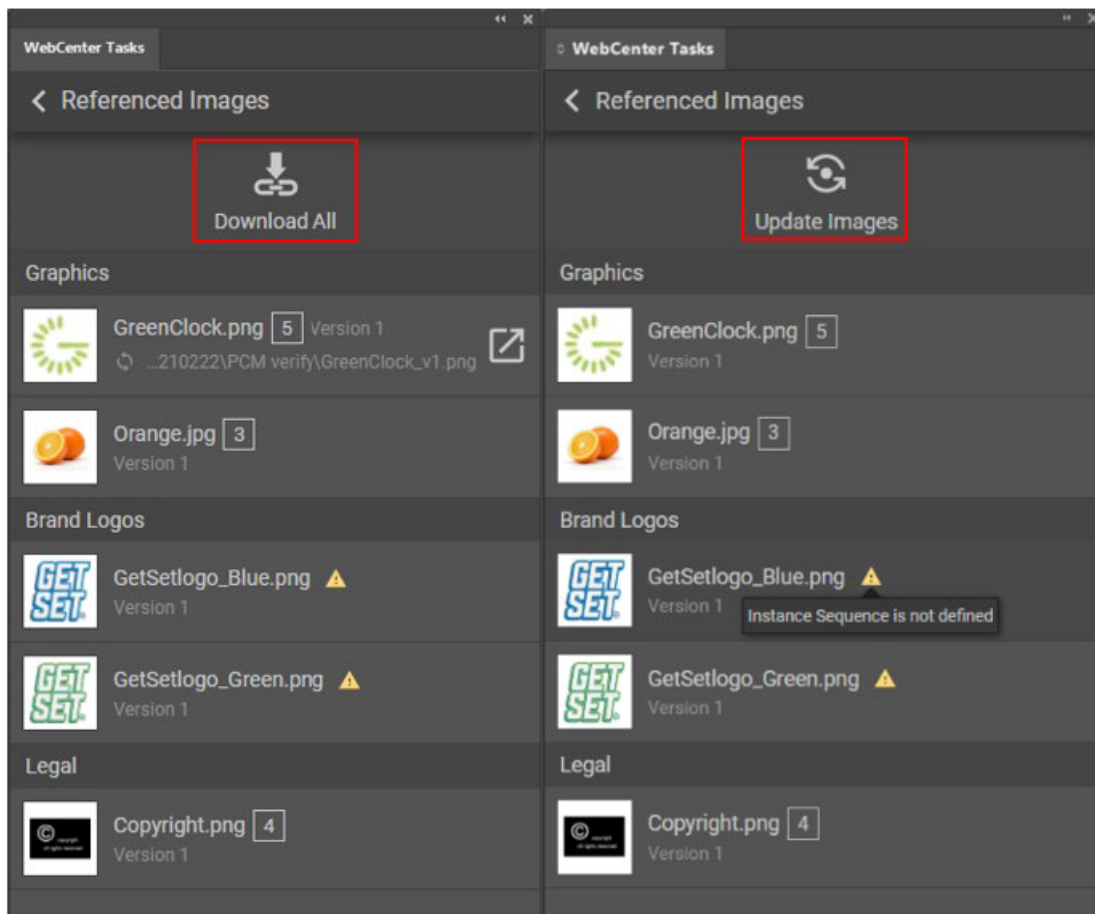
To update all text statements in the artwork, click on the **Update Texts** button and all the text statements are updated in the InDesign document for all languages to which locale mapping is defined and the tags are matched.



Note: In Adobe® InDesign®, font styles like bold, italic etc. are not applied if text placed from plugin does not have proper instance sequence defined on WebCenter.

Image Content Handling

To add images to the artwork from the WebCenter Tasks Plug-in, you can download an image and place it in the artwork by dragging and dropping the image. A warning icon is shown next to the image name if its instance sequence is undefined or duplicate.



Illustrator and Photoshop

Download All button is present in Illustrator and Photoshop using which you can download all images in one go.

InDesign

When you place an image from the plugin a tag is created with the name DESIGN_GRAPHIC_I<INSTANCE SEQUENCE> if it does not exist and the placed image is tagged with this tag name. Placed image is not tagged if instance sequence is undefined or duplicate.

You can update images in the artwork with **Update Images** button. Clicking **update images** downloads all the images and images in the artwork for which matching tags are found will be replaced with the downloaded images.

14. Completing Tasks

You can complete the task within the **Task Details** view in the WebCenter Tasks Plug-in. When you click on **Complete**,

- **Task with specifications:** is redirected to the Task Execution page in the WebCenter instance to complete the task.
- **Task without specifications:** is completed (only when all the conditions of task are satisfied) and task status is changed to **Completed**.

Once tasks are complete, those are not shown in the Tasks list in the Webcenter Tasks plug-in.

15. Saved Searches

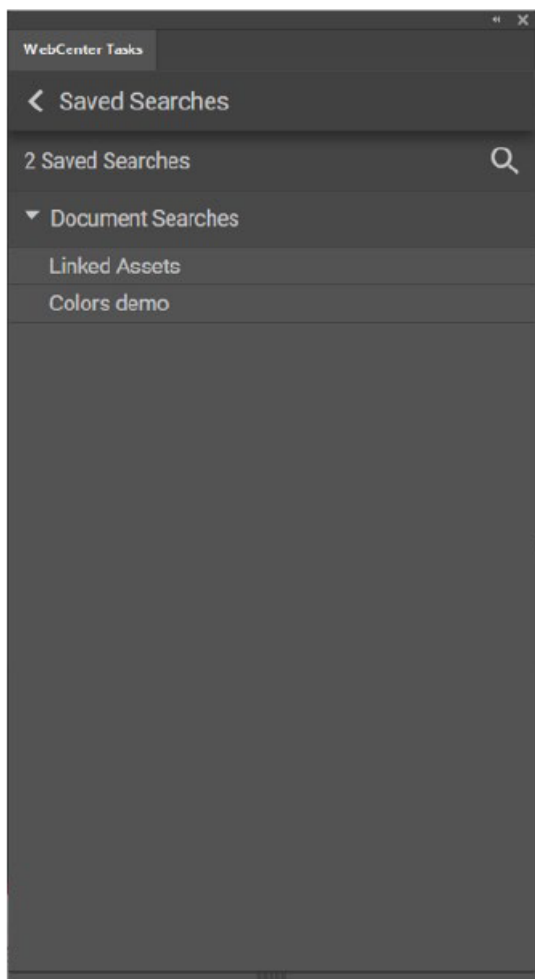
This section consists of support for Saved Searches in plugin. On navigating to Saved Searches from Home view, Saved Searches view loads with list of global Document Saved Searches that is set in preference.json file at server-side.

**Note:**

- **showSavedSearchesNavigation** should be configured in preference.json file at server-side plugin to **true** to view Saved Searches option in Home view.
- Global Document Saved Searches mentioned in **savedSearches** array in preference.json file are listed in Saved Searches view.
- If **savedSearches** array is empty then all global Document Saved Searches in WebCenter are listed in Saved Searches view.

Saved Searches list shows all document saved searches with its name. Each Saved Search can be opened to view documents which are part of saved search, download, and upload new version of those documents from **Saved Search Details view**.

Saved Searches can be searched based on its name using Search option available in **Saved Searches view**.

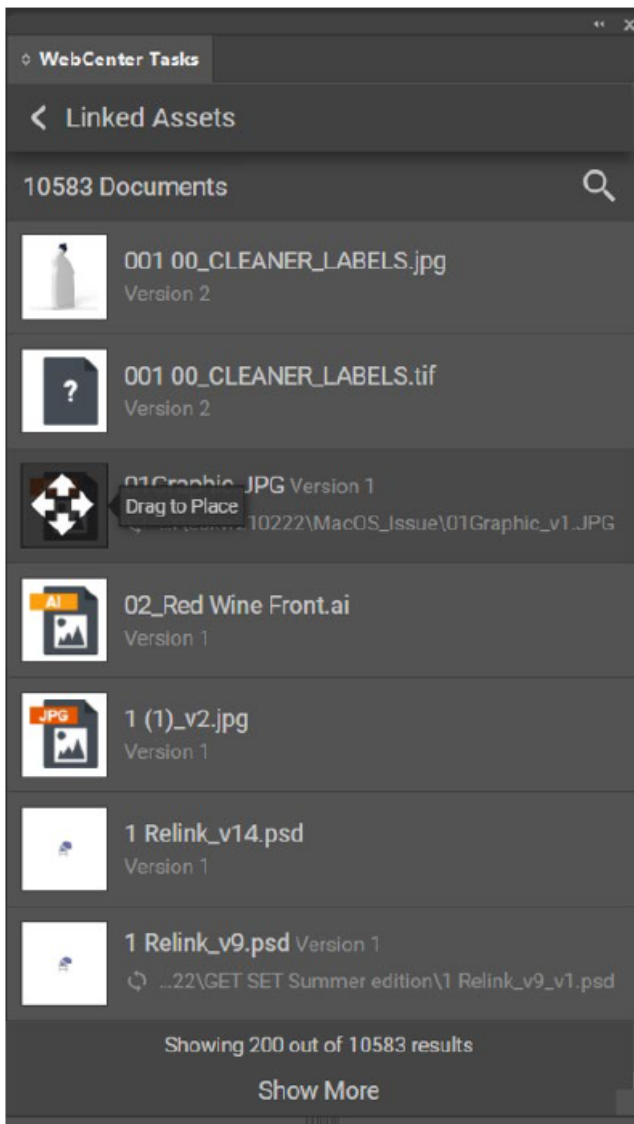


15.1. Saved Search Details

You can click on any Saved Search, to view the details. Saved Search Details view lists down all the Documents which are part of selected saved search.

User can search for any specific document available in saved search using **Search** option based on documents meta information and its attributes.

Saved Search Documents download is same as Task Documents download behavior. On selection of any Document, **Document Details** view loads in the view.



16. Custom Styles

Plug-in supports custom styles for both light and dark themes in Adobe hosts. Custom styles can be defined for any element in the plug-in like button, label, etc.

Custom CSS files must be placed in the WebCenter web server as:

```
..\WebServer\tomcat\webapps\WebCenter_Inst\custom\plugin\styles\custom.dark.css
```

```
..\WebServer\tomcat\webapps\WebCenter_Inst\custom\plugin\styles\custom.light.css
```

17. Configure Plug-in Preferences

Default values for some plugin features can be configured in preferences.json file present in the WebCenter installation directory.

uploadLinkedAssets configure sets **Upload Linked Assets** checkbox check or uncheck in Upload New document and Upload New version views. By default value is set to **false**.

User can configure to view Projects and Saved Searches in plugin by setting **showProjectsNavigation** and **showSavedSearchesNavigation** value to true or false. By default both are set to **true**.

savedSearches array by default is empty which can be configured as below to view specific saved searches.

Example: **savedSearches**: ["Linked Assets", "Graphic Images"], this lists down only mentioned saved searches in plugin.

```
..\WebServer\tomcat\webapps\WebCenter_Inst\plugin\preferences.json
```