

WebCenter 24.03

Administration Guide

03 - 2024

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2. What's New in WebCenter 24.03

WebCenter 24.03 is a WebCenter release including new and much improved functionality in the following areas:

User Interface and Experience

Complete work faster with a powerful and intuitive user interface.

- **Pin Columns for Customized Viewing**

Pin columns to either the left or right side of your screen, ensuring the information most important to you is always within view. This feature allows for a more personalized and efficient workspace by keeping critical data fixed while you scroll through other content. Whether it's tracking key metrics or keeping essential tools accessible, pinning columns enhances your ability to multitask and stay organized.

- **Content Sheet Approval - Discussion Improvements**

WebCenter now offers streamlined discussion management for content sheet approvals. Features include resolving discussions to concentrate on pending items, disabling comments post-approval for clarity, and presetting discussion participants for targeted communication. These updates foster a more focused and efficient approval process.

- **Enhanced Notification Preferences**

Now, directly manage your alert settings with our new notification preferences. Easily opt out of notifications you don't need without admin intervention. This update provides a straightforward way to control what you see and when, making your experience more personalized and less cluttered.

- **Dashboard Task Creation Enhancements**

Introducing new buttons in the dashboard for quicker task creation—either preconfigured for immediate action or customizable via a form. Now, you can also start tasks directly from a form, adjust task lead times for automatic due date updates, and link task due dates with project milestones for better alignment.

- **Task Window Update: Save Without Closing**

Now, when you click "save" while working on a task, the window stays open, allowing you to *continue your work uninterrupted*. This update removes the need to reopen the task after saving, streamlining your workflow.

WebCenter SaaS

Unlock the power of Esko Cloud Services with WebCenter SaaS.

- **Convert on Download: Flexible Format Options**

Enjoy visually appealing and accurate video thumbnails that provide a clear representation of your video assets. Video thumbnails now maintain the proper ratio to the original video, ensuring a visually pleasing and accurate representation of your video content, making video selection and navigation a breeze.

- **Audio Routing and Approval in the Viewer**

Enhance your workflow with our new **Convert on Download** feature. Now, users can select from allowed formats for downloading assets. Administrators can configure this feature to enable users to convert and download files in preferred formats directly from the cloud. Once the conversion

is complete, users will receive an email notification with a link to download the converted file, streamlining the process and ensuring you have the right format at your fingertips.

- **Widget availability in Deep Zoom Mode**

Approval details and the attribute category widget are now accessible in Deep Zoom mode, facilitating the approval or rejection of artwork without interruption.

- **Search Text in Microsoft Office Documents**

Text search now includes MS Office documents for SaaS WebCenters. Activating "Live Text" search for PDFs and Adobe Illustrator documents extends this capability to MS Office files, enhancing document search-ability.

- **Variable Data Printing "VDP" Manager Module**

VDP Manager: Revolutionizing Digital Print Reviews and Approvals The VDP Manager, a new option for WebCenter, is designed to streamline the review and approval process for promotional variants in digital printing. This innovative module allows users to effortlessly load, view, and approve variant data ranging from images and text to barcodes—directly within the artwork template. With support for multiple variants per artwork, the VDP Manager ensures that each piece is print-ready, enhancing efficiency and accuracy in digital printing projects.

Key Features:

- **Enhanced Viewing Experience:** Utilize the VDP Viewer to seamlessly preview and approve artwork variants in one comprehensive interface
- **Effortless Data Integration:** Easily upload variant data using CSV formats and interactively update your database within the viewer.
- **Dynamic VDP Preflight Reports:** Generate and view VDP Preflight Reports directly in the widget, identifying and resolving errors and warnings without navigating through the entire document.
- **Comprehensive Variable Data Support:** From placeholder support for PDFs to live previews of updates, manage every aspect of your variable data with precision.

VDP Manager transforms the way promotional variants are reviewed and approved, offering a robust solution for ensuring the integrity of your digital prints. Whether updating values or detecting potential issues before they impact your project, this module is your key to a streamlined, error-free digital printing process.

Configuration Management

Testing and updating WebCenter with specialized tools.

- **Enhanced Named Configuration Migration and Management**

- This update brings critical advancements to the management and migration of Named Configurations, streamlining administrative tasks and ensuring smooth transitions across servers.
 - **Efficient Configuration Handling:** Enhancements in indexing, comparison, and migration processes for project and template configurations simplify the setup and maintenance of Named Configurations.
 - **Document Approval and Reference Migration:** Improved migration processes for document approval setups and reference values, ensuring only relevant references within Named Configurations are carried over, with clear guidance on handling external and outdated references.
 - **Metadata Insights for Better Transfer:** Exported Named Configurations now include detailed metadata, offering insights into the source system and facilitating informed decisions during imports with a comprehensive impact analysis.

- Streamlined Impact Analysis and Import Logs: The import process is refined with a better-organized impact analysis and a separate tab for import logs, enhancing clarity and making it easier to assess and manage changes.
 - Designed for administrators, these improvements aim to optimize the creation, analysis, and migration of Named Configurations, making it easier to replicate and deploy configurations across different server environments.
- **Automatically Populate Document Reference Forms**
 Automatically populate document reference forms with the new **OnAdded** Script. This feature allows the addition of an **On Document Added** script to document reference attributes in a dashboard form. The script activates when a document is added, referenced, copied, or uploaded, streamlining the document management process.
- **Automatically Populate Project and Task Forms**
 Enhance form efficiency with the **on form initialized** script to pre-populate your forms. Dashboards now support defining On Form Initialized Scripts, executed upon dashboard form initialization. These scripts, applicable in Project, Document, and Task Dashboards in Edit or Create mode, can modify objects in the current context to streamline form preparation.
- **Task Creation from Dashboard**
 Easily create tasks directly from Dashboards using Buttons, Inline Actions, or Table Actions. If linked to a creation Dashboard, users can fill out a pop-up form with task specifications. Tasks can be started or saved for later with corresponding buttons. For tasks initiated from document dashboards, automatic document attachment is possible, streamlining task setup.
- **Customizable Document Viewer Modes**
 Enhance document viewing with customizable modes. Set documents to open in Standard or Deep Zoom modes, with optional flexibility to switch between them. This update streamlines document interaction, allowing for a more efficient and personalized viewing experience.

Scalability & Performance

Work in WebCenter with more teammates on more projects with the best performance possible.

- **Faster Discussions for Large Groups.**
 We've significantly improved loading times for discussions with extensive participant lists. By optimizing backend permission checks, discussions now load up to 34 times faster than before, making your experience smoother and more efficient, especially in projects with over 1000 participants.
- **Enhanced Content Sheet Render Speed**
 Content sheets now render up to 84% faster, providing a more responsive and efficient experience when loading content sheets.
- **Improved rendering speed of certain 3D scenes**
 The 3D viewer was updated. The update brings performance related fixes. Models with complex (repeated) geometry will load significantly faster in the viewer.
- **Enhanced Security with Veracode CVSS 3 Compliance**
 WebCenter has achieved a significant security milestone by adhering to Veracode CVSS 3 standards, ensuring a more secure platform for our users. This compliance means we've thoroughly assessed potential vulnerabilities against a comprehensive framework, focusing on factors like attack complexity and user interaction, to provide robust protections against security threats.

Our commitment to CVSS 3 standards reflects our dedication to maintaining high security policy compliance, offering peace of mind and a safer environment for all users.

Plug-ins for Adobe

- **WebCenter Tasks Plug-In: Support for Structured Content Documents**

The WebCenter Tasks Plug-In now facilitates importing structured content directly into Adobe InDesign, complementing its capabilities for multi-page artwork like leaflets. This update simplifies artwork adjustments and template testing, integrating seamlessly with WebCenter's automation features for efficient design workflows.

General Enhancements

- **Secure Download Link with Verification**

Enhance file sharing security with secure download links, a feature that must be enabled by an administrator. This allows for the secure distribution of files to external parties, where recipients are required to enter a verification code received in a separate email before downloading. This added layer of security ensures that sensitive information is protected and accessed only by intended recipients.

- **Integration Capability with GlobalVision Verify**

WebCenter now supports integration with GlobalVision Verify, enhancing our text comparison suite alongside TVT and InformalT. This new feature is ideal for customers who already use GlobalVision Verify for artwork approval and content inspections, offering an uninterrupted workflow within WebCenter. For integration, customers need to have their own GlobalVision Verify subscription. The necessary integration kit is available for purchase from ESKO, facilitating seamless inspection processes and reporting back to WebCenter.

- **Easy Upgrade to Registered Users**

Now in WebCenter, easily convert unregistered users (email-based approvers) to registered users directly from the User Management page. The system automatically identifies and suggests upgrades for existing unregistered users, streamlining their transition to full user status while retaining their approval history.

Content Management for Packaging (formerly Packaging Content Management)

Produce error free packaging by standardizing the content collection process and to automate the flow of content into artwork.

- **Translation Filtering for Text Statements**

Enhance efficiency with translation filtering, allowing you to display only relevant languages. This feature simplifies updates by reducing the need for extensive scrolling through dozens of translations, focusing only on those applicable to your project

- **Improved Rich text Controls**

Dealing with 25 text statements, each with 25 languages, means that screen real estate needs to be carefully managed. In 24.03, we've moved the formatting tools to be outside the text box being edited, giving you more room to work.

Content Management for Life Sciences (formerly Structured Content Management)

Standardizing the process to define and approve document content and automating the flow of content into output templates.

- **Fonto Editor Upgrade 8.6: Enhanced Language and Comparison Features**

The latest Fonto Editor upgrade introduces Right-to-Left language support, enabling seamless authoring and reviewing in RTL languages. Additionally, improved table comparison offers precise insights into data changes, moving beyond the 'all or nothing' approach to highlight specific alterations in tables on leaflets. This enhancement ensures critical data points are accurately tracked across versions.

- **Revert a Topic in Structured Content Editor**

Choosing to edit a topic was a reserved action for when you were absolutely sure you were going to make edits. Now you can check out with abandon, as those changes can be reverted back to their library versions with no impact to your structured content document.

- **InDesign Content Previewer**

For managing content, context is critical - where and how a particular content element appeared on the packaging or leaflet artwork which was always only available once artwork was automatically generated. In 24.03, when using InDesign artwork templates, you can now preview how content appears in the Viewer before artwork is generated, making Right-First-Time that much closer.

- **InDesign Template Selection Improvements**

Linking content for InDesign placement has never been easier. Templates will now be automatically selected when you are ready to tag your content. Your users will breathe a sigh of relief at the less needless decisions they need to make so they can focus more on what matters.

3. WebCenter Administration Basics

WebCenter installs with a minimal configuration because every installation has different needs. This guide explains as how to set up WebCenter and make it ready for use.

3.1. A Note on Web Browsers

Due to differences between the Web browsers, some configuration issues in Firefox and Safari require extra action in order for WebCenter to function properly. Anyone using WebCenter with either of these browsers on any platform should consider performing these configuration changes.

Mozilla Firefox

Refreshing pages may not get the most current data from the WebCenter Web server. In order to ensure the most current data is seen, caching must be disabled, or you must press ctrl-r on any suspect pages to forcibly reload them.

To disable caching, do the following:

1. Log in and start Firefox.
2. In the Address field, type about:config and press enter.
3. Scroll down to the network.http.use-cache entry and double-click it so that its value changes from true to false.
4. Restart Firefox.





Safari

When using Safari, the built-in browser for Apple Macintosh computers running OS X, there is no way to configure caching. When using the Back button, click Refresh to ensure you see the most current data.

3.2. Understanding the WebCenter Page Layout

Header

The top right of the WebCenter page always shows:

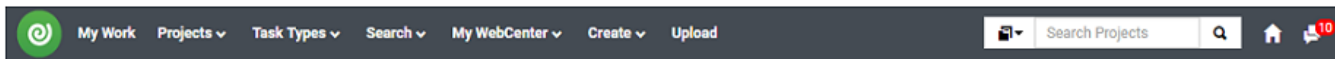
- the name of the current user,
- a  icon to go back to the user's start page,
- a  Discussions icon which indicates the unread messages and redirect to My Discussions. You can view all discussions related to Project or Document or Tasks that you are involved in. For more details, refer to [Discussions in WebCenter](#)
- 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](#) for more details). An administrator can customize the menus.

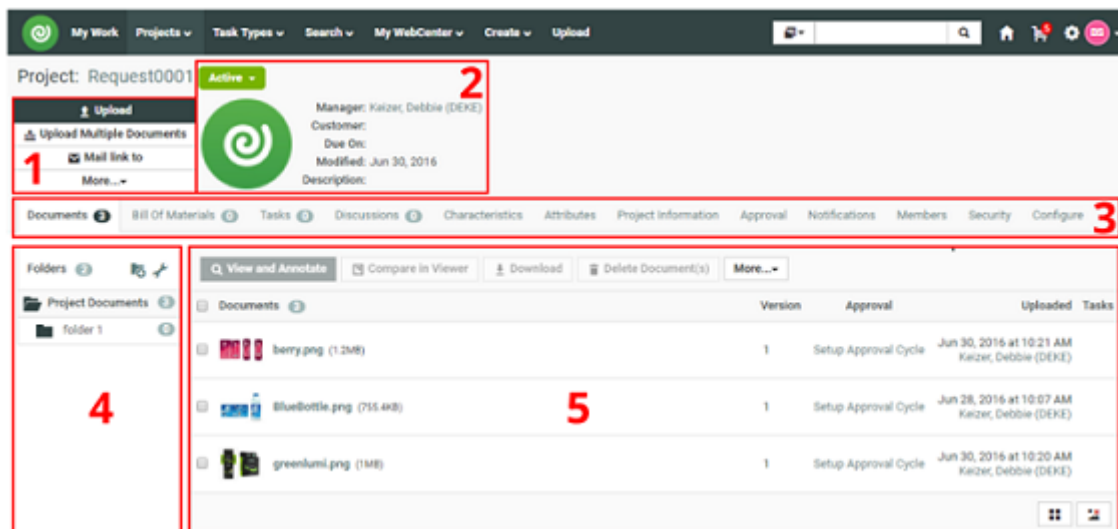


If you have the optional Task Management module and the **User Can Create Task Type** permission, **Task Types** also appears in the top menu bar.

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.

3.3. 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.


3.4. The Admin Menu

All administration is done initially by Admin, the administrative user who has full control over WebCenter.

The Admin user and members of the Admins group have the Admin  button in the right side of the header.



Click the **Admin**  button to go to the Admin menu. The **Users** page is shown by default.

To return to the normal WebCenter menus, click the **Exit Admin**  button.

4. WebCenter Preferences

The **Preferences** menu in the Admin section of WebCenter allows you to set system-wide preferences in a number of categories:

- [General](#)
- [Password Preferences](#)
- [Security](#)
- [Document Types](#)
- [Notifications](#)
- [Menus](#)
- [My Work](#)
- [Customizations](#)
- [Reports](#)

4.1. General Preferences

Click **General** on the **Preferences** bar to set system-wide preferences.



Note: The individual users can override nearly all of these properties for themselves in **My WebCenter > My Preferences**. Those users who have changed these settings are not affected by later changes made to the same fields in **Admin > Preferences > General** by an administrator.

General

- **Language** sets the language used by the user interface.
- **Start Page** sets the page that appears when you log on. It could be either Dashboard, Document Search, My Favorites, My Locked Documents, My Preferences, My Profile, My Work, Projects, Project Search, Saved Search, Welcome page. If Dashboard or Saved Search is selected, a dropdown is shown to select either a My Work or Unspecified Dashboard or a Saved Search.
- **Default Project Page** sets the page that appears when clicking a project name. It could either be Project Dashboard, Documents Page, Attributes page, Tasks page, Bills of Materials page.



Note: When Dashboard is chosen as **Default Project Page** or **Start Page**, you can either choose from the existing dashboards or **Create New Dashboard**.

- **Default Document Page** sets the page that appears when clicking a document name. It could be either be History, Approval, Attributes or Details 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 your users to access their **Cart** contents across sessions.

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** 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).

Show Cards sets the number of individual document objects that are displayed as a table of document thumbnails on a single page in the Search Results.

You can choose to **Show date and time for Date Attributes/Specifications**. By default date attributes in Search Results will not show time information.

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. You can also specify the position of the **Thumbnail position** in the results as Top or Left.

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. You can also specify the position of the **Thumbnail position** in the results as Top or Left.

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 the **Discussions** page.

Roles

Invite Group Default sets the system-wide default state of the **Invite Group** check box, available on the **Manage Roles** page and in the **Members** area of the Project Creation page (when creating a project based on a project/template that contains roles).

Bill Of Materials

Use Bill of Materials enables the Bill of Materials functionality for the entire WebCenter system. See [Bill of Materials](#) on page 460 for more information.

My Work Defaults

- **My Approvals Assignee Filter** sets what users view by default in the **My Approvals** section of their **My Work** page (approvals assigned to **Me**, **Me or Group I Am In** or **Group I Am In**).
- **My Tasks Assignee Filter** sets what users view by default in the **My Tasks** section of their **My Work** page (tasks assigned to **Me**, **Me or Group I Am In** or **Group I Am In**).

- **Non Started Tasks** sets whether users' **My Work** page displays tasks assigned to them that aren't started yet.

Project Autaname Generation

Use the **Project Autaname Generation** settings to automatically generate project names.

These settings use a naming template (**Prefix**, **Suffix** and **Counter Length**) to define the automatically generated names.

Define **Prefix** and **Suffix** by selecting from **Smart Names** drop-down menu.



Note: Make sure to read the notes at the bottom of the page for restrictions. The building blocks are case-sensitive.

The **Counter Length** is a numerical field that gets incremented for each new Project using the same prefix. It is placed between the prefix and the suffix.

In the **Counter Length** field, enter the length of that incremental counter. For example, enter 5 for numbers that will be five digits long.

Select **Use Automatic Naming for Creation of Blank Projects** if you want to automatically generate the names of projects created from a blank project.

Discussions

- **Discussion Counter** option is enabled by default. When enabled, the counter will display all the unread messages including the unread messages from private discussions within a project, where the PM / Admin users are also part of. This option only affects the global counter on the top menu bar.
- **Default Participants:** This is a radio button option. You can either choose
 - To start the discussion with everyone who has access to the current Project / Document/ Task
 - To restrict the option to have the default participant as the Discussion Creator.

Other Preferences

- **Host URL** sets the URL at which the WebCenter site can be accessed. This is the URL used to send automatic email notifications.
- **Host URL for internal use** sets the URL at which internal components, like Automation Engine, can access the WebCenter site. Use this to go through the local network (using your WebCenter server's local computer name) instead of through the internet (using your WebCenter server's public IP or computer name).

You should use this if, due to your setup, the DNS doesn't know the WebCenter server's public name inside your Local Area Network.



Note: You can only use this when Automation Engine and WebCenter are on the same LAN.

If this is not filled in, Automation Engine will connect to WebCenter using the **Host URL**.

For both **Host URL** and **Host URL for internal use**, you can choose to use either **http://** or **https://**. Choose the protocol defined during the WebCenter installation.

PDF Download Options

Admin user can set options to add some more information to the PDF documents when they are downloaded by selecting the required options.

- Add Approval information to downloaded PDF
- Show Approval information in landscape layout
- Prepend Approval Information
- Show User Company / Location in a separate column

You can also add the Project Attribute IDs and Document Attribute IDs of either Text or Date/Time attribute type in the respective fields, which are then displayed in the report when the document is downloaded.



Note: You may contact Esko Solution Architects for further details.

System History Logs

All changes/events in this page are recorded and stored in the **System History** page for Administrator users. Read this page on how to access the [records](#).

4.1.1. Viewer

- **Viewer Workspace:** Select any workspace from the dropdown 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 **Viewing 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.
- **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**.

Configuring Viewer Workspace

Workspace

You can configure Workspaces specifically for **Roles**, **Users**, and at **System level** in WebCenter. It is also possible for users to customize their own workspace in the Viewer.

Admin users can create new workspace or assign a workspace or configure a workspace or delete a workspace from the following locations :

- **General Preferences** where workspace selected is for all the users in the WebCenter
- **Role configuration** where workspace selected is for the specific Role
- **User Preferences** where workspace selected is for the specific user only

Workspace Configuration

On selecting the gear icon in the **Viewer Workspace** field, **Configure Workspace** pop up window is available to make changes to the workspace.

Each of the tool is either in **Visible** state, or **Available** or **Hidden** state.

- **Visible:** Check box is selected for for the tool or widget is not visible for the user but it is available. The user can add the Tool or Widget in the Viewer
- **Available:** Check box with a dash. Tool or Widget is not visible for the user but it is available. The user can add the Tool or Widget in the Viewer
- **Hidden:** Tool is neither visible nor available for the user, so the user will not be able to use the tool or widget in the workspace.

Only the tools and widgets in **Visible** and **Available** state are shown in the workspace for the users to configure.

You can also choose the **Color Theme** of the Viewer specific to the workspace in the **Configure Workspace** pop up.

4.1.2. Approval

Approval Cycle Start when Uploading New Document or Version

Define what should happen to a document approval cycle **When uploading a new document or version**. You can choose to:

- **Start if previous version's approval is on-going or finished**
- **Always start (if Approval setup exists)**
- **Never start**

Select the checkbox

- **Always allow the document owner to start/stop the Approval cycle** to allow the document owner to start or stop the approvals on the document(s).
- **Allow the uploader to override the approval cycle start** to allow the user to overwrite the approval start behavior upon upload.

Require Approval Comments on Viewable Documents

Use this option to require the approvers to add their comments as annotations in the document. Select:

- **Prompt** to start a dialog with a comment field when the Approver Rejects or Approves with a Condition. The Approver can choose to comment in the dialog or leave the comment field empty. This is the default setting.
- **Any Annotation** to enforce that at least one annotation is present while Rejecting or Approving with a Condition. The comment field will contain the following message.

Document annotated

- **User Annotation** to force the Approver to add at least one annotation in the document version before Rejecting or Approving with Condition. The comment field will always contain the following message.

Document annotated



Note: This setting will be applied when submitting an Approval Status from pages outside the viewer.

Block approval when an annotation was set/changed on current version

Check this option to prevent users who have created an annotation on the current version of a document from submitting the **Approved** status without a condition.

If **Approved with Condition** is not enabled, you can submit only the **Rejected** approval state. If users have replied to an existing annotation from another user, they will no longer be able to approve the document without condition.



Note: This setting will also be applied when submitting an Approval Status from any page outside the Viewer. The user will then get the corresponding feedback.

Reasons for Rejection List

After configuring and uploading a list of Reasons for Rejection, an admin user can choose the list from the drop down to enable reasons for rejection on the system. Then, when a user rejects a document, the reasons for rejection can be picked from this structured list. Read more on how to configure the list of [Reasons for Rejection](#).



Note: When the Reasons for Rejection are enabled in the system, bulk rejection is automatically disabled.

4.1.3. 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.
-

4.1.4. Workflow Editor

By default, HTML5 is used as Workflow editor.

4.1.5. 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.)

Project creator

A new user type has been introduced from WebCenter 18.1 onwards called **Project Creator**. This user can create new projects, but cannot manage them. This user type is similar to **Project Manager** but the main difference is that the Project Creator does not have any rights over the project, once the project is created.



Note: A Project Creator user can access the project created,

- if added as a member of the project either directly or in a Group or Role within the project
- if the option **Project Creator becomes Salesperson after Project Creation** is enabled by the admin user.

When WebCenter is under the Named User License model, a dedicated license is available for the Project Creator users. Similar to the other named user license types, you can create as many Project Creator users as you have licenses.

When WebCenter is running in the concurrent license model, you can create an unlimited number of Project Creator users.

You can have two types of permissions for Project Creators users, namely:

- **Limited Visibility of Companies and Groups:** Can view only the list of Groups / Users, Company and locations that are limited to the user's visibility scope

- **Full Visibility:** Can view all Groups/ Users, Company and locations without any restrictions.

4.1.6. Delegation Preferences- System Wide

Delegation Restrictions

To ensure that your user(s) delegate to a limited list of users, you can use the **Delegation Restrictions** either as a system wide settings or per user.

The Administrators can specify system wide delegation restrictions. Admin users can place restrictions on delegation based on various factors like:

- **No Delegation** which prevents your users from delegating their work.
- **All Visible Users** which allows to delegate any user who are visible in his or her list.
- **Users in the same Company** which allows you to choose delegates, only within the same company.
- **Users in the same Location** which allows you to choose delegates, only within the same location.
- **Users in the same Group** which allows you to choose delegates, only within the same group.

You can also enable **Delegator receives e-mail notifications during delegation period** option to receive email notifications when a user has delegated the work.

System History Logs

All changes/events in this page are recorded and stored in the **System History** page for Administrator users. Read this page on how to access the [records](#).

4.1.7. Week Numbering

The first week of the year is determined based on the geographical location. To accommodate the differences in week numbers in WebCenter, an Admin User can set the preference on how many days are mandatorily required to determine the first week and which day is considered as the first day of the week. These settings are used for the various reports generated from WebCenter, for example show the week numbers in the Search Facet Graphs.

To configure this option, Admin users can navigate to **Preferences > General** and scroll down to **Week Numbering** options.

- **First Day of Week** : Choose any day of the week as the first day of the week. Default is set to Sunday.
- **Minimum Days in First Week** : Choose the number of days that should be part of the new year for the first week of the year and the default value set is 1.



Note: The ISO 8601 (which is followed in Europe) definition for week 01 is the week with the first Thursday in it. Weeks start on Monday, so First Day of Week should be set to Monday and Minimum Days in First Week should be set to 4.

4.2. Password Preferences

The Password Preferences determine whether passwords must meet security requirements, whether they expire, and whether or not users need to provide their passwords when approving or rejecting documents.

Password Complexity

You can enforce a number of password rules by enabling **Passwords must meet complexity requirements**. When this feature is not enabled the only requirement is that passwords be non-blank.

If **Passwords must meet complexity requirements** is enabled, WebCenter passwords:

- May not contain the user's username, first name, or last name
- 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: ! \$ # %)
- Admin can also additionally enable two more options in **Password Complexity** namely :
 - **Set minimum password length** which can be between 6 to 16 characters.



Note: Enabling this option or changing the value expires all passwords. Users will be required to change their password on the next login. By default, it is set to eight characters.

- **Set enforce password history** reflects the number of unique passwords the users has to change before an old password can be reused. This can be set between 1 to 20 and by default is set to 1.

Expiration Settings

Enabling password expiration allows you to limit the length of time that a password may be used. When a user logs in with a password that has not been changed in the required number of days, he/she will be required to change their password before accessing the site.

To enable password expiration, select the option **Expire user passwords when they are ... days old** and type a number of days.



Note: To immediately expire all passwords without changing the other password preferences, click **Expire all passwords now** in the top right of the page.

Consecutive Failed Logins

If there are Consecutive Failed Logins, you can select the option **Block authentication after ___ failed consecutive login attempts** or you can choose to **Never block authentication after failed login attempts**.

Digital Signature

- Enable the option **Require password for Approvals/Rejections**, if you want to force users to provide their passwords whenever they approve or reject a page or document in WebCenter. Admin users can also set additional options like
 - **Prompt for password** : This is the default option. When this option is chosen, only the password has to be provided for approval or rejection.
 - **Prompt for username and password**: When this option is chosen, both the User name and password has to be provided.

- **Prompt for username and password once, afterward only prompt for password:** When this option is chosen, user name has to be provided in the first instance and thereafter only the password has to be provided.
- Enable the option **Allow alternative passwords to be used for Approval/ Rejections and Tasks**, in case the users need another level of authentication other than the WebCenter password authentication.
- You can choose **Block browser auto complete on password confirmation** to ensure passwords are not stored for any users in WebCenter.



Note: It is applied to both the login page and also when the user does re-authorization for Approvals and Task completion.

System History Logs

All changes/events in this page are recorded and stored in the **System History** page for Administrator users. Read this page on how to access the [records](#).

4.3. Security Preferences

Use the **Security** preferences if you want to tighten the security in WebCenter.

By default, all the actions are allowed unless mentioned otherwise in the explanation. Deselect them if you do not want any user to perform these actions.

- **Approval**

- **Approval outside the Viewer**

This option enables or disables the approval functionality for documents based on where the document is viewed from. There are 3 options:

- **All Documents**

All documents can be approved outside of the Viewer.

- **Non-viewable Documents only**

Only non-viewable documents can be approved outside of the Viewer. Viewable documents (like Graphical or ArtiosCAD documents) can only be approved in the Viewer. Bulk-approval is not enabled.

- **Do not allow**

All documents need to be approved in the Viewer. Non-viewable documents can not be approved.

- **Allow Force Approval By** and

- **Allow Force Rejection By** : Both these options have the following drop down to choose from:

- PM, Administrators and Approval Master
- PM and Administrators
- Approval Master

- **Allow Conditional Approval option in Approval setup** allows a conditional approval option in the approval setup. When you do not want to allow conditional approval in approval setup, simply disable this option. Only the Admin can set this system-wide option. When this is disabled, the **allow conditional approval** option will not be available for the users while setting up approval on documents, projects or folders.



Note: Enabling or disabling this option will not influence the approval cycles that are already existing or started.

- **Approved Documents**

- **Allow removing Documents with Approval actions** option lets Project Managers or Project members with the **Delete** right to delete documents that have already been approved /rejected / commented by at least one person or group.
- **Allow changing Attributes of approved documents** option lets Project Managers or Project members with the **Change Properties** right to edit the attributes of already approved documents.

- **Attributes**

- **Allow non-Administrators to change the Attribute Category of Projects/Documents** option allows Admin users to restrict other users from changing the Attribute Category of a Project or Document. (By default, this option is enabled)
- **Allow importing from/exporting to JDF on Attributes page** option allows Admin users to restrict the importing or exporting of Attributes to JDF. (By default, this option is enabled)

- **Inactive Projects**

- **Allow changing Attributes of inactive projects** lets Project Managers of the respective project or the Admin user to edit the attributes of inactive projects (projects with the **Non Active, Completed, On Hold** or **Canceled** status).
- **Allow changing members of inactive projects** lets the Project Managers and Admin users to edit the members' list for inactive projects.
- **Allow Document operations on inactive projects** lets the project members with the **Change Properties** right to edit documents in inactive projects.

When this is selected, project members can:

1. download documents (the project history is updated in that case),
2. view the document
3. see a document history or the project history
4. copy documents to other projects (but not within the same project).
5. annotate documents.

But cannot:

1. upload documents to the project,
2. start an approval cycle or do approval operations on documents,
3. move documents,
4. delete documents,



Note: Administrators and the Project Manager for the inactive project can perform all document-related actions.

- **Discussions**

- **Allow removing Discussions and Discussion Messages**
- **Archived Projects**
 - **Allow non-administrators to see Archived Projects**
- **History** Require adding a change comment.
- **Email Notifications and Download Link**
 - **Sharing Links for Document Download**
 - **Allow Project Members with Download permission to e-mail a link for authenticated download of a Document:** Enabling this option allows Project Managers and project members with Download permissions to share links embedded with an authentication code for secure downloads.
 - **Allow Project Members with Download permission to e-mail a link for non-authenticated download of a document,** allows Project Managers and members of a project with Download permissions to send a download link for a file within their project to non-WebCenter users.
 - **Allow large Document preview (approval e-mail notifications)** adds a preview of the graphics and CAD documents in the approval related notification emails.
 - **Allow non-authenticated download of Documents (approval e-mail notifications)** adds a **Download Document** link to the default approval emails generated by WebCenter.
 - This link will only be valid for a certain number of days (enter that number in the **The download link will be valid for ... days** field). The default value is 14 days.


Note:

- By default, this option is deselected.
- If you deselect this option after non-authenticated download links have been sent, these download links will become invalid.
- When a non-WebCenter user clicks a link that is invalid, expired or tampered with (for example if the URL was changed), the user will see a web page stating that the link is invalid.
- Changing the link validity (number of days) will only apply to new links.

- **Forward Link- Registered Users**
 - **Allow sharing Viewer Link** allows sharing of link from the Viewer or Document Action menu, to the users already available in WebCenter.
 - **Allow Forward Approval option in Approval setup** allows sharing of link for Approval in the Approval Setup (Project or Folder or Document), to the users who are already available in WebCenter.
 - **Allow Forward to** choosing one of the options enables the approver(s) to share the document with
 - **Any Visible user(s)** means any user irrespective being present in the role or groups or within the project.
 - **User(s) in the same project** means restricted to the users present in the project as an individual member or in a Role or in a Group within the same project.
 - **User(s) in the same Approval Scope** means can forward to anyone within the same Group or Role as the forwarding user.

- **Forward Link - Unregistered Users**
 - **Allow sharing Viewer Link** allows sharing of link from the Viewer or Document Action menu, to any unregistered user.
 - **Allow Forward Approval option in Approval setup** allows sharing of link for approval to unregistered users from Project or Folder or Document.

You can commit the changes made in this page using the **Save** button.

- **Additional Security Settings**
 - **Allow deleting Users:** By default this option is enabled and not visible to end users. The database administrator can disable this option to prevent user deletion.
 - **Allow renaming Users:** By default this option is enabled and not visible to end users. The database administrator can disable this option to prevent user renaming.
 - **Allow changing Include in Project History settings:** By default this option is enabled and not visible to end users. The database administrator can disable this option to prevent user changing Include in Project History settings.



Note: All of the above options are visible, when the security settings are applied. When these options are disabled by the database administrator, they are visible in security settings.

4.4. Document Type Preferences

Document Types

The Document Types page controls the kind of files WebCenter supports. The document types you enable here are available for selection:

- When uploading a new file.
- In the **Search for** field when searching for documents.

You can edit the **Document Type** preferences in **Preferences > Document Types**.

To enable or disable a specific Document Type, check or uncheck the option in the **Enable** column. Click **Save** to confirm.



Note:

If you disable a document type and you already have documents of that type in WebCenter, they can still be found by selecting **All** in the **Search for** field when searching.

Document Details pages for those document types will still be available, and the documents can still be downloaded and have new versions uploaded.

Other Preferences

On this page you can control the system wide settings for Automatic Document Naming, Default Attribute Category and Start Task for new Documents/Versions. You can either choose **None** or choose a different value.


Note:

These settings are found in each project and template on the **Document Creation** page where you can specify:

- **None**
- **Default** (using the system wide settings)
- **Custom** (defining project/template wide settings)

For each Document Type, you can set up:

- **Automatic Document Name**



Note: Optionally, you can enable the general option: **Enable File Extension Specific Counter**. This will make sure that you have different counters for different types of documents.

- **Default Attribute Category**

You can setup a task to start automatically when you upload a specific file type as a new document or a new version by enabling the following options:

- **Start task for new Documents**
- **Start task for new Versions** (new version of)

To selectively apply the above settings to documents in blank projects, you can enable or disable the options (for all document types):

- **Apply Automatic Naming to Documents in Blank Projects**
- **Apply Default Attribute Categories to Documents in Blank Projects**
- **Apply Default Start Task options to new Documents in Blank Projects**
- **Apply Default Start Task options to new Versions in Blank Projects**

System History Logs

All changes/events in this page are recorded and stored in the **System History** page for Administrator users. Read this page on how to access the [records](#).

4.4.1. Find and Unlock Locked Documents

Locked documents are documents that users have downloaded and are working on, and want to flag to prevent others from working on them.

The Admin user (or any member of the Admins group) can find locked documents belonging to all users and unlock them so that others may work on them without receiving warnings that they are locked.

This is particularly useful for freeing up documents that have been locked by users who are absent for longer periods of time, or who have left the project entirely.

1. Click **Admin > Project Management > Find Locked Documents**.
2. Either filter for users by entering (part of) their last name in the **Search users by last name** field, or click **Go** right away to see all locked documents.
3. Select the document(s) to unlock by selecting the corresponding boxes.

4. Click **Unlock checked items**.

4.5. Notifications Preferences

The **Notifications** page allows you to specify exactly which events in WebCenter should trigger an e-mail notification to the users involved.

For every event or action in WebCenter, you can determine whether it:

- is logged in the project history (select **Include in Project History**).
- triggers an e-mail notification to:
 - the Project Manager only (select **Manager**),
 - all the members involved with the event (select **Involved People**),



Tip: Click on **Involved People** to see a list of involved people for each event.

- all the project members (select **Members**).

You can also set up WebCenter to **Send a reminder to the assignee or an approver when a Task or an Approval is overdue** and **Repeat the reminder every x days until the Task or Approval is finished**.

To limit the number of overdue reminders, you can set the system to only send reminders for **Started tasks** or **Tasks that can be completed** (for example, for tasks having a predecessor needing to be completed before they can be started).

Those options are available when **Send a reminder...** is selected.

Allow Users to opt out of selected E-Mail Notifications through the My Notifications page: Enabling this option permits users to opt out of email notifications via **My Notifications** page and disabling this option prevents users from opting out of email notifications.

System History Logs

All changes/events in this page are recorded and stored in the **System History** page for Administrator users. Read this page on how to access the [records](#).

4.6. Menus

The **Menus** preferences allow you to define what users can see by customizing the WebCenter menus. For example, you can remove certain menus for some users, so they have a simpler user interface to work with (they only see the menus they need to use).

You can assign custom menus to users and / or companies (see [Edit a User](#) on page 254 and [Edit a Company](#) on page 241).

The **Menus** page contains the **Default** menu, and any custom menu you have already created.



Note:

You cannot edit or delete the **Default** menu, but you can use it as a basis for creating custom menus.

From here, you can create/update a custom menu either [through the WebCenter user interface](#) or [using XML](#). You can also [delete a custom menu](#).

System History Logs

All Menu related events like

- **Menu Created**
- **Menu Deleted** and
- **Menu Changed**

are recorded and stored in System History. Read this page on how to access the [records](#).

4.6.1. Create a Custom Menu through the WebCenter User Interface

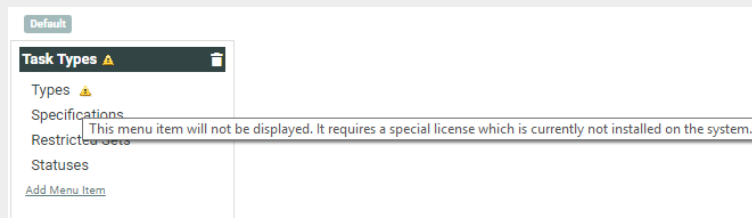
You can create a custom menu for each category of users, to make it more convenient for them.

You will need to:

1. Determine which menus a particular group of users needs, and which menus they don't need.
2. On the **Admin > Preferences > Menus** page, click **Add Menu**.
3. [Create your custom menu](#).



Note: If you do not have **Task Management License**, the **Task** related items will show the following warning:



4. Assign the menu to the user, group or company you created it for.
5. Log in to WebCenter as one of the users to which you gave the custom menu, and check whether the menu works.

Create a Custom Menu

1. On the **Admin > Preferences > Menus** page, click **Add Menu**.
2. On the **Add Menu** page, enter a **Menu Name** and **Menu Description** for your new menu.
3. Click the type of menu you want to customize: **Main Menu**, **Project Details** or **Document Details**.

You are starting with a copy of the **Default Menu**.

On the left hand side, you can see the **Menu Gallery** (1) containing the default menu items in bold, and the default sub menu items under them.

On the right side, you can see the **Menu Builder Canvas** (2) (which is a graphical representation of the menu). This reflects any changes you make.

At the bottom (3), you can see and edit the details of the menu or sub menu item currently selected.

At the top (4), there is a menu to switch between different types of pages. The toggle on the left allows you to switch between Menus and Actions.

4. Edit the menu as desired:

- [Add a Default \(Sub\) Menu Item](#) on page 42,
- [Add a Custom \(Sub\) Menu Item](#) on page 45,
- [Remove a \(Sub\) Menu Item](#) on page 48.



Tip: You can also re-order the menus, or the sub menus within a menu, by drag-and-dropping them on the **Menu Builder Canvas**. You cannot drag-and-drop a sub menu to a different menu though.

5. Click **Save** at the bottom of the page.

6. When you are done editing your custom menu, you can click **Return** to go back to the **Menus** page.

Add a Default (Sub) Menu Item

To add a default menu or sub menu item:

1. Drag it from the **Menu Gallery** into the **Menu Builder Canvas**.


Note:

You can add the same sub menu item to different menus on the **Menu Builder Canvas**, but you cannot add the same sub menu item twice to the same menu, or add the same menu twice to the **Menu Builder Canvas**.

To quickly see whether a (sub) menu item is already used in your custom menu, you can select it in the **Menu Gallery**: this highlights where it is used on the **Menu Builder Canvas**.



Tip: After making a change, you will see that the **Default Menu** label above the **Menu Gallery** becomes **Custom Menu**. You will also see a **Revert Menu** link under it. Click this link if you want to cancel all your changes and go back to an unedited copy of the default menu.

2. In the **Edit Menu** area at the bottom, you can change the properties of your (sub) menu:
 - a) To define what the (sub) menu is called:
 - If you don't want to translate the (sub) menu (it will have the same name in all languages):
 1. Choose **Simple** as **Label Type**.
 2. In **Label**, enter the name to give your (sub) menu.
 - If you want to define a new name in different languages:
 1. Choose **New Localized** as **Label Type**.
 2. In **Language Tag**, enter a new language tag to associate to that menu name in all languages (this language tag is how WebCenter refers to that menu name internally. It must be unique).
 3. In the dialog that opens at right, enter the translations of that menu name in all your WebCenter languages. You need to enter at least the English name.


Note:

Make sure your `customizationConfig.xml` file contains language tags for all the languages you use here (see [Customize the Language Files](#)).

If this is the case, your translations will automatically be added to your custom language files. If you didn't have a custom language file for one or more languages in which you add a translation here, these files will be created automatically.

Otherwise, your (sub) menu will use the value you entered in the **Language Tag** field as a **Simple Label** (it will be shown as it is for all languages).

- If you want to use an existing WebCenter string (piece of user interface text) and its translations as menu name:
 1. Choose **Existing Localized** as **Label Type**.
 2. In **Language Tag**, enter the language tag that is associated with the string you want to use in your language files (in your [custom language files](#) if you have any, otherwise in your default language files).



Tip: When you start typing a language tag, the **Language Tag** field shows all language tags starting with the characters you typed; you can select the desired one in the list.

- The dialog that opens at right shows the translations of that string in all your WebCenter languages.



Note: You can edit those translations (click **Edit** and enter the new translations), but then they will be changed on every WebCenter page that uses that string.

- To define who can see it:

Edit the menu item to limit the **visibility**. Specify the **Visible To > In Groups** as **Specific Groups**.

If you want to limit the menu's visibility to certain groups, select **Groups** and enter the names of the groups that can see the menu, separated by a semicolon (example: GROUP1; GROUP2). You can see this example when hovering on the field.

Language	Translation
English(en)	My Work
French(fr)	Mon travail
German(de)	Eigene Arbeit
Spanish(es)	Mi Trabajo
Italian(it)	Il Mio Lavoro
Dutch(nl)	Mijn Werk
Polish(pl)	My Work
Japanese(jp)	マイワーク
Chinese(cn)	我的工作
Chinese(tw)	我的工作
Thai(th)	งานของฉัน
Czech(cz)	Má práce
Hungarian(hu)	Saját munka
Portuguese(br)	Meu trabalho
Russian(ru)	Моя работа
Turkish(tr)	işim
Croatian(hr)	Moj rad
[LABEL]{label}	[MY_WORK_TAG.My Work]

- To define where a user goes to when clicking it:

- If you want the (sub) menu to link to a specific page (within WebCenter or external):

- In **URL Type**, select **Provide URL**.
- In **URL**, enter or paste the URL of the page to link to.

- If you want it to show the results of a (global) saved search:

- In **URL Type**, select **Saved Search**.
- In **Saved Search**, select the global saved search you want to link to.

- If you want it to use it as a shortcut to create a Project with a specific characteristic:
 1. In **URL Type**, select **Create Project with Characteristic**.
 2. In **Characteristics**, select the characteristic you want to use for the Project.
- If you want it to use it as a shortcut to create a Project from a specific template:
 1. In **URL Type**, select **Create Project with Template**.
 2. In **Project Template**, select the template you want to use for the Project.
- If you want it to show a list of Projects that have a specific characteristic
 1. In **URL Type**, select **Project List with Characteristic**.
 2. In **Characteristics**, select the characteristic of the Projects you want to show.
- If you want the (sub) menu to show a Dashboard
 - In **URL Type**, select **Dashboard**.
 - In **Dashboard**, select the dashboard from the drop down or **Create New Dashboard**



Note: You can only select a **Parent Menu** when *creating a new (sub) menu*, not when editing an existing one.

3. Click **Save** at the bottom of the page.

Add a Custom (Sub) Menu Item

1. On the **Menu Builder Canvas**, click where you want to add your sub menu (if you want to add a top-level menu, you can click anywhere on the canvas).
2. In the **Edit Menu** area at the bottom, click **Add Custom Menu**.
3. Still in the **Edit Menu** area, define the properties of your (sub) menu:
 - a) To define what the (sub) menu is called:
 - If you don't want to translate the (sub) menu (it will have the same name in all languages):
 1. Choose **Simple** as **Label Type**.
 2. In **Label**, enter the name to give your (sub) menu.
 - If you want to define a new name in different languages:
 1. Choose **New Localized** as **Label Type**.
 2. In **Language Tag**, enter a new language tag to associate to that menu name in all languages (this language tag is how WebCenter refers to that menu name internally. It must be unique).
 3. In the dialog that opens at right, enter the translations of that menu name in all your WebCenter languages. You need to enter at least the English name.


Note:

Make sure your `customizationConfig.xml` file contains language tags for all the languages you use here (see [Customize the Language Files](#)).

If this is the case, your translations will automatically be added to your custom language files. If you didn't have a custom language file for one or more languages in which you add a translation here, these files will be created automatically.

Otherwise, your (sub) menu will use the value you entered in the **Language Tag** field as a **Simple Label** (it will be shown as it is for all languages).

- If you want to use an existing WebCenter string (piece of user interface text) and its translations as menu name:
 1. Choose **Existing Localized** as **Label Type**.
 2. In **Language Tag**, enter the language tag that is associated with the string you want to use in your language files (in your [custom language files](#) if you have any, otherwise in your default language files).



Tip: When you start typing a language tag, the **Language Tag** field shows all language tags starting with the characters you typed; you can select the desired one in the list.

3. The dialog that opens at right shows the translations of that string in all your WebCenter languages.



Note: You can edit those translations (click **Edit** and enter the new translations), but then they will be changed on every WebCenter page that uses that string.

- b) To define who can see it:

Edit the menu item to limit the **visibility**. Specify the **Visible To > In Groups** as **Specific Groups**.

If you want to limit the menu's visibility to certain groups, select **Groups** and enter the names of the groups that can see the menu, separated by a semicolon (example: `GROUP1; GROUP2`). You can see this example when hovering on the field.

The screenshot shows the 'Edit Menu: My Work' configuration page. The 'URL Type' is set to 'Provide URL' and the 'URL' is 'mytodolist.jsp'. The 'Visible To' section shows permissions for 'All Users', 'Administrators', 'Project Managers', 'Create Task Rights', 'Create User Rights', 'Project Creators', 'Normal Users', and 'Hide for delegates'. The 'In Groups' section shows 'All Groups' and 'Specific Groups'. The 'Language Tag' is set to 'MY_WORK_TAG'. The table below shows localized labels for various languages:

Language	Localized Label
English(en)	My Work
French(fr)	Mon travail
German(de)	Eigene Arbeit
Spanish(es)	Mi Trabajo
Italian(it)	Il Mio Lavoro
Dutch(nl)	Mijn Werk
Polish(pl)	Moja Praca
Japanese(jp)	マイワーク
Chinese(cn)	我的工作
Chinese(tw)	我的工作
Thai(th)	งานของฉัน
Czech(cz)	Má práce
Hungarian(hu)	Saját munka
Portuguese(br)	Meu trabalho
Russian(ru)	Моя работа
Turkish(tr)	İşim
Croatian(hr)	Moj rad
[LABEL](label)	[MY_WORK_TAG:My Work]

c) To define where a user goes to when clicking it:

- If you want the (sub) menu to link to a specific page (within WebCenter or external):
 1. In **URL Type**, select **Provide URL**.
 2. In **URL**, enter or paste the URL of the page to link to.
- If you want it to show the results of a (global) saved search:
 1. In **URL Type**, select **Saved Search**.
 2. In **Saved Search**, select the global saved search you want to link to.
- If you want it to use it as a shortcut to create a Project with a specific characteristic:
 1. In **URL Type**, select **Create Project with Characteristic**.
 2. In **Characteristics**, select the characteristic you want to use for the Project.
- If you want it to use it as a shortcut to create a Project from a specific template:
 1. In **URL Type**, select **Create Project with Template**.
 2. In **Project Template**, select the template you want to use for the Project.
- If you want it to show a list of Projects that have a specific characteristic
 1. In **URL Type**, select **Project List with Characteristic**.
 2. In **Characteristics**, select the characteristic of the Projects you want to show.

- If you want the (sub) menu to show a Dashboard
 - In **URL Type**, select **Dashboard**.
 - In **Dashboard**, select the dashboard from the drop down or **Create New Dashboard**
- d) To define where to put it in the menu structure:
 - If you want this menu item to be a top-level menu, select **Top Menu** in **Parent Menu**. This will place it at the right of the Menu Builder Canvas, after all the other menus.



Tip: You can re-order the menus by drag-and-dropping them.

- If you want it to be under an existing menu item, select this existing menu item in **Parent Menu**.



Tip: You can also re-order the sub-menus within a menu by drag-and-dropping them.




Note: You can only select a **Parent Menu** when creating a new (sub) menu, not when editing an existing one.

Click **Add** when you are done.

4. Click **Save** at the bottom of the page.

Remove a (Sub) Menu Item

1. To remove a menu or sub menu item from your menu, select it in the **Menu Builder Canvas** and click the grey cross  beside it.
2. Click **Save** at the bottom of the page.

4.6.2. Custom Actions

Just like custom Menus, you can customize **Action** buttons. This feature allows you to remove and re-arrange default Actions for different (groups of) Users. Also, you can add new custom Actions (such as a JavaScript, Create Task, Start Workflow etc.) with custom icons.

There are different types of Actions such as:

- in a table header
- in the header of a Project or Document
- at the top right of pages
- and inside tables (icon-only)

Just like customizing Menu items, you can add or remove them, set a Label and Visibility and modify their display order. You can also specify:

- Action Type
- Priority
- Selection

- Rendering
- Icon
- Icon Color



Note: The available settings depend on the Type of Action that is being customized.

Custom Actions in Different Locations

In the Menu Builder, select **Actions** to customize them. **Menus** and **Actions**. Once **Actions** is enabled, different types of pages become available in the menu:

- Project Lists
- Project Details
- Document Details
- Search
- Cart
- My Work

Under every page type, the individual pages or sections that can be customized are listed. Here you can find an overview of the meaning of each of these different sections:









Project Lists

You can customize the Actions displayed in the table header of the following pages: Favorite Projects, Projects I am invited to, Projects I Manage, and Projects.

For each of the pages you can add or remove **Header Actions** and **Table Actions**. The Header Actions are the buttons displayed top right, like **Create New Project** in the example below. The Table Actions are the buttons listed in the table header, such as **Add to Favorites** and **Add to Cart** in this example.

Projects **Create New Project**

Add to Favorites Add to Cart Delete Change Manager Update Project(s)
Filter on Project Name

<input type="checkbox"/>	Project	Description	Project Status	Manager	Created	Modified ↓	Due On
<input type="checkbox"/>		Request0004	 Completed	Keizer, Debbie (DEKE)	Jun 27, 2016	Jun 27, 2016	
<input checked="" type="checkbox"/>		Request0003	 Active	Keizer, Debbie (DEKE)	Jun 27, 2016	Jun 27, 2016	
<input type="checkbox"/>		Request0002	 On Hold	Keizer, Debbie (DEKE)	Jun 27, 2016	Jun 27, 2016	
<input type="checkbox"/>		Request0001	 Active	Keizer, Debbie (DEKE)	Jun 27, 2016	Jun 27, 2016	

Project Details

In this section Project Detail type pages and sections are listed. The Project Header has **Left Actions** and **Top Actions**. The Top Actions are not used by default, but allow you to move (part of) the buttons on the left to the top right of the page.

Project: Request0001 Active

Upload		Manager: Keizer, Debbie (DEKE)
Upload Multiple Documents		Customer:
Mail link to		Due On:
More...		Modified: Jun 27, 2016

Description:

Project Documents (Table) and Project Bill of Materials (Table) determine the Actions in the table headers on the Project Details Documents and BOM pages.

Q View and Annotate

□ Compare in Viewer

↓ Download

🗑 Delete Document(s)

[More...](#)

Documents 1

Project Documents (Document) and Project Bill of Materials (Document) define the Action buttons that are displayed when you hover over individual Documents listed (typically compact icon-only buttons).

Documents 1

Version

bluebird.png (122.1KB)

Q
↓
☰
1
🗑

Document Details

For now, this item only contains the Document Header. It works in a similar way as the Project Header with Left Actions by default, and optional Top Actions. Note that some of the available Actions still depend on Document Type. For example, the Run as Standard Action will only be shown for CAD Design files.

BlueBottle.png

Version

✉ Mail link to

Q View and Annotate

↓ Download

[More...](#)

Document: BlueBottle.png(755.4KB)

Version: 1

Description:

Project: Request0001

Approval: No Approval Required

Search

It is possible to customize the table header Actions for both Project and Document Search Results.

Search Results

☰

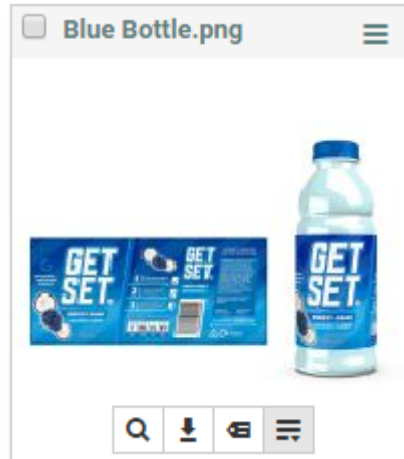
Q View and Annotate

□ Compare in Viewer

↓ Download

🛒 Add to Cart

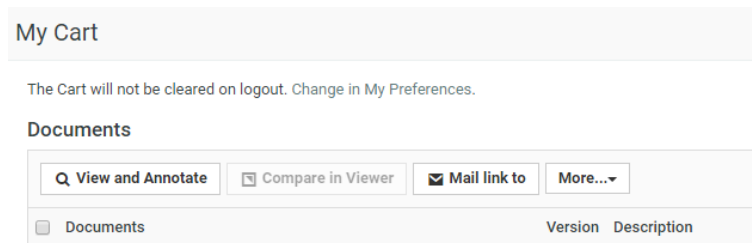
For Document Search Results, Action buttons can also be customized. In case this is already done in the Saved Search setup, WebCenter will combine the two setups. For example, if the Download button is present in both, it is displayed, if it is not present in one of them, it is not shown.



For Search, it is possible to add an extra filter in individual Saved Searches based on **Tag** values defined in the Action configuration. See [Action Settings](#) on page 52 for more details.

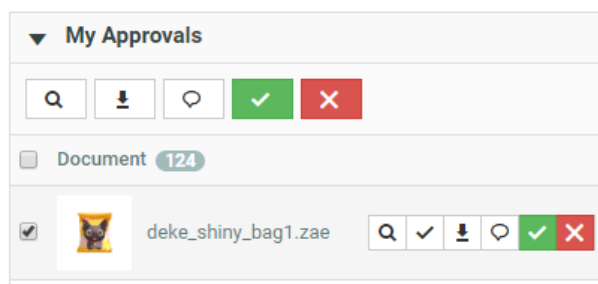
Cart

The Cart Projects and Document pages have table header Actions which can be customized.



My Work

On the My Work page, it is possible to customize the table header Actions for the My Approvals section. The individual Document Actions can be customized for: My Approvals, My Recently Submitted Approvals, and Approvals to Follow Up.



Action Settings

Depending on the Action type and location, following settings may be available:

Priority

Priority determines if and how the Action button is displayed, there are a few options:

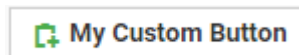
- **Primary (always visible)** - this type of button is always visible and has the primary color selected in the Customization (by default a dark blue/grey shade).
- **Secondary (always visible)** - this button is similar to the primary button, but uses the default button color selected in the Customization (by default: white).
- **Default (visible if space available)** - this button is similar to the secondary button, but is only displayed if there is enough room, if not, the button is listed in a More dropdown menu allowing for optimal use of available space.
- **Available (always in "More")** - this option is always displayed in the More dropdown menu.

Selection

The **Selection** setting determines when the button becomes available. You can set it to **No selection required** if it is not needed to select anything to perform the Action, if one or more items are required, select one of the other options (for example: to delete a Document, you need to select at least one item).

Rendering and Icon

The **Rendering** setting can be used to determine whether to show only an icon, only the label, or both. At the top of the settings panel, you can see a preview of your button.

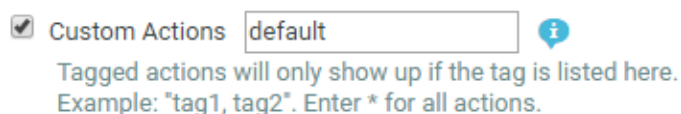


In the **Icon** dropdown you can find a number of icons to choose from. It is not possible to add any additional icons, but new icons will be added in future versions of WebCenter. Use the **Color** dropdown to select one of the standard colors for your icon.

Tag

The **Tag** field is only available for custom Actions in Search. For Search, it is possible to add an extra filter in individual Saved Searches based on **Tag** values defined in the Action configuration.

When the **Custom Actions** setting in the Search Layout Options of your Saved Search is enabled, tags can be entered separated by a comma, by default there is a "default" tag. A * matches all tags. When the checkbox is disabled, no custom Actions buttons will be shown for the Saved Search. When the checkbox is enabled, all custom Actions which do not have a "tag" will be shown as well as all the custom Actions which have one of the tags mentioned in the input field.



Task Settings

For Workflow and Create Task buttons, several settings are available such as **Task Type**, **Start Task** and which fields to show. For more details, see: [Custom Action Types](#) on page 53.

Custom Action Types

With the introduction of the customizable Action buttons, you can not only rearrange and remove the regular Actions, but also add your own custom Actions. Following types are available in the gallery:

JavaScript

The custom JavaScript button has an additional **JavaScript** field (mandatory) where you may copy/paste your own custom code.

It is possible to use fixed variables to reference WebCenter Projects or Documents in this JavaScript code. These variables can be used for example when creating buttons that redirect to specific Project or Document Details pages. An overview:

Variable	Type	How to use
selectedIDs	Array	If a Project list or Document list is available in the action context, the IDs of the corresponding items (for Documents, this is the Document version ID) is available in the variable "selectedIDs".
projectID	String	If a single Project is available in the action context, the ID of this Project is available in the variable "projectID".
docVersionID	String	If a single document is available in the action context, the document version ID of this document is available in the variable "docVersionID".
menuFile	String	Where possible, the current Menu file selection (controlling the display of the primary WebCenter Menu) is available in the variable "menuFile".



Note: It is not guaranteed that JavaScript segments relying on other parts of the browser page DOM or detailed implementation of WebCenter pages will be supported in future versions.



Note: Using other (undocumented) variables is not supported and highly discouraged.

Start Workflow

The custom Start Workflow button allows you to select a **Workflow** Task Type to launch upon clicking the button. Any selected Documents will be added to the Workflow. In a Project context, it is possible to either launch one Workflow per Project or one per selected Document using the **Options** setting.

Create Task

Using the Create Task custom Action button, it is possible to immediately create a new Task from the selected **Task Type**. Use the **Start Task** options to either immediately start the Task, or at a later point in time.

The **Show** setting allows you to enable/disable different fields on the Create New Task page. This setting allows you to hide unwanted fields and elements from the page and reduce clutter. Disable all checkboxes to immediately go to the Task Execution page or create the Task. The **After Creation** setting determines whether the Task Execution page is displayed or not.

Action Type	Create Task
Task Type	Simple Task
Show *	<input checked="" type="checkbox"/> Top buttons <input checked="" type="checkbox"/> Task Type <input checked="" type="checkbox"/> Status <input checked="" type="checkbox"/> Created by <input checked="" type="checkbox"/> Allowed Assignee <input checked="" type="checkbox"/> Assigned to <input checked="" type="checkbox"/> Name <input checked="" type="checkbox"/> Description <input checked="" type="checkbox"/> Predecessors <input checked="" type="checkbox"/> Lead time <input checked="" type="checkbox"/> Due date/time <input checked="" type="checkbox"/> Estimated <input checked="" type="checkbox"/> Start Task options <input checked="" type="checkbox"/> Completion action <input checked="" type="checkbox"/> Bottom buttons
Start Task	Default
After Creation *	<input checked="" type="checkbox"/> Show Task Execution page

If all buttons are disabled, and enough information is defined in the Action to create the Task, it is possible to create a Task without any additional user input needed and (optionally) redirect to the Task Execution page for supplying, for example, Task Specifications to the created Task (or Workflow).

Assisted QA Tool

This custom Action Type is available in all action contexts with Document Lists.

- Project Documents (Table)
- Project Bill of Materials (Table)
- Document Search Results (Table)
- Cart Documents
- My Approvals (Table)

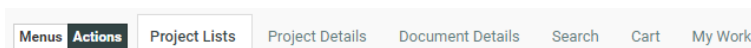
To configure the selected Action button for Assisted QA, specific properties are to be updated.

Assisted QA Tool: (Mandatory) Select the QA Tool that you want to open, when the icon is selected in the menu. If more than one QA tool is configured, then the list of all the available QA tools are viewable in the drop down.

How to Create a Custom Action Button

Follow the steps below to create a custom Action button:

1. In your custom Menu, use the toggle top left to switch to **Actions**.



2. Select the page/section you would like to customize.
3. Select the Action type you would like to add from the **Action Gallery** and drop it into the location where you want to show it.
4. Make sure to select your Action and inspect the settings in the table below it. You can now change settings such as Label, Visibility, Rendering, etc. A preview of your button is displayed in the header of the settings panel. Also see: [Action Settings](#) on page 52.
5. Once you are done, save your Menu.



Note: To see the Menu changes in effect, any User assigned this particular Menu needs to logout and login.

4.6.3. Update a Custom Menu through the WebCenter User Interface



Note: You cannot edit the **Default** menu.

1. On the **Admin > Preferences > Menus** page, click the name of the menu you want to update.
2. On the **Edit Menu** page, edit your menu as desired (as explained in [Create a Custom Menu](#) on page 41).
3. Click **Save** at the bottom of the page when you are done editing the menu.

4.6.4. Create a Custom Project Details / Document Details Menu through the User Interface

You can create a custom menu item for **Project Details / Document Details** page. For example, you can create a menu item for adding a **Saved Search** using **SmartNames**.

You can also specify the visibility of this menu item for particular **groups** or for certain types of projects.

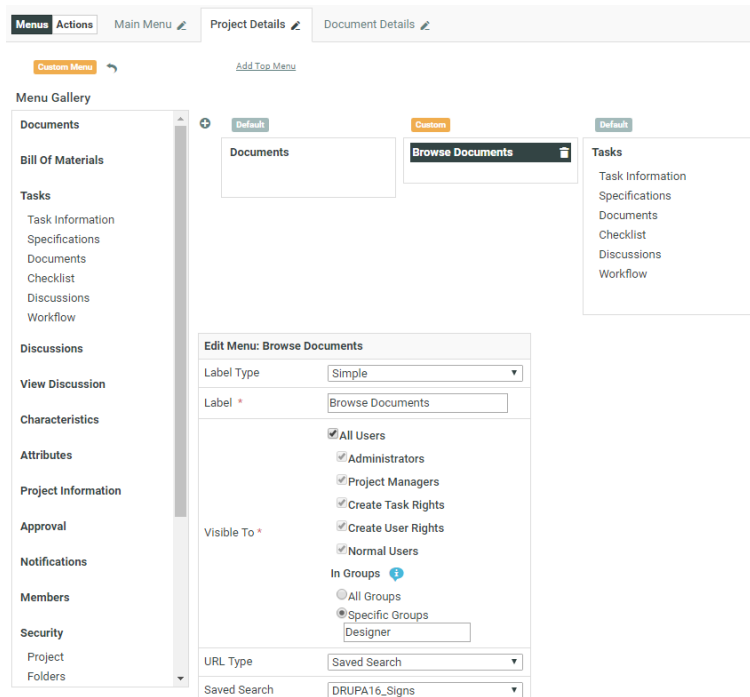
1. On the **Admin > Preferences > Menus** page, click **Add Menu**.
2. On the **Add Menu** page, enter a **Menu Name** and **Menu Description** for your new menu.
3. Click the type of menu you want to customize: **Project Details** or **Document Details**.

In the menu builder, you will see all the menu items of a default **Project Details** or **Document Details** menu.

On the left hand side, you can see the **Menu Gallery** containing the default menu items in bold, and the default sub menu items under them.

On the right side, you can see the **Menu Builder Canvas** (which is a graphical representation of the menu). This reflects any changes you make.

At the bottom, you can see and edit the details of the menu or sub menu item currently selected.



4. Edit the menu item. Select the **URL Type** as:

- **Saved search** if you are configuring a **Saved Search** as the menu item. Select your search from the **Saved search** drop down list below.
- **Attribute Category View** to configure a menu item with a specific **attribute category view**.

Specify the **Name** as the **attribute category view name**.



Note:

The name entered here has to match the custom Attribute Category View name of the Attribute Category (of the current Project or Document).

Your users can edit the attribute values and save them from this custom view.



Note:

From this **Project Details attribute category view**, the users cannot:

- change the attribute category.
- export or import the attribute category.

Read also [Use Case: SmartName Search to find Related Projects](#) on page 211.

5. Optionally:

You can assign a **Project Details** menu item for a certain group of **Projects** having a specific **Characteristic**. This allows you to create menu items (for example, dedicated Saved Searches) visible only in certain types of Projects.

1. [Create a specific Characteristic](#) for configuring a menu item. You can create characteristics for your custom menu items as well as the default ones.

2. [Create a Custom Project Details menu](#) or select the default menu item to edit.
3. Select the specific Characteristic in the **Project Visibility** field. You can select this from the drop down list.

This menu item will appear in the **Project Details** page only if the specified **Characteristic** was assigned to the **project** or the **template**.

As an administrator, you can switch this on and off in the **Project Details > Characteristics** page.

6. Assign the menu to the user, group or company you created it for.

4.6.5. Create a Custom Menu Using XML

You can create a custom menu for each category of users, to make it more convenient for them.



Note:

Menus are XML files, so you can edit them using an XML editor (you can find various freeware XML editors on the internet, for example XML Marker or Notepad++).

For more details on how to edit the XML files to create custom menus, you can read [Create a Custom Menu](#) in the WebCenter Customization Guide.

You will need to:

1. Determine which menus a particular group of users needs, and which menus they don't need.
2. Download the default menu to use as a starting point (click the **Download Menu** link corresponding to the **Default** menu, then save it to a file when it opens in your browser).
3. In an XML editor, remove the menu items that are not necessary for those users.
This allows you to simplify the WebCenter interface, especially for occasional users. For example, you can create a menu that only contains **My Work** for approval users.
4. Add custom menu items, to link to the WebCenter pages of your choice.
This allows you to make the pages most used by your users more accessible. For example, you can add menu items linking to saved searches, or to project creation from a specific project template.
5. When you are done editing the menu file, save it under a meaningful name.
6. Upload your custom menu:
 - a) click the **Menu Upload** button on the **Menus** page
 - b) on the **Menu Upload** page, browse to your XML file,
 - c) give your custom menu a **Name** and a **Description**,
 - d) click **Upload**.
7. Assign the menu to the user, group or company you created it for.
8. Log in to WebCenter as one of the users to which you gave the custom menu, and check whether the menu works.

4.6.6. Update a Custom Menu Using XML

To update a menu you have created:

1. On the **Menus** page, click the **Download Menu** link corresponding to the menu to update.

2. Edit it in an XML editor (see the WebCenter Customization Guide).
3. On the **Menus** page, click the **Menu Update** link corresponding to the menu to update.
4. On the **Menu Update** page:
 - a) browse to the XML file you edited,
 - b) change the menu's **Name** and / or **Description** if necessary,
 - c) click **Update**.

This updates your custom menu.



Note: You cannot edit the **Default** menu.

4.6.7. Menu: Visibility Groups

You can decide the **group visibility** of a menu item present in the **Main menu / Project Details / Document Details** page.

For example, you can create a Project details menu item with a custom **Saved Search** using **SmartNames** and make it visible only to a particular group.

Follow the steps below:

- On the **Admin > Preferences > Menus** page, select the menu.
- Click the type of menu for which you want to edit the visibility: **Main menu** or **Project Details** or **Document Details**.

At the bottom, you can see and edit the details of the item currently selected.

- Edit the menu item to limit the **visibility**. Specify the **Visible To > In Groups** as **Specific Groups**.

If you want to limit the menu's visibility to certain groups, select **Groups** and enter the names of the groups that can see the menu, separated by a semicolon (example: `GROUP1; GROUP2`). You can see this example when hovering on the field.

4.6.8. Customize the Project Details Menu Using Characteristics

You can assign a **Project Details** menu item for a certain group of **Projects** having a specific **Characteristic**. This allows you to create menu items (for example, dedicated Saved Searches) visible only in certain types of Projects.

1. [Create a specific Characteristic](#) for configuring a menu item. You can create characteristics for your custom menu items as well as the default ones.
2. [Create a Custom Project Details menu](#) or select the default menu item to edit.
3. Select the specific Characteristic in the **Project Visibility** field. You can select this from the drop down list.

This menu item will appear in the **Project Details** page only if the specified **Characteristic** was assigned to the **project** or the **template**.

As an administrator, you can switch this on and off in the **Project Details > Characteristics** page.

4.6.9. Delete a Custom Menu

To delete a custom menu:

1. On the **Menus** page, click the **Delete Menu** link corresponding to the menu to delete.
2. Click **OK** in the confirmation dialog.
3. If your menu is assigned to users and / or companies, you need to assign another menu to them. In the **Menu Deletion** page:
 - a) Select the new menu to assign to them.



Note: This will assign the same menu to all those users / companies. If you want them to have different menus, you need to edit the users / companies individually from the **Users** or **Companies** page.

- b) Click **Delete**.

4.7. My Work Preferences

The **My Work** preferences allow you to define what users can see on their **My Work** page.

Default and Custom My Work Pages

As an Admin, you can define a default **My Work** page, that will be available to all WebCenter users by navigating to **Preferences > My Work > Default My Work Setup**

You can also define custom **My Work** pages for specific users or companies, when editing that user or company (see [Create a User](#) on page 252 and [Create a New Company](#) on page 241).

Users can then customize their personal **My Work** page to a certain extent, by adding or removing predefined sections (using **My Work > Edit My Work Setup**).

Admin Users can define which sections are available for specific groups or user types.

In the **My Work** preferences, you can:

- create a new **My Work** section (to use in the default or custom **My Work** pages),
- change what the default **My Work** page looks like.

System History Logs

All My Work section related events like

- **My Work section created**
- **My Work section deleted**
- **My Work section changed**

are recorded and stored in System History. Read this page on how to access the [records](#).

4.7.1. About My Work page

A **My Work** page can be customized using various blocks that are available.

My Work

[Edit My Work Setup](#)

This text can be translated

The screenshot displays the 'My Work' dashboard. On the left, the 'Projects Report (Graph)' shows four categories: Active (1891), Completed (32), Delayed (7), and Start production (1). Below this is a 'Facet List' and three 'Facet Graphs' (two donut charts and one bar chart) visualizing the data. The 'Discussions' section on the right lists several messages with dates and user information. At the bottom, there is a 'test' section with a workflow diagram.

Default My Work Sections

WebCenter has the following default sections, that you can use in the default and custom **My Work** pages:

This section...	will show...
My Approvals	a list of documents a user has to approve or reject.

This section...	will show...
My Recently Submitted Approvals	a list of documents a user has recently approved or rejected.
My Approvals to Follow Up	a list of documents for which a user is Approval Master .
My Tasks	a list of tasks assigned to a user
My Recently Handled Tasks	a list of tasks a user has recently handled
My ToDo List	shows Approvals and Tasks to be done by the user

Custom My Work Sections

You can create a My Work section from any html page. You can define which users will be able to see and use the sections you create, and you can even specify the height the section will take in the page. For details, see [Custom My Work Section](#) on page 61.

4.7.2. Custom My Work Section

To create a section to use in **My Work** pages, you need an html page, whose content will be shown in the section.

1. Click **Admin > Preferences > My Work**. The **My Work Sections** page appears.
2. Click **Create New My Work Section**.
3. Give your new section a **Name**.
4. In the **Type** option, indicate if this section will show:

- a HTML page specifically designed for this purpose (**Generic**),



Note: Please contact Esko's Professional Services if you require such a web page.

- a **Saved Search** (a search you have saved, see [To Save a Search](#) for more information),
- an **External Web Page**.



Note: We recommend you do not add WebCenter pages as **My Work** sections.

5. If you have chosen to show a saved search, select the **Saved Search** to show.
6. If you have chosen to show an external web page, enter or paste its address in the **External Web Page** field (for example: `http://www.esko.com`).

For saved searches and external web pages, the **URL** field is filled automatically by WebCenter.

7. If desired, you can change the height of the section.

To do this, add `&h=` followed by the desired height in pixels at the end of the **URL**. For example `iframe.jsp?url=http://www.esko.com&h=400` has a height of 400 pixels.

WebCenter calculates the width automatically.

8. In **Scope**, choose which type of users will be able to use this section in their **My Work** page:
 - **All Users**,

- **Administrators,**
- **Project Managers.**



Note: You can also change this for the default **My Work** sections.

9. You can use groups to further filter the users that will be able to see the section. In **Role Groups**, choose either:
 - **All Users** if you want all users of the type specified in **Scope** to be able to use the section,
 - **Specific Groups** if you want to restrict the section's visibility to specific groups (within that user type).

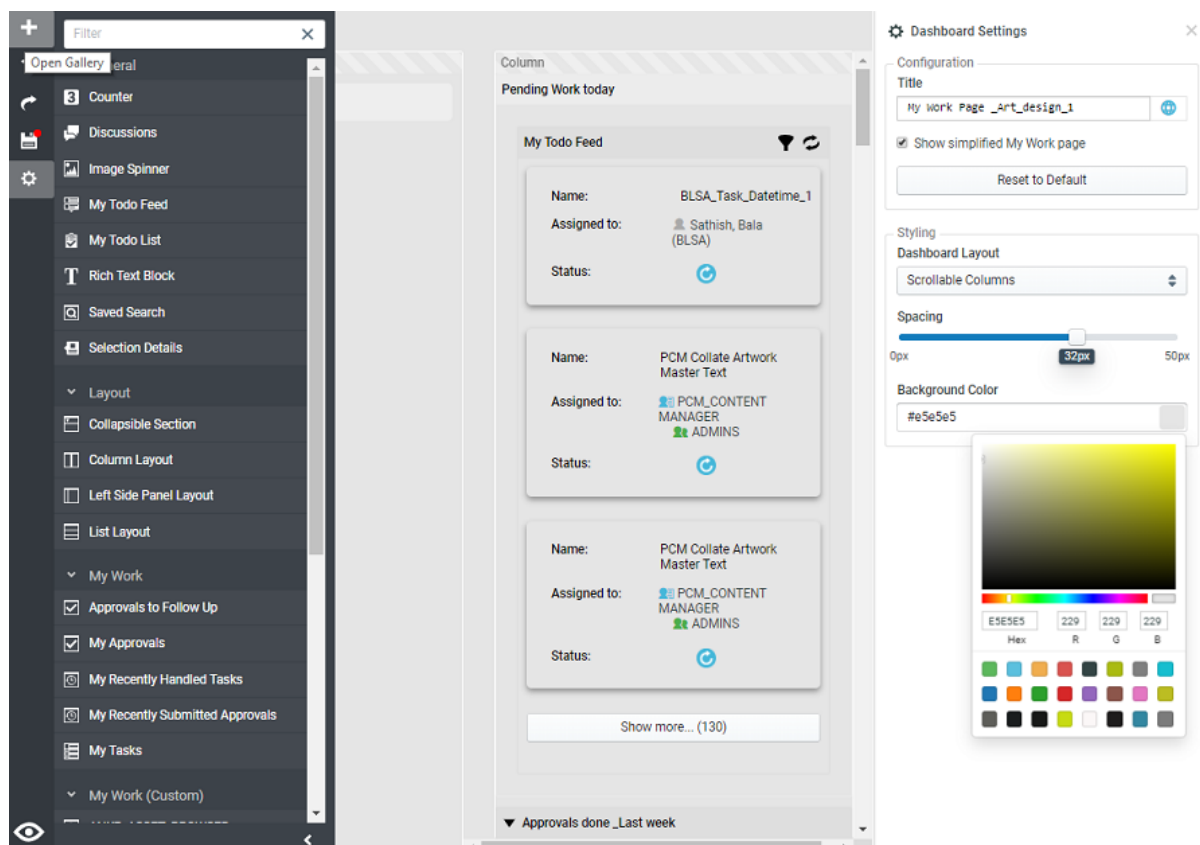
In this case, select the groups which will be able to use this section.

10. Click **Create**.

4.7.3. Edit the Default My Work Page

You can customize and setup **My Work** page for all the users. Admin users can access it from **Admin > Preferences > My Work > Default My Work Setup**.

You can drag and drop the various blocks from the dashboard builder drop-down in the right hand side.



Following options are available in the drop down:

- **All:** This option displays all the blocks that are available.
- **My Work :** All the available blocks of **My Work** Section are displayed. Default blocks available are

- **Approvals to follow up** Displays the list of Documents and their current Approval status for which the current User is set as their Approval Master
- **My Approvals** Displays the list of Documents waiting for approval decision from the current user.
- **My Recently Handled Tasks** Displays Tasks that the current user has completed in a given time.
- **My Tasks** Displays the pending Tasks, waiting to be handled by the current User.
- **My Todo list** Displays a merged overview of all Task and Approvals for the current User.

This block has the following configurable parameters which are all enabled by default:

- **Show Tasks:** Displays all the pending tasks.
- **Show Approvals:** Displays all the pending approvals.
- **Categorize by Time:** You can specify if the block should have categories by time or no categories.
- **Maximum Height:** Specify in Pixels or in percentage and by default has no value.



Note: My Work section can only be added once to the Dashboard.

- **Layout:** You can drag the layout blocks to customize the look of the dashboard. This is similar to the customizing your search results dashboard. Read more about layouts at [Configuring the Search Dashboard Layout and Blocks](#) on page 218
- **General**
 - **Discussions Widget:** You can add this to view the current discussions you are part of. You may choose to display Project or Task or Document discussions or all the discussions. You can enable **Always show Mobile View** to view discussions in a compact format.
 - **Rich Text Block:** You can add a block of text and also display the translations of the text in the languages of your choice.
 - **Counter:** You can specify a **Saved Search** and the results of the search will be counted in the Counter. Read more here [Building a Search Based Counter](#) on page 219
 - **Image Spinner:** Read more about this block [Image Spinner](#) on page 224
- **My Work (Custom)**

This section contains all defined custom My Work Sections of the system.

Menu Options in My Work Page

You can perform actions in the **My Work** page using the menu options

- **Undo / Redo:** To perform Undo / Redo actions in the My Work page.
- **Show simplified My Work page:** Enable this toggle in the **Edit My Work Setup** to display the My Work page with no links to Project and Document details page.
- **Reset to Default:** Admin users or the user can revert the **My Work** page to default settings by clicking this button.
- **Save:** Any changes done will be saved.



Tip: To make the page mobile friendly, define minimum widths on columns to ensure that the columns will reflow to a new row and fit horizontally.

4.7.4. Edit My Work Page for a User

Admin user can set up a customized My Work dashboard to any user.



Note: When a user has no custom setup he/she will see the company **My Work** setup or **Default My Work setup**.

Set up a custom **My Work** setup for the user, follow the steps below:

1. Click **Admin > Users > My Work Setup** tab.
2. Click on **Setup Custom My Work** to edit and configure a dashboard for the particular user.
3. You can customize the **My Work** dashboard as described here [Edit the Default My Work Page](#) on page 62
4. Click **Save** to make changes.

Similarly a customized My Work page can be set up for a Company's user. Read more about it here [Set up My Work page](#) on page 244.

4.8. Dashboard Preferences

Admin users can view the global list of dashboards by navigating from **Preferences > Dashboards**. These dashboards can be used as:

- Menu Items
- Start Page
- Landing Page of a Project or Default landing page of all projects
- My Work

4.9. Reports

You can derive a **Report** of selected parameters of a document derived by querying the database. You can produce Tables, Pie Chart and Bar Chart in these reports and output them in PDF, DOCX, XML, XLS, CSV, TXT, RTF and HTML formats. This feature uses the Jasper Reporting engine to create these reports. You can customize the terminology, look, logo's and the parameters.

Use Reports to:

- calculate averages and compare actuals to targets (KPI's).
- create charts, such as Bar Chart and Pie Chart.
- to create a general report and related sub-reports.

The report is created based on a **report template**. There are built-in reporting templates available to admin users. However, you can upload custom reporting templates as a JRXML file or as a ZIP file. If

you would like to add supporting files such as images and stylesheets, you can create a ZIP with the JRXML file, images and stylesheets.

Using WebCenter Reports, you have the:

- Ability to calculate averages and compare actuals to targets (KPI's).
- Ability to create charts, such as Bar Chart and Pie Chart.
- Freedom on terminology, look, logo's, amount of detail required to be displayed.
- Choice of report output to PDF, DOCX, XML, XLS, XLSX, CSV, TXT, RTF and HTML.
- Ability to create one PDF with a general report and iterate over a set of sub-reports



Note:

- You can create these reporting definition templates in **iReport**. Read more technical details about this in: [Custom Reporting](#).
- You need database access to derive these reports and if you are using WebCenter as a SaaS customer, you cannot generate these reports yourself.
- If a report is generated for a template containing background image in the DOCX format, then the output will not have the background image.

You can access these reporting templates in **Admin > Preferences > Reports**.

System History Logs

All Report related events like

- **Report created**
- **Report deleted** and
- **Report changed**

are recorded and stored in System History. Read this page on how to access the [records](#).

4.9.1. Accessing WebCenter Reports

The WebCenter Reports feature can be accessed by an Admin or member of the Admin group.

1. Log in to WebCenter as an Admin user.
2. Click **Admin > Preferences > Reports**.
3. The **Reports** page appears with the list of available reports.

This page displays the report name, report actions, report description, last modified and the user who uploaded the report (Creator). The Reports page also displays **Upload Report**, **Download Report**, **Update Report** and **Delete Report** buttons.



Note: The built-in reports cannot be deleted.

- 4. Click the desired report name to go to report details page, where you can run the report.

4.9.2. Types of Reports Available

The WebCenter Reports comes with two default reports. The default reports have a typical WebCenter look. However the report definitions can be downloaded and changed in **iReport** to a different look.



Note: Reporting is a separate license in WebCenter. Without this license you can only run the default reports.

The default reports provided are as follows:

- **Approval Statistic (built-in)** report: This report is on duration of approvals. This report has lots of parameters to filter the report on customers, duration and influence on what is shown in the report and how it is displayed.

- **Task Management (built-in)** report: This report is on the duration of tasks. This report comes with many parameters, for example to filter on a task type (showing all CAD Design tasks and disregarding all other tasks).

- **Attribute Category (Built In) Report:** Built-in reports are available for Attribute Category in both PDF and Excel formats.

By default, these reports are not enabled in the **Project's** or **Document's** Attributes page. To enable built-in reports follow the below configuration:

1. Download one of the built-in the reports
 - Sample Attribute Category Excel - built-in report template for XLSX format
 - Sample Attribute Category PDF - built-in report template for PDF format
2. Upload a new report as **Default Attribute Category Report**. You can also rename the report in the name of the attribute category for which report has to be generated.

Download the built-in report and upload new report as name **Default Attribute Category Report** or name the report exactly as the Attribute Category in the required Project or Document for which report is generated.

To get a specific project or document attribute category as a built-in report, upload the template ZIP file with the report name same as the project or the document attribute category name. Report name can also contain optional suffix.

Example: If the attribute category name is - Doc Attr Category, then there can be multiple reports with different names such as Doc Attr Category_PDF, Doc Attr Category_Excel, Doc Attr Category_CSV.

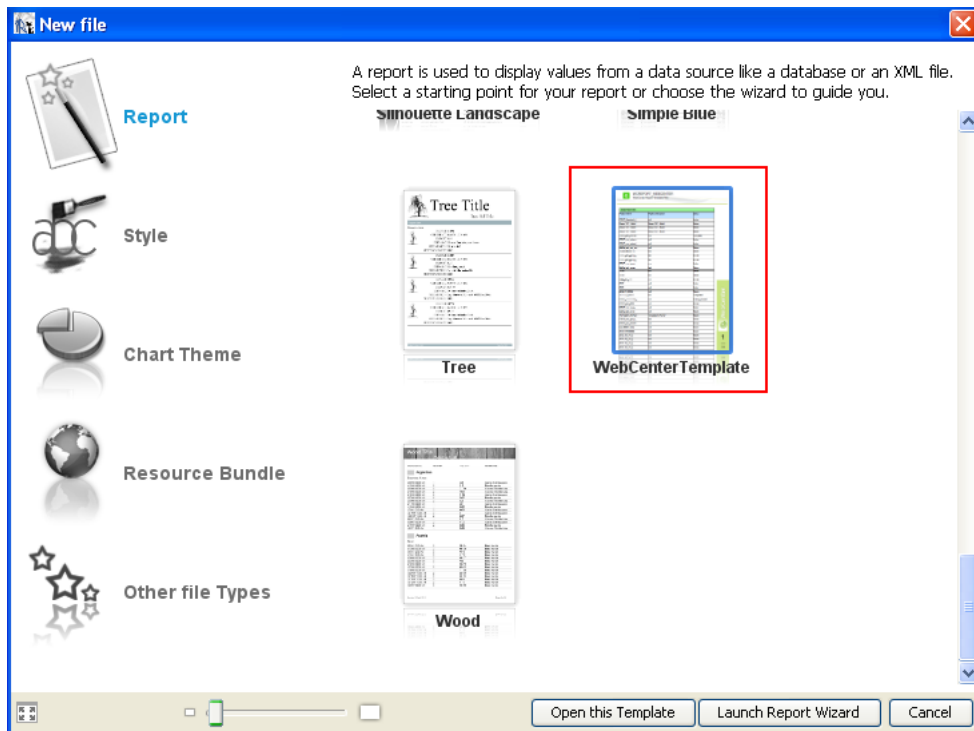


Note: To change the template, download the Jasper Report template, update using Jasper Studio and upload back to WebCenter.

You can also create a custom report using **iReport** tool. To create a new custom report, you can start from a blank template, use the template provided by Esko, or just modify the built-in reports. Upload these to WebCenter and then let WebCenter run the report. One report design is typically used over and over again, for example to create a weekly or monthly report.



Note: To learn how to create such reports, read the **CustomReport.doc** document.



4.9.3. Configuring a Report

To configure a WebCenter Report:

1. Click on the desired report name link on the **Reports** page.
2. In the **Reports Details** page that appears, specify the **Report parameters**.

This can be very simple or very complex depending on the amount of parameters foreseen by the report design. Most often, the time span on which to calculate the report is a parameter. But equally so the report could accept a customer ID (a drop down of customers will be shown) or an option to show more or less detail or what type of charts to use.

The mandatory fields (parameters) are marked by an *.

3. Under **Report Output**:
 - a. Click the **Upload Report to Project** check box, if you want to upload the generated report directly to the required project folder. When it is not selected, the report is generated on the User Interface.
 - b. Specify the report **Document Name** and output **Format**. By default PDF is the output format.



Note: XHTML format is not available if the **Upload Report to Project** option is selected.

- c. Select the **Make Report viewable in WebCenter Viewer if applicable** option to start the view file generation task when the report document is uploaded to the WebCenter project. This option is applicable to reports in the PDF file format and MS Office file formats if configured in WebCenter.

4. In **Report is visible for groups**, select or enter the name of the groups that can run this report. To remove a selected group, click the minus sign in front of its name.
5. In case the jrxml defines projectId as a parameter (with uiTypeID set to PROJECT), an additional **Project Report** checkbox appears on the report details page. In case this option is enabled, this report will only be used as a project report.

You can also set which roles in the project(s) can run this report (in addition to the groups you defined). This way it is possible to create a report that can only be run by the CSR or the SALES person but not by other people (for example suppliers and other external people).

In **Report is visible for roles**, select or enter the name of the roles that can run this report. To remove a selected role, click the minus sign in front of its name.

6. Click the **Save** button, to save the parameters. The next time you want to run this report, you can use the same parameters. If you want to run the same report with two sets of saved parameters you need to upload the report definition twice.

4.9.4. Running a Report

To run a WebCenter Report:

1. Click on the desired report name link on the **Reports** page.
2. In the **Reports Details** page that appears, specify the **Report parameters**.

This can be very simple or very complex depending on the amount of parameters foreseen by the report design. Most often, the time span on which to calculate the report is a parameter. But equally so the report could accept a customer ID (a drop down of customers will be shown) or an option to show more or less detail or what type of charts to use.

The mandatory fields (parameters) are marked by an *.

3. Click the **Run Now** button. The report is generated as per your specification. The **Report Successfully created** message appears in the Reports Details page.



Note: It is recommended to run **Find Lost Documents** built in report during off peak hours, as it can utilize lot of system resources.

Built In Reports

Built In reports are system reports which can be usually accessed only by Administrators. Administrators can view the report but it is not possible to update, delete or download the built-in reports.

To view the built in reports, navigate to **Preferences > Reports**. Click on the report name to view the report details page. Administrators can modify the **Report Name**, **Description** and select **Groups** which can be provided access to run the report manually.

Groups which has permissions assigned, can access the reports from **Search > Reports** page.

Find Lost Documents Report

A lost document is a document in the project for which no files are found on the File Store. Either the file has been removed from the File Store or the document is of the URL type.

The Administrators can run this report in the reports page by selecting the **Find Lost Documents**.

On running the report, the page displays an overview of Lost Documents. Number of lost documents count is indicated at the top of the page.



Note: Run this report during the off peak hours, as it utilizes a lot of system resources and may slow down the WebCenter Application.

The Lost Document report is displayed in a tabular form in which the following details of each document is shown:

- Document Name
- Document ID
- Version ID
- Version Number
- File Number

The user can go to the Document Details page by clicking on a Document Name.

Document Project History Report

WebCenter has a built-in report for **Project History Report**. You can run this report from the **Reports** and select **Project History Report**.

On execution, **Search Projects History** page is displayed with an overview of projects. Administrator users can see all the projects, while the other users can see projects they manage only.

Search History Project is displayed in a list with a sequence number, along with

- Project Name
- Description
- Project Status
- Project Manager
- Creation Date
- Modification Date

To view a project history of any project, click the **Project Name**. You can filter the results on **Manager Last Name**, **Manager Group Name** or **Modified date** or **Project Status**. You can also restrict the number of records displayed in a page.

The order of the results can be changed by clicking on a column header in the results table or by changing the **Sort By** option in the filter section. Select **Print** to print the report.

Sample Attribute Category Report

This is an built-in report that can be run by the admin users.

By running the report, you can download the list of all the attributes and its values along with the document references. This report can be run for both project attribute category or document attribute category.

There are two Sample Attribute Category built in reports based on the way it can be exported:

- **Sample Attribute Category PDF** : Best suited to get the reports in the pdf format along with thumbnails for reference documents
- **Sample Attribute Category Excel**: Best suited to get the reports in sheets separately for each document type

To generate this report for the first time:

1. Navigate to **Reports > Sample Attribute Category (PDF / Excel)**.
2. **Run Report** page is opened.

3. You can select **Upload Report to Project** option and specify the project name, document name and folder in which the report has to be uploaded.

The report is generated in the format selected.

How to get the Attributes Report in the Attributes Page

Download **Sample Attribute Category Excel/PDF (built-in)** report from the **Reports** page. Upload it as a new report with the name as **Default Attribute Category Report** to get the **Attribute Report** icon in the **Attributes** page of all the documents and projects which has attribute category specified.



Note: Attributes Reports can be accessed by any user based on the **Reports** permissions.

In case you want only specific **Project/Document** Attribute Category to get built-in report, upload the template ZIP file with report name same as the **Project/Document** Attribute Category name. The Report name can also contain optional suffix.

This report will show the label of the Attributes as defined in the **Create New Attribute** page and also the last modified date of the attribute. If SmartName or internationalization is used for the attributes, or the attributes is of Document Reference type, then only the attribute names are shown.

Example : If the attribute category name is **Attribute1**, then the uploaded report should be named as **Attribute1XXX**

Attributes page in the **Project/ Document** with the specified **Attribute Category** will have the **Attribute Report** icon.



Note: If you want to change the template of the report, then download the Jasper Report template. Update the reports using Jasper Studio and upload back to WebCenter.

4.9.5. Managing Reports

The Reports page also helps you in managing the existing reports. You can **Download Report**, **Update Report** and **Delete Report** using the inline buttons.



Note: The built-in reports cannot be deleted.

Reports

Upload Report			
Report	Description	Creator	Modified
Approval Statistic (built-in)-Testing	A test report...	ADMIN	Dec 19, 2013

4.10. Download Formats

The **Download Formats** allows administrators to create, edit, and manage Download Profiles, enabling users to download documents in different formats (PNG, JPEG, or PDF). The system provides granular control over access levels, file extensions, output formats, and resizing options.



Note: The **Native format** represents the file as it was uploaded to the system. The Native format cannot be edited or deleted.

This procedure provides step-by-step instructions for creating and editing Download Profiles, managing access levels, configuring output formats, resizing options, and handling access at the Group or User level.

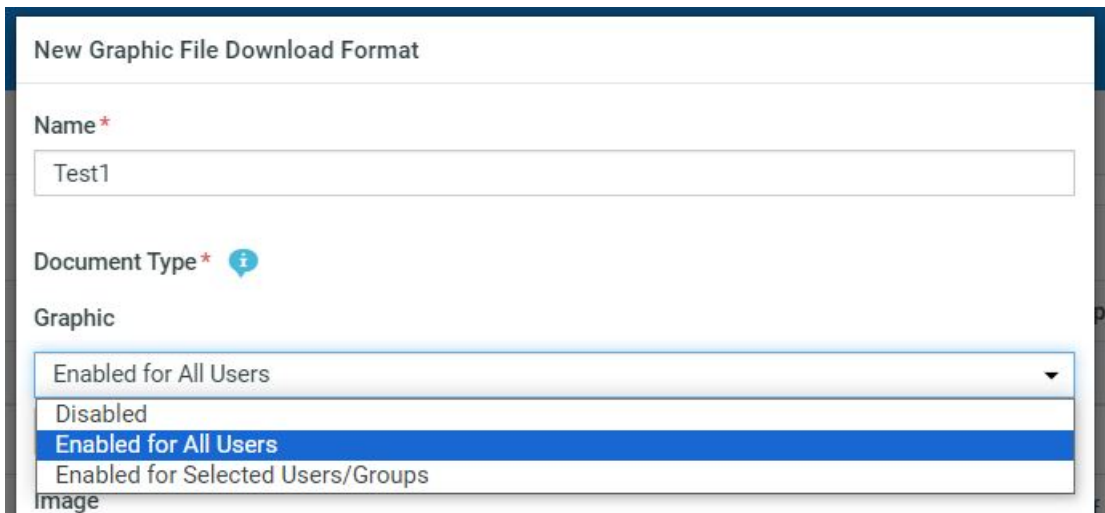
To create a New Download Profile:

1. On the Admin Dashboard, go to **Preferences > Download Formats > +New**.
2. A new interface for creating Graphic File Download Formats will appear.
3. Enter a unique name in the **Name** field for the Download Profile, ensuring it differs from existing profiles.
4. Choose the input **Document Type** among **Graphic**, **Image**, and **Other**, you intend to convert.



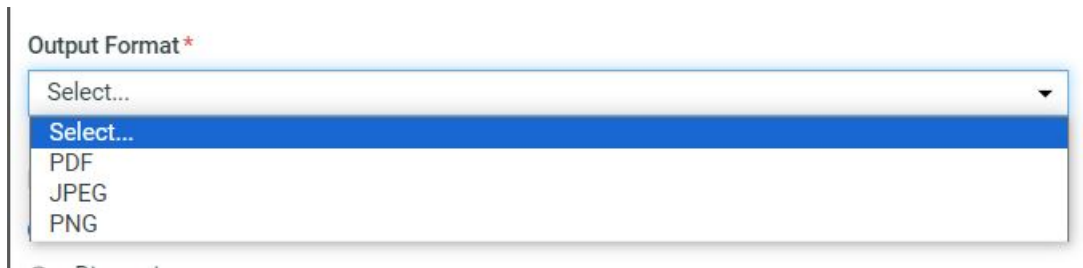
Note: Under the **Document Type** section, if none of the options (Graphic, Image, or Other) is selected, the profile will be automatically disabled.

5. Select **Disabled** to disable all users, **Enabled All Users** to enable all users, or **Enabled for Selected User Groups** to enable specific users or groups.



The screenshot shows a form titled "New Graphic File Download Format". It has a "Name" field with the value "Test1". Below it is the "Document Type" section, which is set to "Graphic". Underneath, there is a dropdown menu for access levels with the following options: "Enabled for All Users", "Disabled", "Enabled for All Users", and "Enabled for Selected Users/Groups". The "Enabled for All Users" option is currently selected.

6. Under **Output Format**, choose among **PDF**, **JPEG**, and **PNG**.



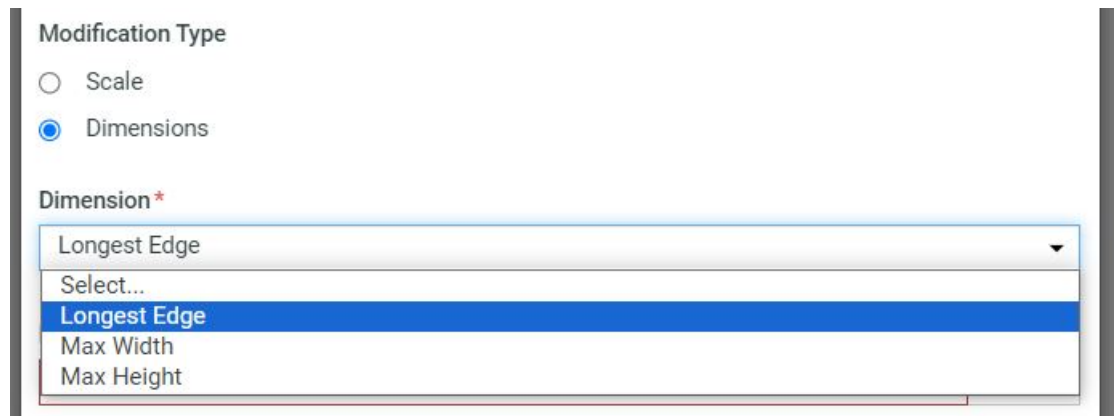
7. For **Modification Type**, select either **Scale** or **Dimensions**.

- If **Scale** is chosen, input the percentage in the **Scale Factor** field.



Note: Images size can be expanded maximum up to 500 percentage.

- If **Dimensions** is chosen, further options will be revealed:
 - Under **Dimensions**, select **Longest Edge**, **Max Width**, or **Max Height**.



- Under **Factor**, input the value in inches or pixels according to your requirements.

8. Click **Save**.

9. Now changes appears under **Image Download Formats** page.

Image Download Formats

<input type="button" value="Save"/> <input type="button" value="+ New"/> <input type="button" value="Delete"/>	
<input type="checkbox"/> Name	Graphic
Native Format	Enabled for All Use
<input type="checkbox"/> Test 2	Disabled
<input type="checkbox"/> test	Enabled for All Use
<input type="checkbox"/> TEST	Enabled for All Use
<input type="checkbox"/> sucutestdownloadformat	Enabled for Selecte

10. Once the download profile is created, assign it to users or groups.



Note: Admins can restrict the download of native files for specific users or groups. By default, if not explicitly denied, users have access to download the original file.

Managing Access to Graphic Download Profiles

Group Level Management:

To control access to a Graphic Download Profile for specific groups, follow these steps:

1. Navigate to **Admin > Groups**.
2. Select the group you wish to manage.
3. Choose the **Download** tab.
4. Enable or disable access to the Graphic Download Profile by selecting or unselecting the enable button.
5. Click **Save** to apply the changes.

User Level Management:

To manage access at the user level, follow these steps:

1. Go to **Admin > Users**.
2. Select the user you wish to manage.
3. Choose the **Download** tab.
4. Enable or disable access to the Graphic Download Profile for the user.
5. Click **Save** to confirm the changes.

Group/User Access:

- If a user belongs to multiple groups, access to the Graphic Download Profile is granted if at least one of the groups allows it.



Note: If a Download Profile is managed at the Group/User level, explicit user settings override explicit group settings.

Applying Preferences:

- Quickly apply one user's configuration to another user by using the "Apply Preferences" button and selecting the Download Format option.

Using Graphic Download Profiles:

- When clicking the download button for a document:
 - The system checks if any Graphic Download Profiles apply based on the document's file type and extension.
 - If eligible, the Graphic Download Profile initiates.
 - If multiple profiles apply, the user is prompted to select one.
- If the result is found, the file download begins immediately.
- If not found, the system generates the file and notifies the user via email when it's available.

4.11. CHILI

You can edit your documents online using WebCenter - CHILI Publish integration.

4.11.1. Configure WebCenter-CHILI Server Connection

Administrator users can configure the CHILI server connection by navigating to **Chili > CHILI Setup** .

In the **Chili Setup** page, the following fields must be specified:

- **Name** : Used to identify the CHILI setup
- Address to the **CHILI server URL** example: <http://chili01/CHILI/main.asmx>
- **CHILI Cloud Connection**: when checked, WebCenter will connect to CHILI Cloud server using REST API's.
- **Use REST API**: when checked WebCenter will connect to CHILI using the REST API instead of the SOAP API
- **CHILI Share** (only available if 'Use REST API is unchecked) example: \\chili01\chilishare
- **CHILI Environment Name** - name of the CHILI environment
- **User login/ User Password** - user login and password (defined within the CHILI environment)
- You can choose to select the following optional fields
 - **CHILI View in side by side Preview mode** to open the side by side view (Document Attribute Category and CHILI view side by side) from thumbnail. [View in Preview Mode](#). When this option is enabled, **Show Content based side by side Preview** option is visible to show PCM -optimized view when enabled.

Users can also view the Attributes and the Chili document side by side in the Preview tab(which can be customized) and this option requires Packaging Content Management and Chili license.

- **Trim leading and trailing spaces from text before applying to CHILI Variable** to remove any extra spaces present in the text

- **Exit CHILI side by side Preview after saving a new version** When this option is selected, the CHILI Side-by-Side Preview is closed and return to the previous page on saving the CHILI document as a new version.



Note: Users can also view the Attributes and the Chili document side by side in the Preview tab(which can be customized) and this option requires **Packaging Content Management and Chili** license.

On **Save**, the configuration is validated and stored in the WebCenter.

On the page, you also find a drop down **Edit Alternative CHILI Setup**: Choose the CHILI setup from the drop down of the configured CHILI setup instances. There is an additional option to **Create New Setup**. You can setup multiple CHILI servers with this option and it is also possible to connect to the same server with different settings.



Note: This is required only if multiple CHILI servers are to be setup.



Note: When using the REST API, WebCenter will connect to CHILI using the newer REST endpoints instead of the SOAP API. This is recommended for connections to CHILI 5.6 or higher. For versions older than 5.6, only the SOAP API can be used. Starting April 2022, all future versions will no longer support the SOAP API and the “Use REST API” flag will be mandatory.

Chili Preview

You can preview the CHILI documents and edit their content when the **View in Preview mode** is enabled in the CHILI setup.

When you click on the thumbnail of any CHILI document, you can preview the chili document along with all the referenced contents and attributes (optionally) for the document side by side with the CHILI editor. Preview of the document is exited or reloaded based on the selection made for the **Exit CHILI side by side Preview after saving a new version** option in the **CHILI Setup configuration**.

You can also show values of a pre-configured document dashboard in the content block.

Following are the the hardcoded dashboard names.

- CHILI_SIMPLE_ATTRIBUTES: To render the attributes of CHILI document
- CHILI_TEXT_DETAILS: To render additional text details
- CHILI_IMAGE_DETAILS: To render image details



Note: This functionality is available with PCM license only.

4.11.2. Upload a CHILI Package

In the Document Types page, a new type “CHILI” will be added. This document type will only be visible if the right license is purchased.

A CHILI Package has the .zip extension. When uploading a zip file in the single document upload page, you will now get the possibility to select “CHILI Package” as Document Type. If you upload the CHILI package with the extension .chp, it will be automatically recognized as a CHILI package, without having

to select it. However, this is not an official CHILI extension. It is a way to make the upload go easier (e.g. it can be used for multiple file upload).

4.11.3. Locking behavior

When a user is editing a CHILI document in the editor, the document will be locked automatically. The document can be unlocked only manually, by saving a new version or by just exiting the editor without saving your changes as a draft. When the editor is opened in read-only mode, however, the document will remain unlocked.

When a user has no editing rights and has no specific workspace assigned, the document will be opened in read-only mode. The editor will also be opened in read-only mode when the document is locked by another user or if it's not the latest version of the document. In the read-only mode, the file can still be viewed, but no changes can be made. The save buttons are not shown, but approval buttons will still be shown to approve if an approval cycle is ongoing.

The CHILI administrator is able to set up a customized read-only view. WebCenter will look for a workspace named "Read-Only" on the CHILI server. Only if that workspace is not found, the default CHILI read-only mode will be loaded.

Note: Draft versions are saved as long as the document is locked. When the document is unlocked, the draft version will be removed. To reset the document, the user can simply remove the lock and start the editor again. To save the changes permanently, the user will have to save the document as new version.

4.11.4. Download CHILI Documents

A user may want (or be allowed by the Administrator) to download different kinds of output of a CHILI document. Some will want to download the original CHILI package or the CHILI XML, while others want download a PDF file. An artwork creator will want the XML to update the master Illustrator document.

When the user wants to download a CHILI document, a page with the available formats will be shown. Users can have different permissions for different download formats. The 'CHILI Package' format is the default option in places where an explicit choice of a target Download Format is not available. If a user has none of the available Download Formats enabled for CHILI document type, he will not be able to download a CHILI document from within any Project.

The different download types are also supported in the SDK. A new parameter was introduced for the DownloadDocument.jsp SDK call

downloadtype: Name of the download format to download. If it is not specified, the default download type will be used.

Example:

http://mywebcenter.mycompany.com/WebCenter_Inst/DownloadDocument.jsp?username=myusername&password=YWJjZGVm&docversionid=00002_0000000018&downloadtype=PDF



Note: When a document is being edited (has a draft version), the downloaded version will not contain the changes of the draft.

Setup of different download types for a CHILI WCR Document

In order to maintain a highly secure environment – enabling/disabling CHILI Download Formats is only available for an Administrator user and is done for individual User/Group at a single moment. User settings can be derived from a sum of Groups Download settings for all the Groups that the User is a member of.

When a new Download Type is defined on the system level it is initially disabled for all Users and Groups in the system.

There are two levels of enabling or disabling CHILI download types. You can either do this system wide or per user/group.

If you want to disable or enable a download type system wide, you can go to the page “Admin > CHILI > CHILI Download Types”, where you have a checkbox with the available Download types. A default setup will have three download types pre-installed which are all enabled by default:

- Chili Package
- CHILI XML
- PDF

For the PDF output, PDF Export Settings named 'Default' must be defined at the CHILI server. An additional column is displayed at the 'CHILI download types' page with the name and availability check (icon) of the PDF Export Settings at the CHILI server.

If you want to set it per user or group, go to the user or group section and click on the user/group you want to give download rights. Then go to the download tab. You will see that the section CHILI Package is added, where all download types that are enabled system wide can be enabled or disabled (disabled by default) for that user or group.

For a user, if you click on “Use Group Permissions”, the CHILI download types are also updated with those of the groups the user is in.

4.11.5. Dynamically assign workspaces and constraints to CHILI Documents

CHILI workspaces can be assigned dynamically by matching workspace names with role names. When a user is assigned to a role in the project the CHILI document is in, WebCenter will look if the CHILI server has a workspace with the name of that role and assign that workspace upon loading the editor. E.g. If the user has the roles “Approver and the CHILI server has a workspace “Approver”, the CHILI editor will be opened in workspace “Approver”.

If no workspace was assigned to the user, and that user has edit rights, WebCenter will look for the workspace name “Default” and assign it to the user. If the workspace “Default” was not found, the editor will open in real-only mode. If a user has multiple workspace/constraint matches, the user will have to select a workspace before the editor opens.

Note: For linked documents, the available workspaces are accumulated.

4.11.6. Loading Assets into the CHILI Editor

An asset is a WebCenter document that is uploaded in the project document library. At the Project/Template > Configure > Document Templates page, an administrator user can select a project or a template to serve as a document library.

For the CHILI document, documents from the document libraries of all projects the current document version is linked to can be used as assets. The documents/folders will be filtered out by the WebCenter security settings. In case of a project document library, the user must have download rights for the document/folder, to be able to use it as an asset. There are no restrictions on using documents from a template document library.

The external assets panel shows a tree structure, where each project/template represents a top level folder. For each document/asset a thumbnail is shown.

To set this up, the CHILI administrator has to add an "External Assets" panel within the workspace and leaves point the "Directory List URL" and "Asset List URL" to the WebCenter SDK with the following calls.

Directory List URL:

```
http(s)://<WebCenter_URL>/<WebCenter_Instance>/GetDocLibraryDirectoryList.jsp;jsessionId=%qs_sessionid%?docversionid=%qs_docversionid%
```

Asset List URL:

```
http(s)://<WebCenter_URL>/<WebCenter_Instance>/GetDocLibraryDocumentList.jsp;jsessionId=%qs_sessionid%?folderid=%id%&documentid=%qs_documentid%
```



Note: We don't support "Search URL" and "Post URL" options. Note that these calls can also be used for image variables pointing to external assets.

4.12. Getting a list of existing projects

To get a list of existing projects based on given filter make a call to the following JSP page:

GetProjects.jsp

With parameters:

1. username
2. password
3. type

Parameter description:

- *type*: specifies category of projects to be listed. This field is mandatory. Supported values are:
 1. my favorite projects
 2. projects I am in
- *name*: limits returned projects to those having the specified string (name parameter) in its name. It's possible to use special characters like in WCR GUI filters and search fields. For example specifying "name=Toy*project" returns both "Toyota project" and "Toy Story project" if they exists in WCR database. This is not applicable when type parameter is set to '6' (type=6). In that case the full name of required project (not case sensitive) has to be specified. This field is optional.
- *projectid*: ID of project to be returned. Ignored unless type parameter is set to '6'.

This SDK call can be utilized by project managers (PMs) or administrators.

If *type* parameter is set to '6' (project by ID or name), one of *projectid* and/or *name* parameters has to be specified. *projectid* parameter has precedence. In this mode *name* parameter has to contain a full name of the wanted project without any special "searching" characters.

Example:

To get list of all favorite projects of currently logged in user (PM or admin) that have "Active" status set use the following call.

http://mywebcenter.mycompany.com/WebCenter_Inst/GetProjects.jsp?username=myusername&password=YWJjZGVm&type=1&statusname=Active

To find projects managed by logged in user that contain particular string ("001") in their names use the following URL. The example returns the first set (page) of 200 projects. If there are more you get the rest by incrementing the *curpage* parameter value and calling the SDK again until it returns less than 200 records (projects) back. Note you can utilize *sorting* parameter to control what projects will be in the first returned set (page).

http://mywebcenter.mycompany.com/WebCenter_Inst/GetProjects.jsp?username=myusername&password=YWJjZGVm&type=3&name=*001*&curpage=1&pagesize=200

Returns:

Successful execution returns a list of projects conforming to given criteria(s). If a problem occurs, appropriate error message is returned.

```
<get_project_list>Getting a list of existing projects on page 79
  <project_list> <project id="00002_0000000135">
    <deleted>0</deleted> <name>a05</name>
    <description/>
    <manager_id>00001_0000000001</manager_id>
    <manager_type>user</manager_type> <customer_id/>
    <location_id/> <salesperson_id/> <category_id/>
    <created_date>1236947156000</created_date>
    <modified_date>1434620655763</modified_date>
    <is_template>0</is_template> <characteristic_list/>
    <attribute_list/> <attribute value_view_list/> <!--
    always empty # <folder_list/>
    <status_id>00001_0000000001</status_id>
    <due_date>0</due_date> <project_doc_list/>
    <project_creation_form>
    <project_name_show>SHOW</project_name_show>
    <project_manager_show>SHOW</project_manager_show>
    <customer_show>SHOW</customer_show>
    <description_show>SHOW</description_show>
    <due_date_show>SHOW</due_date_show>
    <upload_doc_show>SHOW</upload_doc_show>
    <replace_groups_show>SHOW</replace_groups_show>
    <invite_memebers_show>SHOW</invite_memebers_show>
    <set_attributes_show>SHOW</set_attributes_show>
    <set_thumbnails_show>SHOW</set_thumbnails_show>
    <set_planning_show>SHOW</set_planning_show>
    <set_status_show>SHOW</set_status_show>
    <default_planning_method>BACKWARD</default_planning_method>
    <bom_show>SHOW</bom_show> </project_creation_form>
    <autoname_option>2</autoname_option> <manager
    id="00001_0000000001"> <deleted>0</deleted>
    <name>ADMIN</name> <location_id/>
    <last_name>ADMIN</last_name> <first_name/>
    <email>admin@ad.min</email> <phone_number/>
    <mobile_number/> <function/>
    <is_project_manager>0</is_project_manager>
    <password_last_modified>-3600000</password_last_modified>
    <password_forced_expired>0</password_forced_expired>
    <deleted>0</deleted>
    <has_guaranteed_access>1</has_guaranteed_access>
    <max_sessions>-1</max_sessions>
    <ldap_user>0</ldap_user>
    <can_create_task_type>1</can_create_task_type>
    <can_create_user>0</can_create_user> <owner_id/>
    <n_consecutive_failed_logins>2</n_consecutive_failed_logins>
    <user_profile_id="00001_0000000001"/> </manager>
    <thumbnail_url>thumbnails/project.gif</thumbnail_url>
    <project_user_permission> <permission>
    <view>1</view> <add>1</add>
    <update>1</update> <delete>1</delete>
    <checkout>1</checkout> <download>1</download>
    <change_approval>1</change_approval>
```



```

<change_task>1</change_task>
<change_bom>1</change_bom>
<can_manage_this_project>1</can_manage_this_project>
</permission> </project_user_permission>
<manager_locaiton id="00001_0000000001">
<location_view id=""> <location id="">
<deleted>0</deleted> <name/> <shortname/>
<address1/> <address2/> <city/> <state/>
<zip/> <country/> <phone/> <fax/>
<company_id/> </location> <company id="">
<deleted>0</deleted> <name/> <legal_name/>
<type/> <menu/> </company> </location_view>
</manager_locaiton> </project> <project
id="00002_0000000290"> <deleted>0</deleted> ... other
project description </project> ... more projects
</project_list>
<total_filter_projects>1</total_filter_projects>
<total_projects>48</total_projects>
</get_project_list>

```

5. Dashboard

Create Dashboard

You can create a dashboard by clicking on **Create Dashboard** option. To know more about Dashboard Configuration, read [Dashboard Builder](#) on page 83.



Note: You can find five example dashboards in the list of dashboards. Use **Save As** option to make use of these dashboards. Note that every time the database script are run the dashboards are overwritten.

Dashboard Functions

Dashboards can be created for either simply viewing some information or for editing the data that is shown or to create a new project.

Import/Export of Global Dashboards

You can import or export one or selected dashboards from the list of Global Dashboard(s).

To export, select the dashboards and select **Export**. This generates an XML/Zip containing the full configuration of the Dashboard that can be used to migrate the Dashboard configuration to another WebCenter Instance.

To Import a dashboard, select **Import** from **Admin > Preferences > Dashboards**. Choose the XML file containing the Dashboards and click **Import**.

View History

You can view the **Dashboard Created**, **Dashboard Deleted** and **Dashboard Changed** events when you click on this option. You can filter based on the date of the event or the event itself or by the last name of the user who made the change. History results can also be sorted in chronological order or by the type of notification or the user last name.



Note: Dashboard Changed event does not capture any changes made within the widgets in the dashboard.

Delete Dashboards

You can delete a dashboard by selecting from the list and clicking on **Delete Dashboard(s)** option.

System History Logs

All Dashboard related events like

- **Dashboard Created**
- **Dashboard Deleted** and
- **Dashboard Changed**

are recorded and stored in System History. Read this page on how to access the [records](#)

5.1. Dashboard Builder

Dashboard Name

Dashboard Name is a mandatory field in the dashboard. Ensure that the name provided is unique.



Note: If Dashboard is named **WELCOME** then it is loaded in the Welcome page and any dashboard named **CONTACT** is loaded on the Contact page.

Context

You can create Dashboards in the context of where it appears, like


- **Project**
- **Document**
- **Task/Approval**
- **My Work**
- **Unspecified**

There is an option to change the context of the Dashboard that you are building. Based on the context selected for the dashboard, the gallery is updated with different blocks.

Dashboard Functions

- **Edit Form:** Makes it possible to edit. Make sure to add a save button to be able to save the changes.
- **View (default):** Shows information about a Project or Document or Task.
- **Creation Form:** Only available for Projects. You can build a form to create a project from Dashboard.

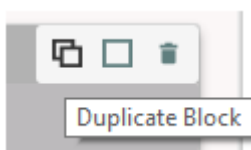
Delete Blocks

You can delete any block in the dashboard by clicking the  (delete) icon on the right top corner of the block and the block is removed from the dashboard.

Add Blocks

There are several ways to add blocks to a dashboard:

- **Drag and Drop:** You can drag blocks from the gallery and drop them in the desired location on the dashboard. Columns can also be rearranged or new columns can also be created with drag and drop.
- **Duplicate Blocks:** Dashboard blocks can be easily duplicated in the dashboard builder by clicking on the duplicate icon in the top-right of the block. This feature is useful, when you have a block that is already configured and a similar block as the existing block has to be created.

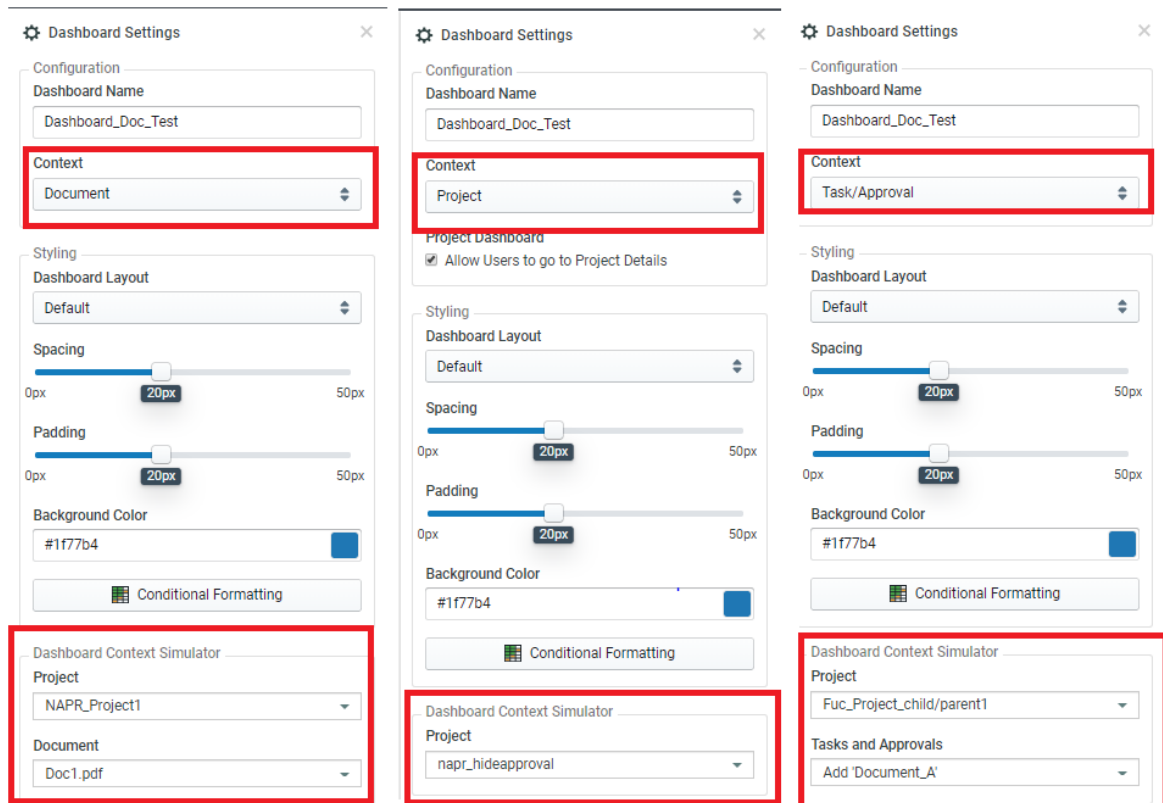


Duplicating also works on all the layout blocks. When layout blocks are duplicated, all the blocks in that particular layout block are duplicated. This allows for fast layout creation in the dashboard.

- **Add Block:** The **Add Block** button allows you to add blocks directly to blocks that accept children (e.g. Column Layout, List Layout, Collapsible Section,...). When clicking "Add Block..." a Gallery popup is displayed from which you can select a block, which is then added as a child.

Dashboard Context Simulator

You can view the Dashboard for a selected Project, Document or Task with this option.



In the **Dashboard Context Simulator** option when

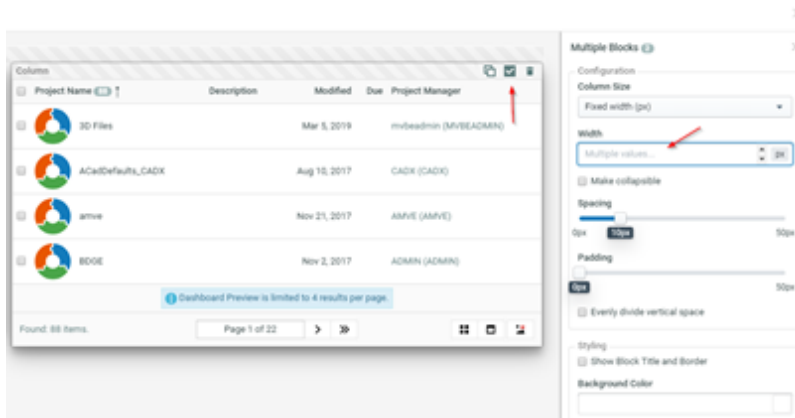
- Project is selected, drop-down lists all the projects from which you can select the project.
- Document is selected, drop down list all the projects in the system from which you can select the document.
- Task is selected, drop down list all the projects in the system from which you can select the task.



Note: This option is not visible when the dashboard is created for unspecified context.

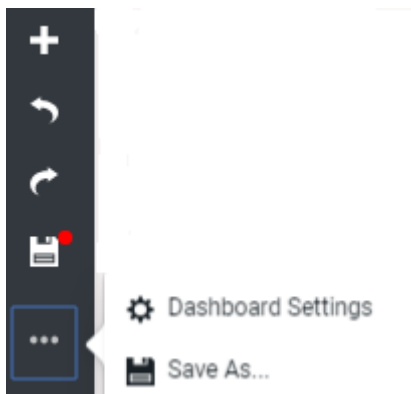
Bulk configuration of blocks


You can select multiple blocks and apply changes to them at once using this option. Select the blocks by clicking on the selection icon in the block and perform **Styling** and **Configuration** actions once. Options that can be configured may vary depending on the blocks chosen.



Gallery Panel Actions

You can add gallery blocks into the dashboard by clicking on the +. You also have Undo and Redo action in the panel along with save. You can select the ellipsis to view the **Dashboard Settings** or make a copy of this dashboard using **Save As** option.



You can view any dashboard when it is built using the preview  icon in the bottom left corner. In preview mode, click the gear icon to return to the dashboard builder. When the dashboard is in configuration mode, you can pin or unpin the gallery. When the gallery is in pinned, the gallery closes while dragging a block and opens up again once the block is dropped onto the dashboard.

Configuring Context based Blocks

Context based blocks can be configured using following parameters:

- **Information Field:** This parameter determines which property the block will show. The label changes based on how the block was initially created, it can be Project Information, Document Information, Task and Approval Information, Project Attributes, Document Attributes or Specifications. The label clearly indicates which object the information field is connected.
- **Custom Label:** Can be used to specify a custom(translated) label.
- **Editable:** Select this option to make this field editable. This option is disabled by default if the Dashboard Function is set to **View**, otherwise enabled by default.
- **Required:** To make this field required. It is unchecked by default. This option only available for blocks that are editable. The checkbox is linked to the editable checkbox: when this option is

checked, the editing for this field will be enabled as well. When editing is unchecked for this field, the field will no longer be required and will be unchecked. Blocks with required checkbox checked will show an asterisk (*) next to the label to show the block is required.

- **Show as:** This option has the following possible values:
 - **Input (Input Field or Dropdown):** When selected, the block displays as input field or dropdown in Dashboard.
 - **Selection (Radio Buttons or Checkboxes):** When selected, the block displays as checkboxes and radio buttons in Dashboard.
 - **Selection with Images (Radio Buttons or Checkboxes):** When selected, the attribute displays as checkboxes and radio buttons with images in Dashboard.
 - **Multi-line text:** Selecting this option shows the attribute as multiple lines if it contains newlines (also in Export to Excel) and allows the user to add multiple lines of text when editing (inline, form or bulk editing).



Note: This option is only available for Attribute block and when the **Show as** option described in this function is set to **Input (Input Field or Dropdown)**.

- **Layout**
 - **Label Only:** shows only label
 - **Value Only:** shows only value
 - **Inline:** none of the others
 - **Align Values:** aligns the values
 - **Multiple Lines:** This is the default layout option and displays the label and value underneath each other.

You can set the background color of the dashboard which is by default set to transparent.

All layout blocks have the Spacing and/or Padding parameter, which allows you to create visually appealing dashboards.

- **Style**
 - **Default:** where the blocks are shown in a list
 - **Scrollable Columns:** where they allow you to scroll every column separately
 - **Grid:** where you can add blocks to a configurable grid
 - **Menu:** use this layout to create a top-level dashboard with a left side panel menu
 - **Conditional Formatting:** When the dashboards are created in Project, Task or Document context, the rendering can be formatted using conditions. This works exactly similar to [Search Results Formatting](#). Options available for conditional formatting depend upon the context of the dashboard.



Note: This option is not visible when the dashboard is created for unspecified context and in scrollable columns.

5.1.1. Configure restriction of attribute values and reference properties to the value of another attribute

In dashboard forms it is possible to limit the allowed values of an attribute/specification or reference property to the value of another attribute in the same context.

The target attribute (which has limited allowed values) should be of the type text; the source attribute (which is providing which values should be available) should be a multi-value attribute.

The target and source attribute should be defined in the same attribute category in the same project/document or task context.

When restricting the value of a reference properties, it is possible to use the value of an attribute that is part of the parent context (project/document/task that is having the document reference on which the reference property is defined).

The configuration of restrict values to another attribute is done in the Attribute Category.

When **Automatically update values when restricting Attribute is changed in Dashboards** is enabled, dashboard forms will automatically update values when changes are made to the source attribute: when there is a single option possible, the value will be selected, when selected values are no longer valid, they are removed.

When a reference property needs to be restricted to an attribute in the parent context, this can be configured in the **Configure columns** popup for the document reference in the Dashboard.

When a reference property needs to be restricted to an attribute in the parent context, this can be configured in the "configure columns" popup for the document reference in the Dashboard.

5.1.2. Dashboards Shortcuts

Dashboard Editor Keyboard Shortcuts

- Ctrl + s: Save the dashboard
- Ctrl + z: Undo
- Ctrl + y: Redo
- Ctrl + click: Multi select blocks
- Shift + click: Multi select blocks
- Delete/backspace: Remove all selected blocks
- Ctrl + g: Open the gallery. You can now directly start searching for blocks, press tab to select a block in the gallery, and press enter to add the block to the top of the dashboard.
- Ctrl + e: Toggle between edit mode and preview mode

- Esc: Close the gallery

5.1.3. Dashboard Gallery

The Dashboard Gallery consists of all the blocks that can be added to create a dashboard. It is located on the left side of the Dashboard configuration page. You can open the gallery by hovering over the +

The blocks that show up in the gallery depends on the the context of the dashboard that is being created.

General

The General section contains the blocks which are available irrespective of the Dashboard context.

- **Counter:** You can specify a **Saved Search** and the amount of search results is shown in the Counter.
- **Dashboard:** To reuse a configuration in different dashboards in the current dashboard.



Note: Use this option sparingly, as this might slow the speed at which the dashboard is rendered.

- **Discussions:** To view the current discussions you are part of. You may choose to display Project or Task or Document discussions or all the discussions.
- **Image Spinner:** Read more about this block [Image Spinner](#) on page 224
- **My ToDo Feed:** To show your Tasks and Approvals in a custom way based on the dashboard context. For example, you can create a dashboard for Task and Approvals for Todo items or in a Project dashboard to show pending tasks. Read More here.
- **My Todo List:** Displays a merged overview of all Task and Approvals for the current User.

This block has the following configurable parameters which are all enabled by default:

- **Show Tasks:** Displays all the pending tasks.
- **Show Approvals:** Displays all the pending approvals.
- **Categorize by Time:** You can specify if the block should have categories by time or no categories.
- **Maximum Height:** Specify in Pixels or in percentage and by default has no value.
- **Rich Text Block:** You can add a block of text and also display the translations of the text in the languages of your choice.
- **Viewer :** You can add this block to view the viewable files in the Dashboard itself. Read [more](#) .
- **Saved Search:** To show a Saved Search where the context of the Dashboard is used to resolve the smartnames of the Saved Search.
- **Selection Details:** To show a Dashboard for each selected item in the Search Results
- **Text Content:** This block shows a Text or Table (wcc or wtc) document from the Packaging Content Module in a Document Dashboard. You can both view and edit the Text and Table Content in the Text Content Block.



Note:

- User can edit a text statement in Text Content Dashboard block and save the changes using the Dashboard.
- **Save** button and version of text statements in dashboard also gets updated pointing to the latest version.



Note: In Dashboard, languages are displayed based on the **Task, Document, Project** contexts and the priority is **Task/ Document/ Project**. In Dashboard view of TextContent Block, the list of languages which are not part of the **context** are removed.

- **Save Changes As Part of Dashboard Save:** An admin user can made changes in PCM Text content blocks and save it using dashboard **Save** button.



Note:

- Dashboard must be configured as **Edit form**
- Dashboard save is applicable for both text content and table content documents.
- If a form is cancelled, the text content block will not be automatically reset. To do this, the user must reload the page.

- **Button:** Add Button block when you want to link a button in the dashboard to an action. You can read about the Button block [here](#).
- **Content Sheet:** Enables you to easily compare the contents of an artwork with content sheet or two versions of the Artwork. Read detailed information about Content Sheet [here](#)

Layout

You can use combinations of list, left side panel, column layouts and collapsible section to present your blocks in the dashboard. Drag and drop the **Layout blocks** into your canvas to create a interactive dashboards. To Configure your layout blocks available in dashboards:

- Select **List Layout** for a vertical list of blocks and **Column Layout** for a horizontal arrangement. Spacing between these blocks can be specified and Padding can be specified for each direction independently.
- Select **Left Side Panel Layout** to present info in a left side **Column Layout** with an embedded List layout. This pre-defined layout can be modified to suit your needs.
- Select **Collapsible Section** to present info which can also be hidden and expand one or more blocks based on the requirements.
- Select **Column Layout** to display blocks in configurable columns. When the user adds a Column Layout to the dashboard, the layout is preconfigured with 2 columns and padding can be specified for each direction independently.
- Select **Menu Layout** to show your Dashboard content by linking to other dashboards or to other blocks. Detailed information of Menu layout can be read [here](#) and you can read about how to use a Menu layout to create a project [here](#).
- Select **Grid Layout** for easily configuring your Dashboard in a grid. Detailed information of Grid layout can be read [here](#).
- Select **Dropdown** to show blocks in a dropdown menu which opens on hover or click. Detailed information of the Dropdown block can be read [here](#).

Context based blocks

Dashboard can be created for different contexts like Project, Document or Task and Approvals. There is also an option to create Dashboards with no specified content called Unspecified. The blocks available in the gallery show information based on the context selected for the dashboard. All the fields which can be searched in a Project/Document/Task/Approval Search are available as separate blocks. It is possible to configure conditional formatting and to customize a link for these blocks which behave the same as in Search. Some of the blocks available are

- **Thumbnail block:** shows the thumbnail of the Project or Document

- **Project Attributes, Document attributes, Task specifications:** these blocks show a view of the attribute category of the Project, Document or Task in read-only or edit mode.
- **Approval Setup :** shows the approval setup of a Document. This block is only available in a document context.

Action Buttons

Project Actions: available in Project Context. Here you can add a **run script** action that can run a script when the user clicks the action.

Document Actions: this block is available in **Document** and **Task/Approval** context.

Use this block to show **Document Actions** which are configured in the menu builder or in the block itself. All actions which are available on Document Search Results are available in this block.

You can also add a **run script** action to trigger a script that uses the Dashboard Forms Scripting API.

Task Actions: The block is available in Task/Approval context. You have two options namely:

- **Execute Task:** opens the Task Execution Page
- **Go to Project:** opens the Project
- **Run Script:** trigger a Dashboard Forms Script

Approval Buttons: This block is available only for Document and Task and Approval dashboards. You can configure approve, reject and comment buttons.

Viewer Block

The Viewer block is available for **Document** and **Task and Approval** Dashboards.

You can configure the Viewer block with the following parameters:

- **Height:** Specify the height of the widget in px (pixel) or in % (percentage).
- **Make Collapsible:** Enable this to allow the block to be collapsible.

The viewer block shows basic text selection when the block is used in a search or in combination with a saved search block.

For Graphic files a limited number of tools are available in the viewer:

- Zoom to fit
- Rotate View and
- Current page number/ total number of pages

For documents with multiple pages, the block shows the current page and the total number of pages.

You can navigate to the previous or next page with the back and forward buttons, when the text search matches are on multiple pages.

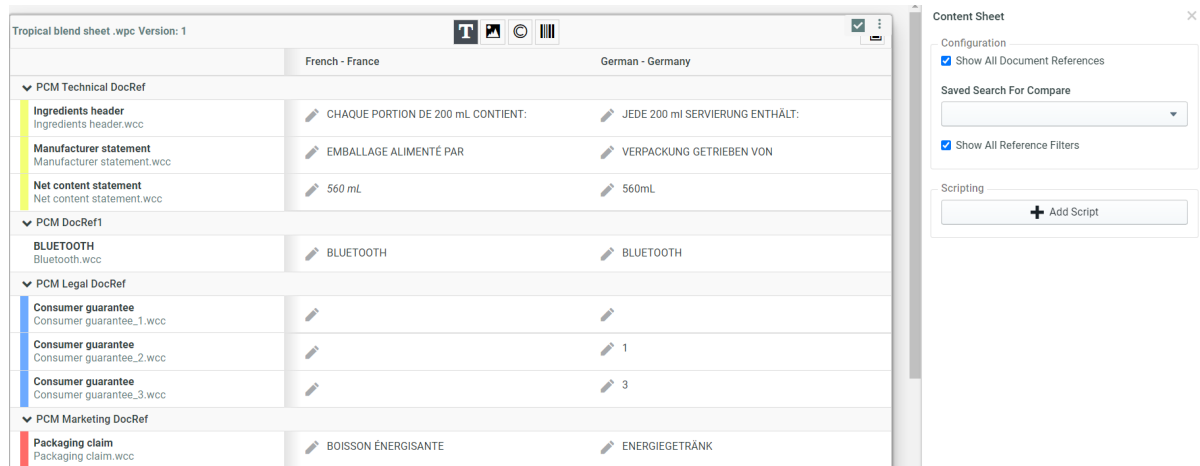
Content Sheet Block

The Content sheet block in Dashboard allows you to easily view and compare content sheets. Content Sheets are typically created as a collection of all the elements required within the artwork as document references. You can read more about Product Content sheet [here](#).

A Content Sheet block shows the selected document references in a predefined layout.

Content sheet block can be configured to show the referenced contents of a component or an artwork document. The contents are shown in multiple tabs namely, Text, Table, Images, Symbol and Barcode

with default tab as Text content. In the Text Content tab, Master and Translation texts are shown along with the Reference scope.



	French - France	German - Germany
PCM Technical DocRef		
Ingredients header Ingredients header.wcc	✎ CHAQUE PORTION DE 200 mL CONTIENT:	✎ JEDE 200 ml SERVIERUNG ENTHÄLT:
Manufacturer statement Manufacturer statement.wcc	✎ EMBALLAGE ALIMENTÉ PAR	✎ VERPACKUNG GETRIEBEN VON
Net content statement Net content statement.wcc	✎ 560 mL	✎ 560mL
PCM DocRef1		
BLUETOOTH Bluetooth.wcc	✎ BLUETOOTH	✎ BLUETOOTH
PCM Legal DocRef		
Consumer guarantee Consumer guarantee_1.wcc	✎	✎
Consumer guarantee Consumer guarantee_2.wcc	✎	✎ 1
Consumer guarantee Consumer guarantee_3.wcc	✎	✎ 3
PCM Marketing DocRef		
Packaging claim Packaging claim.wcc	✎ BOISSON ÉNERGISANTE	✎ ENERGIEGETRÄNK

Content Sheet [Close]

Configuration

Show All Document References

Saved Search For Compare

Show All Reference Filters

Scripting

Configuration of the Block

- Show All Document References
- Show All Reference Filters
- Saved Search for Compare

Show only contextual languages

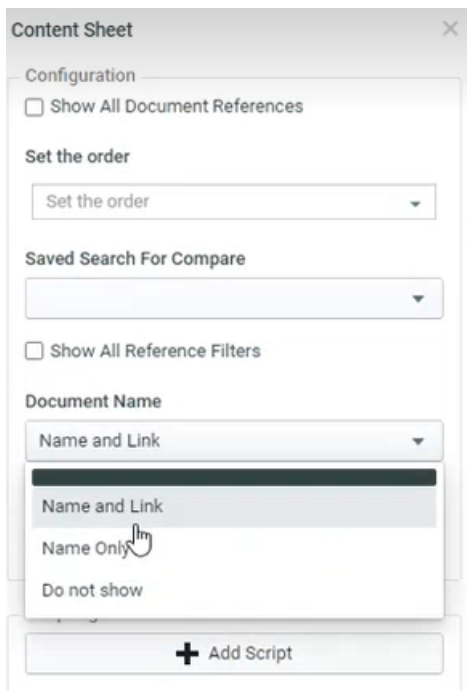
In dashboard, when a content sheet block is added with context, the content sheet will show the contextual languages. If there is no context, it will show content sheet languages. The languages are displayed based on the priority (Task/Document/Project).

Enabling and disabling the document name and link in the Content Sheet Block

Users can enable or disable the document name and link in the content sheet block by selecting from the **Document Name** drop-down list.

Document Name drop-down contains three options, such as:

- Selecting **Name and Link** enables document links and shows the name.
- Selecting **Name Only** disables document links and shows only the names.
- Selecting **Do not show** disables document links, names and only shows element type.



Enabling and Disabling Discussions

When configuring a Content Sheet in the Dashboard, users have the option to enable or disable discussions. When the option is enabled, users can start a new discussion from the Content Sheet dashboard block. When the option is disabled, users can't start a new discussion using the Content Sheet dashboard block; however, any current discussions will remain accessible.

To enable the discussion, select **Enable Discussions**.

Content Sheet ✕

Configuration

Show All Document References

Set the order

Saved Search For Compare

Show All Reference Filters

Document Name

Enable Discussions

Default Participants (Text/Table Content)

All Project Members

Groups

Roles

PCM Permissions

Default Participants (Other Content)

All Project Members

Groups

Roles



Note: By default, the discussions are enabled in the content sheet configurations page.

Comparison of Different elements

You can compare any of the two different

- content sheets or
- versions of the same artworks or
- artworks which has the same attributes

Get Set.ai Version: 1 / Tropical blend sheet .wpc Version: 1

Delta	Position	Variant	Pack Type	English - United States
▼ PCM Technical DocRef				
CHANGED	Top Back	Tropical Blend Coconut & Berry	Corrugated Box Carton	PACKAGING POWERED BY
CHANGED	Front Back Top	Tropical Blend Coconut & Berry	Carton Corrugated Box	EACH 200 mL SERVING CONTAINS:
CHANGED	Top Front	Coconut & Berry Tropical Blend Apple & Lime	Carton Corrugated Box	560 mL
▼ PCM Legal DocRef				
CHANGED	Back	Tropical Blend Coconut & Berry	Carton Corrugated Box	2
CHANGED	Back	Tropical Blend Coconut & Berry	Carton Corrugated Box	1

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:** Status to indicate a table has changed or not.
- **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.

Filtering Language Column in Dashboard for Comparison

In Dashboard, users can filter the language column and compare between master and desired translation languages.











To configure:

1. Navigate to **Configuration > Configure Columns**
2. In the **Configure Columns** window, locate **Text Content Master Text** and **Text Content Translation Text** and select as **Available** and then click **OK**.

Configure Columns

Order	Column	Label	Visibility	Editable	Required
1	Document Name	<input type="text"/>	Visible	<input type="checkbox"/>	<input type="checkbox"/>
2	Text Content Element Type	<input type="text"/>	Visible	<input type="checkbox"/>	<input type="checkbox"/>
3	Text Content Document Status	<input type="text"/>	Visible	<input type="checkbox"/>	<input type="checkbox"/>
4	Text Content Master Text	<input type="text"/>	Available	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5	Text Content Translation Text	<input type="text"/>	Available	<input checked="" type="checkbox"/>	<input type="checkbox"/>

- Under **Document Reference** block + icon appears. Clicking this icon expands the list of languages.






Document References		
Text Content - Editable:		
	Document Name 5	Element Type
 	TC_01.wcc	Consumption context
 	TC_02.wcc	Assembly instructions
 	TC_03.wcc	Allergen statement
 	TC_04.wcc	Active ingredients header
 	TC_05.wcc	Additional product variant
Table Content:		

4. Select the master language and the translation language to compare.

Allow Commenting


This feature allows an admin user to post, delete, print, and view comments within a content sheet. Additionally, each document that is added to the content sheet can be commented.

This feature is also applicable for:

- Text Content 
- Table Content 
- Image 
- Symbol 
- Bar Code 

To add a comment:

1. Hover the cursor over the content sheet header until the message icon appears, and then click the message icon.

2. Click  icon to view the number of discussions.



Note: The numerical count on discussion icon gets updated as new discussions are created or deleted.


3. Discussion page opens and shows the discussions that are already added.




Note: If discussions have already been added, the number will appear next to the message icon.






4. Click  icon.



Note: Click  icon, for more filter options.

5. Add comments in **Subject** field.
6. Enter participants in **Visible to** field.
7. Click  icon.
8. Click the close button to exit from the discussion panel.

On **Discussion Overview** page:

- Click  icon to watch the discussion.
- Click  icon to make the discussion as read-only.
- Click  icon to delete the discussion.
- Click  icon to print the discussion.
- Click  icon to view the participants.

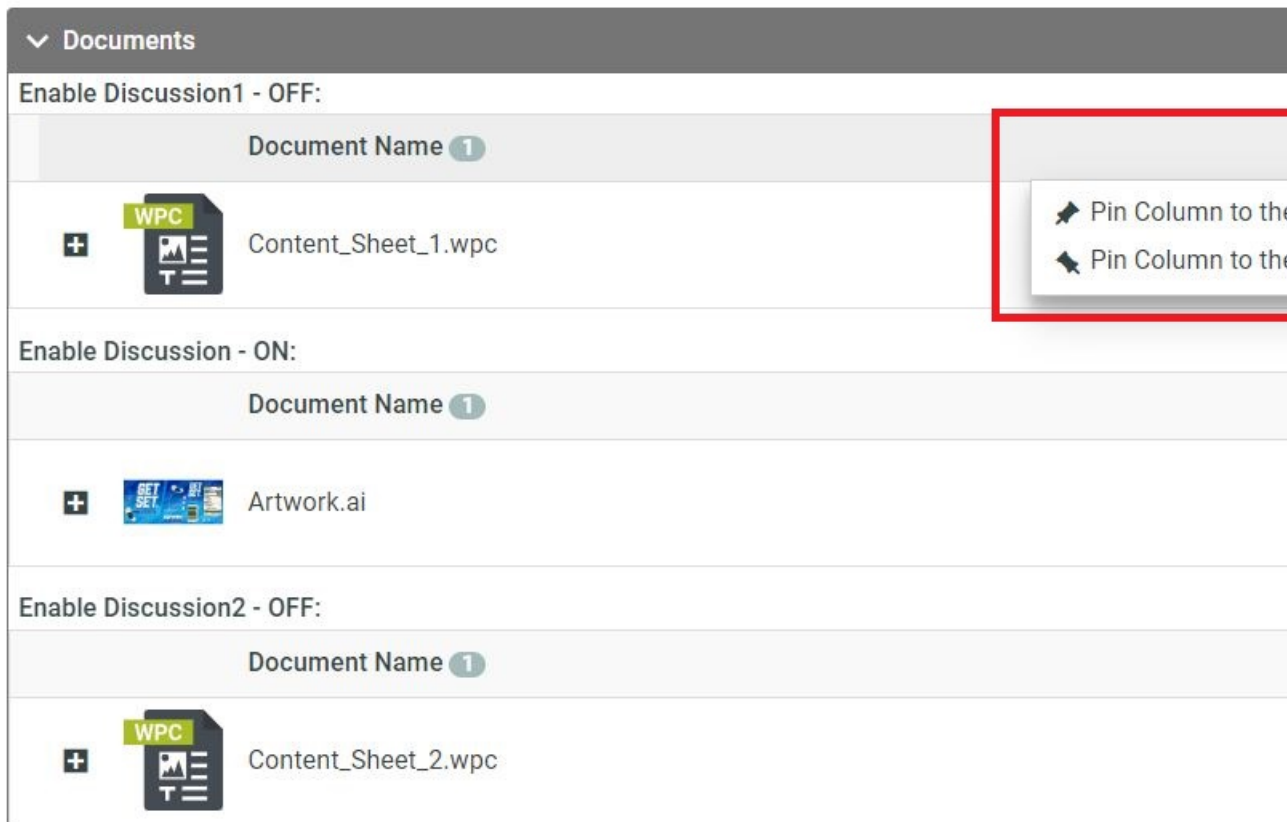
For more details, see [Discussions](#) on page 283.

Allow Pinning Columns for Table Layout

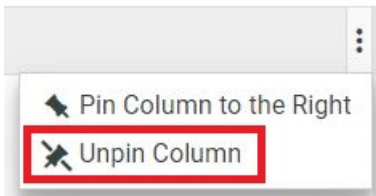
The Pinning Columns feature enables users to enhance their table layout navigation experience by keeping specific columns visible while scrolling through different parts of the table layout. This functionality eliminates the need for users to constantly scroll back and forth, making it particularly useful when working with extensive datasets. Users can freeze any column from left to right, right to left, or even pin columns in the middle for optimized data visibility.

Follow these steps to pin a column:

1. Hover over the column header that you wish to pin and click the three dots.
2. A Pin Column list will appear, offering the following options:
 - a. **Pin Column to the Left:** Selecting this option pins the column to the left, allowing users to scroll data to the right while keeping the selected column visible.
 - b. **Pin Column to the Right:** Opting for this option pins the column to the right, enabling users to scroll data to the left while maintaining visibility of the chosen column.



3. Unpinning a Column: After pinning a column, users can easily undo this action by selecting the **Unpin Column** option from the list that appears upon hovering over the column header.



Sticky Section

A Sticky Section is a block that can stick to the top or the bottom of the page scrolling. A sticky section block behaves in a similar way as a List Layout, with the benefit that you can configure it to stick to the top or bottom of the page. If no position is set, the block behaves as a regular list layout. Define an offset in pixels to determine how far from the top or bottom the section should stick.



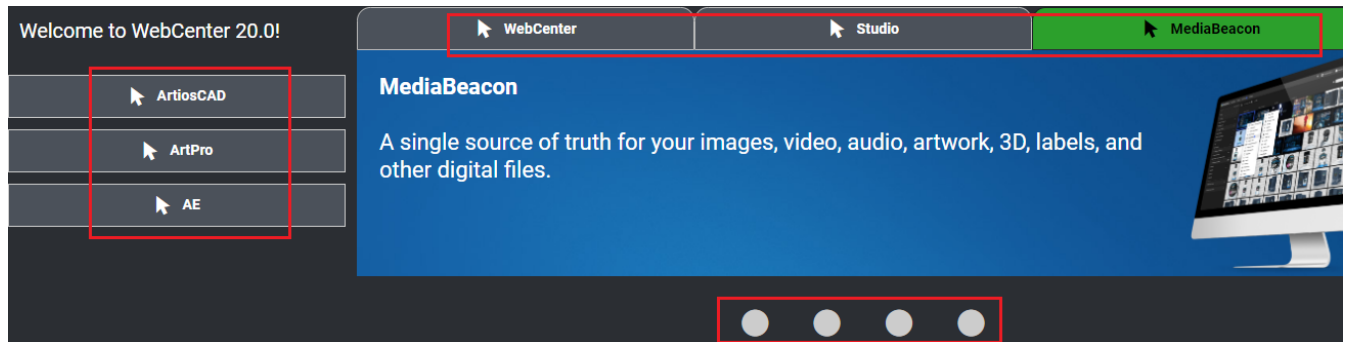
Note: Sticky sections don't consider other sticky sections. They might overlap if not configured correctly.



Note: When a sticky menu is configured in WebCenter, the sticky section will take this into account and will not overlap when configured to stick to the top.

Menu Layout

A Menu layout allows you to create more interactive dashboards which are visually more appealing. The user interface can be designed to alternate between views within the same context, in the same dashboard. A Collapsible Menu Layout allows you to create a sidebar with buttons and/or dropdown buttons that stay visible when the sidebar is collapsed.



Tabs can be added either to top or left or in the bottom. Above screen shots example shows tabs added with all the three options.

Configuration of Menu Layout

The Menu Layout blocks configuration consists of buttons and a content block which are linked to each other and it can be used to control the content of a block with buttons. The buttons are automatically linked to the content block when adding the Menu Layout to the Dashboard. You can create Projects within Menu layout. Read more about it [here](#).



Note: When there are multiple Menu layouts added within the same Dashboard, change the name of the content blocks so that it is easier to recognize them in the configuration panel.

Grid Layout

The Grid Layout block is available in the Dashboard Builder of a **My Work**, **Search** or **Global** Dashboard and allows you to easily position blocks in a grid.

Configuration of the Grid Layout Block

This block is a layout block that can be used to display other blocks in a configurable grid. The block has some typical grid layout parameters:

- **Rows:** lists the rows in the grid (labeled with numbers). For each row the height can be configured.
- **Columns:** lists the columns in the grid (labeled with letters). For each column the width can be configured.
- **Row/Column Gap:** to control the spacing between the rows and columns.
- **Padding:** to change the padding around the grid. Padding can be specified for each direction independently.
- **Minimum Height:** to set the minimum height
- **Fill Container:** to allow the grid layout to fill the container

Configurable Rows and Columns

The dimensions of the individual rows and columns can be configured separately. For maximum flexibility you can use a combination of different units to determine the behaviour:

- **px**: to set a fixed width/height.
- **%**: to set a variable width/height as a percentage of the total grid layout size.
- **fr**: to configure the width/height as a fraction of the layout. The fraction unit represents a fraction of the available space in the grid container. All columns/rows using fractional units will have synchronized width/height.
- **Auto**: to have the width/height determined automatically based on the content of the grid cell.

Grid Cells

When adding content to the Grid Layout, Grid Cells are created. Grid Cells behave like List Layouts with all options like **Background Color**, **Border**, **Border Color**, **Spacing** and **Padding** (slider bar) available.

The **Size** of a Grid Cell can be adjusted by:

- selecting the Grid Cell and dragging one of its corners in the direction in which you want to increase or diminish the cell's dimensions.
- setting the Size in the Grid Cell's configuration panel. The cell will span over the indicated number of rows and/or columns. Note that it is possible to cover other cells in the process.

Styling options available for Grid Layout block

For this block there is only one styling option: **Background Color**.

Button Block

Button block is available In the Dashboard Builder of a **My Work**, **Search** or **Global** Dashboard and shows a button with a text and/or an icon.

Configuration of Button Block

This block is versatile and can be configured for various uses with the following parameters:

- **Labels** and **Icons** which are customizable.
- **Link to**: Specify where the button has to be linked to. Depending on the option linked, further configuration options are shown. Buttons blocks can be linked to
 - **Dashboard** : Choose from the existing Dashboards available in the drop down or create a new dashboard. You have the option to show the configured Dashboard in the **Current window** or **New Browser Tab** or **Pop up** or in **Menu Layout**.
 - **Saved Search**: Choose from the existing Global Saved searches available in the drop down and you can further specify to open either in the same Window or in a New Browser tab.
 - **Create Project** : Choose either a Project or Template available in the drop down, based on which a new Project is created. See how to create a project in Dashboard using [Create Project](#) option.
 - **Download Document**: You can create a link to a document, that can be downloaded from a specific Project.
 - **URL** where you can specify an URL to be opened either in the **Current Window** or a **New browser tab**.

Styling options for the Button block

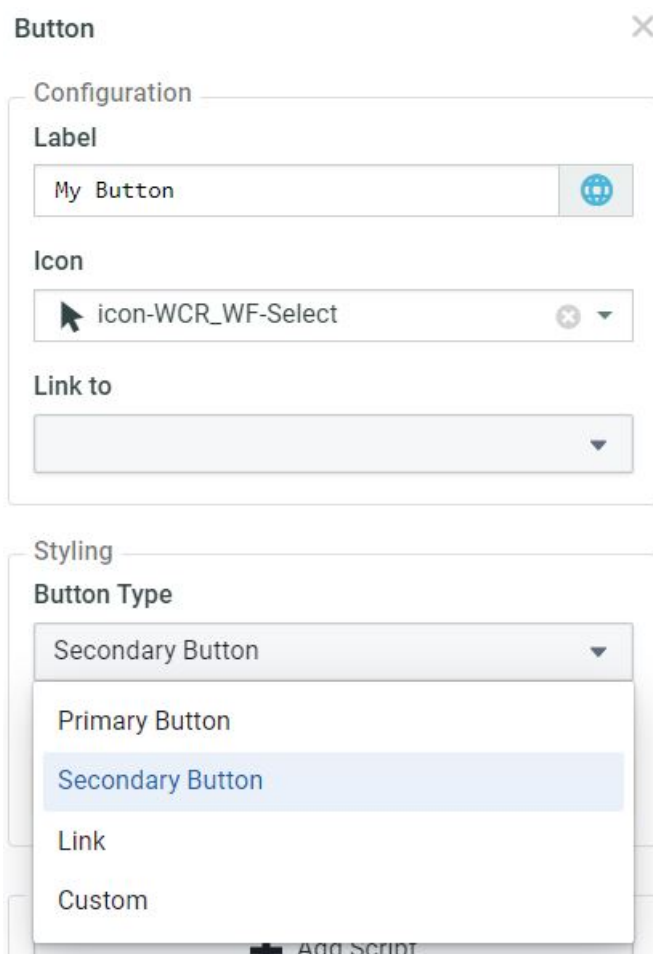
Buttons can be styled in many ways. By setting the Button Type, the button is automatically styled to the system configuration. Using a button type will give consistency and easy of maintenance.

Following button types are available:

- **Primary Button:** the button is shown as a primary button, with the color determined by the customization options.
- **Secondary Button:** the button is presented as a secondary button, with the color determined by the customization options.
- **Link:** the button is represented as a link, the icon appears after the label, and the color is synchronized with the link color choice in the customization.
- **Menu:** when a button is used in a menu section, menu style is available.
- **Tab:** when a button is used in a tab section, tab style is available.

If you want to deviate from the system styles, you can use **Custom** button type. For Custom type, various styling options are available like **Background Color, Text Colors (or contrast color), Border Style, Border Color, Hover Color, Padding and Size.**

Button blocks can be rendered either as **Text Only, Icon Only** or **Icon and Text** .



Dropdown Block

The Dropdown block is available in the Dashboard Builder of a **My Work, Search** or **Global** Dashboard and shows a button with a text and/or an icon.

Configuration of the Dropdown Block

This block is versatile and can be configured for various uses with the following parameters:

- **Labels** and **Icons** which are customizable.

- **Open on Hover** or **Expand Inline** to specify the behavior of the dropdown.
- **Direction** to determine the direction in which the menu is opened. This option is not available when **Expand Inline** is selected.

Styling options available for Dropdown block

This block can be customized with various styling options available like **Background Color, Use Contrast color for text** or **Hover color** based on your preference.

Dropdown blocks can be rendered either as **Text** or **Icon** or **Icon and Text** . Along with this you can also choose the **Alignment Border, Border Color, List Background Color, Size** and **Padding** (slider bar).

The block itself can be made to render in various sizing options like small, medium, large or extra large based on your requirements.

A Dropdown block can be nested in another Dropdown block.

How to Configure My ToDo feed

My ToDo feed has the following configurable parameters:

- **Show Tasks/Approvals:** These two parameters define the items that are visible in the list.
- **Task Dashboard/Document Dashboard:** The configured dashboards are used to show the entries of the todo list. It is possible to select a different dashboard for tasks than for documents.



Note: Use context specific information blocks to view your tasks and approvals along with Action buttons to perform actions your Todo items.

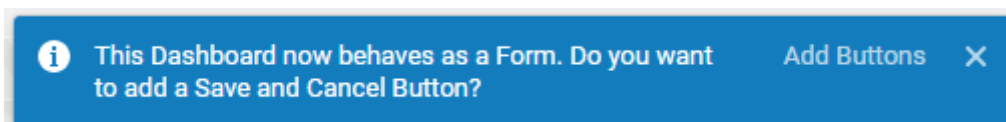
- **Padding:** Spacing between the cards and the border/frame of the block can be set and adjusted
- **Spacing:** spacing between two cards can be set and adjusted. When you view this block in the dashboard, you can perform the following actions
 - **Refresh:** To update the information.
 - **Filter:** To filter the items that are visible in the Block.

The Tasks and Documents that are shown in the My Todo Feed are the same as in the **My Todo** List block.

5.1.4. Project Creation from a Dashboard

Dashboards are more interactive in order to edit the data which can then be saved or have forms where input can be added. Project creation has been incorporated to enable easier collection of information with specific action driven pages in Dashboards.

Admin users can set the Dashboard function to **Creation Form** in the Project context. Then an option is available to add a **Save** and **Cancel** button.

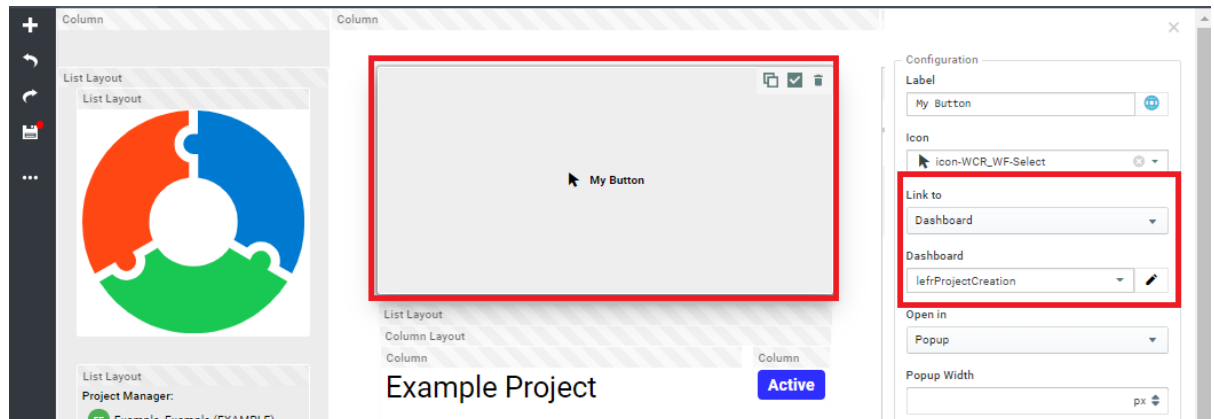


You can create customized Projects from an existing Project or a Template which are available in the dropdown. When no Project or Template is selected, a blank project is created.

Save and **Cancel** buttons can be formatted with various configuration parameters available for the blocks.

Creating a Project using a Button Block

You can configure a [Button block](#) so that clicking the button opens a Dashboard. 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. Set the Dashboard Function to **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 documents can be added to the project created.
7. Now create another Dashboard with any context that you need and add a Button Block. In the configuration of the block, link it to the dashboard created earlier.
8. Save the Dashboard.



Note:

In the Dashboard, when a user attempts to navigate away using browser navigation without saving changes, a dialog box appears containing two options:

- **Leave:** Opting for this choice leads the user away from the current page, effectively navigating to a different destination within the browser. It's an acknowledgement that the user accepts the risk of losing any unsaved changes.
- **Cancel:** By selecting this alternative, the user chooses to interrupt the navigation process. This action prevents them from leaving the current page and thus protects the unsaved modifications.



Note:

In the Dashboard, when a user attempts to navigate away from an edit form or hide a form without saving changes, a dialog box appears with three options:

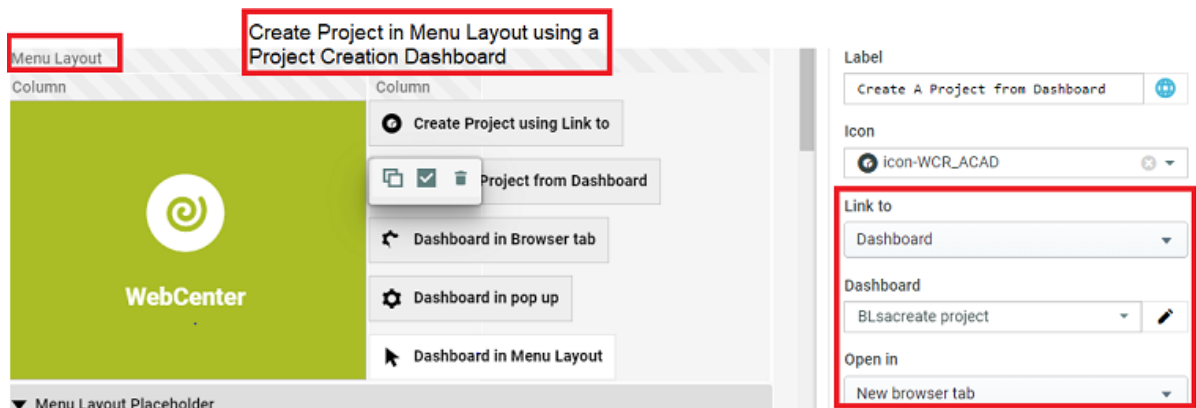
- **Cancel:** Opting this cancels the navigation.
- **Continue without saving:** Selecting this option results in closing the page without saving any modifications.
- **Save and Continue:** This option allows the user to save the Dashboard before navigating away.

All changes made by before validation scripts are ignored when deciding whether to show the dialog box.

Creating a Project using a 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.



5.1.5. Task Creation from Dashboard

Creating Task from Dashboard

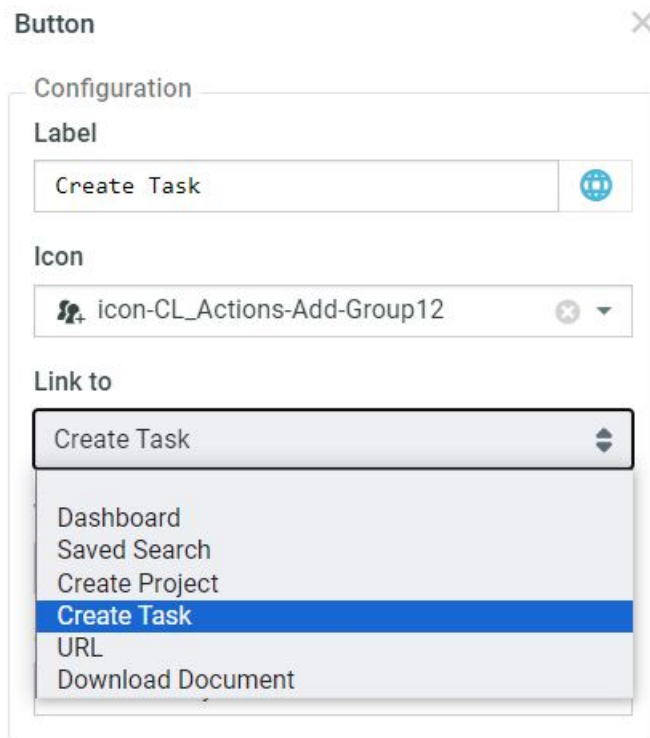
This documentation outlines the process for Admin users to create tasks from the dashboard using two different methods. Tasks can be created either by adding a button in the button configuration block of the dashboard or by adding a Create Task button in Task/Approval actions, Project actions, and Document actions.

Creating task using Button Configuration Block

Perform following steps to create a task using button block in dashboard:

1. Navigate to the Dashboard where you want to add the Create Task button.
2. Under the **Button** section, add the following details:

- **Label:** Type the desired button name.
- **Icon:** Select an icon from the available list.
- **Link to:** Choose **Create Task** from the list.



The screenshot shows a configuration window titled "Button". It has three main sections:


- Label:** A text input field containing "Create Task" and a small globe icon to its right.
- Icon:** A dropdown menu showing "icon-CL_Actions-Add-Group12" with a plus icon and a dropdown arrow.
- Link to:** A dropdown menu with a list of options: "Create Task", "Dashboard", "Saved Search", "Create Project", "Create Task" (highlighted in blue), "URL", and "Download Document".

- **Task Type:** Select the task type that is linked to the dashboard.
- **Start Mode:**
 - Choose **Open Form to Create Task** if you want to create a task with a form.
 - Choose **Automatically Start the Task** if you want to create a task without a form.


Button
✕

Configuration

Label

Create Task



Icon

 icon-CL_Actions-Add-Group12
 ✕ ▼

Link to

Create Task
↕

Task Type

SUCUTASKTYPE12022024
▼


Start Mode

Automatically Start the Task
▼

Automatically Start the Task
▼

Open Form to Create Task
▼

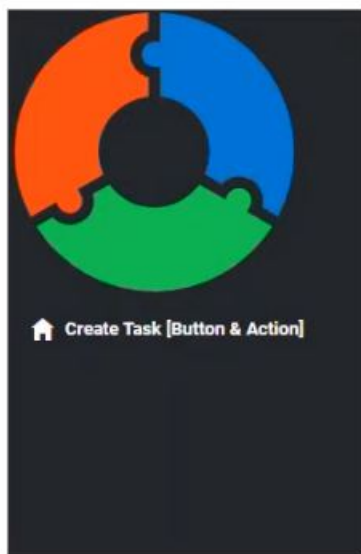
Button Type

Primary Button
↕



Note: The task status depends on its creation method. If created automatically, it's **In progress**, when using the with form option, it depends on which save button is used (save # created status or start task # in progress status).

3. Save the changes after adding the button and provide change comments.
4. Navigate to the linked project from the dashboard.
5. Click the **Create Task** button and click **Save** to initiate the task creation process.



Project Name: saci_project_demo

Status: Active

Description: Demo Project

Project Manager: SS saci, saci_demo (SACI_DEMO)

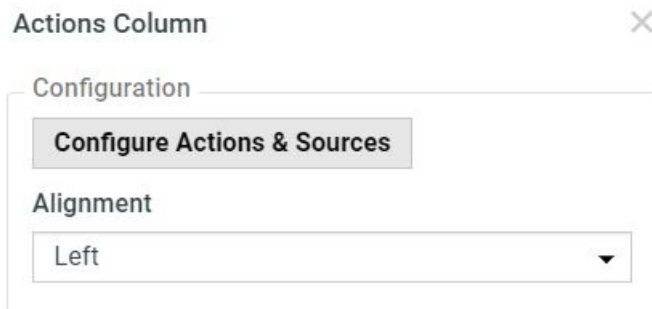
Project Button Block

Project Action Block

✓ Task has been

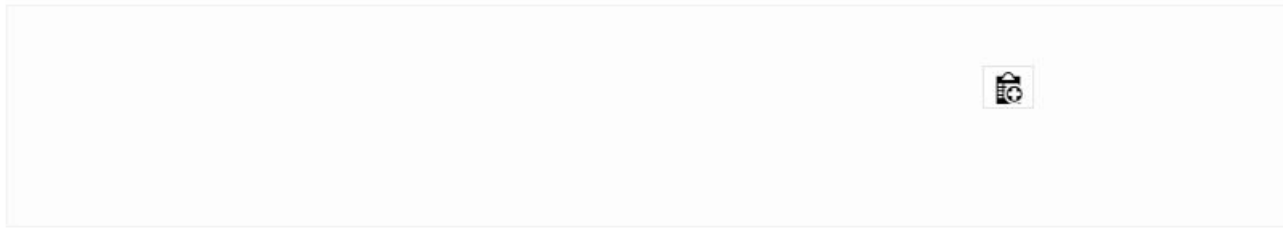
Creating Task using Action Column in Dashboard

1. On the Dashboard page, under the **Actions Column**, click **Configure Actions & Sources**.

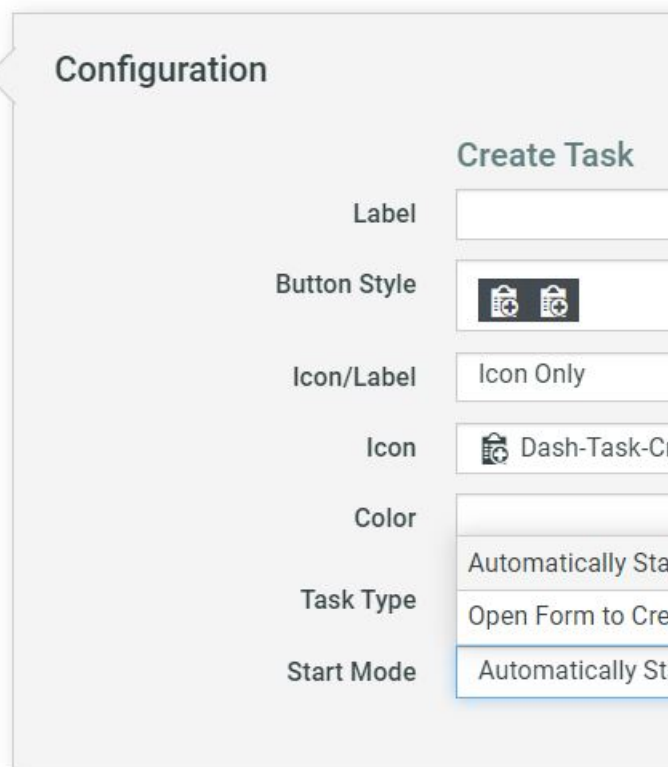


2. On **Configure Actions and Sources** page, under **Buttons**, select **Create Task** and add the following details:

Configure Actions & Sources



Buttons



- **Label:** Type the desired button name.
- **Button Style:** Choose a style from the available list.
- **Icon/Label:** Select both Icon and Label from the list.
- **Task Type:** Select the desired task type.
- **Start Mode:**
 - Choose **Open Form to Create Task** if you want to create a task with a form.
 - Choose **Automatically Start the Task** if you want to create a task without a form.

3. Click **OK**, and then save the changes after adding the button with appropriate change comments.
4. Navigate to the linked project from the dashboard.
5. Click the **Create Task in Project actions** button to initiate the task creation process.


Note:

Task creation from the dashboard only supports the following contexts:

- **Document**
- **Project**
- **Task/Approval**

Task Creation with Documents in Dashboard

This feature enables user to create a task with documents in Dashboard, user can provide additional information in creation form, creation of task with multiple documents using table actions and easier configuration of dashboard as compared to menu builder.



Note: When the task type permits document inclusion, users have the flexibility to configure the button or action for adding documents within the current context. In the document dashboard, activating this action will append the current document to the task. Similarly, in a document reference with a **Create Task** table action, the chosen document from the reference will seamlessly integrate into the task.

The configuration can be done in two ways:

- **Inline Action/Sources**
- **Table Actions**

To Configure using Inline Action/Sources:

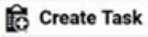
1. Add a document reference attribute to the relevant context, such as **Project**, **Document**, or **Task**.
2. Navigate to the **Configuration** tab. and click **Configure Actions & Sources**.
3. In the **Configure Actions & Sources** window, find **Inline Action/Sources** and select **Create Task** from the button list.
4. On the **Create Task** configuration page, fill in all required fields and in the **Task Type** field, specify the desired task type.




Note: If the selected task type allows documents, the **Document Selection** field will be pre-selected to **Include Documents Present in the Dashboard**. If the task type doesn't allow documents, a warning message **The selected Task Type does not allow documents** will prompt and the user must change the task type.

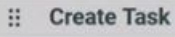

Configure Actions & Sources


Document Sources **Inline Actions/Sources** Table Actions




Buttons 

Hover Actions

Add... 


Dropzones

Add... 


Configuration

Create Task

Label

Button Style 

Icon/Label

Icon  Dash-Task-CreateTask

Color

Task Type

Start Mode

Document Selection Include the document present in

5. Under the **Start Mode** field, select either **Automatically Start the Task** or **Open Form to Create Task**.

6. Click **OK** to save the configuration or click **Cancel** to discard the operation.

To Configure using Table Actions:

1. Ensure a document reference attribute is added to the relevant context, following the steps mentioned in **Inline Action/Sources**.
2. Go to the **Create Task** configuration page.
3. Enter all necessary information in the required fields.
4. Under the **Start Mode** field, select either **Automatically Start the Task** or **Open Form to Create Task**.

Configure Actions & Sources


Document Sources

Inline Actions/Sources

Table Actions

 Create Task

Buttons

 Create Task

Add...

Configuration

Create Task

Label

Icon/Label

Icon

Color

Task Type

Start Mode

 Automatically Start the Task

 Open Form to Create Task

 Automatically Start the Task

5. Click **OK** to save the configuration or **Cancel** to discard the operation.



Note: When user attempts to select multiple documents from a document table, be it on the dashboard or in search, and these documents belong to different projects, an error message will be triggered. Therefore, it is essential for the selected documents to belong to the same project to avoid encountering this error.

5.1.6. Copy Document Reference in Dashboard

This feature enables admin user to copy document references of multiple projects to current project in Dashboard.

For details, see, [Copy Document References](#).



Note: When **Copy with Local References** is chosen, all referenced documents in the same project are also copied .

5.1.7. Configuring a list of Documents as Tables

Configure a list of Documents as a Table

Dashboards can be configured and customized to show the list of Documents in different Table layouts like List or Grid layouts. This functionality works only with **Document Reference Attributes** in Project or Document contexts and with **Documents** and **Document Reference Specifications** in Tasks and Approvals Context in Dashboards.

An Administrator user can configure a list of documents for any of the Project or Document or Task information fields in dashboards as a table.

A **Display Style** option allows you to configure the list for the Information field as either a

- **Simple Text:** Shows only the name for the list of documents
- **List Layout:** Shows as table with the information shown in columns
- **List Layout, with no headers:** Shows as table with no headers
- **Grid Layout, Thumbnail on Top:** Shows list as blocks with thumbnails at the top
- **Grid Layout, Thumbnail Left:** Shows list as blocks with thumbnails to the left
- **Card Layout:** Shows the list as cards
- **Dashboard:** Shows each document in the list as the selected dashboard

When any option other than **Simple Text** or **Dashboard** layout is set as Display Style, the following options are available:

- **Configure Columns** allows you to configure the information in columns. Read in detail [here](#).
- **Conditional Formatting** allows you to set conditions based styles for display of the information.
- **Configure Sources** allows you to configure Drop zones and Buttons for adding documents. Read in detail [here](#).
- **More Options** opens a popup where you can choose the layout options (similar to [Search Results Dashboard](#)).

When **Dashboard** layout is selected and the Document dashboard is set to **Edit Form**, these Document dashboards become part of the form of the parent dashboard. This means that by saving the form of the parent, which can be a Project, Document or Task dashboard, the changes on the documents will also be validated (scripts will be executed) and the values will be saved.



Note: This layout allows you to create deeply nested dashboards, which may involve a performance risk. For layouts with deeply nested dashboards, saving the form will make WebCenter check all the documents. Making sure that all required information is filled out and all validation scripts are passing might take a while.

View and Edit Lists in Dashboard

Dashboards are enabled to show preconfigured lists (like in Attribute Category page) and it can also be made editable. This allows using the Dashboard as an input page with restricted values and also to save the values from the dashboard.

Admin users can set this up in Dashboards with attributes that has list configured in Project or Document or Task Dashboards where each of the attributes can be linked to a single list or column combination.

To set up a list in Dashboard, follow all steps as provided [here](#) and add it to the configured [attribute category](#) for the Project or Document or the Task that you wish to add the Dashboard.

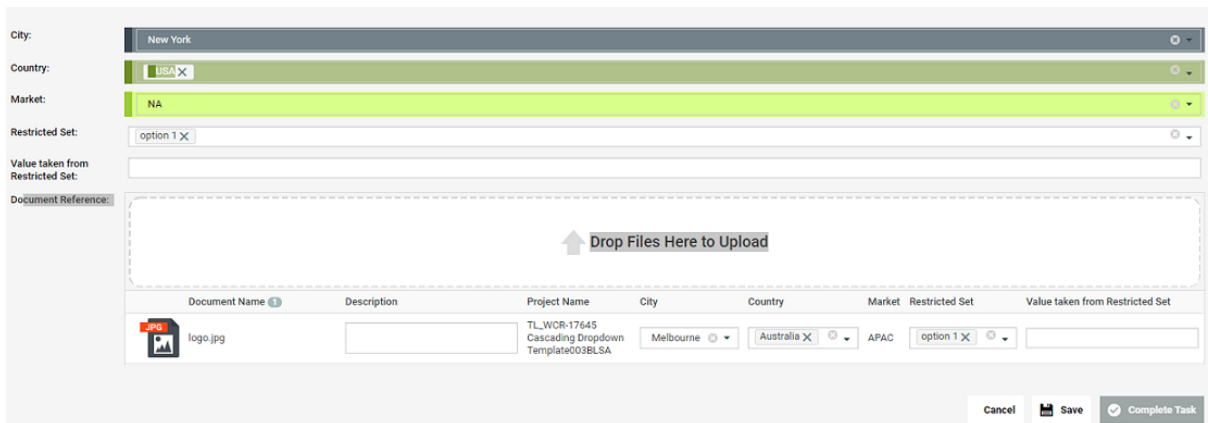
Functionalities like distinct values, filtering of linked attributes, anomaly handling, and task specifications are available in Dashboards as well.


Options available in the **Configure List** window like

- Allow other values
- Autoselect Matching Values when other values are filled out outside of Attributes page (e.g. Workflow)

are also applied in Dashboards.

Project Dashboards setup with attributes that has lists configured, can be used as a landing page to choose values from the dropdown in Projects, where the attribute category contains the same attributes.



Document Name	Description	Project Name	City	Country	Market	Restricted Set	Value taken from Restricted Set
 logo.jpg		TL_WCR-17645 Cascading Dropdown Template003BLSA	Melbourne	Australia	APAC	option 1	

Similarly with Tasks and Document Dashboards, the same attributes have to be present in the **Attribute Category** of the Project, where the Task is executed or the Document that is present.

Document Sources for Dashboards

You can create specified areas in Dashboard that can be configured to drop the documents, like for example for Project Creation. You can configure document sources for the field when the layout option chosen is not **Simple Text**. You can either have a Drop Zone or a Button configured as a document source. You can select one of the type of Document Source in the dropdown and add or delete the document source.

You can configure the document sources in the Dashboard with the **Configure Actions & Sources** option.

Live preview of the configuration of the **Configure Sources** are reflected at the top of the window in the preview area.

Buttons

Buttons can be configured with one of the following ways given below.

Configure Actions & Sources ✕

Document Sources Inline Actions/Sources

Preview

Drop Files Here to Upload or
 Asset Management Connection
 Browse
 Saved Search

Buttons

- Asset Management Connection ✕
- Browse
- Saved Search
- Add... ▾

Dropzones

- Upload
- Add... ▾

Configuration ✕

Asset Management Connection

Label

Connection ⓘ ⚙️

Document Template ⓘ

Folder ⓘ

Popup Title ⓘ ⓘ

Primary Button Label ⓘ ⓘ

Cancel
OK

- **Browse:** Allows you to upload files from your system and you can specify the file extensions, along with the Document Template and folder.
- **Saved Search:** Allows you to choose files from the Saved Search results where the name of the Saved Search is shown in the pop up. Operations like **Copy** or **Use by Reference** are possible on the document and you can specify the **Document Template** and **folder**. When the saved search with SmartNames are chosen, the SmartNames are resolved and rendered.
- **Asset Management Connection:** Allows you to select one of the configured asset management connection from the **Connection** drop down and update the connection details like the Folder, Popup Title, Button Label. Currently WebCenter and MediaBeacon connections are supported.

Note: This option is available with advanced connect license only.

- **Document Template:** Allows you to select from a document library when adding a document to the document reference.

If 'Run a standard' is enabled in the project, it will be run on save when selecting a cad file (ard file type), which has the necessary attributes in the attribute category of the document.

Drop Zones

Drop zones are designated locations in the Dashboard where you can add **Documents to Projects** or **Tasks** either from a Saved Search or by uploading the document. You can add a document from a **Saved Search** or upload the document. The documents from the saved search can be dragged and dropped into the **Drop zone** configured.

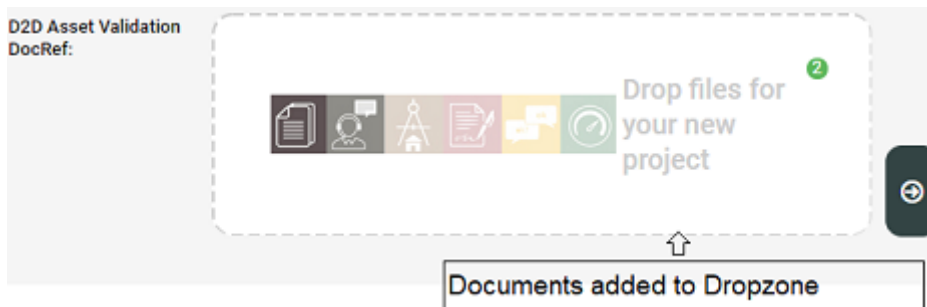


Note: Document Sources option where you can create a **Drop Zone** or a **Button** are only available when the Dashboard Function is set to **Edit Form** or **Creation Form**

Drop zones can be presented with multiple versatile styling options in the dashboard. Extensive Layout options, Spacing (Automatic/Compact/Wide), customizable label field, and the Icons can be configured.

Styling Options	
Layout	Buttons below Label
Spacing	Automatic
Label and Icon	Label and Icon
Label	Drop files for your new project
Icon	
Items shown as	Counter with Popup
Counter Color	#5cb85c

The added items can be shown as a table or the number of documents added can be shown in counter.



You can configure the Drop zone to add the document from either of the options below

- **Saved Search:** Documents from the saved search can be dragged and dropped into a drop zone configured to create a new project. The dropped documents are copied to the Document list. You can also specify the operations on the document namely whether it is copied or used by reference. Apart from this, you can also specify the document template and the folder.
- **Upload:** Add the document from the system. You can specify the following parameters for the uploaded documents namely allowed file extensions, Document Template or Folder.



Note: Although file uploads are generally permitted, restricting the allowed file extensions does not effectively prevent the uploading of ARD files and other custom file types. Consequently, the restriction does not apply to these specific file extensions.

If multiple dropzone sources configured, then the dropzones are showed next to each other. For both types of sources, it is possible to configure a custom translatable label and the order of the buttons/ dropzones.

Inline Document Actions

The inline actions that can be performed on the document sources can be configured in this tab for a document list block. Live preview is updated to reflect the changes done and most document actions are available.

Configure Actions & Sources

Document Sources | **Inline Actions/Sources**

Buttons ⊕

Hover Actions

- ⌵ Approve
- ⌵ Approval Info
- ⌵ Add to Cart
- ⌵ Comment
- ⌵ Download
- ⌵ Lock
- ⌵ Mail Download Link
- ⌵ Mail link to
- ⌵ Open in ArtiosCAD
- ⌵ Remove
- ⌵ Reject
- ⌵ Upload New Version
- ⌵ View and Annotate
- ⌵ **View in 3D**

Add...

Dropzones

- ⌵ Upload New Version

Add...

Configuration ✕

View in 3D

Label

Icon/Label

Icon

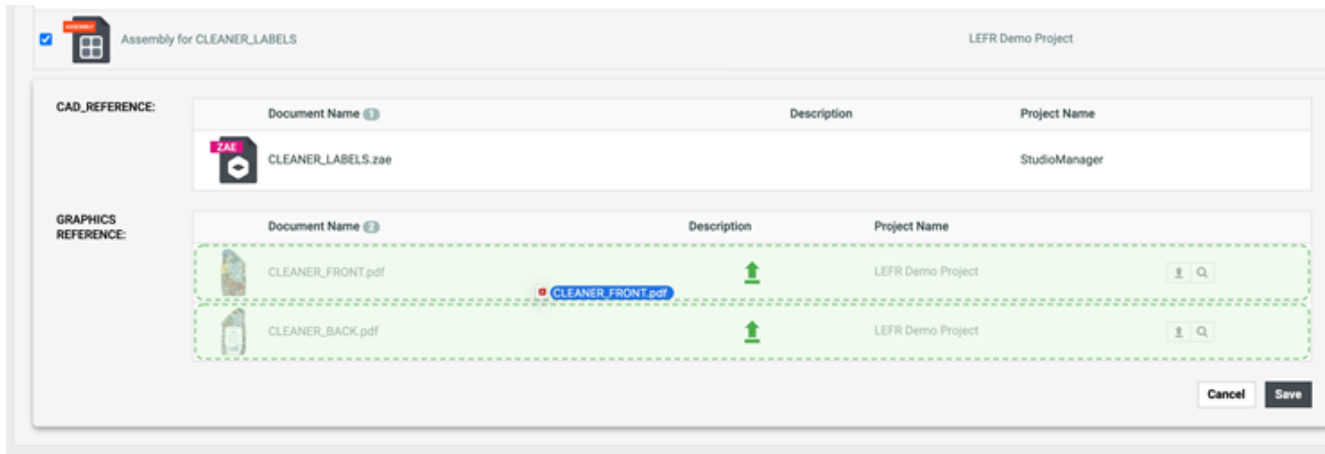
Color

Button Style

Each document action is shown in a row and can be set to either **Visible** or **Visible on hover**.

Uploading a new version of the document

You can upload new versions of the documents to the editable dashboard blocks with a configurable button, provided you have the **Update** permissions on the document.



You can configure the document sources of the attribute dashboard block, either by

- adding the upload new version button to the document row (hover action) or
- in the dropzone

Unsaved changes on the previous version are also applied on the new Document Version.



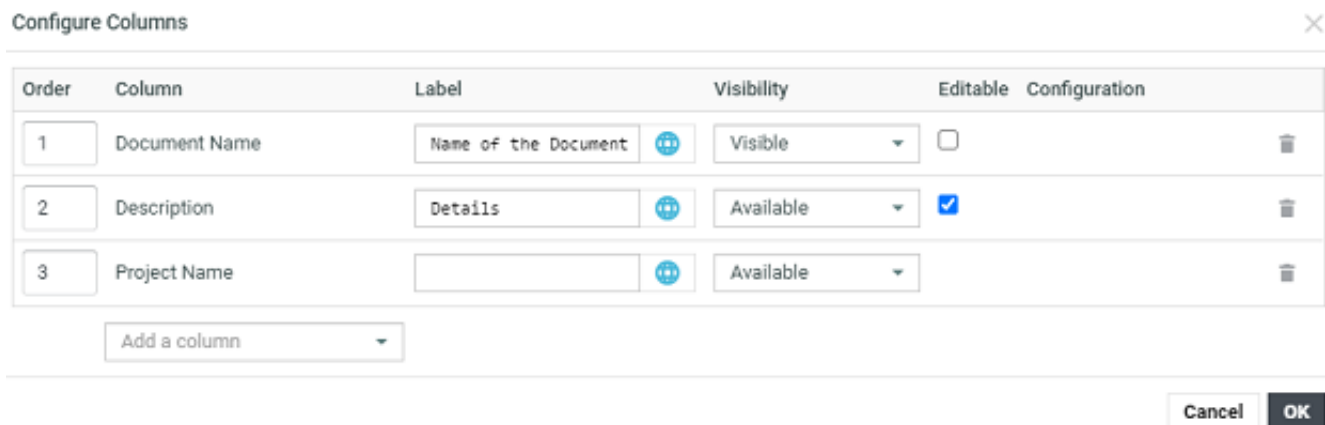
Note: Currently new version upload is not supported for page list documents and version comments is required for all uploaded documents.

Remove

You can configure a remove button for the documents added. This button removes the document from the document reference, but does not delete the document from the project. Similarly when the remove button is used when uploading the document, it allows to cancel the ongoing upload of the new version.

Configure Columns

You can configure the visible information of the table in the **Configure Columns** pop up window.



You can order the columns by entering the value in the Order field and enter customized column names in the Label field. You can also set visibility of the field as Available or Visible. Fields that are allowed to be edited, have the **Editable** check box next to it.

Configuration field shows if any additional configuration is present for the specific column. You can also add or delete a column.

Text Content Master/Translation Columns

Introduction

Packaging Content Management documents can be shown in multiple ways in Dashboards like the [Content Sheet Block](#) on page 90 or the [Dashboard Gallery](#) on page 88. However, a more simple and configurable way is just to show a list of such documents in a document reference or task documents block as a table.

When showing such a table with a list of documents, the columns that are shown can be customized (see [Configure Columns](#) on page 117) and as part of that, a few Packaging Content Management specific columns can be enabled.

Master/Translation Text columns

Text Content documents have Master Text and Translation Text and these can be shown by enabling the columns with the same name. Each document can have different master and translation languages. In the table itself a specific set of languages will be shown. This set of languages cannot be configured when configuring the columns in the table itself, but instead the table will always use the language(s) selected in an attribute called MASTER_TEXT_LANGUAGE or TRANSLATION_LANGUAGE outside the table. You will need to add this attribute somewhere above or next to the document reference or set the values automatically with workflow. For information on how to set up these language attributes, (see [Configure Master and Translation Language Lists and Attributes](#) on page 511)

The table shows the languages selected in the above mentioned attributes for the master and translation columns. First, it uses the attribute of the Project, Document or Task where the table is shown. When the value is empty and the table is shown in a Document dashboard it uses the attribute of the Project/Document/Task referencing the Document with the table (e.g. an artwork document that is referencing a contentsheet (component) document). When that value is also empty, it uses the value of the attribute of the Project of the Document referencing the Document with the table. When that value is also empty it uses the value of the Project of the Document/Task with the table.

This means that the dashboard with the document reference table can be reused on different places or it can be used in a drilldown dashboard or dashboard popup, the table will show the languages based on the context.

In columns that show a language, a bulk-add button is shown when the user has permission to add one of the languages in the column. Clicking the button will add a language to all documents in the column at once, eliminating the need to add each language manually. When no languages can be added due to permissions or the fact that the language is already added to all documents, the button will be hidden.

In translation columns, the autotranslate button is shown when the user has permissions to edit the text statements and a translation API key is set in the PCM configuration (Admin -> Configuration -> Structured Content Configuration). Clicking the button will translate all editable statements in the corresponding column with a translation from the first selected Master Text Column.

Other available columns

Next to Master and Translation Text, some other Packaging Content Management information can be shown, like Element Type or Document Status.

More Options

In the **More Options** configuration of e.g. Document Reference blocks, an Administrator can enable **Show Dashboard in Drilldown** and reordering of documents in the document reference.

Drilldown

If drilldown is enabled into a dashboard, the drilldown icon is shown in the document table. When the **drilldown** button is clicked, the configured document dashboard is rendered inside the table. The user can also click the drilldown button again to collapse the expanded dashboard. Multiple documents can be in expanded state at a time.

When drilldown into a dashboard is enabled, all visibility scripts, validation scripts and required fields configured in the drilldown dashboard are validated, even the collapsed ones. All the before validation are also run.



Note: This layout allows you to create deeply nested dashboards, which may involve a performance risk. When saving the form, WebCenter will check all the documents, making sure that all required information is filled out and all validation scripts are passing.

Reordering of document references

It is possible to reorder the documents in a document reference from a Dashboard Form.

Reordering is possible for document references displayed as a list layout in an edit form (project, document or task) and project creation forms. Enabling the reordering will show all the documents in a document reference at once, without paging, with a maximum of 400. Showing more than 400 documents would have too big of a performance impact.

How to enable ?

- Create a document/project/task edit form (or project creation form)
- Add a document reference
- Display as List Layout
- Open more options panel, enable "allow reordering of items" in the general section

5.1.8. Configure a Content Sheet in Dashboards

Introduction

Packaging Content Management documents can be shown in multiple ways in Dashboards, e.g. through a [Content Sheet Block](#) or a [Text Content Block](#). However, a simpler and more configurable way is to show a list of documents in a document reference or task documents block.

Configuration

1. Add a Document Reference attribute to the dashboard.
2. Select **List layout** as Display Style.
3. Open the **Configure Columns** popup.
4. Search for **Text Content Master Text** and **Text Content Translation Text**.
5. Add them both as columns.
6. Make both columns editable to allow the user to edit the statements.



Note: Inline editing is not enabled for these columns so make sure your dashboard is set to either **Edit Form** or **Creation Form**.

Master/Translation Text columns

Text Content documents have Master Text and Translation Text which can both be shown by enabling the columns with the same name. Each document can have different master and translation languages. In the table itself a specific set of languages will be shown. This set of languages cannot be configured when configuring the columns in the table itself, as the table will always use the language(s) selected in an attribute called MASTER_TEXT_LANGUAGE or TRANSLATION_LANGUAGE. You will need to add this attribute somewhere above or next to the document reference or you can set the values automatically with workflow. For information on how to set up these language attributes, see [this page](#).

The table shows the languages selected in the MASTER_TEXT_LANGUAGE or TRANSLATION_LANGUAGE attributes for the master and translation columns. By default, it first uses the attribute of the Project, Document or Task where the table is shown. When that attribute does not exist it uses the value of the Project of the Document/Task with the table. 'Exist' in this case means "is part of the attribute category's default view" of the Project, Document or Task.

However, when using Document Dashboards and adding a Master/Translation column to a document reference an option in the configuration of these columns can affect the behavior. If the option **Use the language attribute of the project/document/task referencing the content sheet** is not checked (default) then the behavior is as mentioned above. If the box is checked, then before checking the rules mentioned above, it will first use the attribute of the Project/Document/Task referencing the Document with the table, e.g. an artwork document that is referencing a content sheet (component) document. When that attribute does not exist in this context, it uses the value of the attribute of the Project of the Document referencing the Document with the table. When that also does not exist, it falls back on the default rules.

This means that the dashboard with the document reference table can be reused in different places or it can be used in a drilldown dashboard or dashboard popup. The table will then show the languages based on the context.

Configuring features of PCM widgets

When configuring a Master Text or Translation text column in a dashboard document reference it is possible to control which features are enabled in the PCM widget. When you add a translation or master text column in a document reference, you can enable/disable features (show or hide status, options for inheritance, commenting, approval information, and the ability to show the edit user interface on load) of the widget in the display options. These help the admin to simplify the user experience by hiding the options that shouldn't be used by the user.

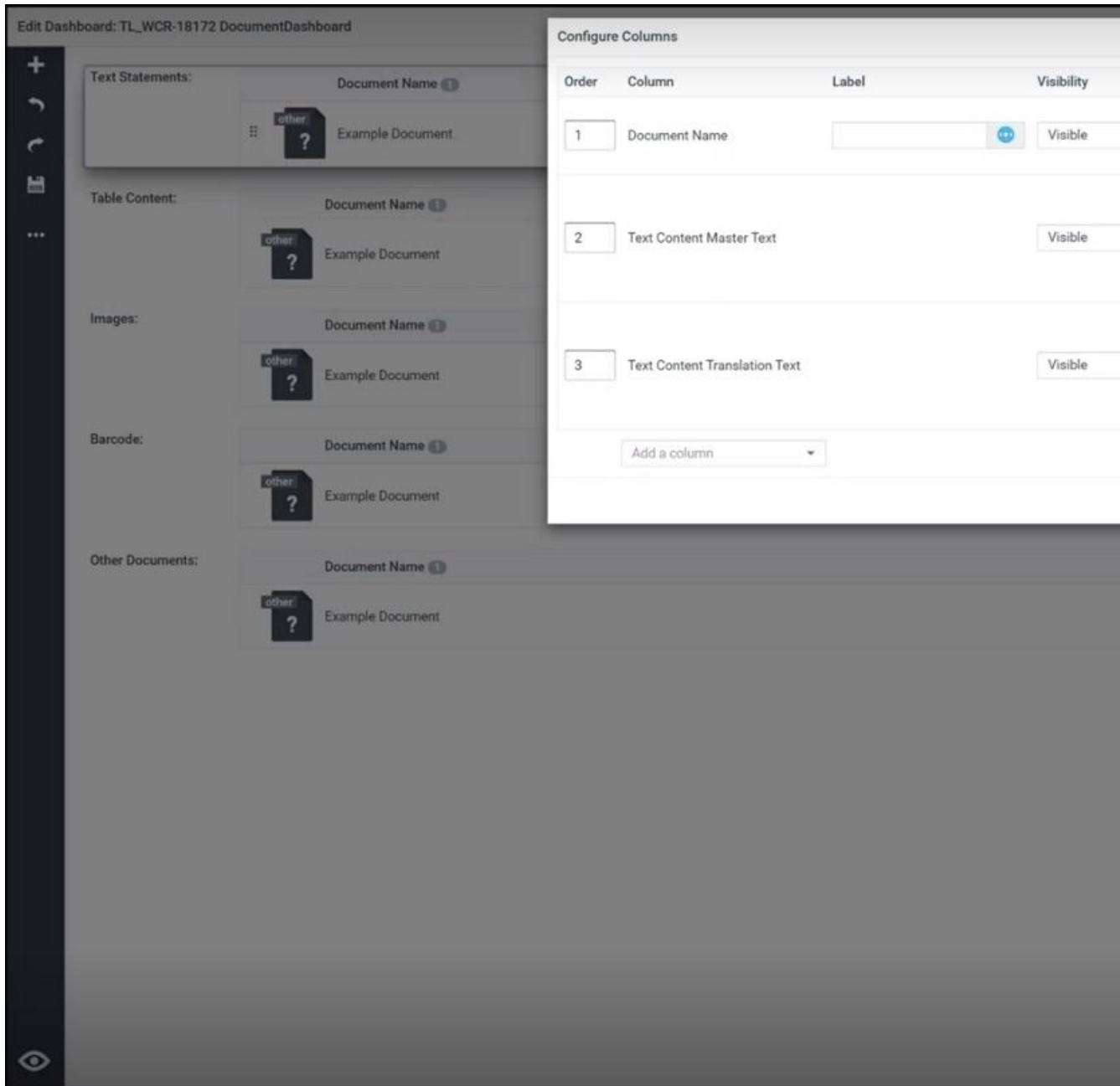
In the dashboard, under **Configure Columns**, when the **Show Edit UI on load** option is enabled, the block will display language widgets in a manner that allows users to modify and save text. However, disabling **Show Edit UI on load** button helps user to load the content sheet in a must faster time with compact mode.

Document Name	Master: English - International	Translated: Arabic (U.A.E.)	Translated: Danish
CS_25_Statements_25_Translations.wpc			
Text Statements:			
Document Name 25	Master: English - International	Translated	
TextContent_1.wcc	Per 1 100% RECYCLABLE Can Serving: 140 calories; 0 g sat fat (0% DV); 45 mg sodium (2% DV); 39 g total sugars. Caffeine Content: 34 mg/12 fl oz.		ن أن تتخذ: 140 سعرة حرارية 0 غرام دهون مشبعة (0% DV)؛ 45 ملغ صوديوم (2% DV)؛ 39 جم سكريات إجمالية. 12 / أونصة سائلة.
TextContent_2.wcc	Coca-Cola INGREDIENTS: TREATED WATER, MINERALS Carbonated water – Approximately 90% of Coca-Cola is water. The carbonated part is purified carbon dioxide, which gives the drink its "bubbles" or "fizz". Sugar – Coca-Cola Classic's sweet taste (and also some of its mouthfeel) comes from sugar.		تتكون من ماء معالج، معادن المياه الغازية - ما يقرب من 90% من ماء الجزء السكرين هو ثاني أكسيد الكربون، يعطي الشراب "فقاعات" أو "قوران". السكر - يأتي كلاسيك (وبعض المذاق اللذيذ أيضا) من السكر.
TextContent_3.wcc	"Taste the Feeling" MADE IN INDIA 8906017290040		في الهند
TextContent_4.wcc	STORE IN COOL AND DRY PLACE WHEAT FLOUR, PALM OIL, SALT, AND LESS THAN 2% OF SUGAR, HYDROLYZED PEANUT PROTEIN, ONION POWDER, CORNSTARCH, WHEAT GLUTEN, SPICES, POTASSIUM CHLORIDE, CORIANDER, CHILI POWDER, TURMERIC, GARLIC POWDER, CUMIN, CITRIC ACID, SODIUM TRIPOLYPHOSPHATE, POTASSIUM CARBONATE, SODIUM CARBONATE, CARAMEL COLOR, DISODIUM GUANYLATE, DISODIUM INOSINATE, BAKING SODA, GUAR GUM, POTASSIUM IODATE.		تحتفظ بمذاق الفصح، زيت الخيل، ملح، وأقل من 2% من السكر، وحب الفول السوداني، ومسحوق البصل، الفصح، والثوابل، وكثيرة البوتاسيوم، والكزبرة، والبوندر، والفوسفات، كربونات البوتاسيوم، لون الكرايميل، نيسوديوم جوانيلات، كينج صودا، صمغ الغار، بوتاسيوم يودات.
TextContent_5.wcc	Coffee beans (70%) and ChicoryMKT BY: BISLERI INTERNATIONAL PVT. LTD., WESTERN EXPRESS HIGHWAY, ANDHERI (E), MUMBAI - 400 099, MAHARASHTRA. "BEST BEFORE SIX MONTHS FROM MANUFACTURE".		بهنداء MKT بواسطة: BISLERI INTERNATIONAL PVT. LTD., WESTERN EXPRESS HIGHWAY, ANDHERI (E), MUMBAI - 400 099, MAHARASHTRA. "BEST BEFORE SIX MONTHS FROM MANUFACTURE".
TextContent_6.wcc	Storage Recommendation: MFD BY: BISLERI INTERNATIONAL PVT. LTD., 525/14/1, WESTERN EXPRESS HIGHWAY, ANDHERI (E), MUMBAI 400 099, MAHARASHTRA, INDIA.		بواسطة: BISLERI INTERNATIONAL PVT. LTD., 525/14/1, WESTERN EXPRESS HIGHWAY, ANDHERI (E), MUMBAI 400 099, MAHARASHTRA, INDIA.



Note: The **Show Edit UI on Load** option is enabled by default.

To load the content sheet must faster in read only mode, click the pencil icon, under **Display Options** of **Configure Columns** in dashboard view and then click **OK**.



If a user is viewing the page in the read-only mode and desires to make changes to the content of a widget, they can do so by clicking within the widget. This action will alter the mode of the widget so that it can be edited, giving the user the ability to make changes to the content and save those changes. If there are actions that have the potential to influence numerous widgets at once, such as inheritance or auto-translation, then the only widgets that will be turned into an editable view are the ones that have the potential to be affected.

Other available columns

Next to Master and Translation Text, other Packaging Content Management information can be shown, like Element Type or Document Status.



Note: When the auto-add option is enabled in the PCM deployment and configuration page, the auto-adding functionality will for now only be applied to newly created documents.

6. Project Management for Administrators

Most Project Management tasks in WebCenter will be carried out by dedicated members with the Project Manager role.

However, Administrator users have some additional options: they can view and edit all **Projects**, create project and document **Templates**, and **Find Locked Documents** in the system, so they can reset them.

6.1. Projects

The **Project Management** page (**Admin > Project Management > Projects**) lets members of the Admins group manage all projects in WebCenter.

For more information about managing projects, see the WebCenter User Guide.

6.2. Project Templates

Members of the Admins group can create and configure project **Templates**. Those are pre-configured projects that Project Managers use to quickly and easily create new projects.

You can manage all project templates from WebCenter's **Templates Management** page (**Admin > Project Management > Templates**).

- Click **Create a new template** in the header to create a new project template.



Note: You can also save a project as a template.

- Click the name of an existing template to edit it.
- To delete a template, select it in the list and click **Delete** in the actions menu. Click **OK** to confirm the deletion.



Note:

If you try to delete a template with a custom document creation setting and if this template is being used by other projects / templates, you will get an error message.

Go to the relevant projects/templates configuration tab and select another template before trying to delete.

System History Logs

All Project/Template related events like

- **Project/Template created**
- **Project/Template deleted**
- **Project/Template imported**
- **Project/Template restored**

are recorded and stored in System History. Read this page on how to access the [records](#).

6.2.1. Create a Template from Scratch

1. Click **Admin > Project Management > Templates**, then **Create a new template**.
2. In the **Create a new template** page, select **Start from a Blank Template** and click **Continue**.
3. Enter the **Template Name** and optionally a **Description**.
4. To use a custom thumbnail, select **Specify New Thumbnail** and Browse for it.

To use the default thumbnail, leave that choice selected.

5. Click **Finish**.

Your template is created. You can now define **Attributes**, **Upload a document to the template**, **Add project members**.

6.2.2. Create a Template from a Project Template

1. Click **Admin > Project Management > Templates**, then **Create a new template**.
2. In the **Create a new template** page, select **Use a Project Template** and click **Continue**.
3. Select the **Template** to use and click **Continue**.



Tip:

- Use the filter to only show certain templates. For Project Manager users and Project Creator users with limited visibility only the templates applicable are shown.
- Click a template to view its details in another window. Click **Close Window** to return to the **Create a new template** page when you are done looking at the template details.

4. Enter the **Template Name** and optionally a **Description**.
5. Choose the **Thumbnail** to use:
 - To use a new thumbnail, select **Specify New Thumbnail** and Browse for it.
 - To use the default thumbnail, leave that choice selected.
 - To keep the thumbnail of the project template you are using, select **Use Template Thumbnail**.
6. You can **Invite Members** and also create a new user to the project. To do this, Select **New Project Members** drop down and scroll down to **Create and Invite New User**.
7. Click **Finish**.

Your template is created. You can now define attributes, upload a document to the template, Add project members.


Note:

- The project template is created with the same folder structure, documents, characteristics, attributes, discussions, members, and security as in the original template.
- Any documents in the template are copied into the new template as new standalone documents, even if they were linked documents in the template.
- Any documents in the template are copied into the new template as new standalone documents, even if they were linked documents in the template.

6.2.3. Save a Project as a Template

1. Create the project as desired, or open an existing project.
2. On the Project Details page, click **More actions** and **Save as Template**.
3. Enter the name of the template and a description in the appropriate fields.

To use a custom thumbnail, click **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.

4. Click **Finish**.

The template is created.

6.2.4. Configure Project Creation Terminology

It is possible to change the terminology used for project creation so that the Project Creation page talks about "Designs" instead of "Documents", or "Client" instead of "Customer", for example...

You can achieve this by customizing the terminology in the attribute category of the project or template used as a basis for project creation.

You need to:

1. Make an attribute category with [custom project creation terminology](#).



Attention: Your custom terms will not be automatically translated, and will show **as you enter them** for all languages in which you run WebCenter.

2. [Make a project template](#) (or a project that will be used to create other projects) using that attribute category.

Users creating projects from this project template will see your custom terminology on the Project Creation page.

6.2.5. Configure Customized Document Rendering in projects

You can configure the **Upload Document** section, when a new project is created from an existing project or a project template. Ensure that the upload document is enabled in the **Project Source** or **Project Template**.

To customize the upload document section in the Project Creation form, navigate to **Projects > Configure > Document Rendering** in the Project Source or Project template.

You can read on how to customize at [Create an Advanced Table Rendering](#) on page 355.

6.3. Document Templates

As an Admin, you can create and configure **Document Templates**. These templates will serve as "dummy" documents (placeholders) that have a document type, file format, and attributes already specified. This information will be useful to real-life projects.

Those document templates will be used by Project Managers / other users to create **document placeholders** for future project documents.

For example:

1. You (the Admin) create a Document Library Project containing the document templates, and project templates referring to that document library (see [Create Document Templates](#) on page 127).
2. When creating a project from one of these project templates, the Project Manager will create placeholders from the document templates, to mark where the project deliverables should go.
3. When using the **Upload** function, a project member (with the **Add** right) can also create a placeholder from a document template, to indicate the characteristics (document type, file format, and attributes) of the final document to be uploaded.



Note: This is only possible through the normal WebCenter upload (see [Uploading a Document via Upload](#) and [Copy / Create Multiple Documents](#)), not when uploading documents from other applications like Automation Engine and ArtiosCAD.

6.3.1. Create Document Templates

1. Create a Project Template that will contain all your document templates (this will be your **Document Library**).

Having all the document templates in one location makes them easier to manage, and saves disk space.

2. If desired, create a folder to contain your document templates.



Note: If the project in which placeholders are created contains a folder with the same name, that folder will be used as default destination for the placeholders.

3. To create document templates:

- a) Upload a document of the right file format into the **Document Library**.

You can use any document type (enabled in the [Preferences](#)) except Page Lists.

- b) Define attributes for your document template: choose an Attribute category and fill in default attributes values.



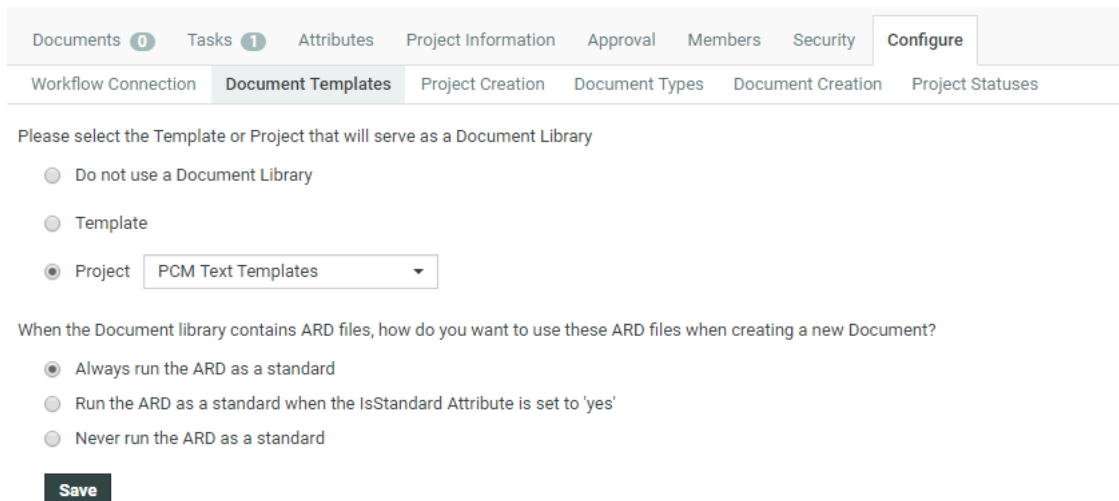
Note: When users will create documents from this document template, they will inherit these attributes (and default values).

- c) Repeat for all document templates you want to create.


Tip:

- If you want a document template to always be used when creating placeholders of a certain file type, call it `Default.<extension>`, using the extension of that file type.
For example, call it `Default.pdf` so it is always used when users create `.pdf` placeholders (in projects using document templates from the **Document Library**).
- You can also create a generic document template called `Default` (without the extension), that will be used automatically for file types who don't have a `Default.<extension>` template associated.
For example if a user wants to create a `.png` placeholder but there is no `Default.png` document template in your Document Library, then the `Default` template will be used.

4. Create a Project Template for each kind of project that will be required by Project Managers.
5. In each of these Templates **configure** the **Document Library** as follows:
 - a) In the **Project Details** page, **Configure** > **Document Templates**.
 - b) Select **Project** or **Template** and select your document template library from the drop-down.



Documents 0 Tasks 1 Attributes Project Information Approval Members Security **Configure**

Workflow Connection **Document Templates** Project Creation Document Types Document Creation Project Statuses

Please select the Template or Project that will serve as a Document Library

Do not use a Document Library
 Template
 Project

When the Document library contains ARD files, how do you want to use these ARD files when creating a new Document?

Always run the ARD as a standard
 Run the ARD as a standard when the IsStandard Attribute is set to 'yes'
 Never run the ARD as a standard

Save

- c) If your document library contains ARD files, and you want to use them to [run ArtiosCAD standards](#), select either:
 - **Always run the ARD as a standard** if you want to be able to use any ARD document template in the document library to run a CAD standard,
 - **Run the ARD as a standard when the IsStandard attribute is set to 1** if you only want to use some ARD document templates to run CAD standards.

These ARD document templates must have the **IsStandard** attribute assigned, with the default value set to 1.

Select **Never run the ARD as a standard** if you are not working with CAD standards.
- d) Click **Save**.

Projects created from one of those project templates will keep the project template's link to the document library.

Project Members can then create placeholders from the document templates in the document library.



Note:

If you know that the Project Managers will always use the same set of placeholders in all their projects, you can also:

1. Create a document library Project Template.
2. Add Document Templates to the Project.
3. Go to **Project Details > Configure Document Templates** and select the same Project in the **Templates** list.
4. Project Managers can create projects directly from this Template to have the Document Templates as placeholders.

Note that this approach is less flexible!

6.4. Project Creation Settings

As an Admin user, you can configure the **Project Creation Settings** for a project or template. You can find these settings in the project or template's **Configure** section, under **Project Creation**. These settings define what is displayed on the **Project Creation Page** when you create a new project from this project or template.

First of all, you can choose whether you want to **Use Auto Naming** and define the naming scheme.

Furthermore, you can choose what features are displayed on the **Project Creation Page**. You can choose the following options:

- **Set Project Manager:** Show/hide the project manager selection on the project creation page. If you hide it, the project manager will be the same as used in the template or parent project. If you choose to show this section, it will default to the person creating the project.
- **Set Status:** Show/hide the project status selection on the project creation page. If you hide the project status, the new project will be created using the first available active project status.
- **Set Customer:** Show/hide the customer selection. You can make this a required field. Hide this field to use the customer set in the source project or template.
- **Set Description:** Show/hide the description field. You can make this as a required field.
- **Set Due Date:** Show/hide the due date selection. You can make this as a required field.
- **Upload Documents:** Show/hide the documents section. You can make this section required, so that the project creator has to add at least one document.



Note: You can configure the document upload section in the source project or the project template. Refer to [Configure Customized Document Rendering in projects](#)

- **Assign Roles:** Show/hide the role assignment section. You can decide for each role whether it is required to assign a group or user to it and/or whether you can assign multiple users or groups to this role.
- **Invite other members:** Show/hide the members section to enable/disable adding additional members to the project.



Note: When the Admin Users or the User creators assign Roles, deactivated users are shown in the drop down who can be activated and added to the project. User creators have access to only activate the users they created, whereas admin users can activate any deactivated users.

- **Set Attributes:** Show/hide the attributes section. You can show or hide the creation view of the project attributes of the source template or project.
- **Select Thumbnail:** Show/hide the project thumbnail section. If you hide this section, the thumbnail of the source project or template will be used.
- **Set Planning (Tasks):** Show/hide the task planning section. You can make these fields required.
- **Default Planning Method:** You can set the default planning method to **Forward** or **Backward**. Even if the Set Planning section is not displayed, the setting you choose here will be used for the new project.

6.5. Document Creation Settings

As an Admin user, you can configure the **Document Creation** settings for a project or template. You can find these settings in the project or template's **Configure** section, under the **Document Creation** tab.

When a project manager creates a project based on a template or an existing project, you can add **Documents** using the Default options or Custom options.

You can create a **custom** document creation set up in your template. In this setup, for each row in the configuration, a link is added to the specified section in the same order.

- **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](#) on page 127.


- **Another Template's Document Creation Setup**

Use this to copy a setup from a template with a custom document creation set up.

- **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. <ul style="list-style-type: none"> • Standard • Simple

	<ul style="list-style-type: none"> • Translated
Details	<p>Additional information such as:</p> <ul style="list-style-type: none"> • Allowed Extensions • Document Template Selector <p>Here you can select the already specified document templates. Read also: Document Templates on page 127</p>
Operation	<p>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</p>
Sections	<p>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.</p> <ul style="list-style-type: none"> • the Project Creation Documents • the Project Creation Bill of Materials • Bill of Materials • Upload (Copy or Create Multiple Documents) <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;">  Note: You can also drag and drop multiple files onto an Upload button. </div>
Target Folder	The destination folder

To add a new source type, click **Add Document Source**. The document sources in the list can be deleted by clicking the delete icon.

You can configure:

- a simple **Browse** link for the user to upload a document.



Note: You can also drag and drop multiple files to the upload button.

- **Document Templates** from the template library. This will serve as a place holder with pre-configured settings such as attribute categories. Read more about templates in [Document Templates](#) on page 127.
- **Current Project**
- **Saved Search:** Use this option to allow the user to select a file from a saved search. When the user clicks the document reference as a link (with a custom **label**), saved search results will appear in a pop-up with all the configured options.
- **Asset Management System:** Use this to allow selecting a file from the configured Asset Management Systems. Read more in [Configure Asset Management Connections](#) on page 410

If you want to delete a template with a custom document creation setting, make sure that it is not being used by other projects/templates for document creation. If it is being used, you have to select another template in the relevant projects/templates before attempting deletion.

6.6. Document Types

As an Admin user, you can configure settings for each of the **Document Types** for a project or template in **Configure > Document Types**. These settings define what happens when you add documents to your project.

The settings are organized per **Document Type**. Per type you can set the following options:

- **Automatic Document Naming:** Use this setting to enable/disable autonaming for a specific document type. Choose **None** to disable autonaming. Choose **Default** to use the system wide autonaming settings or choose **Custom** to enter a specific naming scheme for this project or template.
- **Default Attribute Category:** Use this setting to assign an attribute category to a specific document type. Choose **None** to not use a default attribute category. Choose **Default** to use the system wide settings or choose **Custom** to select a specific attribute category.
- **Start Task for new Documents:** Use this setting to start a task of the specified type when adding a document to the project. The task is automatically started, assigned to the uploader and the uploaded file is linked to the task. Choose **None** to not start a task upon upload. Choose **Default** to use the system wide settings or choose **Custom** to select a specific task type.
- **Start Task for new Versions:** Use this setting to start a task of the specified type when adding a new versions of a document to the project. Choose **None** to not start a task upon upload. Choose **Default** to use the system wide settings or choose **Custom** to select a specific task type.

6.7. Create Project Thumbnails Automatically from Documents

As an Admin user, you can configure a setup to create automatic thumbnails from the document images.

When a new graphics or CHILI document is being uploaded to a Project or Template, the user will 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**.

1. Create a text **Attribute** called **Make Project Thumbnail**.
2. Set **Values** to **Restricted Set**.
Create the check box by entering **Yes** and **No** as values of the restricted set. The values are case sensitive.
3. Create an **Attribute Category** and include **Make Project Thumbnail** in the attribute.
4. Create a **Project Template**.
5. In the project template, go to **Configure > Document Types**.
6. Specify the **Default Attribute Category** as the Project thumbnail Attribute category for the desired document types.
The user has to select **Make Project Thumbnail** during the upload of documents to use this feature.

Attributes:

Name	Value	Type
Make project thumbnail	<input type="checkbox"/>	yes or no



Note: When multiple documents in a project have the attribute **MAKE PROJECT THUMBNAIL** set, each upload overwrites the previous thumbnail in the natural sequence they happen. In case of multi-document upload at the same time, thumbnail can be set from any of the document based on the sequence they are returned from OBGE.

If the documents are published from **Automation Engine**, (when the view files are generated on AE and not on the OBGE), then the project thumbnail will not change.

Changing the project thumbnail on upload is guaranteed to work, only if the upload is through WebCenter.

6.8. Deleted Projects and Templates

Admin users can view the list of deleted projects or templates in the system by navigating to **Project Management > Deleted Projects and Templates**.

The list is by default sorted by modification date showing the most recent deleted project first but sort can be performed on any other columns as well. The filter section at the top allows searching for particular projects. You can click on the project name to see the history of the deleted project/template containing all the events logged during the life cycle of the project/template, for example who deleted the project. The deleted projects and templates are only shown until the cleanup tool is run.

6.9. Project Statuses

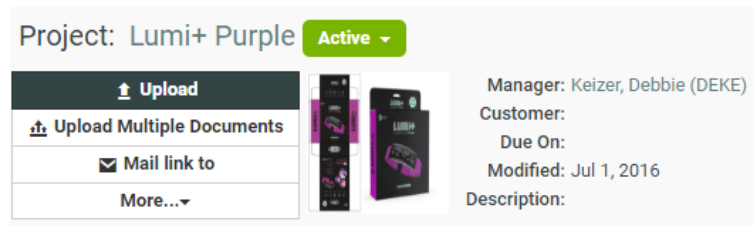
The **Project Status** feature allows you to review the current project standing. This feature can be accessed by an Admin user or a member of the Admin group, Project Managers and an User.

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](#) on page 142



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.

Project: Lumi+ Purple **03 - Artwork (In Progress)**

Upload

- Upload Multiple Documents
- Mail link to
- More...

Manager: Keizer, Debbie (DEKE)
 Customer:
 Due On:
 Modified: Jul 1, 2016
 Description:

Documents 1 Bill Of Materials 1 Tasks 1 Discussions 1 Characteristics Attributes Project Information Approval Notifications **Configure** More...

Workflow Connection Document Templates Project Creation Document Types Document Creation **Project Statuses**

+ Add Project Statuses Remove

Name	Active	Color	Icon
01 - Briefing (Complete)	Active	Esko Green	Briefing → Concept → Artwork → Prepress → Closure
02 - Concept (In Progress)	Active	Esko Green	Briefing → Concept → Artwork → Prepress → Closure
03 - Artwork (In Progress)	Active	Esko Green	Briefing → Concept → Artwork → Prepress → Closure
04 - Prepress (In Progress)	Active	Esko Green	Briefing → Concept → Artwork → Prepress → Closure
05 - Closure (In Progress)	Active	Esko Green	Briefing → Concept → Artwork → Prepress → Closure

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.

6.9.1. Viewing a List of Project Statuses

The available Project Statuses can be viewed in the **Project Status** page. In the Project Status page, you can add, edit or delete the Project Status. You can also choose or add an icon, add a custom color for the Project Status and decide the sequence of the statuses. When you use custom colors, text colors on the Project status is automatically adjusted to make it visible.

To view Project status, navigate from **Admin > Project Management > Project Status**. The Project Status page appears.

Display Order	Name	Language Key	Active	Color	Icon	File
1	Non-active	PS_NONACTIVE	Non-active	Light Gray		Select Icon Choose File No file chosen
2	Briefing		Active	Light Blue		Select Icon Choose File No file chosen
3	QA		Active	Khaki	QA	Select Icon Choose File No file chosen
4	Files uploaded by suppl		Active	Orange	Files uploaded by supplier	Select Icon Choose File No file chosen
5	Imaging to plate		Active	Sand	Imaging to plate	Select Icon Choose File No file chosen
6	Waiting for Confirmation	L_WAITING_FOR_CONFI	Active	Light Blue		Select Icon Choose File No file chosen
7	Markiert		Active	Esko Green		Select Icon Choose File No file chosen
8	Template Uploaded		Active	Brown	Template Uploaded	Select Icon Choose File No file chosen
9	Project Created		Active	Dark Red	Project Created	Select Icon Choose File No file chosen
10	Stepping in progress		Active	Red	Stepping in progress	Select Icon Choose File No file chosen
11	Waiting for Artwork	L_WAITING_FOR_ARTW	Active	Light Blue		Select Icon Choose File No file chosen
12	Artwork creation		Active	Magenta	Artwork creation	Select Icon Choose File No file chosen
13	Client Approval		Active	Violet	Client Approval	Select Icon Choose File No file chosen
14	SOBK Status1		Non-active	Custom	SOBK Status1	Select Icon Choose File No file chosen
15	Active	PS_ACTIVE	Active	Blue		Select Icon Choose File No file chosen
16	SOBK Status2		Active	Custom	SOBK Status2	Select Icon Choose File No file chosen
17	MASTER_COMPLETED	PS_COMPLETED	Completed	Esko Green		Select Icon Choose File No file chosen

System History Logs

All Project Status related events like

- **Project Status created**
- **Project Status deleted** and
- **Project Status changed**

are recorded and stored in System History. Read this page on how to access the [records](#).

6.9.2. Adding a Project Status

You can add a new Project Status through the **Project Status** page. You can also choose or add an icon, a color for Project Status and decide the sequence of the statuses.

1. Click the **Add Status** button on the **Project Status** page.
2. In the **New Status page**, type the **Name** of the status and select the **Project Status type**.

You can add multiple statuses at a time. When the new status is marked as Active, it is added just behind the previous active status. When the new status is marked as Non Active or Completed, it is added at the end of the Project Statuses list with no rules applied.

New Statuses

Clear this Form

#	Name	Project Status Type
0	<input type="text" value="Project Started"/>	Active ▼
1	<input type="text" value="Project In Progress"/>	Non-active ▼
2	<input type="text" value="Project Discussion"/>	Active ▼
3	<input type="text" value="Project Testing"/>	Active ▼
4	<input type="text" value="Project Completed"/>	Completed ▼
5	<input type="text"/>	Select ▼
6	<input type="text"/>	Select ▼
7	<input type="text"/>	Select ▼
8	<input type="text"/>	Select ▼
9	<input type="text"/>	Select ▼
10	<input type="text"/>	Select ▼

- Click the **Save** button to make changes. The Project Status page appears with the new status.



Note: The new status will get a default color and no icon added to it. This can be changed in Project Status page.

6.9.3. Editing a Project Status

You can edit the existing or newly added Project Statuses through the **Project Status** page. In the Project Status page, you can change the Name, Language key, Sequence number, Add Icon and Set Color.

Project Statuses

+ Add Status		Delete								
Display Order	Name	Language Key	Active	Color	Icon	File				
1	01 - Briefing In Progress		Active	Esko Green		Briefing In Progress	Select Icon	Choose File	No file chosen	
2	01 - Briefing At Risk		Active	Orange		Briefing At Risk	Select Icon	Choose File	No file chosen	
3	01 - Briefing On Hold		Active	Red		Briefing On Hold	Select Icon	Choose File	No file chosen	
4	01 - Briefing Complete		Active	Dark Green		Briefing Complete	Select Icon	Choose File	No file chosen	
5	02 - Design In Progress		Active	Esko Green		Design In Progress	Select Icon	Choose File	No file chosen	
6	02 - Design At Risk		Active	Orange		Design At Risk	Select Icon	Choose File	No file chosen	
7	02 - Design On Hold		Active	Red		Design On Hold	Select Icon	Choose File	No file chosen	
8	02 - Design Approval		Active	Light Blue		Design Approval	Select Icon	Choose File	No file chosen	
9	02 - Design Complete		Active	Dark Green		Design Complete	Select Icon	Choose File	No file chosen	
10	03 - Artwork In Progress		Active	Esko Green		Artwork In Progress	Select Icon	Choose File	No file chosen	
11	03 - Artwork At Risk		Active	Orange		Artwork At Risk	Select Icon	Choose File	No file chosen	
12	03 - Artwork On Hold		Active	Red		Artwork On Hold	Select Icon	Choose File	No file chosen	
13	03 - Artwork Approval		Active	Light Blue		Artwork Approval	Select Icon	Choose File	No file chosen	
14	03 - Artwork Complete		Active	Dark Green		Artwork Complete	Select Icon	Choose File	No file chosen	

Type the sequence number in the **Display Order** column to change the sequence number. The change in sequence number appears only after saving the changes.

The language string key has to be added to the XML formatted language key file (wcstrings_<2 character ISO language code>.xml for English: wcstrings_en.xml) for all used languages. By default the language (en) has to be added.



Note: The language key field is not mandatory. If you want all languages to follow the same names (Not translated stage names), you leave the language key field empty.

Type the **Name** of the Project Status to change the Project Status name and click the **Save** to make changes.

The new status will be set to Esko Green as default color. You can select a **Color** for a dropdown for each project status. This color will be used in the calendar-view of the project overview.



Note: You cannot add your own new color.

Once you select the required color from the drop down list, click the **Save** button to make changes. Here, the Color is changed to Red.

Project Statuses

Changes were made since last Save

+ Add Status		Delete								
Display Order	Name	Language Key	Active	Color	Icon	File				
1	01 - Briefing In Progress		Active	Esko Green		Briefing In Progress	Select Icon	Choose File	No file chosen	
2	01 - Briefing At Risk		Active	Red		Briefing At Risk	Select Icon	Choose File	No file chosen	

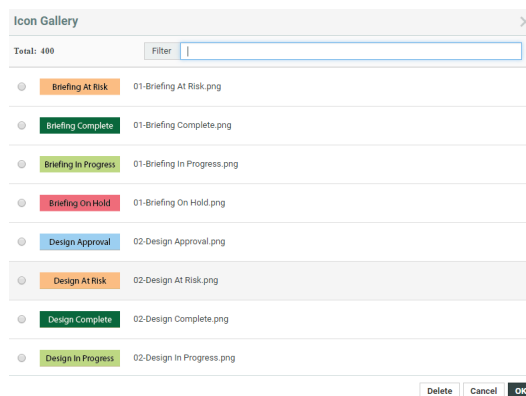
You can change an icon for the existing Project Status in the Project Status page. The Project Status icon can be selected from the Icon Gallery or you can also upload an icon. WebCenter allows JPG, JPEG, GIF, BMP and PNG file types as icons.



Note: The UI is optimized for an icon height of 16 pixels. Icons will be placed in overviews without any scaling.

Click the **Select Icon** button, to select the required icon from **Icon Gallery**.

In the **Icon Gallery** window, select an icon via the radio button and click the **OK** button. The gallery allows filtering of icons by its name.



Click the **Browse** button to upload an icon of your choice. The icons can be re-used for other statuses.



Note: You can change the icon of the built-in Project Statuses. When no icon is set, the name of the status is used instead.

6.9.4. Deleting a Project Status

You can delete a Project Status and this status will be marked as deleted/obsolete in the WebCenter database. When a project status is marked as deleted, it will no longer appear in any of the locations where a Project status can be selected. The Projects and Templates having the deleted status will still keep this status. You can however no longer change projects to the deleted status. To delete a Project Status,

1. Select the required Project Status and click on **Delete** in the **Actions** menu.
2. Click the **OK** button to confirm the deletion.

6.9.5. 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.

6.9.6. 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.

Project Name	<input type="text"/>
Description	<input type="text"/>
Project Status	<div style="border: 1px solid #ccc; padding: 2px;"> Show All ▼ ⌵ </div> <ul style="list-style-type: none"> <li style="background-color: #0070c0; color: white; padding: 2px;">Show All <li style="padding: 2px;">Show All Active <li style="padding: 2px;">Show All Not Active <li style="padding: 2px;">Show All Completed <li style="padding: 2px;">Non-active <li style="padding: 2px;">Active <li style="padding: 2px;">Concept Art (at risk) <li style="padding: 2px;">Briefing (at risk) <li style="padding: 2px;">Briefing (on track) <li style="padding: 2px;">Concept Art (on track) <li style="padding: 2px;">Lancement <li style="padding: 2px;">PAO Contrôle <li style="padding: 2px;">Erreur Contrôle <li style="padding: 2px;">En attente Lancement <li style="padding: 2px;">PAO Contrôle OK <li style="padding: 2px;">PitStop oK <li style="padding: 2px;">PitStop Avertissement <li style="padding: 2px;">Pitstop Erreur <li style="padding: 2px;">En cours de traitement <li style="padding: 2px;">Nouvelle Soumission
Created	<input type="text"/>
Modified	<input type="text"/>
Due	<input type="text"/>
Customer/Location	<input type="text"/>
Salesperson	<input type="text"/>
Project Manager	<input type="text"/>
Manager's Location	<input type="text"/>
Add Role	<input type="text"/>
Attributes...	

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.

6.9.7. 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.

6.9.8. Archiving Projects

Project Status –Archived

A new Project Status type has been introduced called **Archived**. You can set this status based on the stage of the project. The visibility of Archived projects depends on the setting chosen by the Admin user in the **Security Preferences**. Admin user has an option to allow non-admin users to view the archived projects.

Visibility of Archived Projects

Archived projects are visible to Admin users by default. Visibility to archived projects for other users are set optionally by the Admin users in the **Admin > preferences > Security Page**. Enabling **Allow non-administrators to see Archived Projects** option makes the Projects in **Archived** status visible.



Note: Changing the option triggers search index re-crawl and that may interfere with **Search Results** on Archived projects until the recrawl is complete.

When this option is not selected by the Admin user in the security preferences, changing the status by the Project Manager (who is not an Admin user) to **Archived** restricts the access to view the project for all users in the project including the Project Manager.

Once the project is archived, the project is excluded in the Project list and hence 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.

Project Status –Set Status to Archived

When the Project is set to a project status, which is of Project status Type Archived, the project is no longer visible to anyone except Admin user unless enabled by Admin user.

Project Status Filter

Admin users can now set the Project Status type to Archived. From the WebCenter 20 onwards, Project status can be filtered/ searched as Active or Completed or Non-Active or Archived.

6.9.9. Setting a Project Status to Active or Non Active

An Administrator can set a project to Active by giving it an Active status. Whether a status is active or not is determined when the status is added.

If a project has been set to a Non Active status, by default the permissions for all members are masked with the View and Download permissions, so that these two permissions are still enabled if and only if they were enabled already, while all other permissions are disabled.

However, whether certain actions can still be performed in non-active projects, also depends on the security settings for the system. An Admin user can change these settings on the **Security** page (**Preferences > Security**). It is possible to allow or disallow changing attributes, changing members and document operations in inactive projects.

Prevent direct changes to Project Status

As an Admin user, you can prevent project status changes by the project manager. When this option is enabled, the project status becomes read-only in the header of a Project.

To prevent direct change to Project status, navigate to **Projects > Configure > Project Statuses** in the Project template and disable the option **Project Status can be modified by Project Manager**. All the projects (also previously) created from the template will adhere to this setting.

By default, the option is checked in the template, and allows Project Managers to change the Project Status.

However, the Project status can still be changed:

- when a task is completed and the task is configured to change the project status on completion
- when a workflow node changes the Project Status
- by admins via an SDK call changing the project status
- by admins in a saved search allowing to change the project status.

- if the project is not created from a project template.

6.10. JavaScript Rule Action

Admin Users can use the **JavaScript Rule Actions** to execute JavaScript from a rule without a workflow. In the **JavaScript Rule Actions** you can **Add** a rule, Edit or delete the rules.

System History Logs

All JavaScript Rule Action related events like

- **JavaScript Rule Action Created**
- **JavaScript Rule Action Deleted**
- **JavaScript Rule Action Changed**

are recorded and stored in System History. Read this page on how to access the [records](#).

You can read more about API's for WebCenter [here](#).

6.10.1. Add JavaScript Rule Action

You can customize **Rules** to perform specific actions. This can be done by adding rules which are written and executed in JavaScript.

To add a rule in JavaScript:

1. Click **Admin > Project Management > Add JavaScript Action Rule** .
2. A **Edit JavaScript Rule Action** window is opened on selecting this option.
3. Enter the name for the rule, description and the script. Save the Rule to view the list of JavaScript Rules.
4. To edit an existing rule, double-click on the **JavaScript Rule Action** from the list. To delete the rule, click once to enable the delete icon on the row selected.

6.10.2. View JavaScript Rule Action

1. Click **Admin > Project Management > Find Locked Documents**.
2. Either filter for users by entering (part of) their last name in the **Search users by last name** field, or click **Go** right away to see all locked documents.
3. Select the document(s) to unlock by selecting the corresponding boxes.
4. Click **Unlock checked items**.

6.11. Shared Documents

The **Shared Documents** tab allows admin users to view all active Secure Download Links associated with files shared within projects managed by users. Information displayed includes details on who

shared the documents, when they were shared, with whom they were shared, the shared documents, and the link expiration date.

Additionally, admin users can disable one or multiple links.

To disable:

1. Navigate to **Project Management > Shared Documents**.
2. Select the user.
3. Click **Disable Link(s)**.

Shared Secure Download Links


Disable Link(s)			
<input type="checkbox"/>	Created By	Shared With Email	Document Name -- Project Name
<input checked="" type="checkbox"/>	HARSH	TestA@esko.com	LinkedAsset1.PNG -- Structured
<input checked="" type="checkbox"/>	HARSH	TestB@esko.com	LinkedAsset1.PNG -- Structured
<input checked="" type="checkbox"/>	HARSH	ExternalUserA@esko.com	LinkedAsset1.PNG -- Structured
<input checked="" type="checkbox"/>	HARSH	harsh.thakkar@esko.com	LinkedAsset1.PNG -- Structured
<input type="checkbox"/>	HARSH	harsh.thakkar@esko.com	LinkedAsset1.PNG -- Structured
<input type="checkbox"/>	HARSH	harsh.thakkar@esko.com	LinkedAsset1.PNG -- Structured
<input type="checkbox"/>	TESTU1	harsh.thakkar@esko.com	36687d83-2766-4bc4-b76f-cba
<input type="checkbox"/>	HARSH	harsh.thakkar@esko.com	17f93590-d668-4bcf-aa07-57e
<input type="checkbox"/>	HARSH	harsh.thakkar@esko.com	06370be6-c818-496a-8a43-bd

6.12. Delete View Files

View files (that make files viewable in the WebCenter Viewer) take a certain amount of disk space. If necessary, Admin users can delete those view files.



Note: You can only delete view files per project (for all of the project's documents at once), not per document.

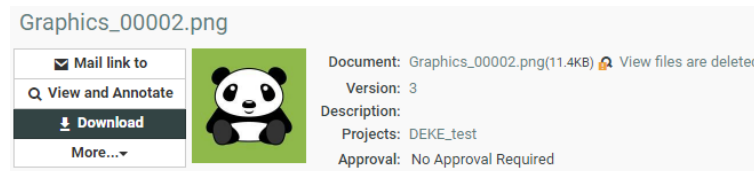
1. Use the [Search](#) to find the projects whose view files you want to delete.
2. Select the projects whose view files you want to delete, and click **Delete View Files** in the actions menu .

Confirm your choice by clicking **OK**.



Note: When deleting view files, Viewer annotations, document metadata and thumbnails are kept.

You can see that the view files have been deleted on each document's **Documents Details** page.



6.12.1. Regenerate View Files

Users can regenerate documents' view files as needed provided that:

- they have the **View** permission on those documents,
- those documents' view files can be regenerated.



Note:

Most view files can be regenerated, except for:

- page lists coming from Automation Engine,
- documents uploaded via Automation Engine with the **Upload only view files** option.

If you need to regenerate the view files:

1. Go into the project whose view files you deleted.
2. Select the documents for which you want to regenerate view files.
3. Click **View and Annotate** in the actions menu.

6.13. Configure a Landing Page for a Role

Administrators can configure the start page of a Project per Role in the Project Template. This means that when a particular Role-User come into the Project Details, he or she will see the specified **Landing Page** first. This feature allows you to configure different start pages for different types of users(Roles).

To configure **Landing Page** per Role:

- Go to **Project Template > Details > Configure > Landing Page** section. Click **New Landing Page**.

[New Landing Page](#)
[Delete Landing Page\(s\)](#)

Role	Landing Page	Details
<input type="checkbox"/> Legal	Documents Page	Folder name or empty for root folder
<input type="checkbox"/> Marketing	Attributes Page	Attribute Category View or empty for Default view
<input type="checkbox"/> Technical	Tasks Page	

- Specify the **Role** and the **Landing Page**. Choose from the following pages.

Options	Description
Documents	Specify the folder in the Details section.
Attributes	Specify the Attribute Category View in the Details section. <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> Note: If you leave this section empty, the user will see the Default View. </div>
Saved Search	Specify the name of the Saved Search in Details . <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> Note: The Role-user will be directed to the Saved Search which is plugged into the User's Project Details menu. </div>
Approval Page	Details section is read-only.
Tasks	Details section is read-only.
Bill of Materials	Details section is read-only.
Dashboard	Choose the dashboard that you require as landing page. You can also create a new dashboard from this drop down.

- The Landing Page configuration is copied when you copy a Template or Project.
- When you **export** your template, the landing page configuration is included in the XML.

6.14. Configure Rules in a Project

What is a Rule?

You can configure a **Rule** to execute specific **Actions** based on one or more Trigger events. The Rule sets reside in Project Templates and will be applicable in all Projects created from them, including the previously created ones. This administrator feature lets you establish communication between Child and Parent Projects or between any two Projects. See an example use case at the end of this chapter.


Note:

You need the **WebCenter Task Management Advanced** or **WebCenter Life Cycle Management** license to be able to define Rules.

To set up **Rules**, go to **Project Template > Configure > Rules Setup** tab.



Note: Although Rules are configured within a Project Template, you can create Rules that are triggered after the project is created from the template.

Triggers

A **Trigger** is an event that happens in the system (for example, the Child Project Status changes to **Completed**). A successful Trigger condition will execute a Task based **Action**.

You can specify multiple triggers and actions in a Rule. When one Trigger event (as specified in the Rule) happens, the system evaluates the Rule and executes the corresponding Action(s).

See the supported Triggers below:

- **Project Status Change:** The **Action** is executed when the Project Status changes.
- **Project Attribute Change:** The **Action** is executed when the specified Project Attribute changes. You can specify the attribute from a drop-down.
- **Project Due Date Change:** Any change in the Project Due Date will trigger the specified **Action**.
- **Date/Time Reached** trigger lets you define an exact time stamp to execute the Rule. When the server time passes the Trigger time, the Rule will be executed. There are 2 options:
 - Specific Date: the actions will be executed on the specific date and time
 - Date in Project + Offset: the actions will be executed on the selected Project Due Date or Date/Time attribute plus or minus an offset of days and/or hours.



Note: The calculation is done in working days/hours.

Actions

- **Start Task:** This action launches a Task in the same Project where the Rule is configured. Specify the **Task** by selecting it from the drop-down.
- **Execute Javascript:** This action launches a specified **JavaScript Rule Action**. You can specify one from the **Javascript Rule Actions** configured in the system.

It is possible to configure multiple actions by clicking on the '+' sign. Use 'x' to remove existing actions.

Example

See the example of a Project Template's Rule below. This Rule gets executed when the specified Date/Time Reached.

Edit Rule

Rule Name *

Enabled

Description

Order

When any of these Triggers occur

Perform Action(s)

Warning: Calculating date/time triggers can potentially take a while. This rule will be applied in 4 projects.

The Javascript Rule Actions are configured in **Admin > Project Management > JavaScript Rule Actions**. See the example script below.

```
var children = API.getProject().getChildProjects(); if(children.length >
    0){ var atRisk = false; var inDelay = false; for(var i = 0;
    i<children.length; i++){ var child = children[i];
    if(child.getStatusName() !=
    'Completed'){ atRisk = true; } else if(child.getStatusName() ==
    'Non-active'){
    Campaign
    inDelay = true; } } if(atRisk){ API.getProject().getAttribute("mvbe
    State").setValue('At risk'); } else if(inDelay){
    API.getProject().getAttribute("mvbe Campaign State").setValue('In
    delay'); }
    else { API.getProject().getAttribute("mvbe Campaign
    State").setValue('On
    schedule'); } }
```

Two days before the milestone, this Rule will get executed. Depending on the child Projects' statuses, the Program Project's status will be updated.

7. Advanced Search Setups in WebCenter

7.1. Advanced Searching

There are advanced search features using which you can design and create dedicated search pages. You can:

- Save a **Search** with advanced settings.
- Find assets which were stored in WebCenter with certain **Attributes** or with a certain project criteria. This will help you to:
 - Find, collect and download pictures for a certain product line. You can also send these as [download links](#).
 - Search according to criteria to find required Packaging types: for example Carton Boxes.
 - Search based on **Project Status**. For example, you can find all projects with a status **Initial design**. Display the Project Status as text, icon, color or both. Select your Project Status setting as **Show Color Label** to get the project status bar in your search.
 - Perform bulk operations.
- Alter the column order in the View column and search based on Projects or Documents or Tasks and Approvals and choose to not show the same parameter in the search results.
- Refine **Search Results** using a search parameter panel. Using this, users can limit the list of items to be searched.
- Define the sequence of columns in results. Alter the column order in the **View** column and search based on **Projects** or **Documents** or **Tasks and Approvals** and choose not to show the Project Name or Document Name or Task and Approval name in the search results.
- Create dedicated **Global Saved Searches** for Users. Global Saved Searches are accessible to all users and hence advanced search option access can be given judiciously to users. You can customize these as **Asset Browsers** which can be incorporated into the menu.
- Create Saved Searches with [Projects Calendar View](#) on page 170.
- You can search by selecting multiple options in drop downs or even type the text to search.
- If an action has been done as delegate of another user, it is shown in the corresponding field in search results. For example, in the field **created by** for a task search.
- Click on any of the gear icon in the date/time fields to **Show Time** except for attributes and search is either sorted or filtered on this. For Project Status, gear option gives the configuration options like Automatic or Label and Icon, Only Icon, Only Label, and Color Label. For **Pending Approvers**, gear option gives configuration option to **Show Assignee details (original Group /Role)**.
- Each field that represents a project, document or task has a link configuration option, e.g. project name, document reference attribute. The link can be customized to Default, No Link, Project/Document/Approval Details page, Task Execution page, Viewer or Dashboard Popup. When the option Dashboard Popup is selected, the user can select which dashboard will be shown.

System History Logs

All Saved Search related events like

- **Saved Search created**
- **Saved Search deleted** and
- **Saved Search changed**

are recorded and stored in System History. Read this page on how to access the [records](#).

7.2. 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.

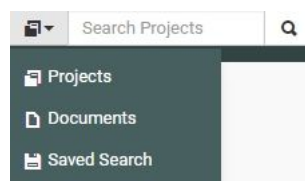





Note:

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 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.

7.2.1. Search Panel Design

The saved searches can be setup for Projects, Documents and Tasks and Approvals. These saved searches can be edited by an administrator. The administrator decides for each saved search (and for each operation) whether these operations are allowed or not.

All users can design searches via the Search Results options. However, administrators get an extra check box **Search Panel Design**.

In the Search page:

- Select the **Search Panel Design Options**. The **Visibility, Label, Row, Column** will appear in the search page.

Additionally, the check boxes in the View column will become drop downs when enabling this option.

Search for Documents

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

Search for:

Use Advanced Search Characters ?

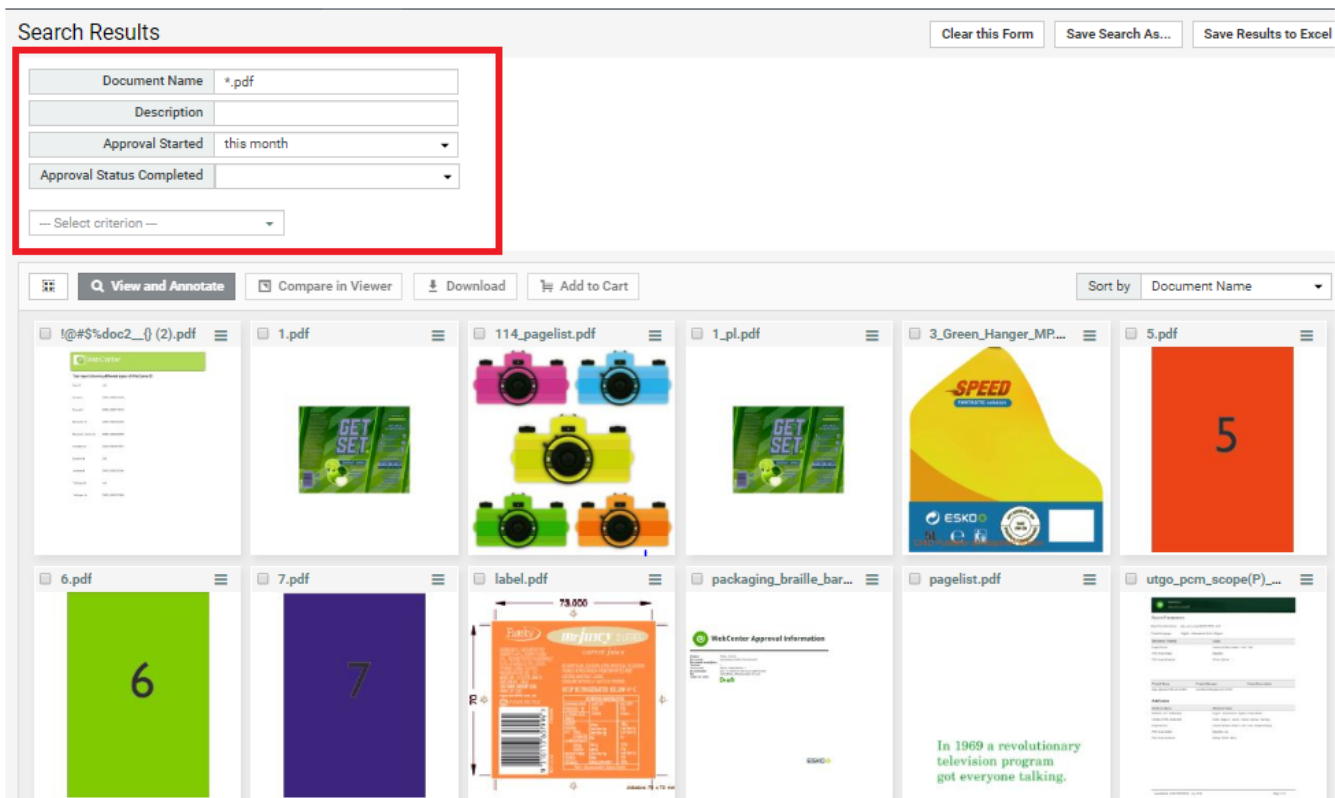
Search Panel Design Enable SmartNames ?

	Label	Visibility	Row	Column	View	Column Order	Editable	Sort
Document Name	<input type="text"/>	Hidden			Visible	1		<input checked="" type="checkbox"/>
Version Author	<input type="text"/>	Hidden			Hidden			<input type="checkbox"/>
Author's Location	<input type="text"/>	Hidden			Hidden			<input type="checkbox"/>
Description	<input type="text"/>	Hidden			Visible	2		<input type="checkbox"/>
Created	<input type="text"/>	Hidden			Hidden		<input type="checkbox"/>	<input type="checkbox"/>
Modified	<input type="text"/>	Hidden			Hidden		<input type="checkbox"/>	<input type="checkbox"/>
Keywords	<input type="text"/>	Hidden			Hidden		<input type="checkbox"/>	<input type="checkbox"/>
Attribute Category	<input type="text"/>	Hidden			Hidden		<input type="checkbox"/>	<input type="checkbox"/>
Attributes...								
Reference	Matches <input type="text"/>	Hidden			Hidden		<input type="checkbox"/>	<input type="checkbox"/>
Referenced by	Matches <input type="text"/>	Hidden			Hidden		<input type="checkbox"/>	<input type="checkbox"/>
Approval Status	<input type="text"/>	Hidden			Hidden		<input type="checkbox"/>	<input type="checkbox"/>
Approval Status Completed	<input type="text"/>	Hidden			Hidden		<input type="checkbox"/>	<input type="checkbox"/>
Approval Started	<input type="text"/>	Hidden			Hidden		<input type="checkbox"/>	<input type="checkbox"/>
Approval Due	<input type="text"/>	Hidden			Hidden		<input type="checkbox"/>	<input type="checkbox"/>
Approval Completed	<input type="text"/>	Hidden			Hidden		<input type="checkbox"/>	<input type="checkbox"/>
Approval Duration	= <input type="text"/> +/- <input type="text"/> days	Hidden			Hidden		<input type="checkbox"/>	<input type="checkbox"/>
Approval Time Left	= <input type="text"/> +/- <input type="text"/> days	Hidden			Hidden		<input type="checkbox"/>	<input type="checkbox"/>
Current Approval Stage	<input type="text"/>	Hidden			Hidden		<input type="checkbox"/>	<input type="checkbox"/>
Pending Approvers	<input type="text"/>	Hidden			Hidden		<input type="checkbox"/>	<input type="checkbox"/>
Reason(s) for Rejection	Default <input type="text"/>	Hidden			Hidden		<input type="checkbox"/>	<input type="checkbox"/>

Here:

Column	Description
Visibility	Determines whether the criteria will appear in the saved search top panel. The available values are Hidden, Available and Visible.
Label	A label is the name of the criteria as it needs to appear. A label can be given regardless of the setting of visibility. The label will automatically applied to the column header in list layout and will be visible in grid layout too. If the field is left empty then, the label will be the same as the criteria and not different to other localized languages.
Row and Column	Position where the criteria will appear. Row and column are filled in automatically but can be changed by the user. The second criteria can have the same values for row and column. For example: If the Project Name criteria has the value Row 1 and column is 2, the criteria will appear in column two of the UI.

For example; when the **Visibility** is set to **Visible** for **Approval Completed**, the following results page appears.



When your users use this search (for example as an asset browser), they can use the design panel to further refine the criteria. You can now

Set up first visible Column in Search Result

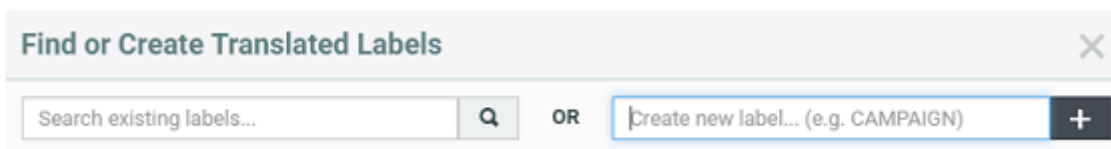
In WebCenter, you can configure any searchable field as the first column of the Search Results other than the name of the Project/Document/Task. In fact, you can choose to hide the Name column and/or choose any another column as the first column. Inline actions are shown on top of the first column.



Note: In Card Layout header, Focus Layout header and Selection section, some of the fields like calendar view, text statements, rich text attributes, project/approval/task statuses, users/groups and company /locations are not supported.

Internationalize Labels for Search

Search labels can be also translated to other languages. To find or create new translated labels, select the blue global icon in the **Search Panel Design** options. A **Find or Create Translated Labels** window is opened.



You could find translations for search labels or create a new label in the language you want it translated.

[Find or Create Translated labels](#) on page 293

7.2.2. Setting Search Result Layout Options

You can configure advanced searches for Projects, Documents and Tasks and Approvals. Using **Show Result Layout Options**, you can configure the search results interface for the users. You can also enhance these searches with [Dashboards](#) to display the search results in a graph/chart/counters.

The available options are different depending on whether it is a Project / Document / Task search. Some of the options available commonly are

- You can use **Use a custom Search Title** to modify or rename the Search Title while viewing the results. The custom search title field is translatable which is indicated with the blue globe icon.
- **Limit cell height (expand by request)** which is enabled by default limits the height of the results shown. You can turn off this option to view all the content of the cells.
- You can get the **Larger Thumbnail on Hover** in the search results page by hovering on the search result row. Optionally you can also disable this action. You can also enable the larger thumbnail on click for which a button is displayed in the right corner of the image.
- You may choose to hide the button to show/ hide the thumbnail in the results by choosing **Show "Hide Thumbnail" Button**.
- You also have an option to choose whether the thumbnail display will be as per the **Default (User Preferences)** or **Show Thumbnail** or **Hide Thumbnail**. This option is available for only Projects and Documents search.
- You can alter the **Column order** and select whether or not you want to make fields visible in the View column. This allows you to order the results based on some fields, and display entirely different search fields/columns in the result page.

You can also hide the first field namely Project Name or Document Name or Name (for Tasks and Approvals Search) by unchecking it.

- Enable **'Show as Grid/List/Cards' Button** to show this button for Documents and Projects Search results.
- Choose the units to be used when exporting to Excel in the **Save Search Results** option. You choose to export the results in either Metric, Imperial or Use User Preferences. You can also configure the order of search results. Read more about [Configured Order](#) on page 162.
- Choose whether to **Show clear this form** button in the search results layout.
- Allow Changing Attribute Category, where-in the Change Attribute Category will show up in the actions bar for Projects and Document Searches.
- Enable/disable the **Table Bulk Actions** per saved search. You can check the **Show Bulk Edit Actions for fields marked as editable**. In List layout in Search Results page, you can still access bulk editing by clicking on the pencil icon (inline) in the column header.
- Display Labels in a grid layout.
- Set up a [Drilldown](#).
- You can enable or disable the **Save this Search**, **Save Search Results** and **Search** buttons to customize your searches.

Configuring Initial Search Results Style

For Document and Project searches, you can also configure **Initial Search Results Style**. Select from:

- Default (determined by the User's Preferences)
- List
- Grid
- Card
- [Focus Layout](#)

The selected view style will be applied on the Search Results page instead of the default user preference.



Note: Users can change the view of the search results by clicking the Show as Grid/List/Cards/Focus buttons if these are not disabled.

Project Search Layout Options

To select your options for project, go to **Search > Projects > Show Result Layout Options** > You can choose to:

- Show the search result as Grid, List or Card.
- Configure the thumbnail: show, hide, link to a specific dashboard or page.
- Choose the units to be used when exporting to Excel in the **Save Search Results** option. You choose to export the results in either Metric, Imperial or Use User Preferences. You can also configure the order of search results. Read more about [Configured Order](#)
- Choose whether to **Show clear this form** button in the search results layout.
- Display the Project Status as text, icon, color or both. Select your Project Status setting as **Show Color Label** to get the project status bar in your search.
- Allow Changing Attribute Category, where-in the Change Attribute Category will show up in the actions drop-down.
- Display Labels in grid layout.
- Setup advanced options like [Search Results Dashboard](#) and [Drilldown](#).

Document Search Layout Options

In **Document** searches, you can configure [Individual Result Actions](#) and Display options. To allow an operation or a display option, keep it enabled.

Result Layout Options

Search Results General

Search Title

Use a custom Search Title

Background Color

#5f5f5f

Other Display Options

Show "Save this Search" Button

Show "Clear this Form" Button

Show Search Button

Show Cart

Individual Result Actions

Type

Default (from Menu)

Approve Reject

Comment View in 3D

View and Annotate Open in ArtiosCAD

Download Define Document Attributes

Approval Info Mail Download Link

Mail link to Upload New Version

Lock Rename

Add to Cart Delete

Custom Actions: default

Tagged actions will only show up if the tag is listed here. Example: 'tag1, tag2'. Enter * for all actions.

Table Bulk Actions

Show "View and Annotate" action

Show "Compare in Viewer" action

Show "Download" action

Show "Add to Cart" action

Show Bulk Edit Actions for fields marked as editable

Allow Changing Attribute Category

Allow sending Download Mail for Multiple Documents

Custom Actions: default

Tagged actions will only show up if the tag is listed here. Example: 'tag1, tag2'. Enter * for all actions.

Show Project Creation Link

Results Table

General

Limit cell height (expand on request)

Labels

Show Labels in Grid Layout

Set Labels in Grid Layout in bold

Layout

Initial Layout

Default (User Preferences) | List | Grid | Cards | Focus

Allow user to switch to a different layout

Focus Layout

Enable Focus Layout

Default Dashboard

Thumbnails

Initial Thumbnails

Default (User Preferences) | Shown | Hidden

Allow user to "Show/Hide Thumbnails"

Larger Thumbnails on Hover

Only After Button Click

Save Search Results to Excel

Show "Save Search Results" Button

Use following units when exporting:

Metric (mm, cm, dm, m)

Use following column order when exporting:

Use Configured Order

Drilldown

Show Drilldown using Saved Search

Asset Browser

Lists in Left Tree Panel

Type	Name	Depth	Height
+ Add List			

Tree Panel Width

300 px

Image Area Style

Left panel only (no images)

Allow Changing Image Area Style via Dropdown

Enable **Show Cart** to show the cart with the selected documents. You can perform actions such as create a project or clear from cart.

You can also set up document searches as [Asset Browsers](#).

Search Results

Save This Search | Save Search Results

Currently in your Cart

+ Create Project from Cart | Remove from Cart | Clear Cart

01_Disappearin Back2... | 01_Disappearin Front... | 01_Disappearin Front2... | GET SET_BOTTLE_BL... | GET SET_MULTIVITWS... | Bollin_Test_Graphic_R...

View and Annotate | Compare in Viewer | Download | Add to Cart | Create Project from Selected

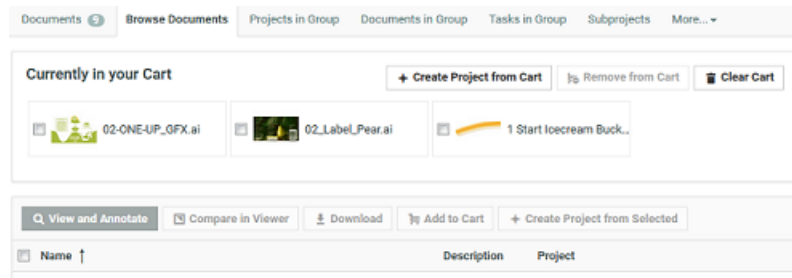
Sort by: Reversed Modified



Note: **Add to Cart** allows you to add documents to the cart.

If the option **Show Cart** is enabled in a Saved Search, the cart will be displayed in all the locations where the Saved Search is used.

- Saved Search configured in **My work, Document Details** and **Project Details**

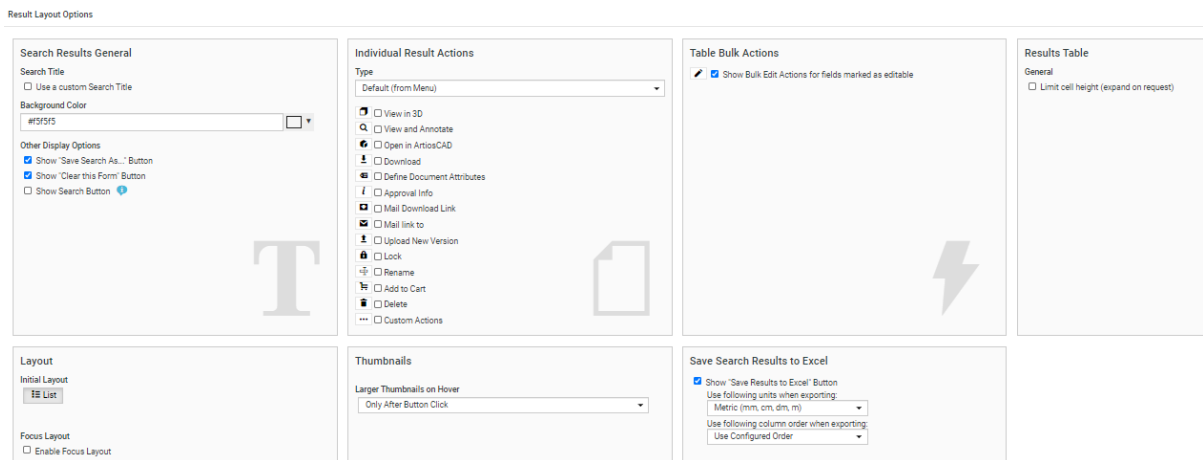


- **Cart** will not appear in Searches used as **Document Source**.

Tasks and Approvals Search Result Layout options

Navigate to **Search > Tasks and Approvals > Show Result Layout Options**.

You can also configure [Individual Result Actions](#).



Custom Actions in Search

When you configure custom **Action** buttons for Searches. You can enable or disable those **actions** in specific Saved Searches.

This can be done by defining a **Tag** for the **Action** defined in the custom menu.

To have Custom Actions in Saved Searches:

- [Create Custom Search Actions](#)
- Specify a **Tag** for the custom Search Action. Save the menu and apply to the User(s).
- Create a Search. In **Result Layout** options, enable **Custom Actions** and specify it with the exact **Tag**.

- In the Search Results page, you will be able to see the custom Action that you configured.

Persistent Search Results

Search Results selection is persistent and the selection is kept while you remain on the Search Results page. You can navigate to another page of the search results, or re-sort, or filter from the design panel, or use facets, or add available columns, and so on. The selection is available while you remain on the same WebCenter page and do not execute any other actions on the selection.

The number of items selected is indicated in a counter in the header. You can view the thumbnails of the selection by clicking the counter. Next to the thumbnail, it is also possible to view either the

- Document Name and Project Name for Document
- Project Name and Project Description for Projects
- Task Name and Project Name for tasks (only available if a search dashboard is configured)

The items are added in the persistent selection section as in the order in which you select the items. So, when you select a new item to be added to the persistent selection, it is added to the top of the list. When multiple items are selected, the items are added and ordered the same way as they were on the page.

Each item can be removed individually from the Selection or you can remove all.

Focus Layout

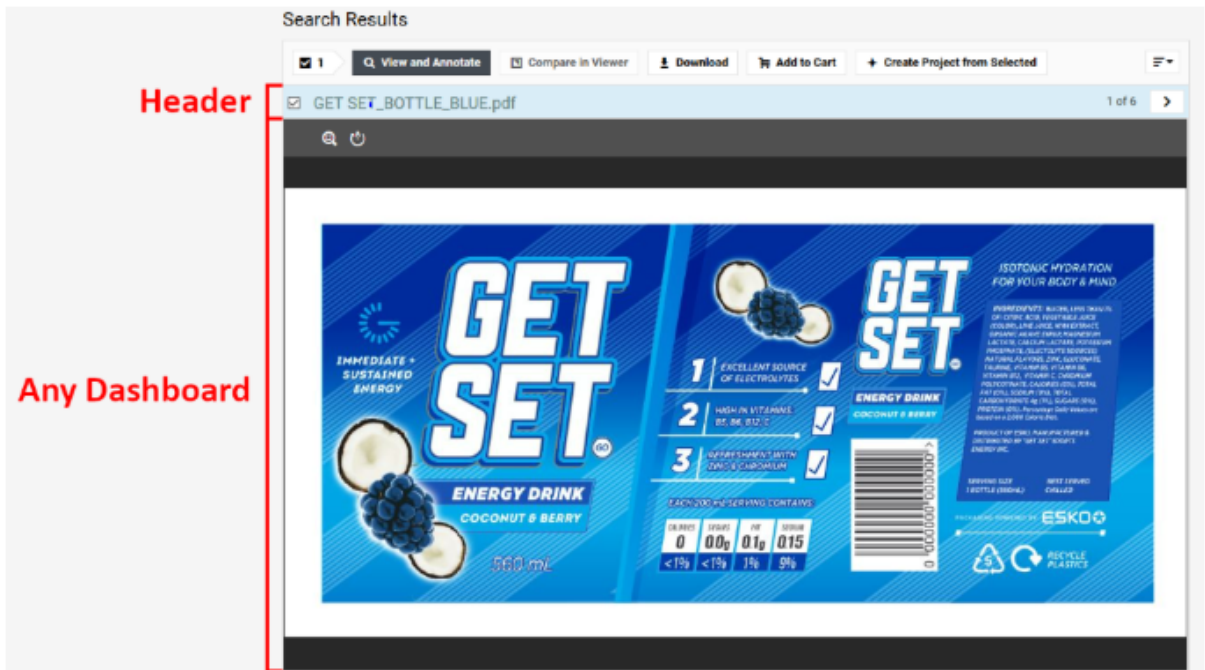
Focus layout option shows results of **Document, Project or Task and Approval** Search. Focus layout provides a better visual representation and an immersive experience of the images in the search results.

When Focus Layout is used to display the **Search Results**, the results page displays a single item at a time. You can select the viewed result with the check box in the top left. In the top right, you can navigate through the results or can go directly to a result by providing the number. The selected search results can be viewed when the selection counter in the header is expanded. Read more about [Persistent Search Results](#) on page 158 .

When enabling the Focus layout, dashboard can be created newly or can be selected from the existing dashboards.



Note: When a Task Search results are viewed with Focus layout, the Dashboard existing in the respective Task Type is shown if it exists or else the dashboard specified for focus layout is considered.



Focus layout utilizes the full screen for a single search result, allowing you to view the individual search result items without opening a Document details or the Viewer window.

This can be combined with persistent selection and Viewer dashboard block, to click through a set of search results and decide which ones to include and which ones to omit for a specific operation.

Focus Layout is enabled by default for Document searches, whereas for the Project and Task and Approval search, it has to be specifically enabled by the Admin user.

7.2.3. Individual Result Actions

You can configure standard document operations like in the document or Task and Approval **Search Results** page. For example, from this page, you can send download links for the selected documents.



Note: In Tasks and Approvals Search Result page, the Document actions are only available for approvals. The actions apply to the document on which the approval is setup.

There are two options to configure namely Default and Custom.

- Admin users can see the check boxes available in the **Default (from Menu)** like Approve, Reject, Comment, View and annotate, Define Document Attributes, Lock and so on

You can navigate from go to **Search > Documents** and click on the **Show Result Layout Options** link.

Select the option you require to be displayed in your search result.


Individual Result Actions

Type

Default (from Menu) ▼

<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> Approve	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> Reject
<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> Comment	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> View in 3D
<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> View and Annotate	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> Open in ArtiosCAD
<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> Download	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> Define Document Attributes
<input type="checkbox"/> <input type="checkbox"/> Approval Info	<input type="checkbox"/> <input type="checkbox"/> Mail link to
<input type="checkbox"/> <input type="checkbox"/> Upload New Version	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> Lock
<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> Rename	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> Add to Cart
<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> Delete	
<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> Custom Actions	<input type="text" value="default"/> <input type="button" value="i"/>

Tagged actions will only show up if the tag is listed here.
Example: "tag1, tag2". Enter * for all actions.



By default, the operations selected in the image are enabled for Document search whereas for **Task and Approval** search, the options **Approve**, **Reject** and **Comment** are only enabled. You can also add Custom actions. Read more on configuring custom actions [here](#).

- When you choose the type as **Custom**, then you further configure icon and color for each of the action. You can also select the style as either **Icon** or **Icon and Label**.

Individual Result Actions

Type

Custom...

Action	Icon	Color
Approval Info	<i>i</i> Actions-	#5bc0de
Approve	✓ Actions-	#d9534f

Add Action

Style

- Icon and Label
- Icon Only
- Icon and Label



Note: You can configure the search results layout options for:

- Document Search Results
- Saved Searches used in custom project/document menu items
- Saved search based **My Work** page

These actions will not work in the Saved Searches used as document sources in Project Creation and Document References.

7.2.4. Show Additional Project Search Criteria

You can use the **Show Additional Project Search Criteria** option as a advanced search for Documents, Tasks and Approvals in saved searches.

Project Name 6

Show Additional Project Search Criteria

After selecting **Show Project Search Criteria** option, the following options appear:

Using these you can search on project features when searching for **Documents** or **Tasks and Approvals**. Any of the project property or attribute can be used as a search criterion for Document searching and for Task and Approvals searching.

For example, you can search for the tasks in projects of a certain customer and what is the progress currently going on for a customer. You can also use the Project start date, completed date etc to arrive at the duration and filter on the other fields.

7.2.5. Configured Order

The order of columns for search results saved to excel files are now configurable by the admin user.

To enable this, choose the **Configured Order** in the **Use following column order when exporting** dropdown.

Use following column order when exporting:

Use Configured Order

Use Configured Order
 Use System Order

When you choose this option, the order of the columns in the excel file saved is the same, as the order of the columns in the **Search Results** page. This configuration is the default for all the new searches.



Note: All the saved searches that were created in WebCenter Versions 16.1 or earlier will have **Use System Order** by default and their order can be reconfigured.

7.2.6. Define Search Result Options

You can define which fields needs to be displayed for each search result. By entering numbers, you can change the sequence of the columns or the sequence of the information in the grid cells. You can choose to make the view of the field in the results either Available, Visible or Hidden



Note: When you enter an existing number, all others shift to upward numbers. In case of list layout, this information will be displayed in columns.

Search Results Options				
View	Column Order	Editable	Sort	Order
Visible	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1 ▲
Hidden ▼		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	2 ▼
Hidden ▼		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4 ▲
Visible ▼	2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	3 ▼
Hidden ▼ ⚙		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 ▲
Hidden ▼ ⚙		<input type="checkbox"/>	<input type="checkbox"/>	



Note:

Click on any of the **Gear** icon to **Show Time** for the date / time fields. For Project Status, **Gear** icon gives the configuration options like **Automatic** or **Label and Icon**, **Only Icon**, **Only Label**, and **Color Label**. For Pending Approvers, **Gear** icon allows you to configure **Show assignee details (original Group / Role)**.

Search Results

Drupa16_Library*

 Show All

<input type="button" value="View and Annotate"/> <input type="button" value="Compare in Viewer"/> <input type="button" value="Download"/> <input type="button" value="Add to Cart"/>					
Name ↑	Brand	Sample	Flavor	Project Modified	
GET SET_BOTTLE_BLUE.pdf	Get Set	Label	Coconut & Berry	May 17, 2016	
GET SET_BOTTLE_BLUE_NOCAD.pdf	Get Set	Label	Coconut & Berry	May 17, 2016	
GET SET_BOTTLE_GREEN.pdf	Get Set	Label	Apple+Lime Twist	May 17, 2016	
GET SET_BOTTLE_GREEN_NOCAD.pdf	Get Set	Label	Apple+Lime Twist	May 17, 2016	
GET SET_BOTTLE_ORANGE.pdf	Get Set	Label	Tropical Blend	May 17, 2016	
GET SET_BOTTLE_ORANGE_NOCAD.pdf	Get Set	Label	Tropical Blend	May 17, 2016	

In case of grid layout, this information will be displayed in each cell either below the thumbnail or to the right of the thumbnail.

Search Results

Clear this Form Save This Search Save Search Results

Project Name: Drupa16_Library* Due: [dropdown] Project Status: Show All [dropdown] [icon]

View and Annotate Compare in Viewer Download Add to Cart Sort by: Name [dropdown]

<p>Name: GET SET_BOTTLE_BLUE.pdf Brand: Get Set Sample: Label Flavor: Coconut & Berry Project Modified: May 17, 2016</p>	<p>Name: GET SET_BOTTLE_BLUE_NOCAD.pdf Brand: Get Set Sample: Label Flavor: Coconut & Berry Project Modified: May 17, 2016</p>	<p>Name: GET SET_BOTTLE_GREEN.pdf Brand: Get Set Sample: Label Flavor: Apple+Lime Twist Project Modified: May 17, 2016</p>
<p>Name: GET SET_BOTTLE_GREEN_NOCAD.pdf Brand: Get Set Sample: Label Flavor: Apple+Lime Twist Project Modified: May 17, 2016</p>	<p>Name: GET SET_BOTTLE_ORANGE.pdf Brand: Get Set Sample: Label Flavor: Tropical Blend Project Modified: May 17, 2016</p>	<p>Name: GET SET_BOTTLE_ORANGE_NOCAD.pdf Brand: Get Set Sample: Label Flavor: Tropical Blend Project Modified: May 17, 2016</p>
<p>Name: GET SET_WRAPPER_BLUE_NOCAD.pdf Brand: Get Set Sample: Label Flavor: [blank] Project Modified: May 18, 2016</p>	<p>Name: GET SET_WRAPPER_GREEN_NOCAD.pdf Brand: Get Set Sample: Label Flavor: [blank] Project Modified: May 18, 2016</p>	<p>Name: GET SET_WRAPPER_PURPLE_NOCAD.pdf Brand: Get Set Sample: Label Flavor: [blank] Project Modified: May 18, 2016</p>
<p>Name: GET+SET_WRAPPER_BLUE.ai Brand: Get Set Sample: Energy Bar Flavor: [blank] Project Modified: May 18, 2016</p>	<p>Name: GET+SET_WRAPPER_PURPLE.ai Brand: Get Set Sample: Energy Bar Flavor: Berry Mix Project Modified: May 18, 2016</p>	<p>Name: LUMI_PLUS_CARTON_BLUE.pdf Brand: Lumi + Sample: Sports Watch Flavor: Blue Project Modified: May 9, 2016</p>

In case of card layout, the information will be displayed on the back of the card, which can be viewed on clicking the card.

Search Results

Clear this Form Save This Search Save Search Results

Project Name: Drupa16_Library* Due: [dropdown] Project Status: Show All [dropdown] [icon]

View and Annotate Compare in Viewer Download Add to Cart Sort by: Name [dropdown]

<p>Name: GET SET_BOTTLE_BLUE.pdf Brand: Get Set Sample: Label Flavor: Coconut & Berry Project Modified: May 17, 2016</p>	<p>Name: GET SET_BOTTLE_BLUE_NOCAD.pdf Brand: Get Set Sample: Label Flavor: Coconut & Berry Project Modified: May 17, 2016</p>	<p>Name: GET SET_BOTTLE_GREEN.pdf Brand: Get Set Sample: Label Flavor: Apple+Lime Twist Project Modified: May 17, 2016</p>	<p>Name: GET SET_BOTTLE_ORANGE.pdf Brand: Get Set Sample: Label Flavor: Tropical Blend Project Modified: May 17, 2016</p>	<p>Name: GET SET_WRAPPER_BLUE_NOCAD.pdf Brand: Get Set Sample: Label Flavor: [blank] Project Modified: May 18, 2016</p>	<p>Name: GET SET_WRAPPER_GREEN_NOCAD.pdf Brand: Get Set Sample: Label Flavor: [blank] Project Modified: May 18, 2016</p>	<p>Name: GET SET_WRAPPER_PURPLE_NOCAD.pdf Brand: Get Set Sample: Label Flavor: [blank] Project Modified: May 18, 2016</p>	<p>Name: GET+SET_WRAPPER_BLUE.ai Brand: Get Set Sample: Energy Bar Flavor: [blank] Project Modified: May 18, 2016</p>	<p>Name: GET+SET_WRAPPER_PURPLE.ai Brand: Get Set Sample: Energy Bar Flavor: Berry Mix Project Modified: May 18, 2016</p>	<p>Name: LUMI_PLUS_CARTON_BLUE.pdf Brand: Lumi + Sample: Sports Watch Flavor: Blue Project Modified: May 9, 2016</p>
--	--	--	---	---	--	---	---	---	--

Link Visibility of Available filters and Columns

In the **Result layout options** page, **Link visibility of Available filters and columns** option is available. When this option is enabled, and both the design panel item and the column are set up as being **Available** for a certain field, making one of them visible will make the other one visible as well. Hiding the field in design panel or column will cause both of them to be hidden. When a column is configured as visible or hidden instead of available, showing or hiding a filter in the design panel from the search results page will not affect the columns shown.



Note:

In List view, a + icon appears on the right side of the table.

In Grid and Card view, a "More..." link is shown to add or remove information.

7.2.7. Set Attribute Value on a Search Result

The administrator can set the attribute columns to be editable when you run a search. By this, the user can then select a number of projects or documents (depending on the type of search).

The administrator needs to determine what columns can be edited. This is done in the Search definition panel.

Fill in one or more fields. Prefer less fields? Try [Keyword Search](#).

Search for:

Use Advanced Search Characters [?](#) **Search Results Options**

Search Panel Design Enable SmartNames [?](#)

	View(List)	Column Order	Editable	Sort	Order
Document Name <input type="text" value="get set"/>	<input checked="" type="checkbox"/>	<input type="text" value="1"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="1"/>
Version Author <input type="text"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	
Author's Location <input type="text"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	
Description <input type="text"/>	<input checked="" type="checkbox"/>	<input type="text" value="2"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Modified <input type="text"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	
Attributes...					
eskoBrand	<input checked="" type="checkbox"/>	<input type="text" value="4"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Product	<input checked="" type="checkbox"/>	<input type="text" value="5"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Approval Status <input type="text"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	
Revision <input type="text" value="Latest Revision"/> Revision Letter: <input type="text"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	
Characteristics...					
Project Name <input type="text"/>	<input checked="" type="checkbox"/>	<input type="text" value="3"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Show Additional Project Search Criteria

Search Clear this Form Save this Search Show Result Layout Options

In the above example, the administrator has selected **Trademark** and **Brand** attributes to be editable. When you save and run the search, the attribute columns which are set editable will appear with a pencil icon.

Q View and Annotate		Compare in Viewer	Download	Add to Cart	Set Attribute (eskoBrand)	Set Attribute (Product)
Name ↑	Description	Project		eskoBrand	Product	
<input type="checkbox"/>	CHILI-DA-DC GET SET demo for Drupa 2016 TOTA.mov	GET SET MULTIVITS variants				
<input type="checkbox"/>	GET SET - BOTTLE_ORANGE.ai	Alpro Demo				
<input type="checkbox"/>	GET SET - FRIDGE PACK.ai	Alpro Demo				
<input type="checkbox"/>	GET SET - FRIDGE PACK_WOTA.ai	WOTA_Upgrade_Movies_ATC_16				
<input type="checkbox"/>	GET SET - FRIDGE PACK_WOTA_Norm.pdf	WOTA_Upgrade_Movies_ATC_16				
<input type="checkbox"/>	GET SET - FRIDGE PACK_WOTA_std.pdf	WOTA_Upgrade_Movies_ATC_16				
<input type="checkbox"/>	Get Set.xml	CHST Demo				
<input type="checkbox"/>	GET SET_BOTTLE_2LABELS.A3D	Collection of ArtiosCAD assets that will be u (...)	drupa 2016 ArtiosCAD assets			
<input type="checkbox"/>	GET SET_BOTTLE_2LABELS.dae	drupa 2016 ArtiosCAD assets				
<input type="checkbox"/>	GET SET_BOTTLE_BLUE Briefing.docx	Briefing_ccc (01)				Energy Drink
<input type="checkbox"/>	GET SET_BOTTLE_BLUE Briefing.docx	Drupa16_BO Library				Energy Drink
<input type="checkbox"/>	GET SET_BOTTLE_BLUE Briefing.docx	Briefing_German (01)				Energy Drink
<input type="checkbox"/>	GET SET_BOTTLE_BLUE Briefing.docx	Briefing_MGEskoWorld (01)				Energy Drink
<input type="checkbox"/>	GET SET_BOTTLE_BLUE Briefing.docx	Briefing_Test PCM 27 june (01)				Energy Drink
<input type="checkbox"/>	GET SET_BOTTLE_BLUE Briefing.docx	Briefing_French (01)				Energy Drink
<input type="checkbox"/>	GET SET_BOTTLE_BLUE Briefing.docx	Briefing_KDCR test (01)				Energy Drink

Select a number of projects or documents and click on the Edit button. A dialog box appears asking for a value. These values adapt to the type of the attribute. When the value is provided and **Start** is clicked, you will see feedback about the progress and success of the operation.

Set Attribute
✕

Set eskoBrand to

Advanced

Start
Close

Status	Document	Comment
	CHILI-DA-DC GET SET demo for Drupa 2016 TOTA.mov	
	GET SET - BOTTLE_ORANGE.ai	
	GET SET - FRIDGE PACK.ai	

Start
Close



Note: When the attribute could not be set on a project or document, the feedback shows a failure icon and gives the reason (No permission to set attribute, project is non-active, etc).

By clicking on **Advanced**, the dialog changes to accept different values for each project or document.

Set Attribute ✕

Set eskoBrand to
Simple

Status	Document	eskoBrand	Comment
	CHILI-DA-DC GET SET demo for Drupa 2016 TOTA.mov	<input type="text"/>	
	GET SET - BOTTLE_ORANGE.ai	<input type="text"/>	
	GET SET - FRIDGE PACK.ai	<input type="text"/>	



Note: Here, failure happens per item. So when selecting 20 items and the first fails, the rest is still attempted.

7.2.8. 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 \uparrow / \downarrow 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 \uparrow 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 \downarrow .
- Down arrow \downarrow indicates that results are sorted on this field in descending order. To reverse the order, click \uparrow .

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.

Project Name ▼

- Name
- Reversed Name
- Project Name
- Reversed Project Name
- Description
- Reversed Description
- Project Manager
- Reversed Project Manager
- Modified
- Reversed Modified
- Due Date
- Reversed Due Date
- Project Status
- Reversed Project Status

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.

7.2.9. Pinning of Table Layout Columns in Search Results

For the Search Results shown in the list layout, columns can be pinned to the left or right enhancing data visibility while scrolling through large volumes of data. To know more, see [Allow Pinning Columns for Table Layout](#).

7.2.10. Task and Approval Search

In the **Tasks and Approvals** search you can

- Configure a search for **Tasks and / or Approvals** by choosing whether you want to search **All Approvals** or **All Manual Tasks** or **All Workflow Tasks** from the **Type** drop down. You can also choose any of the manual tasks or workflow tasks from the drop down or a combination of all the above.
- search for **Task Description** or **Task Type Description** in their respective fields. There is also an option to search on the **Status** of the Approvals or Tasks or a combination using multi-select.
- search for **Task Created** or **Task Estimated** or **Task Created By** or Approvals by **Approval Master** or **Stage Approval Status** or **Final Approval Status**.
- Search on any **Specification**. Select any of the Specification from the drop-down to refine your search.
- Filter the Specifications based on a Task Type. To filter, select a **Task Type** and enable **Filter task specifications by selected Task Type** option.
- search tasks based on the document uploaded within the tasks or search for the document to approve for approvals.

Search for Tasks and Approvals ?

Fill in one or more fields. Prefer less fields? Try [Keyword Search](#).

		Search Results Options			
		View	Column Order	Sort	Order
<input type="checkbox"/> Use Advanced Search Characters ?	<input type="checkbox"/> Search Panel Design				
<input type="checkbox"/> Enable SmartNames ?					
Name	<input type="text"/>	<input checked="" type="checkbox"/>	1	<input checked="" type="checkbox"/>	1 ▲
Task Description	<input type="text"/>	<input type="checkbox"/>		<input type="checkbox"/>	
Type	<input type="text" value="All Approvals X"/> <input type="text" value="*Assign all roles to Project Manager Soft Points v3.1 X"/>	<input type="checkbox"/>		<input type="checkbox"/>	
Task Type Description	<input type="text"/>	<input type="checkbox"/>		<input type="checkbox"/>	
Status	<input type="text" value="All Not Started X"/>	<input checked="" type="checkbox"/>	2	<input type="checkbox"/>	
Task Created	<input type="text"/>	<input type="checkbox"/>		<input type="checkbox"/>	
Started	<input type="text"/>	<input checked="" type="checkbox"/>	3	<input type="checkbox"/>	
Modified	<input type="text"/>	<input type="checkbox"/>		<input type="checkbox"/>	
Due	<input type="text"/>	<input checked="" type="checkbox"/>	4	<input type="checkbox"/>	
Completed	<input type="text"/>	<input type="checkbox"/>		<input type="checkbox"/>	
Task Estimated	<input type="text"/>	<input type="checkbox"/>		<input type="checkbox"/>	
Task Created by	<input type="text"/>	<input checked="" type="checkbox"/>	7	<input type="checkbox"/>	
Completed by	<input type="text"/>	<input type="checkbox"/>		<input type="checkbox"/>	
Duration	= <input type="text"/> +/- <input type="text"/> days	<input type="checkbox"/>		<input type="checkbox"/>	
Time Left	= <input type="text"/> +/- <input type="text"/> days	<input type="checkbox"/>		<input type="checkbox"/>	
Assigned to	<input type="text"/>	<input checked="" type="checkbox"/>	5	<input type="checkbox"/>	
Assignee's Location	<input type="text"/>	<input type="checkbox"/>		<input type="checkbox"/>	
Approval Master	<input type="text"/>	<input type="checkbox"/>		<input type="checkbox"/>	
Keywords	<input type="text"/>				
Specifications...					
Document(s)	<input type="text"/>	<input type="checkbox"/>		<input type="checkbox"/>	
Parents (Document Reference) of	Matches <input type="text"/>				
Stage Name	<input type="text"/>	<input type="checkbox"/>		<input type="checkbox"/>	
Stage Approval Status	<input type="text"/>	<input type="checkbox"/>		<input type="checkbox"/>	
Final Approval Status	<input type="text"/>	<input type="checkbox"/>		<input type="checkbox"/>	
Comment/Condition	<input type="text"/>	<input type="checkbox"/>		<input type="checkbox"/>	
Reason(s) for Rejection	Default <input type="text"/>	<input type="checkbox"/>		<input type="checkbox"/>	
Project Name	<input type="text"/>	<input checked="" type="checkbox"/>	6	<input type="checkbox"/>	

How to find the duration taken and time left for Tasks and Approvals

You can search to find the duration taken for Tasks (both Manual and Workflow) and also for Approvals. You can choose/ filter the search with the following fields

- **Started:** Start date of the Task or Approval
- **Due:** Due date of the Task or Approval

- **Completed:** date the task or approval was completed
- **Duration:** the time (duration) between the start date and the completed date. When the task is still ongoing, it is the time between the start date and the current time.
- **Time Left:** the time between the due and the completed. When the task or approval is yet to be completed, this is the time between the due date and the completion date.

When the time left is a positive number, then the due date is not reached yet. If it the search yields time left as a negative number, then the task or the approval is overdue.



Note:

1. **Both Duration** and the **Time Left** do not consider weekends(Saturday and Sunday). You can also switch the weekend days to Friday and Saturday.
2. You can configure to get either the time in days or in hours.

Reporting on Approvals

The main use case for approval search is reporting. In the search, you can find all the pending, and also all completed approvals. Approvals can be searched for each Approver in an approval stage.

For example, if a user and a group have to approve then two rows are displayed, each with details about who (of the group) completed the approval, and whether it was rejected or approved, and the duration. This is very useful information for reporting purposes.

7.3. Projects Calendar View

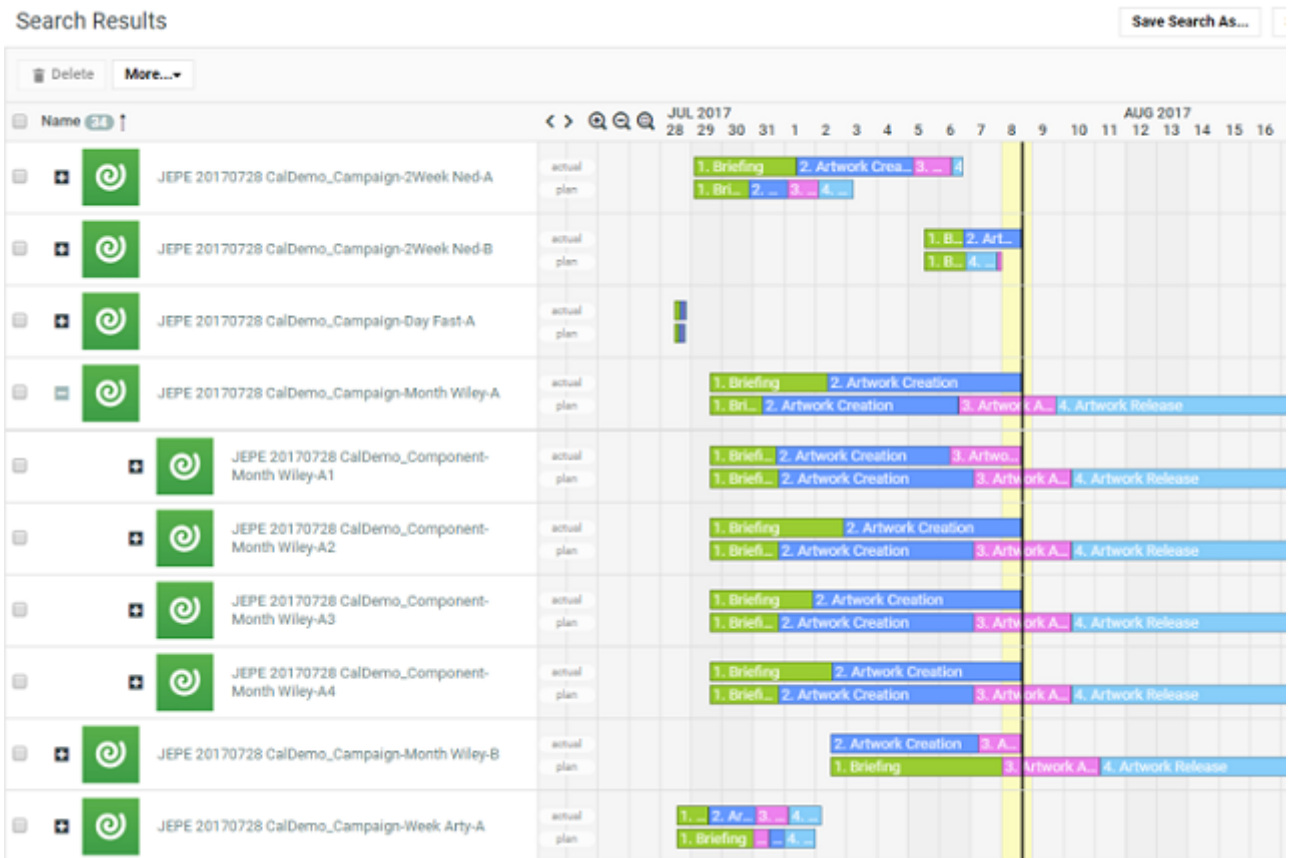
7.3.1. What is Project Calendar View?

The Calendar View is another feature of project search. Status changes in the project history are displayed as project stages in a calendar. The picture below shows an example.

This creates a quick dashboard overview of your projects and helps you to prioritise which projects need your attention.

Why should you use Project Calendar view

- To show the Actual Vs Planned status of the project
- View the Project status of the child projects as a drill down
- Due dates are set up as attributes which you can configure at the Project page



To view the project feedback, project status history option must be enabled in **Admin > Preferences > Notifications > Include in Project History**. Enable **Project Status change**. Click **Save**.



Note:

1. Calendar View is enabled for Projects in List Mode only
2. To be able to use some of the calendar view functionality, you need the **Lifecycle management license**.

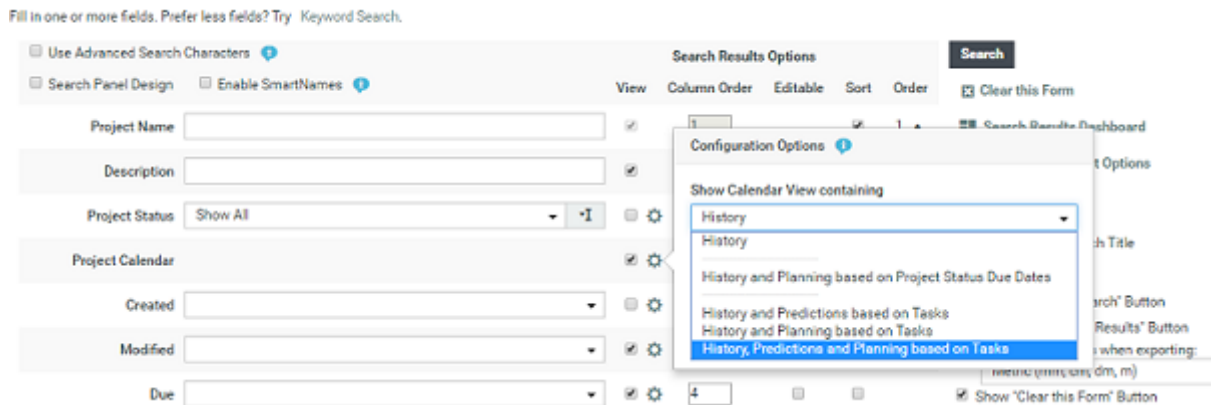
You can view the status of the projects along with the labels in the search results. This view also shows the planned vs actual status of the project status.

7.3.2. How Can you Set Up a Search with the Calendar View?

1. Go to **Search > Projects**.
2. Select the **View** check box **Project Calendar** to view in the Search results page.
3. Click on the gear icon to open the Configuration options for the Project Calendar. You can configure the **Project Calendar** options to display your project status in a dynamic way. **Configuration options** allow you to choose multiple options, which can provide information on the current status of your projects and predict the future state. You can set the status based on the task completions or on the date of the project statuses. Read more on [Set up a Search with a Project Calendar](#) on page 172.

4. Specify the width (in pixels) for the calendar column (minimum is 200px but you get better results with 500px). Decide whether to also show the project status icon (which will then appear at the left of the calendar).
5. Click **Search** to view the **Project Calendar**.

Note that the calendar is displayed in the column defined for the project status. By changing the column order for this column, you will move the calendar in the search result. In most cases the best result is obtained, if the calendar is the last column and if there are not too many preceding columns.



Set up a Search with a Project Calendar

To set up a Saved search with Project Calendar option, in the search page.

1. Click on the gear icon in the **Project Calendar** row to open **Configuration Options**
2. Choose the options from **Show Calendar View Containing** drop down options.

Options in the drop down are

- **History**: shows past statuses (history)
- **History and Planning based on Project Status Due Dates**: shows past statuses, planning based on the milestones that are linked to the project status and the originally planned timeline (in gray)
- **History and Predictions based on Tasks** shows past statuses, predictions based on the tasks
- **History and Planning based on Tasks** shows past statuses, due dates based on the tasks or the lead time depending on which one is the latest.
- **History, Predictions and Planning based on Tasks** shows past statuses, due dates based on the tasks or lead time and the originally planned time line (in gray).



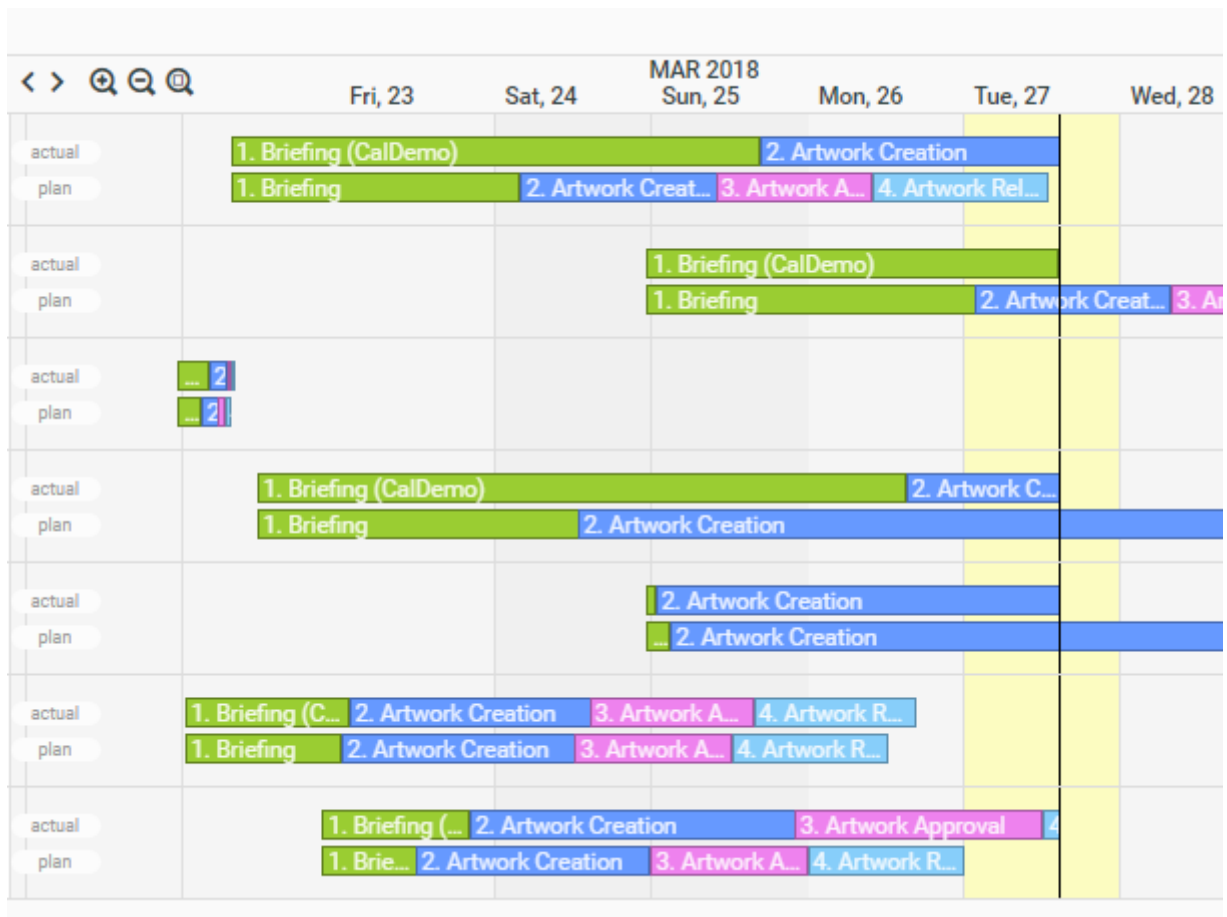
Note: The last three options are available with the task management license only.

3. You can select the **Apply Forward Planning to calculate Predictions** option, when you choose the **History Predictions and Planning based on Tasks** or **History Predictions based on Tasks**. In such a case, forward planning is done based on the start date and the next due dates are calculated based on lead times.

When this option is not chosen, then backward planning is done where the due date is considered and the other due dates are calculated backwards based on lead times given.

4. Select **Show Project Due Date** to display the project due date in the search results.
5. Specify the **Calendar Column Width** in the box for the calendar column (minimum is 200px but you get better results with 500px).
6. **Labels Shown on Project Status Bars** gives options to display the labels in the Project Calendar view. You can choose the labels to display **Label shown on Project Status Bars** from the drop down list as one of the below:
 - Number of Project Status
 - Number in order of Appearance
 - No label or
 - Status Name configured
7. Select **Search** to view the search results.

In the **Search Results** page, Project Statuses of the project is shown over timelines.



The timeline can contain 2 bars:

- **Actual:** Displays the actual state of the project now.

For values in the past this bar will always be there and will show the Project Status History.

For values in the future it can also show predictions based on tasks. Predictions based on tasks show the due dates of the tasks or the lead time depending on which one is the latest or which one is first when using forward planning. When calculating the date with lead times, week days are taken into account.

- **Plan:** Shows the planned project status of this project.

Planning based on tasks shows the due dates of tasks that have an effect on the project status.

Planning based on milestones shows the values of date attributes in the project that are linked to the project statuses.

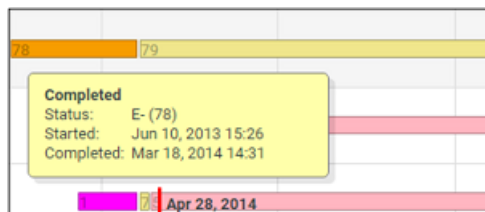
7.3.3. Using the Basic Calendar View

In the basic **Show Calendar View** only 1 line is displayed and it stops at the vertical 'today' line.

- The vertical black line is always on 'today'. So the current status of the project can be seen from the color where the black line cuts through the status line.



- You can zoom the calendar view with the + and - buttons or with the scroll wheel. This changes the time scale from months to weeks to days or reversely.
- You can pan the calendar view by using the arrows (just before the + and - icons) or by dragging also.
- Clicking the magnifier icon resets the view.
- The colors are as defined in the project status setup. (Admin/Project Management/Project Statuses).
- The number displayed corresponds to the project status index (same statuses have the same number in all projects).
- The small red vertical line indicates the project due date (if set).
- The color changes on the date where the project actually changed status.
- You can hover over any of the status blocks to get more information (name of the status, start and end date, status type, calculated delay).



7.3.4. Using the Calendar View with Predictions



Note: Calendar view with prediction is only available if the user has the task management license.

In order to use this feature, your projects must have Tasks configured to set Project statuses.

- The first part of the project line (till today) works as in the basic view.
- The second part (after today) shows a prediction of the project based on the project tasks (rescheduled based on their current status). The estimated due date is based on the task predecessors, task due date and lead time.
- A lighter version of the project status color is used to draw this part of the bar. For each project status, it will look for a task completing this project status. Then it will determine from predecessor logic which tasks need to be completed to complete this task, and how much time this will take in total. For not started statuses, this will be the length of the block. For started statuses, it will first subtract what is already consumed and only add the remainder (potentially nothing) to the block. This way the time line is extended.

7.3.5. Using the Calendar View with Planning

When using this view, you will see 2 lines for each project, a colored line and a grey line.

- The colored line behaves identical to the 'calendar view with predictions'.
- This grey line shows the planned project time line based on the project tasks. For each project status, it will look for a task which completes this project status and for this task, it will take the due date. This will determine the end date for the grey block of this project status (the begin date is simply the end date of the previous status).

Notes:

- Subtasks are left out of the calculation.
- In case multiple tasks are set the same project status, one (merged) stage is shown only. This situation is best avoided.
- In case no project status history is available, nothing is shown.
- 'Completed' Project Statuses are not shown in the calendar view. When a project has been put to completed, and was started again later, there will be a gap in the history bar.

7.3.6. Project Status History Settings

In order to be able to show the project feedback, the project status history option must be turned on.

When loading the page, the following tests are made:

- If the global settings for the 'Project status change' include in project history is turned off, a message box with a clear message is shown.
- If project specific settings for the 'Project status change' include in project history is turned off for some projects (and the global settings is on), a warning icon with a clear tooltip message is shown next to the project name.

7.4. 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	<p>The time between the start date and the completed date. Only active statuses are considered to calculate the duration of the project.</p> <p>When the project is not completed, the duration is the time between the start date and the current date/time.</p>
Time Left	<p>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.</p> <p>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.</p> <p>In this case, the time left is a positive number, indicating that there is still time remaining before we reach the due date.</p> <p>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.</p>

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.

Project Status Started

Prepress Creation Started

Prepress Approval Started

Select Project Statuses that you want to search on

You can filter each selected Project Statuses based on the duration criteria

Project Status Duration

Prepress Creation Duration days

Prepress Approval Duration days

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

7.5. Asset Browser

Asset browser is a user-friendly feature to search and find assets in a large collection of WebCenter assets. You can customize the Asset Browser into the WebCenter Menu for easy access. In addition, you can create more than one Asset Browsers in the same WebCenter with different names for different sets of users for easy browsing.

For example, a project manager can benefit from an Asset Browser which will collect Project Templates and a printer will benefit from one that points to finished Projects which are ready to be printed.

You can create a menu item which can be named "Assets" or "Repository" or simply "Search" or "Browse". This menu will be linked to a highly configured **Global Saved Search** which will function as your **Asset Browser**. One Asset Browser can be linked to one **Attribute Category** as in saved searches. However, this **Attribute Category** can have multiple **Cascading Dropdowns** resulting in multiple independent trees in the same asset browser. Read more in about Saving Searches as Asset Browser in [Setting Up an Asset Browser](#) on page 180.

A customized graphical Asset Browser will help you to visually browse through projects and graphical assets previously stored in WebCenter. To achieve this, you need to classify assets using custom attributes with graphical icons(Attribute Value Images). Read more about graphical labeling of attributes in [Setting Up a Graphical Asset Browser](#) on page 185

You can set up a graphical browser or a tree browser and both. Technically, the Asset Browser has all the features of Saved searches which is enhanced with Tree and Graphical browsing through Cascading Attributes. Read more about Cascading Attributes in [Cascading Dropdowns](#) on page 335

7.5.1. What You Need to Know about Asset Browsing

Concepts Used in this Section

Concept	Definition
Asset	Any digital file including pictures, graphics (PDF, Illustrator, ...) and Office documents stored in the WebCenter. For example a piece of packaging design that is uploaded to WebCenter.
Asset Browser	A user-friendly way to find assets in a large repository. Read more in Asset Browser on page 178
Repository	A part of WebCenter which is considered to contain assets. WebCenter as a whole is a repository but by filtering you can pin-point to the specific section of the repository. You can achieve this by filtering on: <ul style="list-style-type: none"> certain document types

Concept	Definition
	<ul style="list-style-type: none"> range of projects based on project characteristics or naming conventions both documents and project range.
Saved Search	Highly configurable Saved Searches from WebCenter 12 onwards. Read more in the following sections from the WebCenter User Guide. Advanced Searching on page 149
Tree browser	This tree is built based on your Cascading Attributes which you can put in the left panel to browse through the assets.
Search Parameter Panel	A panel appearing at the top of the search results of Asset Browser which you can use to further refine your search.

Organizing Assets in WebCenter

You can use the Asset Browser to its full extent by organizing Assets in WebCenter. You can upload the assets in bulk during the early stage of the WebCenter deployment which will grow with new designs and documents. For conducting effective search via an asset browser, you need to specify **Attributes** (metadata) for your assets while uploading them to WebCenter. You need to:

- define **Attributes**.
- assign those attributes to **Attribute Categories**
- assign the right attributes from this **Attribute Category** to the assets(documents) while uploading.

From WebCenter 12 onwards, you can assign these Attribute categories automatically to uploaded documents. This is done by:

- using default Attribute Categories using **Document Types**.
- using document templates with **Attribute categories**

Read more about this in [Autonaming Projects / Documents](#) on page 471

When you store assets in specific projects you should ideally:

- have at least one project template created for projects specifically meant to store assets. This helps in setting up **Security, Roles, Autonames** and default **Attribute Categories** which will aid in better organization.
- not store too many documents in one WebCenter Project. Since Projects only have one level of folders, project browsing gets slow when there are too many documents or too many folders in the project. Asset Browsing will be easier when they are stored with pre-determined metadata in a set of projects.



Note: You do not have to specifically create “asset projects”. It is possible to design an Asset Browser for entire WebCenter site.

7.5.2. Creating Asset Browsers

Setting Up an Asset Browser

1. Save a Search using your own search settings.

Asset Browser is essentially a highly configured Saved Document Search. Therefore, the features of Saved Searches are available in the Asset Browser. You can:

- Set the **Saved search** to be **Global** or **Personal** as an administrator.



Note: You should use the **Global** setting for Asset Browsers. **Personal** searches does not serve the Asset Browsing function since they can only be used by admins who create them.

- Filter on almost any property or attribute of documents in advanced ways.
- Define a drill-down (parameter) panel to appear at the top of the search results.
- Assign the saved search to a menu item.
- Assign which document properties or attributes will be displayed in the search results and in what sequence.
- Set the sorting order of the results.
- Set a preference on how many search results will appear per search result page.
- Define what operations can be done in the saved search results.
- Define layout settings of the search results (grid versus list, number of results, thumbnails or no thumbnails).

Read more in the following sections from the WebCenter User Guide.

[Advanced Searching](#) on page 149

[To Save a Search](#)

[To Search Content](#)

2. Add Cascading Attributes to the Saved Search. You need to follow the steps below.

- a) Log in as an administrator
- b) Create Cascading Attributes. Read more in [Lists](#) on page 335. Create an attribute category with these Cascading attributes with which you want to customize browsing and displaying.
- c) Go to **Search > Saved Searches**. Choose and edit the **Saved Search** from the previous step. If you did not save the Search, go to **Search > Documents** and restore the previous settings (within the same session) or start over.
- d) Click on the **Attributes** link. Add the Attributes from the Attribute Category that you want to assign to this search.



Note: Only the Cascading attributes from the **Attribute Category** are available for tree browsing in Asset Browser.



Notice: Avoid Using the same **Attribute** in different **lists** used in the same Asset Browser as it leads to unpredictable results.

- e) Enable **Search Panel Design**. In the **Search Panel Design**, you should set these attributes to be **Visible/Available**



Tip: The tree view in the Asset Browser requires the **attributes** to be set to **Visible** or **Available** in the **Search Panel Design**.

You will have a top panel with Visible/Available Attributes to refine the search. Selecting a value for one Attribute will limit the values for other Attributes.



Note: If the Attributes appear but not as dropdowns, check whether the **Attribute Category** is correctly configured. Assign it to a document to test whether the cascading effect works.

3. Create a Browsing Tree using Cascading Dropdowns.

A cascading attribute can be shown as a tree or as a set of mutually dependant attribute dropdowns where choice of one from a dropdown limits the choice available in other dropdowns.

Attributes in Category BO_Item

Meta Data

Category Beverage

Brand Get Set

Product Energy Drink

Element Type
Advanced...
Energy Drink

File Type
Values requiring changes to other selections:
Energy Bar
Energy Gel
Hand Cream
Perfume
Shower Gel
Sports Watch
Vitamins

Save **Export to JDF** **Import from**

Search Results

Current Selection: BO_Master Data - Beverage - Get Set - Energy Drink

File Type 3D Mockup Market

Q View and Annotate Compare in Viewer Download Add to Cart More...

GET SET_BOTTLE_BL... VIEW_GET_SET_BOTT... VIEW_GET_SET_BOTT...
VIEW_GET_SET_BOTT... VIEW_GET_SET_BOTT... VIEW_GET_SET_POUC...

Found: 8 Items. Page 1 of 1

You can choose from any of these two options or both views together. Read below some remarks about these options.

- The tree view takes more space and loads slower
 - The tree view allows multiple selection
 - The tree view can be restricted using the **depth** parameter

 - Dropdowns in the top panel can also be restricted
 - The tree view can be shown in a graphic way (using thumbnails). This takes even more space on the screen but creates a beautiful user experience provided you have good image representations.
- a) Go to **Search > Saved Searches**. Choose and edit the **Saved Search** from Step 1. If you did not save the Search, go to **Search > Documents** and restore the previous settings (within the same session) or start with a new Search.
 - b) Click on **Show Result Layout Options**. This opens a panel with additional options.

Document operations:

- View
- Open in ArtiosCAD
- Download
- Define Attributes
- Approval Info
- Mail Link To
- Upload New Version
- More actions

Other display options:

- Show "Save this Search" Button
- Show "Save Search Results" Button
- Show "Hide Thumbnail" Button
- Show "Show as Grid/List/Cards" Button
- Show Labels in Grid/Card Layout
- Set Labels in Grid Layout in bold

Initial Results Display:

Advanced Functions:

- Allow Changing Attribute Category
- Custom Actions
- Show Search Button
- Show Cart
- Show Project Creation Link
- No Template Specified
- Fixed Template
-
- Template from Characteristics Path

Lists to be shown in left tree panel:

Type	Name	Depth	Height
<input checked="" type="checkbox"/> list	<input type="text" value="Demo_Sheet Brand"/>	<input type="text"/>	<input type="text" value="px"/>
<input checked="" type="checkbox"/> list	<input type="text" value="Demo_Sheet Packaging"/>	<input type="text"/>	<input type="text" value="px"/>
<input checked="" type="checkbox"/> list	<input type="text" value="Demo_Sheet Product"/>	<input type="text"/>	<input type="text" value="px"/>

Add List

Tree panel width: px

Image Area Style:

Allow Changing Image Area Style via Dropdown


c) Enter the list names that you have configured in the Listmanager project.



Note: You can add lists to the tree panel by clicking on **Add List** or remove them by clicking on the **-** icon. Use the arrows in the second column to move the lists up or down.

d) Set the properties for each list. These properties are applicable when a left tree panel is selected.

Depth	<p>If you leave it empty, all the columns from lists.xml will be available.</p> <p>If you need four columns out of five columns from your lists.xml, enter 4</p>
--------------	--

<p>Height</p>	<p>You can set a maximum height for the tree here.</p> <p>If you leave it empty, the tree will take as much space as it requires.</p> <p>If the tree height is bigger than your entry in this setting, a scroll bar will appear.</p> <div data-bbox="901 533 965 600" style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;">  <p>Note: You can enter 1000 pixels or less for the best user experience. However, it can vary depending on the size of the user monitor.</p> </div>
----------------------	---

e) Set the browsing style for Tree browsing and Image browsing by modifying the following fields.

<p>Tree panel width</p>	<p>Default Tree panel width is 300 pixels which you can increase or decrease depending on your requirements.</p>
<p>Image Area Style</p>	<p>For a browsing tree at the left hand side, choose Left panel only (no images)</p> <p>If you want to browse through an image panel at the top, choose Top panel only (no tree to the left)</p> <p>If you want both tree browsing and image browsing, choose Left panel and image panel</p>
<p>Allow Changing Image Area Style via Dropdown</p>	<p>If you want the user to change the browsing style, enable this option.</p>

4. Save/Run this search.

If you have save it as a **global saved search**, all WebCenter users can run this asset browser from their saved search lists or from the menu if you have customized a menu item for this Asset Browser.



Note:

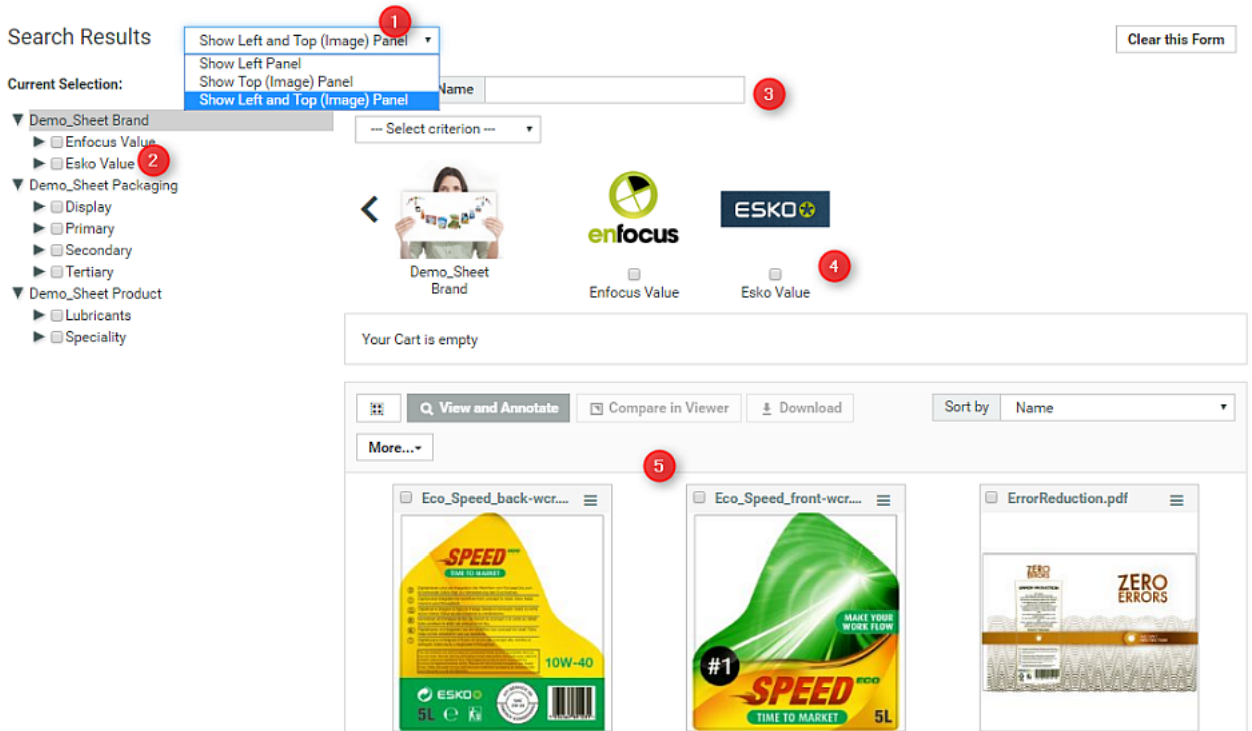
You can restrict access to the Asset Browser by:

- deleting **Saved Searches** item from the **Search** menu for the restricted Users.
- deleting the menu item assigned for the Asset Browser.

When you run the search, you will get a tree in the search results. This tree will have branches according to the columns in the lists (Cascading Attributes). You can see in the screenshot below:

- 1. The user can choose from three options. This is only available when you have enabled **Allow Changing Image Area Style via Dropdown**. See the explanation above.
 - **Show left Panel**
 - **Show Image Panel**

- **Show left and image(top) panel**
- 2. Tree Panel. This shows the information from the **lists**
- 3. Search Parameter Panel where you can refine your search using Attributes or document properties.
- 4. Image Panel
- 5. Search Results



The screenshot displays the Esko WebCenter interface. At the top left, a dropdown menu (1) is open, showing options: 'Show Left and Top (Image) Panel', 'Show Left Panel', 'Show Top (Image) Panel', and 'Show Left and Top (Image) Panel'. Below this, a 'Current Selection:' section shows a tree view (2) with categories like 'Demo_Sheet Brand', 'Demo_Sheet Packaging', and 'Demo_Sheet Product'. A search bar (3) is visible with a 'Name' field and a 'Select criterion' dropdown. The main content area (4) shows three image thumbnails: 'Demo_Sheet Brand', 'Enfocus Value', and 'Esko Value'. Below the images, a message states 'Your Cart is empty'. At the bottom, a 'More...' button (5) is visible above a grid of search results, including 'Eco_Speed_back-wcr...', 'Eco_Speed_front-wcr...', and 'ErrorReduction.pdf'. A 'Clear this Form' button is located in the top right corner.

Setting Up a Graphical Asset Browser

As already mentioned, the tree panel to the left can be replaced with a panel of images at the top. Alternatively, you can choose to have both at the same time which will give you synchronized results.

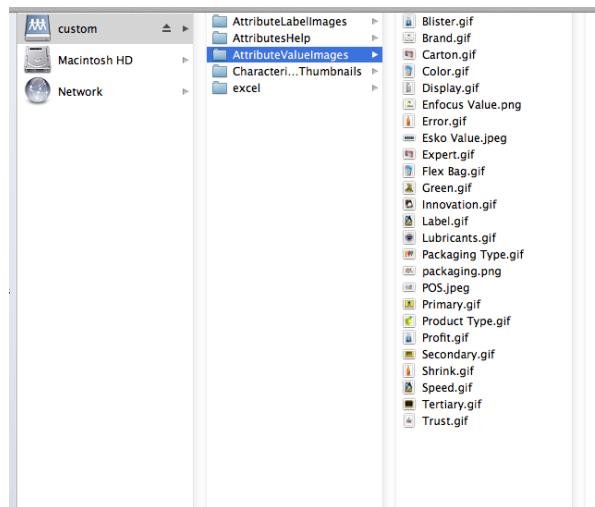
These images are a representation of the attributes and you can also configure an image label for an attribute.

1. Create images for each value of **Attributes** and **lists**.



Note:

- For the best user experience, use .jpg images. It does recognize .gif, .jpeg and .png.
- The name of the **Attribute** (or **lists**) and the image should be entirely the same including the case of the letters. Extensions should be specified in lower case.
- The images appear as 100x100 pixels. If you add images exactly of this size, best performance is assured. If the sizes vary, it will be adjusted to fit into 100x100 appearance. Therefore, the image appearance will vary depending on your browser's capacity to scale images.



2. Add these images to WebCenter\WebServer\tomcat\webapps\WebCenter_Inst\custom\AttributeValueImages.

If more than one WebCenter instance is used, you have to copy this setup to each instance.

AssetDemo Show Top (Image) Panel

Brand: Document Name: Sub Brand:

Packaging: Packaging Sub Type: Product Type:

Variant:

Search

Current Selection:

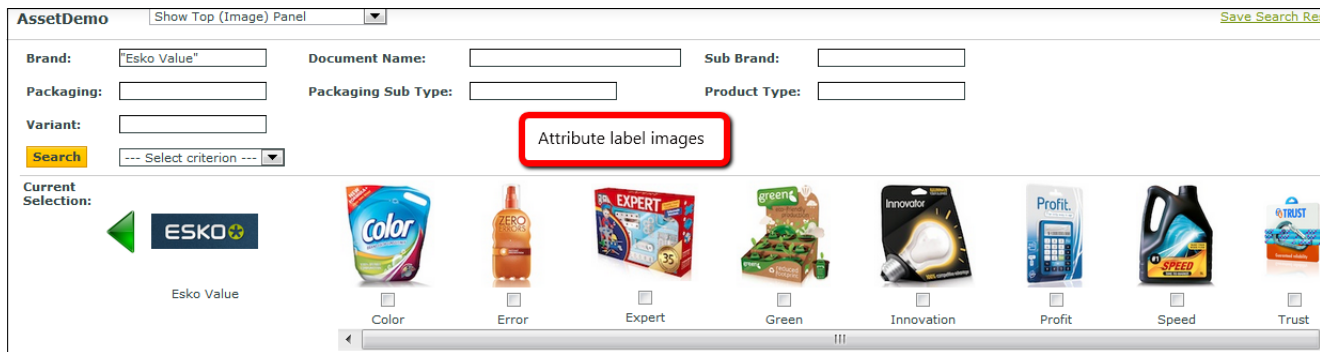
Brand

Packaging

Product

These images correspond to the lists (cascading dropdown lists).

Your cart is empty



Note:

Make sure that you have an image for each list used. In the above example screenshots above, this is Brand.jpg, Packaging.jpg and no image attached with Product.

Use a .jpg for the lists since list images will be frequently used. As mentioned earlier, WebCenter is optimized for .jpg. When some attribute value has no fitting image, the list image will be shown instead.

Removing the Search Button from the Asset Browser

If you keep the **Search** in the asset browser, for every search modification in the Asset Browser, you have to click it to refresh the results. You can remove this button from the Asset Browser to improve the user experience.

By removing the **Search** button, you can:

- save on screen space in the Asset Browser
- any change in the search criteria from the browsing tree or the search panel will update the results.

You can accomplish this by editing the Saved Search created for the Asset Browser:

1. Go to **Search > Saved Searches > Edit Search**
2. On the right hand side of the page, click on **Show Result Layout Options**
3. Disable the **Show Search Button** option.

Document operations:

- View
- Open in ArtiosCAD
- Download
- Define Attributes
- Approval Info
- Mail Link To
- Upload New Version
- More actions

Other display options:

- Show "Save this Search" Button
- Show "Save Search Results" Button
- Show "Hide Thumbnail" Button
- Show "Show as Grid/List/Cards" Button
- Show Labels in Grid/Card Layout
- Set Labels in Grid Layout in bold

Initial Results Display:

Advanced Functions:

- Allow Changing Attribute Category
- Custom Actions
- Show Search Button i
- Show Cart i
- Show Project Creation Link i
- No Template Specified
- Fixed Template
-
- Template from Characteristics Path

i Lists to be shown in left tree panel:

Type	Name	Depth	Height
<input checked="" type="checkbox"/> list	<input type="text" value="Demo_Sheet Brand"/>	<input type="text"/>	<input type="text" value="px"/>
<input checked="" type="checkbox"/> list	<input type="text" value="Demo_Sheet Packaging"/>	<input type="text"/>	<input type="text" value="px"/>
<input checked="" type="checkbox"/> list	<input type="text" value="Demo_Sheet Product"/>	<input type="text"/>	<input type="text" value="px"/>

Add List

Tree panel width: px

Image Area Style: i

- Allow Changing Image Area Style via Dropdown

7.5.3. Customizing the User Menu with the Asset Browser

Assigning a Menu Item for the Asset Browser

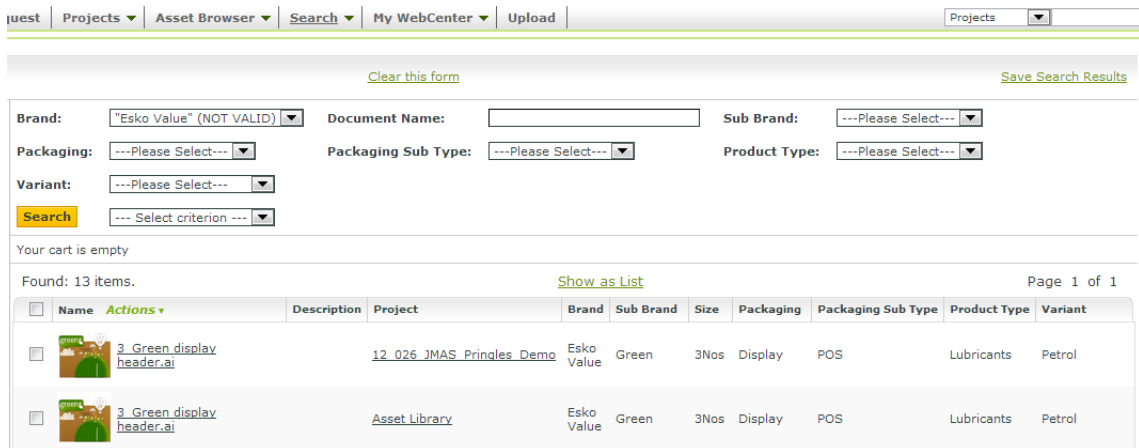
You can create and assign a **Menu** Item for easy access to your Asset Browser. The procedure is similar to assigning a menu item for **Saved Searches**. Read [Add Custom Menu Items](#) from WebCenter Customization Guide for details

1. Go to **Admin > Preferences > Menus**. Download the XML file or create a new XML file and add the following code under the NON_ADMIN.

```
<menuitem>
<name>AssetDemo</name>
<labeltag>Asset Browser</labeltag>
<url>dosavedsearch.jsp?searchName=AssetDemo</url>
</menuitem>
```

2. Assign the scope of this menu to the (set of) users or to a Company/Location. Read more in [Add Custom Menu Items](#)
3. Save this XML and upload as a new menu.

This results in the following Menu Item named **Asset Browser**. The search results are directly available by clicking on this item. The name of the page is the same as the name of the **Saved Search**. In this example, the page appears as AssetDemo instead of "Search Results"



Name	Description	Project	Brand	Sub Brand	Size	Packaging	Packaging Sub Type	Product Type	Variant
3 Green display header.ai		12_026 JMAS Pringles Demo	Esko Value	Green	3Nos	Display	POS	Lubricants	Petrol
3 Green display header.ai		Asset Library	Esko Value	Green	3Nos	Display	POS	Lubricants	Petrol

Assigning Submenus to Dedicated Asset Browsers

You can customize your Asset Browser further by creating submenus for different asset browsers with a more dedicated and simplified user interface. This will help you to navigate easily between the asset browsers(saved searches. You do this by adding a submenu to the asset browser's menu item which is explained in [Assigning a Menu Item for the Asset Browser](#) on page 188.

1. Set up dedicated Asset Browsers for your assets. These are **Saved Searches** called Brands and Packaging in this example.
2. Update the XML file with the similiar fragment as in the example below. You can see that there are submenus for the set of Asset Browsers created in the previous step.

```
<menuitem>
<name>Asset Browser</name>
<url>dosavedsearch.jsp?searchName=AssetDemo&amp;actionMenu=Asset Browser</url>
<labeltag>Assets</labeltag>
<menuitem>
<name>Brands</name>
<labeltag>Brands</labeltag>
<url>dosavedsearch.jsp?searchName=Brands&amp;actionMenu=Asset Browser</url>
</menuitem>
</menuitem>
```

```
<name>Packaging Types</name>
<labeltag>Packaging Types</labeltag>
<url>dosavedsearch.jsp?searchName=Packaging&amp;actionMenu=Asset Browser</url>
</menuitem>
</menuitem>
```


Note:

- This will result in submenu which folds out and permanent links on the top left below the main menu bar. The second one is caused by `&actionMenu=Asset Browser`.
- Check the spelling as every character is important.
- This code addition is not necessary if you use one menu item for a single Asset Browser alone. Example in [Assigning a Menu Item for the Asset Browser](#) on page 188.

3. Upload this XML to a new menu or update a previous menu in **Admin > Preferences > Menus**
4. Assign this menu to a set of **Users** or a **User**. You can also assign a menu item to a **Company/Location**. This versatility helps you to restrict the access to specific **Groups** and **Users**.

Clicking on **Brands** under **Assets** will bring you to the saved search called Brands. You can save this with simpler settings or with a graphical asset browser according to your preference. It is possible to give different names to the **Saved Searches** and the submenu items.

7.5.4. Advanced Options in Asset Browser

Configuring the Cart in the Asset browser

You can configure the Cart in the Asset Browser which can 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. The Cart has to be configured by the administrator while determining the settings of the Asset Browser (the **Saved Search**).

1. In the Search Settings, click on **Show Result Layout Options** which will open the **Advanced Functions**.
2. Enable **Show Cart**.

Advanced Functions:

- Allow Changing Attribute Category
- Allow sending Download Mail for Multiple Documents
- Custom Actions
- Show Search Button
- Show Cart
- Show Project Creation Link
- No Template Specified
- Fixed Template
- BO_Packaging
- Template from Characteristics Path

3. Save the search.

The next time you access the Asset Browser, the **Cart** will appear within a few seconds. You can now add your selections to the cart.

The screenshot shows the 'Search Results' page in the Asset Browser. On the left, there is a 'Current Selection' tree with categories like 'Demo_Sheet Brand', 'Demo_Sheet Paclaging', and 'Demo_Sheet Product'. The main area displays search results for 'Eco_Speed' and 'Final_Collar'. A 'Currently in your Cart' section is highlighted with a red box, showing a list of items with their respective thumbnails and titles. Above the cart, there are buttons for 'Create Project from Cart', 'Remove from Cart', and 'Clear Cart'. Below the cart, there are navigation options like 'View and Annotate', 'Compare in Viewer', 'Download', 'Add to Cart', and 'Create Project from Selected'. The bottom of the page shows a grid of document thumbnails, including product labels and technical documents.




Read more about using the Cart in [Using the Cart from the Asset Browser](#) .

Configure Project Creation 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 project template for these recurring elements. Asset Browser will help you to browse for these templates and existing packaging projects while setting up new Projects. You can either collect the relevant items to the Cart and start a new Project directly or start Project creation from the **action list** menu. Follow the steps below to configure this feature.



1. In the Search Settings, click on **Show Result Layout Options** which will open the **Advanced Functions**.
2. Enable **Show Project Creation Link**.

Advanced Functions:

- Allow Changing Attribute Category
- Allow sending Download Mail for Multiple Documents
- Custom Actions
- Show Search Button 
- Show Cart 
- Show Project Creation Link 
 - No Template Specified
 - Fixed Template
 - DEKE_test_this is a template
 - Template from Characteristics Path

This will add a link to the search results **action buttons (Create project from selected)** and to the Cart **CartCreate project from cart**.

3. You can choose the template for the project creation from Asset Browser. For this, enable the **Fixed Template** option and select the template from the dropdown list.

Option	Result
Fixed Template	Select the template from the dropdown list.
Template from Characteristics Path	You have to specify the path. For example, <code>projects\modificationTemplates</code> . <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;">  Note: Follow the correct spelling and letter case. </div> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;">  Note: Projects can have multiple characteristics. The same template can appear in multiple asset browsers together with other sets of templates. </div>
No Template Specified	This will result in the standard project creation user interface.

4. Save the search under the same name.

You can either use **Create Project from Selected** link or **Create Project from Cart** to create projects from your selected assets (either from the selection or from the Cart). This will lead to project creation user interface depending on the template choice made in the steps above. When creating the project, the selected assets will be copied to the new project.

Search Results Show Left and Top (Image) Panel Clear this Form

Current Selection:

- ▼ Demo_Sheet Brand
 - ▶ Enfocus Value
 - ▶ Esko Value
- ▼ Demo_Sheet Packaging
 - ▶ Display
 - ▶ Primary
 - ▶ Secondary
 - ▶ Tertiary
- ▼ Demo_Sheet Product
 - ▶ Lubricants
 - ▶ Speciality

Currently in your Cart + Create Project from Cart Remove from Cart Clear Cart

--	--	--	--	--

View and Annotate Compare in Viewer Download Add to Cart Create Project from Selected Sort by Name

7.5.5. Tips and Tricks



Tip:

In certain cases you might want to have your assets attached with different **Attribute Categories** to be shown in your Asset Browser. For instance, when you have graphical designs attached to one **Attribute Category** and photographs attached to another **Attribute Category**. If you want your Asset Browser to show these two types of assets, you can create a third **Attribute Category** combining these two **Attribute Categories**. You can create your Asset Browser attached with this **Attribute Category**. You can refine your Search Results from the Browsing Tree or using Search Panel.

It is a good practise to name this combined **Attribute Category** with the name of the Asset Browser for future reference. However, this is not mandatory.

Remarks

- You can use any quicker browsers like Google Chrome, Edge and Firefox on Windows PC and Safari or Firefox on Mac.
- If the same value for an **attribute** exists in different **Attribute Categories**, the image label will be the same in the Asset Browser. For example if you have attribute named "lemon flavor" for Brand A and Brand B, you cannot have two different images for Brand A and Brand B.
- You cannot search for empty **attributes**. If you are doing a complex search with multiple checkboxes from the browsing tree with one of them without a value, the Asset browser does not give intuitive results.
- Attribute values or list names should not contain disallowed characters for the Windows Operating system file names when setting up a Graphical Asset Browsing. Avoid the double quote as well.

7.5.6. Troubleshooting

Problem: The asset browser works fine on on WebCenter Instance but not on another WebCenter Instance

- You need to copy all of the setup to each WebCenter Instance:
 - Migrate the ListManager Project or Template.
 - copy the images to `webinstance\custom\AttributeValueImages`

Problem: You get a message box with “No Search Panel Exists for attribute xxx”

The chosen attribute is not set to **Available** or **Visible** in the **Search Panel Design**.

7.6. How to Search for Document Reference Attributes

1. To search for **document references**, click on:
 - the [attributes](#) link from the **Search Projects / Search Documents** page.
 - the **task specifications** link from the **Search Tasks and Approvals** page.

You will get the **Search Attributes / Search Specifications** page.
2. Choose your **Attribute Category** with the reference to the document you are looking for.

Search Attributes
✕

Show Attributes in Category

PACKSHOT_CAD_REFERENCE_PROPERTIES

Available Attributes

Filter available Attributes

- CAD_ORIENTATION
- CAD_ALIGNMENT
- CAD_OFFSET_X
- CAD_OFFSET_Y
- PACKSHOT_ARTWORKBOX
- PACKSHOT_ARTWORKANCHOR
- PACKSHOT_FRONTBACK
- PACKSHOT_USERFRIENDLYNAME
- PACKSHOT_PRINTAREAID

Selection

Filter selected Attributes


- CAD_PRINTAREA

<< >>

Clear All
Cancel
Add

3. For each of your **Document Reference Attributes**, you can specify the search criteria as:

Options	Description
Empty	to search for projects / documents where the document reference attribute has no document attached to it. <div style="border: 1px solid #ccc; padding: 10px; margin: 10px 0; text-align: center;"> Attributes... CAD_REFERENCE is Empty </div>
Matches	to search for a specific document by its name. <div style="border: 1px solid #ccc; padding: 5px; margin: 10px 0; display: flex; align-items: center;"> <p>Note: supports wild cards and special characters</p> </div>

Options	Description
Select	<p>to select a specific Document from a specific Project folder.</p> <p>This option gives you a Select Document Reference pop-up where you can specify:</p> <ul style="list-style-type: none"> • a Project • the Folder • the Document • a single Version or a Revision. If you specify a revision, all the versions of this revision will become selected. The default is Any version. <div data-bbox="927 748 1426 976" style="border: 1px solid #ccc; padding: 5px;">  <p>Note: You can select the Project and Folder to specify the location of the document. But the search will locate all the versions of the same document located in different projects as well.</p> </div>

Search for Reference Documents

Use **Reference** field to search on all document reference attributes or specifications in the **Project / Task and Approval** searches.

You cannot make it viewable or sort on this field. If you want to make the referenced documents visible you will need to do this by making specific document reference attributes visible.



Note: It is not possible to search with **Empty** option.

It is recommended to use the SmartName **Document Version ID** rather than the SmartName **Document Name**. The **Document Version ID** SmartName uniquely identifies the document version, when it is searched in the **Matched** mode.

7.6.1. Searching for Reference and Reference By

Use **Reference** field to search on all document reference attributes in the **Document** search.

When using the **Referenced by**, the resulting Documents will only contain a specific Document if the latest version of said Document is referenced by the selected Document (Version).

You cannot make it viewable or sort on this field. If you want to make the referenced documents visible you will need to do this by making specific document reference attributes visible.



Note: It is not possible to search with **Empty** option.

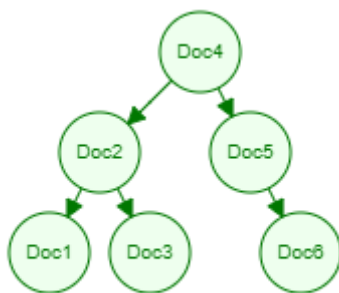
It is recommended to use the SmartName **Document Version ID** rather than the SmartName **Document Name**. The **Document Version ID** SmartName uniquely identifies the document version, when it is searched in the **Matched** mode.

You can search or create saved searches for Documents with reference attributes. You can search for a specific document used as a reference either by name or its project and location.

In both the Reference and Referenced by options, you can use

- **Select/Matches:** to search for the documents that are referencing a given document (version)
- **Select/Matches (any level):** to search for the documents that are referenced by a given document(version)

Find an example below where both options are explained.



The arrows show the relation between the documents (E.g. Doc4 has a document reference to Doc2)

Reference

- Select "Doc1" in this field and it will return Doc2.
- Select (any level)"Doc1" and it will return Doc2 and Doc4.

Reference by

- Select "Doc4" this will return: Doc2 and Doc5.
- Select (any level)"Doc4" this will return: Doc1, Doc2, Doc3 and Doc5.

Both the Reference and Referenced by support "Any level" searching for Document References. It is possible to turn the "Any level" searching off in the search crawler settings.

When using the **Referenced by**, the resulting Documents will only contain a specific Document if the latest version of said Document is referenced by the selected Document (Version).

E.g. Document A references both Document B (version 1) and Document C (version 1 whilst latest version is version 2) => when searching for "Referenced by" Documents of Document A only Document B will be found.

7.7. Searching Documents

In **Search for Documents** page, you can filter the search to a specific document type. When a document type is selected from the drop down, all additional parameters configured for the selected document type becomes visible.

7.7.1. Search Documents by Version Count and Approval Version Count

As a Project Manager or Admin user, you may want to find the number of versions of a Document existing in WebCenter (Version Count) or want to filter for certain count of Document versions on which approval cycle has started at least once (Approval Version Count).

To search the **Version Count** or **Approval Version Count** in the Document Search,

- check the field in the view and specify the column order
- enter the criteria in the respective field along with filtering conditions like greater than, equal to or lesser than for Version Count and with filtering conditions like greater than, equal to, and variance for Approval Version Count.

Search results shows the Documents along with the number of versions and number of approval cycles.

7.7.2. 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, AI or Structured Content document using **Live Text in Document**. This field is available for search, based on the setting in the [Search Crawler configuration](#) set by the Admin user.



Note: Searching for Live Text in Structured Content documents requires the Structured Content license.

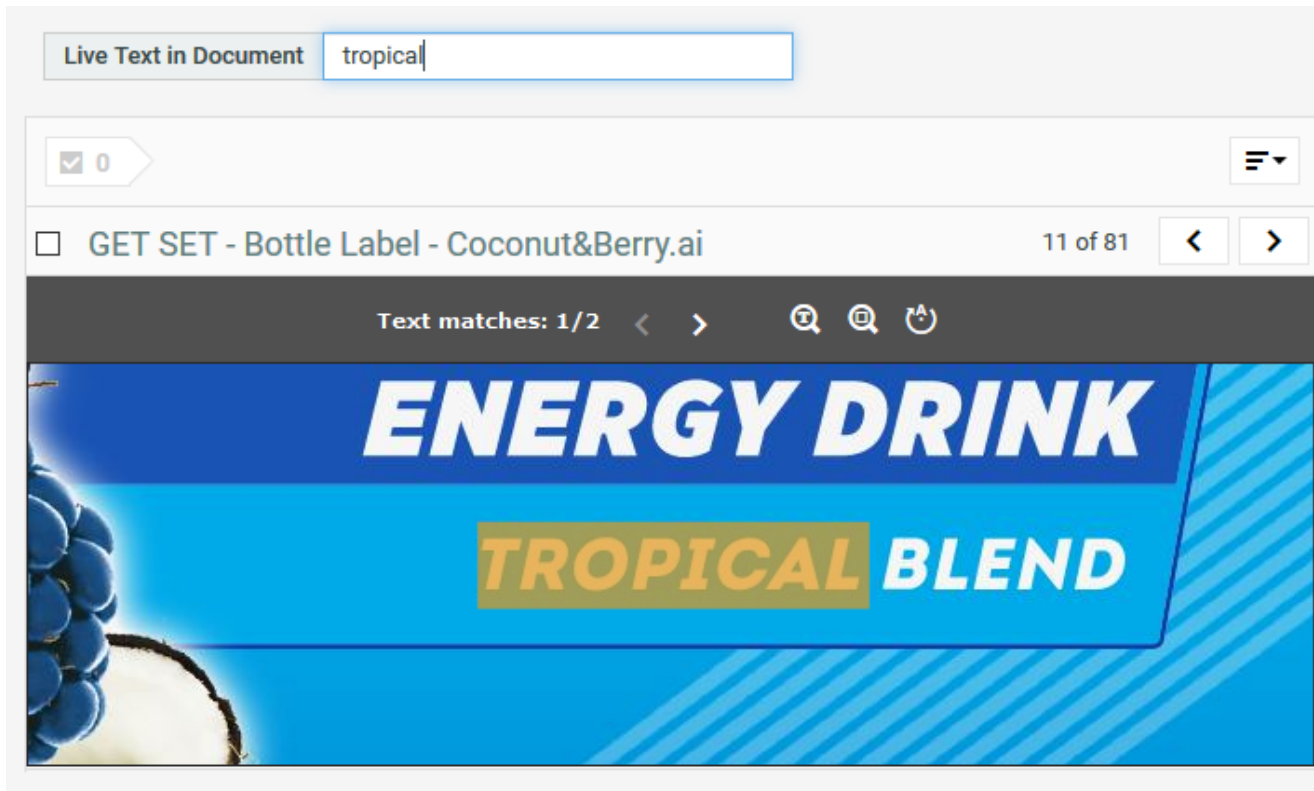


Note: Searching for Live Text will not produce results if the text is present within an image or outlined text.

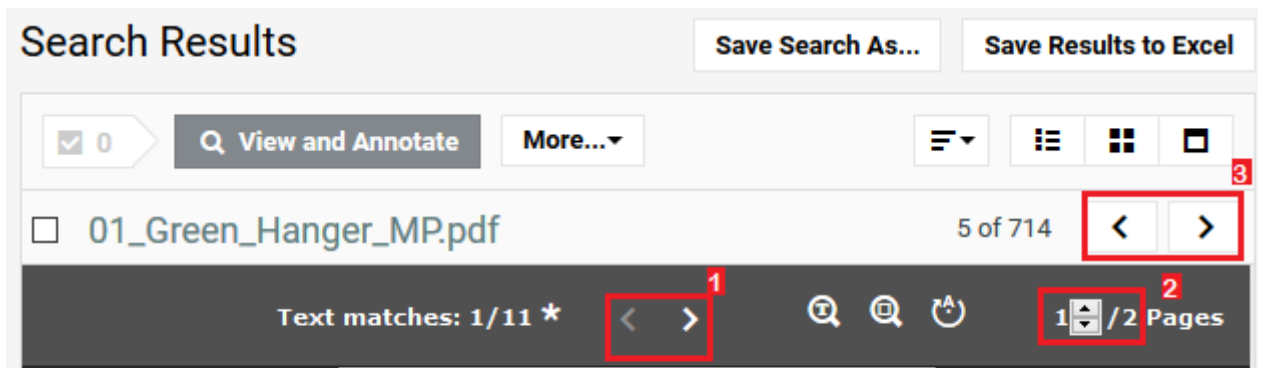
When the search results are shown as a *Focus layout* with a viewer block, the matches for the searched text are highlighted in the document. You can navigate through the matches to see where the searched text occurs. The number of instances of the text occurring in the document are shown in the header.



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.

7.7.3. Search Document by Reasons for Rejection

You can search on documents for **Reasons for Rejection**. You can either search for the current version of a document or search for all versions of the document.

Both the fields has 3 modes and a text field where you can enter any text. You can search for:

- Both Category and Reason (default)
- Only Category
- Only Reason

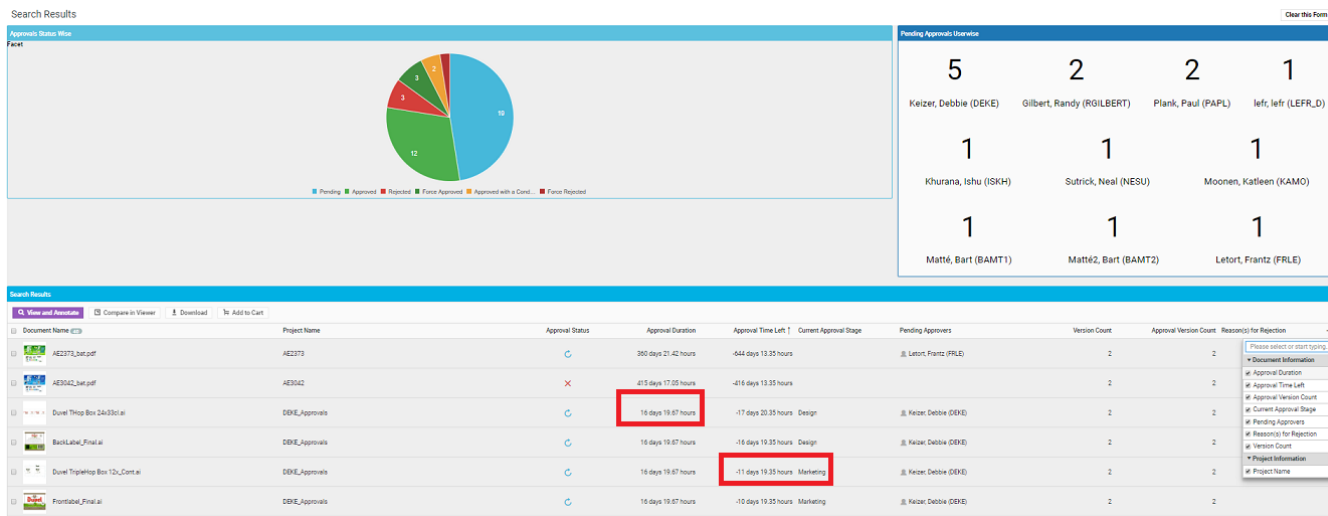
When searching in **Both Category and Reason**, this specific reason can be found by using the same format as shown in the search results: "reason (category)" or "reason" (if there is no category).



Note: The results are sorted on the **Category** and then on **Reason**. Reasons without a category are displayed after all the reasons that have a category.

7.7.4. Document Duration

Duration Metrics for a document are related to the Approval cycle(s) on the document.



Some of the fields you can use to know the metrics of a document approval are

- **Start date** which is the start date of the approval cycle of the document
- **Due date** which is the due date of the approval cycle of the document
- **Completion date** which is the date and time the document reached an approved status
- **Approval Duration** is the time between the start date and the completion date when the documents are already approved. When the document is not approved yet, it is the time from the start date until the current date and time.
- **Time Left** is the time in days that is still left until the due date. When the documents are approved before the due date, the **Time Left** is positive and shows the number of days it is ahead of schedule, whereas when the document is approved after the due date, the **Time Left** is the number of days the approval was overdue. When the document is not yet approved, this is the time between the current date and the due date.

7.7.5. 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**.

Search for Documents

Fill in one or more fields. Prefer less fields? Try [Keyword Search](#).

Search for:



- Use Advanced Search Characters [i](#)
 Search Panel Design Enable SmartNames [i](#)

TEXT CONTENT INFORMATION

Element Type

Document Status

Statement

	Language	Danish	▼
	Translation		▼
	Text		... ▼
	Modified		▼ +
Document Name			
Version Author	 		
Author's Location			
Description			

today

yesterday

before today

this week

last week

this month

last month

this year

last year

more options...

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.

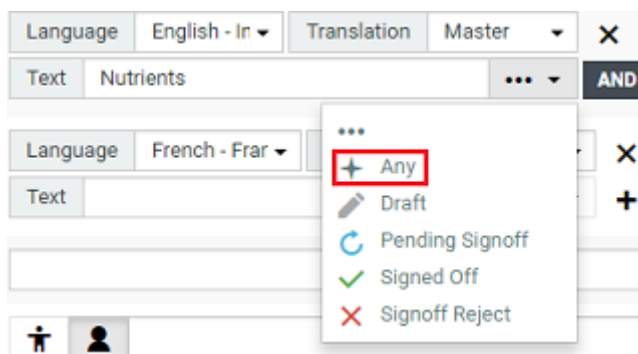


Note: You can also leave these fields blank. If the language field is blank, all languages (both Master and Translated) are searched for.

- 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.

Search Results Save This Search Save Search Results

Name	Description	Project	Element Type	Document Status	Master: English - United States	Version Author
Content claim.wcc	Briefing_deketest (01)		Content claim		WITH 26 NUTRIENTS	Keizer, Debbie (DEKE)
Content claim.wcc	Briefing_KADA Test (01)		Content claim		WITH 24 NUTRIENTS	Conway, Antony (ACON)
Content claim.wcc	Drupa16_BO Library		Content claim		WITH 24 NUTRIENTS	Conway, Antony (ACON)
Content claim.wcc	PCM Text Library		Content claim		WITH 24 NUTRIENTS	Conway, Antony (ACON)

Found: 4 items. Page 1 of 1



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

Search Results Options

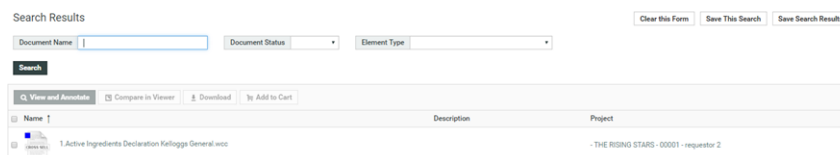
To customize the Search Results, select your criteria in the **Search Result Options** fields. The **Document Name** is selected by default but can also be removed by unchecking the box. Read in: [Search Result Options](#).

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.



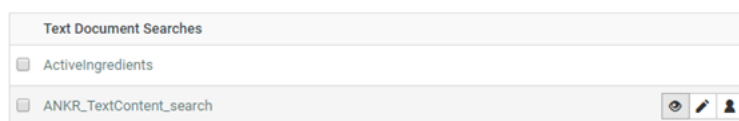
Note: When smartname is selected for the language field, to view each resolved language in a separate column in the Search Results page, select the view as visible.



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.

7.7.6. Search Document by Folder

You can now search and display the folder where a document resides. Folder Search is useful to set up searches, to find certain types of assets. For example, when you have to search for pack shots in a

certain folder in the project. You can either select the root folder, or search with the name of the sub-folder.

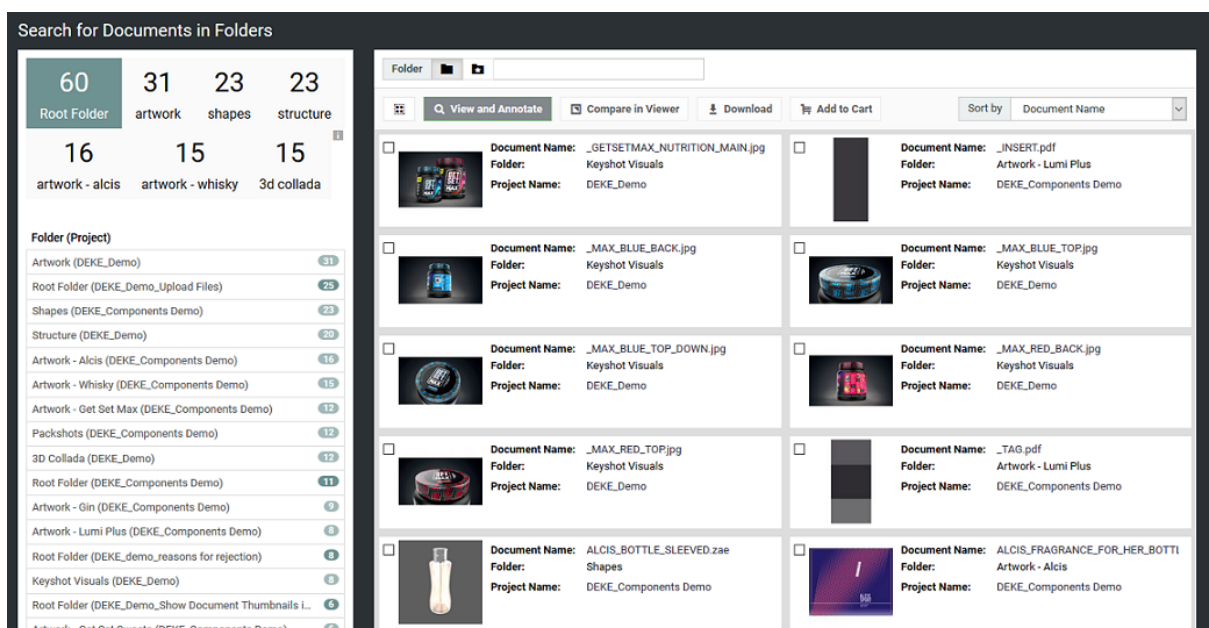
There is a new filter on the document search where you can specify the folder to look for. You can either search in the root folder or the name specified.



You can facet the search results for folders in three ways namely:

- **Grouped by Folder Name**

When searching the system for documents, you can group all the folders by name when you facet on the results.



- **Individual Folders**

When searching the system for documents, you can have the folders shown individually when you facet on the results. In this case, the project name will be appended because you can have multiple folders with the same name in different projects.

- **Project Context**

When searching for documents and faceting on the folders within a project context, this facet option will mimic the folder structure of the project, meaning all folders are listed, even when they are empty, and the ordering is the same as on the project documents page.

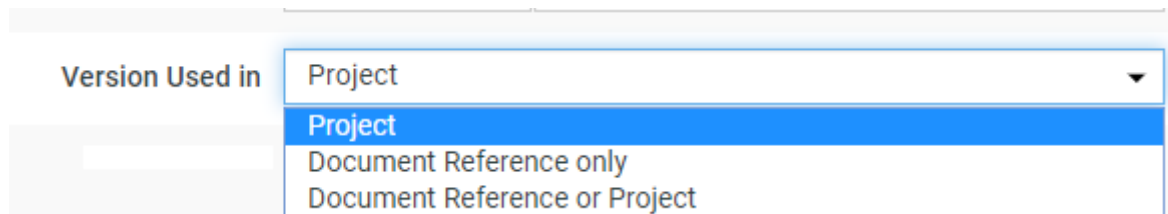
7.7.7. Search on non Latest version of the document

In WebCenter 18.1.1, we added a new option to search index documents which are referenced to earlier versions.

To enable this feature, **Admin users** must select **Index all currently referenced Document Versions** in the **Search Crawler Setup** page. The index is rebuilt wherever the option selection is changed in the setup.

This option is only useful, when you have the older versions of the documents which are referenced and it would occur when a document reference with the "**Selected Version**" option is used.

When this option is turned on, the Document search setup page has a new field, **Version Used In**.



Following are the options that can be chosen when you search for a document based on the version used.

- **Project** is the default option selected and the search returns versions of the documents that are linked into a project or are the latest version of a document revision.
- **Document Reference only** option limits the search to referenced document versions that are not the latest in any Project or Revision.
- **Document Reference or Project** returns any version in a project or referenced by any other document.



Note: Only versions referenced from a document reference in Documents are taken into account and not if a version is referenced from a document reference in a project.

7.7.8. Search on Approval Status

You can search for more than one Approval Status by selecting multiple statuses in the **Approval Status** field and you can also search on **Approval status completed** field.

With the Approval Status field you can also search for documents where the approval is stopped or not set up yet.

Approval Status	<input type="checkbox"/> Pending X <input type="checkbox"/> All Rejected X <input type="checkbox"/> Approved with a Condition X	<input type="checkbox"/>
Approval Status Completed	today	<input checked="" type="checkbox"/> ⚙️
Approval Started	today yesterday	<input type="checkbox"/> ⚙️
Approval Due	before today this week last week	<input type="checkbox"/> ⚙️
Approval Completed	this month last month	<input type="checkbox"/> ⚙️
Approval Duration	this year last year more options...	<input type="checkbox"/> ⚙️

7.8. Search on Pending Approvers

Pending Approvers

You can make the **Pending Approvers** column visible. This column shows all the approvers who still need to approve. You can also sort, facet, and filter on **Pending Approver**. There is a configurable option to show the assignee details of the **Pending Approver**.

Pending Approvers







Display User

To enable the navigation and filtering for specified approver(s) easier, you can choose to configure this fields results. You can choose to show the pending approver(s) field in the Search results page either as **Name** or **Avatar and Name** or **Avatar only**.

7.9. Searching for Parent or Child Projects

It is possible to search for Projects which are related in a Campaign or Program. This is very useful in creating Saved Searches that can be used in the context of a Program or Campaign.

It is also possible to use these Project criteria in the Document and Task searches.

You can use the fields: **Parent Projects** or **Child Projects** to specify a name criterion.



Tip: Use SmartNames to use Saved Searches in the context of a Program or Project. If you set the **Parent Project** as the [Project id], your results will list all the Child projects of the current project. See more in: [SmartNames in Search](#) on page 208



Note:

- The search results depend on the view permissions of the user.
- It is possible to save the Parent and/or Child Projects in Search results to Excel if that option is selected.

If you specify the **Parent Projects** field as `campaign_`, the search will look for Projects with a Parent Project with "campaign_".

Searching in Parent Projects

When you are searching for Projects who has a certain Parent, you have three options:

- **Search only in Direct Parent Projects:** Use this option if you want to search in Projects that are one level higher in the Program structure.
- **Search in all Parent Projects:** This option lets you search in all Parent Projects directly above and in all higher levels in the Program structure
- **No Parent Projects:** Use this when you have to search in Projects that are at the top of the Program structure, or the Projects which do not have parents.

Searching in Child Projects

When you are searching for Projects with certain child Projects, you have three options:

- **Search only in Direct Child Projects** to search in Projects that are one level below in the Program structure. The second(and deeper) level Projects will not be considered in this search.
- **Search in all Child Projects** lets you search in all Child Projects from all levels.
- **No Child Projects:** Use this when you have to search for Projects that do not have Child Projects.

7.10. SmartNames in Search

Administrators can create **Saved Searches** with **SmartNames**. SmartNames are variables that will refer to a value when placed in the **right context**.

Read about the SmartName [here](#).



Note: These searches will resolve only in the context of the **Project / Document** and will not be useful as a general [search](#).

When you plug in these searches into a project / document, these SmartNames will resolve with values retrieved from that context. For example, if you create a **saved search** for finding the related projects, your users will be able to view the search results within a project tab. Read more in: [Use Case: SmartName Search to find Related Projects](#).

You can also use SmartName searches as the document sources in [Document Reference Attributes](#) and Project Creation.

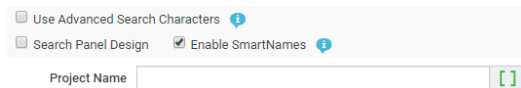
These SmartName searches will display different results in different projects/documents as the context of the SmartName changes.

7.10.1. Using SmartNames in Saved Searches

A SmartName is a variable that will refer to a value when placed in the right context (For example, within a project or in the context of a document).

To create a SmartName powered search:

1. Go to **Search > Documents** or **Search > Projects** or **Search > Tasks**.
2. Enable **SmartName**.



All your search fields will display the SmartNames + icon.

If a SmartName used in a Saved Search has no values, Search shows an error when executing the Search. You can customize the **SmartNames without values** option via the gear icon next to **Enable SmartNames**.

Search for Projects

Fill in one or more fields. Prefer less fields? Try [Keyword Search](#).

Use Advanced Search Characters i

Search Panel Design Enable SmartNames i ⚙️

Configuration Options

SmartNames without values:

Show error

Note that removing or replacing SmartName account (e.g. `Example*` OR `"[Some SmartName Example*"` after removal of the SmartName

Project Name

Description

The available options are:

- Show error
- Remove SmartName from filter
- Replace SmartName with EMPTY keyword

Examples for removing (or replacing) SmartNames with the syntax

Example* OR "[Some SmartName]" becomes:

Example*

after removal of the SmartName (on the condition that the SmartName is empty)

You can also combine multiple SmartNames or combine it with EMPTY:

"[Some SmartName A]" OR "[Some SmartName B]"

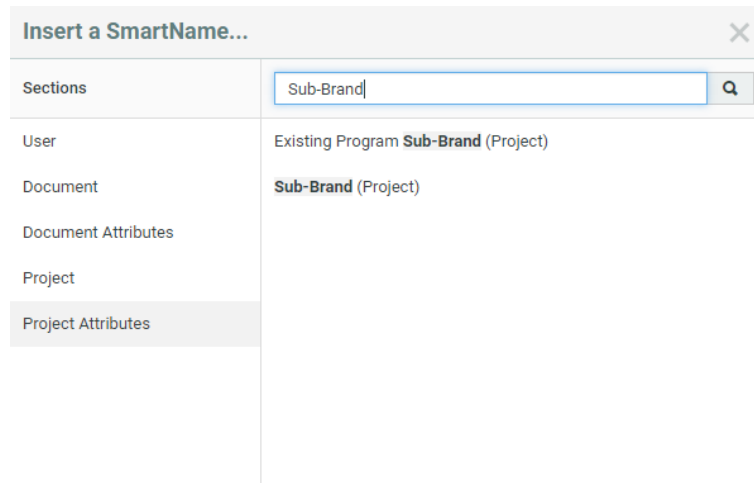
EMPTY OR "[Some SmartName]"

These examples even work with empty SmartNames. The **Replace SmartName with EMPTY keyword** option can be used in case you do not want to find Documents, Projects or Tasks where the value is not filled in, unless the SmartName you search with is also empty.

3. Click on the **+[]** icon in the field where you want to configure the SmartName.

For example, Project Name can indicate the group of projects it belongs to. In this case click **+[]** in the **Project Name** field.

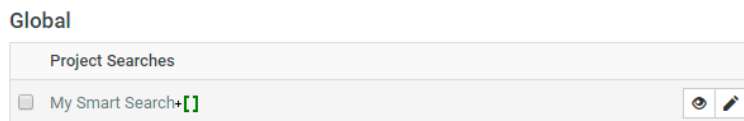
4. In the SmartName dialog, choose the SmartName.



5. Save the search. Your SmartName search will appear in the list of **Saved Searches**.



Note: SmartName enabled searches can be saved only as **global** searches. These searches will be visible only to the **ADMINS** group. You can change the visibility of the search by clicking the **Edit visibility** button. Read more in [Creating Advanced Saved Searches](#) on page 150.



You can plug these searches into the relevant projects where the SmartName will get resolved. Your search results will then list the results based on the context.



Note: If a SmartName gets resolved into multiple values (a multi-value Project Attribute), your search criteria will be all of those separated by the OR separator.



Remember: If you execute a SmartName search from the **saved searches** page, you will not get valid results.

Save as Global when SmartName Context is enabled



Note: SmartName enabled searches can be saved only as **global** searches. These searches will be visible only to the **ADMINS** group. You can change the visibility of the search by clicking the **Edit visibility** button. Read more in [Creating Advanced Saved Searches](#) on page 150.

7.10.2. Use Case: SmartName Search to find Related Projects

When you have a group of Projects under a Packaging Project / Program, your projects share **attributes**. You can use these common parameters (in the search) to display the related **projects / documents**. This is also useful when you have derived-projects created using the **Create Project** node.

Depending on your business needs, you can customize a SmartName powered search and plug this as a tab in the **projects** details page. For example, you can display all the derived-projects in one tab and all the related projects in another by plugging in **SmartName saved searches** in these custom tabs.



Tip: You can configure this as a dedicated [menu](#) item for the **Project Details / Document Details** page.

SmartName Searches in Project Details / Document Details

To use your SmartName powered searches as a dedicated tab of the Project / Document details page, [create a custom menu item](#).

You can link this custom tab to a **saved search** with SmartNames. The SmartNames will resolve to values derived from the current Project (for Project Details Menu Items) or Project and Document (for Document Details Menu Items) context.

The user / group / company with this menu will have a custom tab displaying the search results based on the SmartName criteria.

7.10.3. Use a SmartName Saved Search as a Document Source

You can create custom **Document Sources** using dedicated SmartName searches. You can use these as sources in:

- Project Templates with [Document Creation Settings](#) on page 130.
- Documents or Projects assigned with [Document Reference Attributes](#)

When the user uses this source during Project creation or to add documents to a task within the Project, the Saved Search configured as the document source is executed from the current Project / Document context.

Setting up a SmartName Saved Search as a Document Source

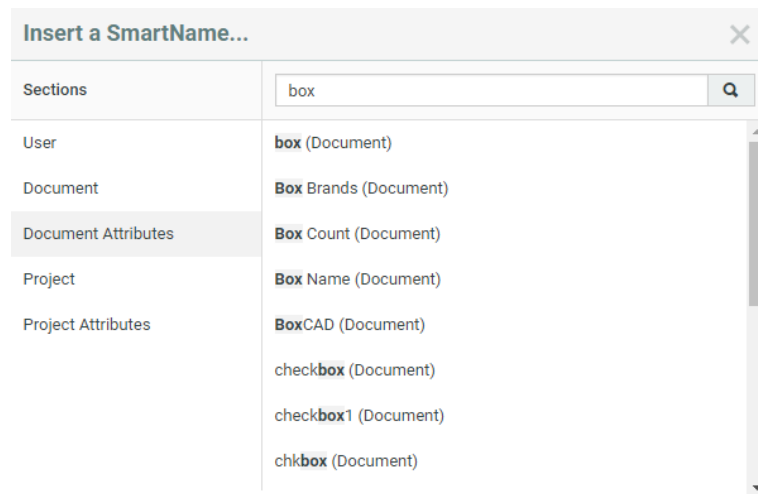
1. Go to **Search > Documents**.
2. Enable **SmartName**.

All your search fields will have a SmartNames icon next to it.

3. Click on the **attributes** link.
4. Click the icon next to the attribute from your attribute category.

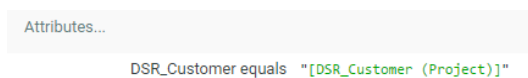
As an example, if you want to setup a document source for a Customer, from the library of your CAD files:

- specify the customer related attributes as the SmartName search criteria.



Tip: Configure [Search Layout](#) options to get an advanced layout.

The selected attribute(s) will appear in the search form.



Tip: The above example will work only in a document assigned with a document reference attribute (category). If you would use this as a document source in project creation, use the `[Box Brands (Project)]` as the SmartName.

5. Save the search.



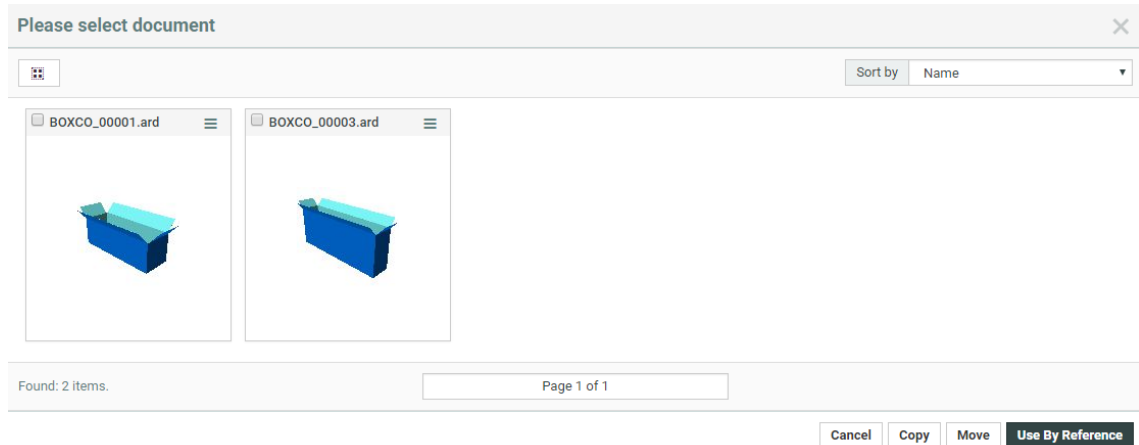
Tip: If you want to limit the scope of the search within a library of documents (a repository project), specify the project name as another criteria.

You can add this search as a document source in:

- [Document Creation Settings](#) on page 130 of Projects / Templates.

- Document sources in [Document References](#) on page 342

When the user clicks a custom link to add a document as a [document reference](#), the result will be a pop-up with the saved search results. You can configure the [search result layout](#) settings to configure the features in the document source pop-up.

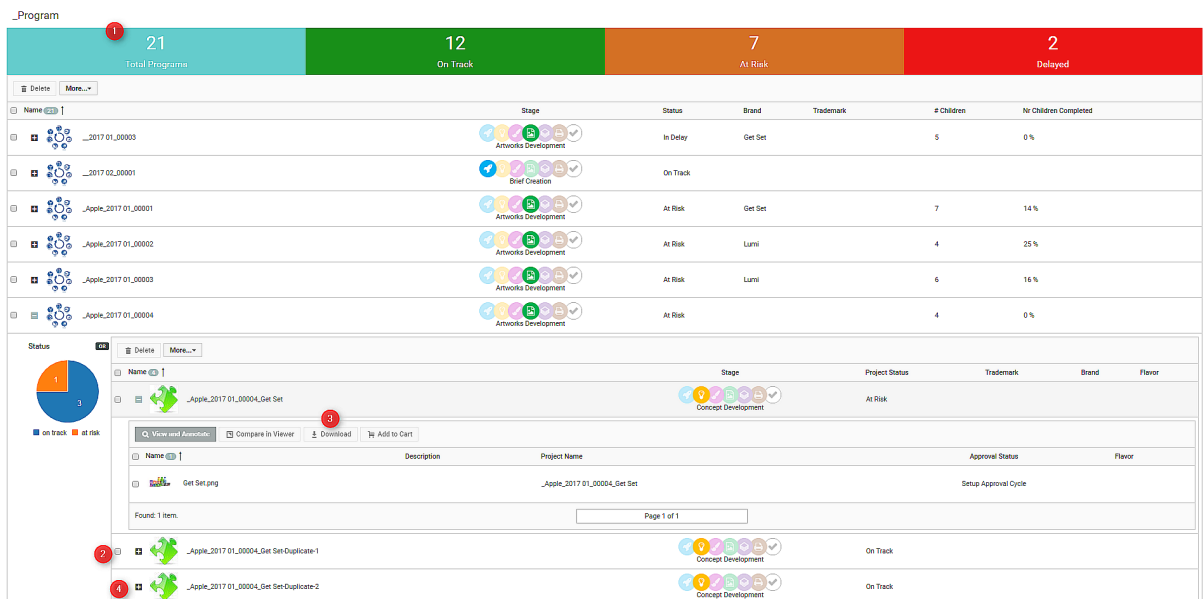


7.11. Drilldown Searches

You can use Project search based **drilldowns** to set up a:

- Drilldown into all levels of Projects. This feature allows the Program Manager to explore project data beyond the overview. If you have a nested structure (Project / Grouping / SKU / Components) in your Program, an expand button lets you access the next level.
- Drilldown into Components (documents) or Tasks.

Use Case: Program Search



1. The parent Search with Programs. This example shows a [Search Results Dashboard](#) on page 215 with **counters**.
2. The second level of Drilldown executes the **Saved Search** specified in the parent search. This search contains a **Dashboard** with a **Facet Graph**. [Configure a Drilldown Search](#) on page 214
3. The third level of **Saved Search** with a **Document Search**.
4. The expand button to execute the drilldown.

7.11.1. Configure a Drilldown Search

To create a drilldown view, you need a Search with the **Drilldown** option turned on. As a result, the parent search will have an expand button in every row of the results table.

When you click to expand, it will execute the Saved Search or show a Dashboard.



Note: For Task and Approval Search, the only available drilldown option is Dashboard.



Note: Drilldown expand buttons are only shown in the List view of the Search results.

1. To set up a Search to show a drilldown of child Projects or related documents:
 - a) Search for your Programs (Parent Projects) or Documents.
 - b) Select **Saved Search in Drilldown** in the **Show Results Layout Options**.
 - c) Save the search with all the advanced settings you want. Read more in: [Creating Advanced Saved Searches](#) on page 150
2. To create multiple levels of **Drilldown** searches:
 - a) Create Searches for all your sub-levels and save them. Optionally, configure [Dashboards](#).
 - b) Specify the **Search Criteria** for your parent search.
 - c) Select **Saved Search in Drilldown** and specify a **Saved Search** from the drop-down.
 - d) Create further levels using the same steps.

To configure the layout of the drilldown in the search results, choose any of the three options for the **Layout, Selection and Actions**. Read more about it [here](#).


Note:

- The Dashboard Facets will display the data based on the specified Saved Search. Clicking on a Facet (Graph/List/Counter) section will refine the search results of child search.
- It is recommended to use Document Version ID SmartName rather than the Document Name SmartName, since the Document ID is unique.

7.12. Search Results Dashboard

A WebCenter Search dashboard organizes and creates a visual representation of your data along with tables. It is built using a set of smaller components (blocks) with specific information. The admin has to configure each of these blocks in a Saved Search.

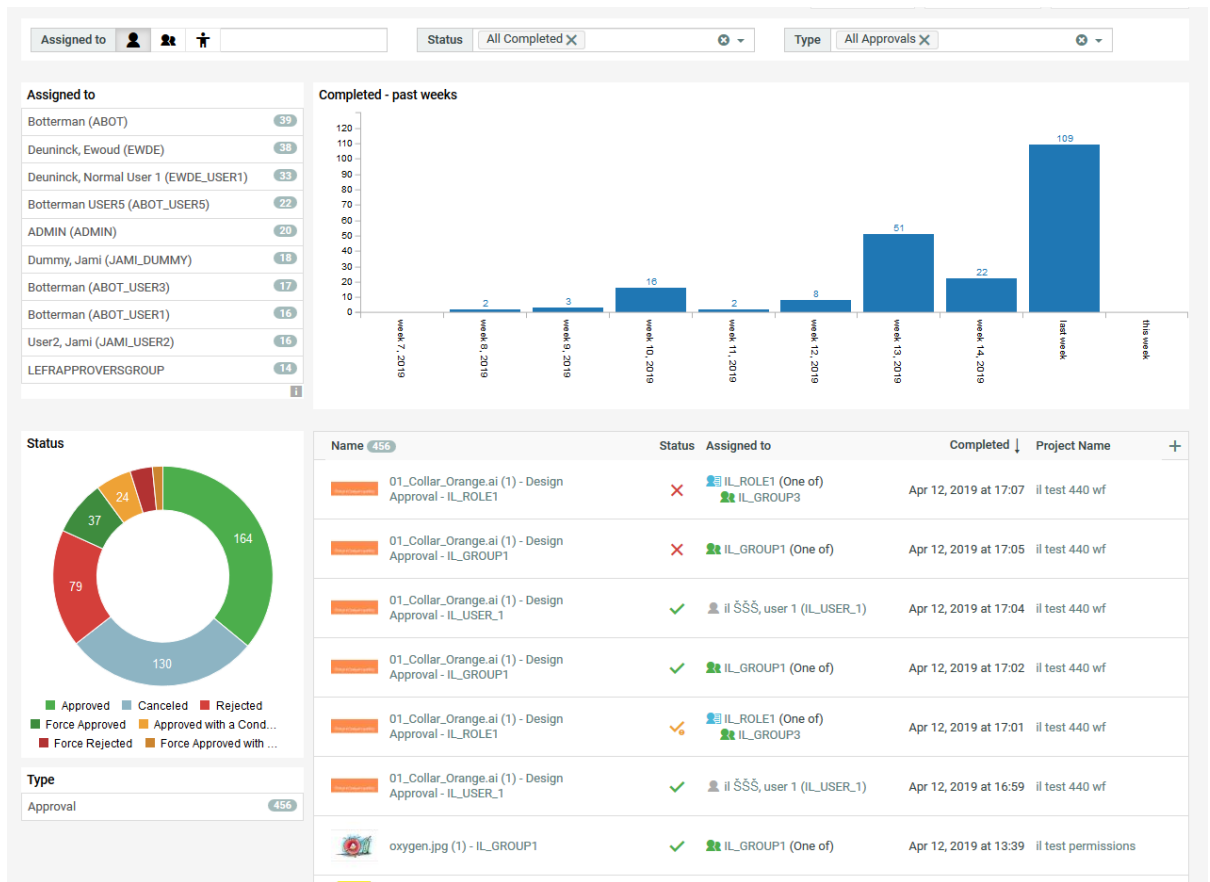
You can decide the layout and configure it with the components that suit your user's interest. To configure a **Search Results Dashboard**, you can simply drag each component into your canvas from a gallery. You will have live editable preview as you configure each of the dashboard component. Each of these components can accommodate specific settings and search criteria.

All the search-specific blocks like facets, results table, asset browser, cart, design panel will show a preview with real data instead of just a placeholder. When editing the configuration or dragging in new blocks, the search will rerun to load the new data and the preview will be updated.

You can configure **Dashboards** with **Project/Document/Task and Approvals** searches.

Once setup, you can use **Dashboards** on your user pages such as:

- **My Work**
- **Menu**
- **Project Details** with context aware [SmartNames](#)
- **Drilldown** overviews of Projects/Programs
- **Asset Browsers**



Note: Live preview is not available when the dashboard is configured with SmartNames in it.

7.12.1. Types of Dashboard Blocks

Dashboard Blocks

A **Dashboard** consists of several building **blocks** that can show information as graphs, counters or tables. These are interactive and you can use it to refine the displayed data. You can configure several such **Blocks** in a **Dashboard**.



Type of Blocks

General	<ul style="list-style-type: none"> Rich Text Block Selection Panel Counter
Layout	<ul style="list-style-type: none"> Collapsible Section Column Layout Left Side Panel Layout List Layout
Search Facets	<ul style="list-style-type: none"> Facet Bar Chart Facet Counter Bar Facet Donuts Chart Facet Horizontal Bar Chart Facet List Facet Pie Chart
Search General	<ul style="list-style-type: none"> Search Details Search Design Panel Cart

- **Asset Browser Side Panel**
- **Asset Browser Image Panel**

7.12.2. Configuring the Search Dashboard Layout and Blocks

To configure a **Dashboard**, you can utilize any of the building blocks depending on your requirements. You can make a visual representation of your search results using various faceting blocks. You can see how your configuration will look like when you start building your **Dashboard** live.

- From the **Project/Document/Task and Approvals** Search page, click on **Search Results Dashboard**. It opens up a canvas with a gallery on the left hand side. The gallery displays all the available [blocks](#).



Tip: Search Result Dashboard now supports Internationalization. You can define translations for Block titles, Counter Labels and Rich Text fields.

- Arrange your **Layout** blocks.
 - a) Drag **Layout blocks** into your canvas. You can use combinations of list, left side panel, column layouts and collapsible section to present your blocks.
 - Select **List Layout** for a vertical list of blocks and **Column Layout** for a horizontal arrangement.
 - Select **Left Side Panel Layout** to present information in a left side **Column Layout**. This pre-defined layout can be modified to suit your needs.
 - Select **Collapsible Section** to present info which can also be hidden and expand one or more blocks based on the requirements.
 - Select **Column Layout** to display blocks in configurable columns. When the user adds a Column Layout to the dashboard, the layout is preconfigured with 2 columns.
 - b) Add **Rich Text Blocks** to add any Text message/ information to your users.
- Determine the dimensions of your **Layout** blocks
 - a) Specify **Spacing** to define space between **Layouts**. This is optional and use it if you want to separate the **layout blocks**.
 - b) To style your **Column Layout**, you define the width, minimum width and maximum width of individual columns. If you leave the **Width** as empty, the columns will fill according to the available space.
 - c) Fill each of these **Layout blocks** with the **Search** and **Facet** type of blocks.
- Configure the **Facet blocks**. To configure a Facet Graph, List or Counter Bar, specify the **Facet** field (Search criterion) to facet on and the maximum **number of facets** to be displayed.

Read more about Facet fields in: [Facet Settings](#).

 - a) Drag your **Facets** into the **Layout** block.



- For any **Facet** block, you can select the **Type** from Bar Chart, Horizontal Bar Chart, List, Donut Chart, Counter Bar and Pie Chart (default).
- Use **Customize Value Order and Colors** [Customize Labels and Colors](#) on page 220 to configure custom labels and color definitions for **Facet Graphs**, **Facet Lists**, and **Facet Counter Bars**.
- Specify the dimensions of your graph or chart (**width** and **height**). This is an optional step and if the sizes are not specified the graph fits to the available space.
- For **Facet Counter Bars** (Facet and Search Based Counters), you can specify the **Style** to adjust the display size.
- Optionally, specify a **Block Title** and enable **Show Block Title and Border**. This will enable a color picker from which you can specify the **Border color**.

You can add **Search Results**, **Search Panel**, **Cart Asset Browser Side Panel** and **Image Panel** to your **Dashboard** layouts.

Building a Search Based Counter

You can use a **Counter** block to display the total count of a Saved search.

To configure counters for your dashboard follow the steps below:

- Specify a Global **Saved Search**. In the counter display, the dashboard will show the count of this particular search.
You can use a SmartName based search in a counter. If the SmartName cannot be resolved, the counter will show a -.
- Add a **Label**. If you did not specify a label, the counter displays the Saved Search's name.
- Specify a **Background Color**.
The default color is green and you can change the color by typing a hex value or picking a color using the color-picker.
- Select a **Style** from the drop-down: Extra small, Small, Small Left Aligned, Default, Default Left Aligned, Large, Large Left Aligned and Large No Label.
You can configure several of these counters in a column layout to create an interesting overview. Read more in: [Program Dashboard with a Drill-down View](#) on page 487.



Note: Enable or disable the **Run Search on Click**. This option is enabled by default. If this option is on, you can click the counter to view the search results in the current window.

Customize Labels and Colors

How to Customize Labels and Value in Search Results

This option enables to configure the labels and color definitions for the **Facet Counter Bars**, **Facet Graphs** and **Facet Lists**.

When any facet block is configured, there is an option to **Customize Labels and Colors** to modify the labels and colors for the values selected. This can be used for string and status fields.



Note: Date and user fields cannot have custom values. For example, if you are configuring **Roles** in a facet list, then this option is not visible.

If this option is enabled, a new section appears in the configuration panel. A table is displayed in which custom labels and color definitions can be configured. Click **Add Value** and a new row is added to this configuration table.

To Add Value

To customize the labels and colors for the facet values, you can either select the values from the drop-down list, input fields or even a range of values based on the facet chosen. For each value, a custom label and color can be defined in the row. You can reorder rows by drag and drop. To delete the row, you can click delete button at the end of the row.

Faceted fields like project status, approval status that have predefined colors that denotes a status, do not allow color customization.

Enable **Only display currently defined custom values and order** to restrict the display of only the customized values. In that case, the option **Maximum number of facet values** is ignored and **Number of values** field and the corresponding drop down becomes invisible.

7.12.3. Facet Settings

Facet blocks (see [Types of Dashboard Blocks](#) on page 216) allow you to visually represent your specified search field (Facet). You can use the cascading drop-downs of available fields to specify the Facet.

The Number of Facets (**Number of Values**) field determines the maximum number of facet values displayed in the graph/ chart/counter bar/list. The facets with the most number of results get priority in the chart/graph/list/counter bar display.

Facet Settings- Project Search Fields

1. **Project Information** has the following fields in the drop-down:

- Attribute Category
- Completed
- Created (date)
- Customer/Location (company/location)
- Due (date)

- Manager Location (company/location)
 - Modified (date)
 - Project Creator
 - Project Manager
 - Project Template
 - Project Status
 - Salesperson
 - Started
 - Time Left
2. To facet on a Role, select it from the Roles drop-down.
 3. To facet on an Attribute, specify it from the Attributes drop-down (Text attributes, Text restricted set attributes, Numeric and Date Attributes).
 4. You can facet on the Project Status Duration, Project Status Started, Project Status Completed, Project Status Due Date and Project Status Time Left. You can read about it here.

Facet Settings- Document Search Fields

1. **Document Information** Facet has the following criteria:

- Approval Completed
- Approval Due
- Approval Duration
- Approval Started
- Approval Status (status only)
- Approval Status Completed
- Approval Time Left
- Approval Version Count
- Attribute Category
- Author's Location (company/location)
- Created
- Current Approval Stage
- Folder
- Modified (date)
- Pending Approvers
- Version author
- Version Count
- Version Size



Note: When you select **Version Count**, you can specify the range of the values and customize the label names and the display colors.

2. **Document Attributes:** You can specify the attribute from the Attributes drop-down with Text attributes, Text restricted set attributes, Numeric attributes and Date attributes. When you choose numeric attributes, range of values has to be specified and labels can be customized for display. The range and the label are displayed in the same order.
 - a. **Multi-line Text:** Selecting this option shows the attribute as multiple lines if it contains newlines (also in Export to Excel) and allows the user to add multiple lines of text when editing (inline, form or bulk editing).



Note: This option is only available when the **Show as** option is set to **Input (Input Field or Dropdown)**.

Attributes...

Attribute 01 (Category)

Reference Matches ▼

- 3. Specific Document Information** You can also add specific document meta data based on the document type searched for and display in the search dashboard. When you search for text content documents, you can show for Document Status and Element Type.

Facet Settings- Task and Approval Search Fields

- 1. Task Information** Facet can be of the following criteria:

- Approval Master
- Assigned To
- Assignee's Location (company/location)
- Completed (date)
- Completed by
- Due
- Duration
- Final Approval Status
- Modified (date)
- Reason(s) for Rejection
- Stage Approval Status
- Started
- Status
- Task Created (date)
- Task Created by
- Task Estimated
- Time Left
- Type

- 2.** You can also Facet on Task Specifications. The Specifications (Numeric, Text, Text restricted set and Date) are listed in the adjacent drop-down.



Note:

- When you select a **Date** criterion, you can specify the time in the past or future days, weeks and months when applicable.

7.12.4. Facet Search: Viewing Search Results

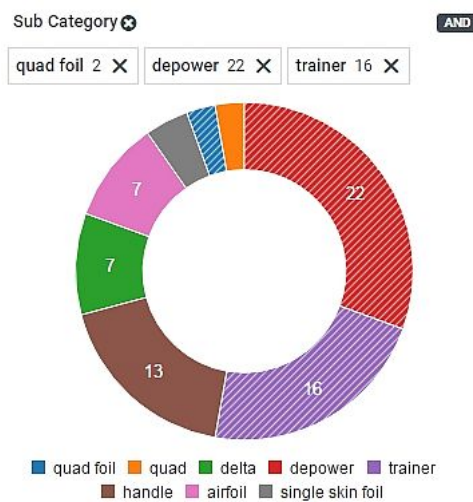
Facet List

A **Facet List** presents the search information in a List. All possible values for the faceted field (the search criterion specified) are presented in a list form in the descending order of the number of occurrences (displayed in the list as a badge).

Project Status	
Status	
Active	2116
Wait for Files	113
Non-active	46
Nightcrawler	39
CalDemo Completed	37
Completed	34
PRMA_Initial	27
PRMATest	26
SAH_STATUS_ACTIVE_1@1	13
SAH_STATUS_ACTIVE_2	10

Facet Graphs

Facet Graphs present the data based on the Facet Field as a graph like bar or vertical bar chart or as donut chart or pie chart. All possible values will be presented as separate sections in the graph. There is priority for the values with the number of occurrences if there is a specified value for the Facet Field. Read in [Facet Settings](#) on page 220.



Facet Counter Bar

The Facet Counter Bar lists the number of occurrences of the faceted field in a horizontal bar and similar to the Facet List, the counters appear in the descending order.

You can specify the **Style** to adjust the alignment and size of the counter bar.



Note: The number of values of the faceted field is restricted by the **maximum values** set in the [Dashboard Facet settings](#).

Refining Search Results using AND/OR Operations

To refine the search results to one particular value (of the Field/Criterion), simply click on the item (or section) in the List. The results will be refined and you will see 'x' icon to deselect. You can either use 'x' or click on the value again to deselect it.

By default, this is an **OR** operation. To display a results of all the selected 'values' of a particular **Field**, you can simply click on all of them and switch the operation to **AND**.

When you click on a list/counter/graph item or section, by default, search uses an **OR** operation to refine the results. For Facet Fields (**Attributes/Specifications/Roles**), you can switch to the **AND** operation to combine these sections.



Note:

- The **Information Fields** (Project, Task and Document information) do not show an operator.
- The Date and Time Fields show only **OR** operator.



Important: Clicking on a section would automatically update your search results if the **Show Search Button** option is turned off. If this option is on, you have to select a section and then click **Search**.

Default Colors

If you are faceting on project statuses or document approval statuses, the appropriate colors are used for the count badges, graph sections and counters.

7.12.5. Image Spinner

Image Spinner allows you to display selected images in a Dashboard. This can be a display of your relevant artworks or any relevant images.

See the settings of this block below:

- **Saved Search:** Select a **global saved search** of graphical documents (pdf, ai, png, jpg, jpeg). The first 25 images will be displayed in the **image spinner**.

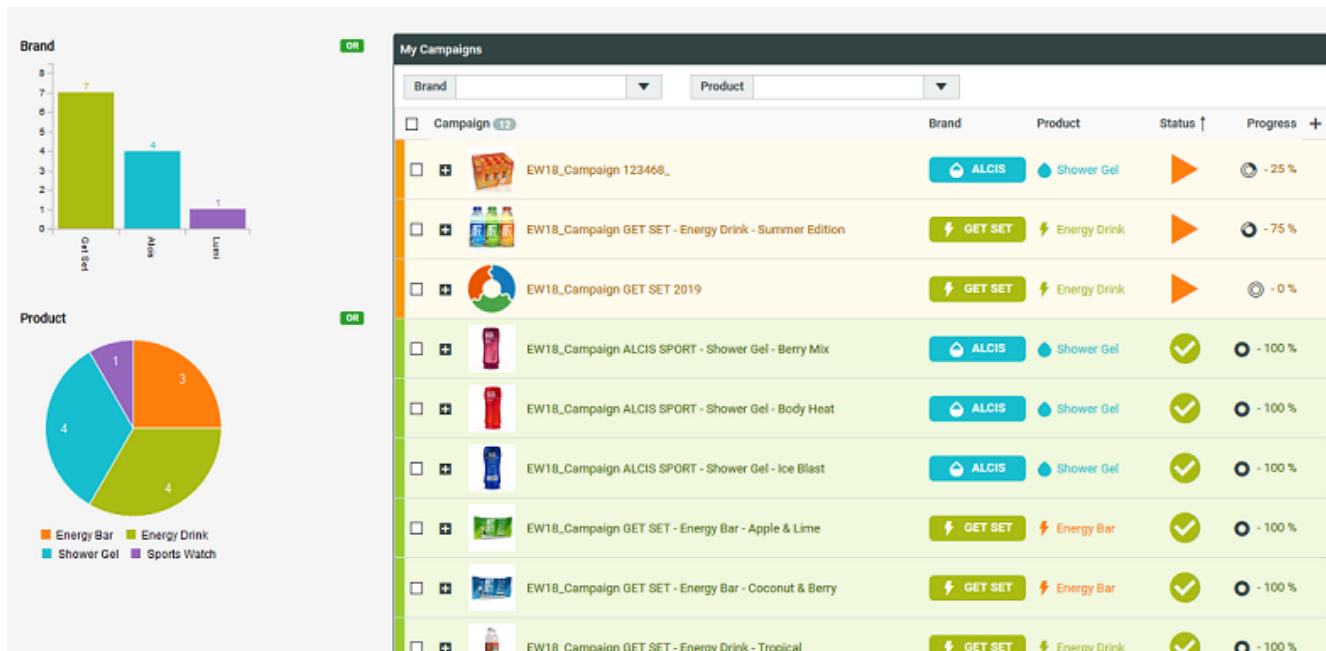


Note: It is possible to use a SmartName based Search. However, make sure that these SmartNames are resolvable to prevent an empty **image spinner** block.

- **Horizontal & Vertical resolution of the images:** Specify a resolution value for the image. The value can range from 1 pixel to 5000 pixels.
- **Scale image to width of block** (Default option): When this option is on, the images are always completely visible. If the option is off, the images are shown according to their size.
- **Seconds:** Specify the duration of display for each image in seconds in this field.

7.13. Search Results Formatting

Search Result Formatting framework makes it simple to present result data in an attractive and clearly communicating form.



Admin users can setup **Search Results Formatting** by navigating from the Search setup page for Projects or Documents or Task and Approval Searches.

This opens a pop-up with two tabs, namely **Fields** and **Row/Card**. The default selected tab is **Fields**.

Choose the **Row/Card** to set up a styling rule in the Search results or you can set up the rules specific to each field by using the **Field** tab.

1. Select **Add Rule** to add a new rule to the field chosen with a defined condition.

This adds a row to the table and allows selecting:

- A Condition
- An Operator
- A Value
- A Style
- Apply to Fields (only for Fields tab)

The first three columns determine when the rule for styling should be applied.

Rules created can be reordered by drag and drop and the order determines the required sequence.

2. Select a field based on which you want to create the rule for styling from the **Condition** drop down. The list displayed may vary based on whether it is a **Project or Task and Approval** or **Document** Search.

Document search will have fields related to Document Information like **Approval Completion Date, Document Name, Description, Last version Comments** along with Document Attributes, Project Information related fields, Roles and so on.

3. Based on the field chosen for the **Condition**, relevant operators are available in the **Operator** drop down. For example if any date related field is chosen for Condition, then the operator will have options like Is after, Is empty, Is Before and so on.
4. Again based on the operator used, only the relevant fields are shown. If the Condition field is a date and if the operator chosen is **Is after**, then the relevant date fields are shown in the drop down with an offset option.
5. In the Style field, you can either **Create New Style** or Import an existing style with the saved searches. If you want to create a new style, click on **Create New Style** to open the pop up window. Styles can also be *imported* from another saved search for consistency and efficiency.

You can edit an existing style by clicking on the edit icon and click **OK** to make the changes to the same style or you can **Save as New Style**.

Create New Style
✕

Style Name *

Colors

Background Color ■

Use Background Color Label

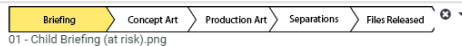
Text Color ✕

Border Style

Content


Display Style

Fixed Text
Tip: This text will be displayed instead of the actual field value. Leave empty to show the actual value.

Icon  ✕

01 - Child Briefing (at risk).png

Preview



6. Choose the field from the drop down for which you want to set up a **Style** chosen or created in the **Apply to Fields**. You can choose more than one field per row or can create multiple rows for different conditions or operators.
7. For the Row/Card, follow the steps from 1 to 5 to set up a style for the search results.

Styles thus created are available per saved search.

7.13.1. Create New Style

You can create new styles to apply it on either selected fields or the complete row in the search results. Click on **Create New Style** to open a pop up window.

Create New Style
✕

Style Name *

Colors

Background Color

Use Background Color Label

Text Color

Border Style

Border Color

Content

Display Style


Fixed Text
Tip: This text will be displayed instead of the actual field value. Leave empty to show the actual value.

Icon

Icon Color
Tip: A glyph icon without a specific color will follow the text color by default.

Icon Size

Preview



1. **Style Name** is a required field by default. You can provide a unique name to the style you are creating.
2. Select the background color for the style from the color picker tool.
3. Select **Use Background Color Label** in the check box to use a background color only for the label. This option is only available for field styles.
4. Choose a text color for the style from the color picker tool.
5. You can either choose **No border** or **Right** or **Left border** for the field or the rows of search results.
6. Specify whether you want to have **Both Icon and Value** or **Only Icon** or **Only Value** to be displayed for the fields in the search result. If you choose any of the icon options then another drop down is displayed with the available icons. When an icon is chosen, you get additional options to choose the color and the Icon Size also. In case you choose **Value Only** or **Icon and Value** option, you get an additional field for entering a **Fixed Text** which will be displayed in the field.

7.13.2. Import Styles

You can select the **Import Styles** to reuse any existing style in the saved searches.

Import Styles ✕

Saved Search

DEKE_Demo_Duration_nographs ▼

Styles to Import

Select Style ▼

Import All Styles

<1 day

<10

<15

<20

<5

>3 days

>4 days

0-3 days

1-2 days

2-4 days

long

on time

1. On selecting this option, you get a drop down of all the available saved searches with styles. Choose the saved search which has the requisite style.
2. You will get an additional drop down to choose from all the styles already created in this **Saved Search**. Styles available for field is displayed when you choose this option in the **Fields** tab and styles available for rows are displayed when you choose this option in the **Row/ Card** tab.

7.14. Setting Up Project Operations in Saved Searches

7.14.1. Updating Due date, Manager or Status

The Project Manager, Due date and Project status properties can be modified from Project search results or a saved Project search results.



Note:

All actions are restricted to current permissions on the individual projects involved.

Search For Projects

Fill in one or more fields. Prefer less fields? Try [Keyword Search](#).

		Search Results Options					
		View(List)	Column	Order	Editable	Sort	Order
<input checked="" type="checkbox"/> Use Advanced Search Characters [?]	<input type="checkbox"/> Search Panel Design						
Project Name:	<input type="text"/>	<input checked="" type="checkbox"/>	1		<input checked="" type="checkbox"/>	1	▲
Description:	<input type="text"/>	<input checked="" type="checkbox"/>	2		<input type="checkbox"/>		
Project Status:	<input type="text" value="Show All"/>	<input type="checkbox"/>			<input checked="" type="checkbox"/>		
Created:	<input type="text"/>	<input type="checkbox"/>			<input type="checkbox"/>		
Modified:	<input type="text"/>	<input checked="" type="checkbox"/>	3		<input type="checkbox"/>		
Due:	<input type="text"/>	<input checked="" type="checkbox"/>	4		<input checked="" type="checkbox"/>		
Customer/Location:	<input type="text"/>	<input type="checkbox"/>			<input type="checkbox"/>		
Salesperson:	<input type="text"/>	<input type="checkbox"/>			<input type="checkbox"/>		
Project Manager:	<input type="radio"/> User <input type="radio"/> Group <input type="radio"/> Me <input type="text"/>	<input checked="" type="checkbox"/>	5		<input checked="" type="checkbox"/>		
Manager's location:	<input type="text"/>	<input type="checkbox"/>			<input type="checkbox"/>		
Add Role Search Criterion							
<input type="radio"/> TEMA_DESIGN	<input type="radio"/> User <input type="radio"/> Group <input type="radio"/> Me <input type="text"/>	<input checked="" type="checkbox"/>	6		<input checked="" type="checkbox"/>		
Attributes...:							
Characteristics...:							
Bill of Materials:	<input type="text" value="Show All"/>	<input type="checkbox"/>			<input type="checkbox"/>		

[Clear this form](#)
[Save this search](#)
[Show Result Layout Options](#)

1. In the main menu, go to **Search > Projects**.
2. Type the parameters you would like to use to filter the search results.
3. Enable the **Editable** check-boxes for **Project Status**, **Due** and/or **Project Manager**.

Use the **Editable** column to enable bulk operations on projects. You can modify the following parameters of several projects at once:


- **Due date**
- **Project Manager**
- **Project Status**

- **Attribute Category or Project members/permissions**
- **Project Role assignments**




The bulk operations can be done from the **Search Results** page or from **Saved Search Results** page.



Note: These bulk operations are always limited to current permissions on the projects involved.

When you enable the **Editable** items, you get an Edit  button next to the selected items in the **View** List.

4. Now **Save** the **Search** or click **Search**.

Due Date 	Manager 	TEMA_DESIGN 
--	---	---



Note: For each **Editable** item, a corresponding option will be created in the table actions bar.

7.14.2. Updating Attribute Category or Project Member / Permissions

You can setup Project **Search Results** to allow bulk updating of:

- the Project Attribute Category
 - Project Members
 - Project Permissions
1. In the main menu, go to **Search > Projects**.
 2. Type the parameters you would like to use to filter the search results.
 3. Click **Show Result Layout Options** to see advanced search options.
 4. Enable **Allow Changing Attribute Category** and / or **Allow Changing Project Members**.
 5. Now **Save** the **Search** as **Global**.

7.14.3. Updating Roles

1. In the main menu, go to **Search > Projects**.
2. Type the parameters you would like to use to filter the search results.
3. Add one or more Role Search Criteria by clicking the **Add Role Search Criterion** link.
4. Enable the **Editable** check-boxes for **the role or roles that you want to make editable**.

5. Save the **Search** as **Global**.

7.14.4. Detach Child Projects

You can configure **Detach Child Project(s)** operation in a Saved Search. Program Managers can use this in a contextual Saved Search configured in the Parent Project's details. The use case is that the Project or Program Manager can select existing Child Projects displayed in the search tab and detach them from the Parent Project.



Note: The action is only available to the users with **Change Permissions** of the parent and child project.

- Create a global [Saved Search](#) to search on child Projects. Enable the **Search Result Layout** option **Allow Detaching Child Projects**.
- Apply the Saved Search into the Project Details menu of the Parent Project Manager.
- To detach child Projects, go to the Child Projects tab with the saved search, select child Projects and click **Detach Child Project(s)**.

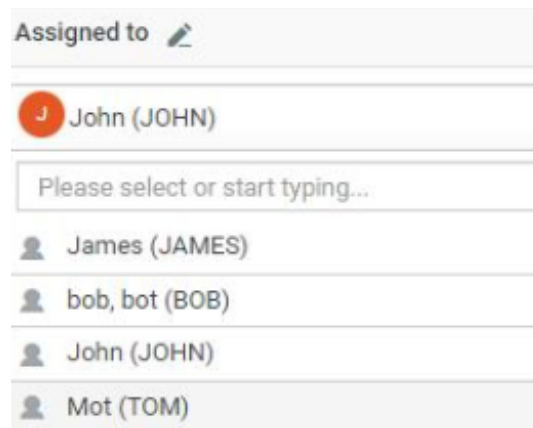
8. Inline Editing


Inline Editing allows you to directly edit a Project or a Document or a Task in **Search Results** page or **Dashboards** for editable fields. Editable fields have a pencil icon next to it on hover, indicating that it is possible to edit that field.


When a field in Search or in Dashboard is set as editable and if you have the necessary rights, you can edit the field. The changes are applied to the corresponding Project, Document, or Task.

List of editable Fields in **Search Results** page or in **Dashboards** for Project, Documents and Tasks can be checked [here](#).


For example, to re-assign a task in your Search Result page, there is no need to go to the **Task execution** page to change the assignee and go back to your search, you can just directly edit it.





Assigned to 


 John (JOHN)

Please select or start typing...

 James (JAMES)

 bob, bot (BOB)

 John (JOHN)

 Mot (TOM)

Conditional Formatting for Editable fields

You can edit a field inline in **Search Results** page or in the **Dashboard** which has some conditional formatting set. If the field is a Restricted set or Project Status or Task status or a dropdown that is connected to a list, the values in the drop down are shown with the conditional formatting applied on it.

For example, there is conditional formatting set to show the values as progress bar.

<input checked="" type="checkbox"/> 0 Delete Change Project Manager Change Project Status Assign Role (DESIGNER) Set Attribute (Packaging Type)						
Project Name	Status	Project Manager	Salesperson	Packaging Type	Briefing Text	Briefin
<input type="checkbox"/> Label Project 001 test	Demo - Concept Art - on time	Penninck (JEPE)	abot (ABOT_TODELETE1)	Box	We need a label for our big box to put candy inside! - the team	<input type="checkbox"/>
<input type="checkbox"/> Label Project 002	Demo - Concept Art - at risk	Penninck (JEPE)	Penninck (JEPE)	Can	Hello there, we need a new can label design.	<input type="checkbox"/>
<input type="checkbox"/> Label Project 003 renamed	Demo - Production Art - on time	Penninck (JEPE)		Box	We may need another <u>box label for this Project.</u>	<input type="checkbox"/>

Live Preview

Preview of any editing done to is shown both for editable and non-editable information. When editing a value, preview of changes is shown in all the instances of the field within the same Dashboard and across all locations in WebCenter.

For example, when the Project status is edited in a list, all other instances of project status (of the same project) is also updated simultaneously in the Dashboard.

Similarly, when a Project name is changed, then it has a cascading effect on the child projects or parents' projects. The same applies to Document Name changes, where the change is also affected across all versions of the document and wherever the document may reside like a Document reference or a Task.

When the Conditional formatting rules are edited, the changes are visible in the Dashboard simultaneously. This could be helpful for Project status and Task Status based Dashboards.

Some of the fields where the live preview do not reflect immediately are

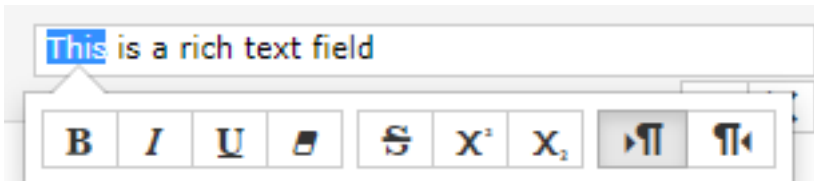
- Project Calendar or Project or Task Approval due date which reflects in milestones
- Auto naming of the Project or Document
- Rules triggered based on events

Rich Text fields

What is Rich Text ?

Rich text is text that is formatted with common formatting options, such as bold and italics, that are unavailable with plain text.

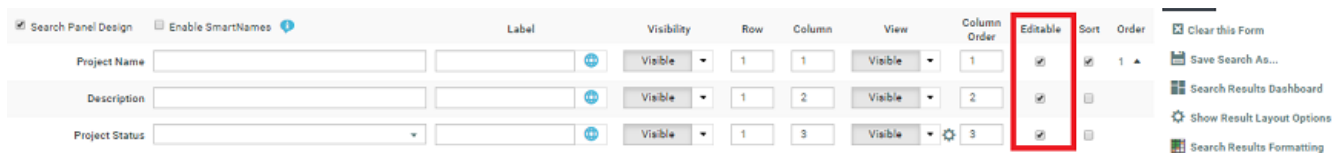
Rich Text fields are also editable inline. Select the text in a rich text field to open the rich text panel.



8.1. Configuring Editable Fields

Configuration of Editable Fields in Search Results

To make a field editable, enable the editable option in the **Search Results Options** for a Search. Editable fields for Projects or Documents or Tasks and Approvals varies as per the context.



Configuration of Editable Fields and Required fields in Dashboard

When you configure any type of Dashboard (Project, Task or Document), in the Configuration panel, select the **Editable** option.



Enabling Mandatory fields in the Dashboard forms

You can select **Required** option to make the dashboard block as a mandatory field. On save, the fields that are marked as mandatory but not filled in are highlighted along with an error message.

Configuration of Bulk Editing

Admin user has to select the **Show Bulk Edit Actions for fields marked as Editable** option in the Table Bulk Actions in **Search Result Layout Options**.

Table Bulk Actions

- Show "Delete" action
- Show "Generate/Delete View Files" actions for Admins
- Show Bulk Edit Actions for fields marked as editable
- Allow Changing Attribute Category
- Allow Changing Project Members
- Allow Detaching Child Projects ?
- Custom Actions ?

Tagged actions will only show up if the tag is listed here.
Example: "tag1, tag2". Enter * for all actions.



Note: Pencil icon in the header to bulk edit is available for whichever field has been chosen as Editable irrespective of the above option selection.

8.2. Inline and Form Editing for Projects, Tasks and Documents

Inline Editing in Projects

Project fields that are editable are **Project Name, Description, Attributes, Role, Due, Sales Person, Project Manager, Project Status**.

Inline Editing in Documents

Document fields that are editable are **Document Name, Description, and Attributes**.



Note: Editing Attributes in both Projects and Documents has two preconditions. Firstly the user must have the editing permission for the Attribute values and the Attributes should be present in the Attribute Category of the Project or Document respectively. Document References are editable in Edit form Dashboards only.

Inline Editing in Tasks

Task fields that are enabled for inline editing in Dashboard and Search Results are **Name, Description, Due, Task Estimated, Task Status, Task Specifications, Assigned to** (not applicable for Approvals and only to Project members with permissions), **Documents** (in Edit form Dashboards only).



Note:

- In the Task Dashboard, users can still save the form using the **Save Anyway** button, regardless of any unfilled fields or validation errors. This functionality prevents users from losing their edits and enables them to resume the task at a later time.
 - The **Save Anyway** button will not be available for users while completing the task.



Note: Specifications are only editable, if they are in the Task Type of the Task and if the user has the right to edit the specification values.

8.3. Shortcuts in Inline Editing

Inline editing can be performed by using shortcut keys easily. Click on the first field that you want to edit and after that you can continue editing using only the keyboard.

When you are not inline editing and the mouse points to one of the things you could potentially edit, you can use the following:

- **Arrow Key Right:** To navigate to the next inline editing input in the same Dashboard or same Search results row.
- **Arrow Key Left:** Navigate back to the previous inline editing input in the same Sashboard or Search results row.
- **Arrow Key Down:** For list layout, cursor moves to the next inline editing input in the same column (inside the same table) and for non-list layout (Grid layout, dashboard...), does the same as Arrow Key Right.
- **Arrow Key Up:** For list layout, cursor moves to the previous inline editing input in the same column (inside the same table) and for non-list layout, does the same as arrow key left.
- **ENTER:** Enter inline editing mode for the selected field.

While you are actually inline editing, you can use :

- **Tab :** To **Save** and go to the next input
- **Enter:** Save and do the same as Arrow Key Down afterward and **Ctrl+Enter** Only for multiline fields (Description, Rich text attributes)
- **Escape:** Cancel and keep the focus on the current item.

When you are in a dropdown:

- **Arrow Key Down :** Go to the next element in the dropdown.
- **Arrow Key Up:** Go to the previous element in the dropdown.
- **Enter:** Select the element and close the dropdown if only one value can be selected for this field.
- **Escape:** Close the dropdown.



Note: Tab is a general shortcut in browsers, that is used in **Search Results** or **Dashboard** page to go to the next input or link.

8.4. Scripting with forms

In places where inline document actions are configurable, a **Run Script** action is available.

Next to the standard configuration options, you can enter a script that will be run when clicking the button. Click **Edit Script** to open the editor in which you can add a script. The script editor marks any syntax error that may be present and has auto completion enabled to make suggestions on which methods are defined.

Scripts in forms

Next to scripts which can be executed with inline action buttons, admins can also write scripts to be executed before the form is submitted.



Note: These scripts are configured per dashboard block ensuring specific configurations for each individual block. However, **On Form Initialized Scripts** are configured once per entire dashboard.

Following types of scripts are available:

- **Before Validation Scripts:** These are executed first, when saving the form. The scripts can read and adapt values of the Project, Document or Task. They are allowed to use setters (e.g. `project.setName`) in order to auto fill some fields.
- **Validation Scripts** These are executed after the Before Validation scripts and can be used to validate if all fields are filled out correctly (e.g. check that all dimensions are > 0). In Validation scripts it is not possible to adapt values. Validation scripts keep running until the form is valid and submitted or the user clicks away the validation error message.

To show a validation message (and block form submission), you can call the method `API.addValidationError()`. It is not needed to remove validation errors; before every script run all errors are removed.

- **On Change Scripts:** These are executed when the user modifies a field to which an On Change script is linked. The field to which an On Change script is applied should be editable and be part of a dashboard that is in either Edit or Creation form. The scripts can read and adapt values of the Project, Document or Task. It can be used to autofill or update some information based on the user input.
- **On Document Added Scripts:** These are executed when a document is added, referenced, copied, or uploaded to document reference or task documents block in a project, task or document context. It is applicable only when the **Dashboard Function** is configured as **Edit** or **Creation Form** under **Dashboard Settings**.



Note:

- The **On Document Added Script** button gets disabled when no document sources are configured.
- A progress bar is displayed for long-running scripts until all scripts are executed.
- **On Form Initialized Scripts:** These are executed when the dashboard is loaded as the root dashboard on the page. It is applicable only when the **Dashboard Function** is configured as **Edit** or **Creation Form** under **Dashboard Settings**.
- **Visibility Scripts:** These are run continuously and determine the visibility of the block. The scripts are configured per dashboard block. Only one visibility script is allowed per block. It is not allowed to use setters to adapt values.

Every Visibility script should return one of the following constants, depending on the type of block:

- Project/Task/Document information blocks:
 - **HIDDEN:** the block is hidden
 - **READONLY:** the block is visible, but not editable
 - **VISIBLE:** the block is visible, but not editable
 - **EDITABLE:** the block can be edited, but is not required
 - **REQUIRED:** the block is made editable and requires a value before submission is allowed
- Other blocks:
 - **VISIBLE:** the block is visible, but not editable

- **HIDDEN:** the block is hidden



Note: Using a Visibility script overrides any configuration done by the **editable** and **required** checkboxes in the configuration panel. Blocks that are made hidden by a Visibility script will no longer be required or execute their validation scripts. Furthermore, the constants **VISIBLE** and **READONLY** have the same effect, but can not be used interchangeably. To know which constant to use, please refer to the comments in the example script that is generated when creating the script.

- **Scripting Buttons:** Inline action **Run Script** buttons are available for documents. These scripts can read and adapt values of the document.



Note: Check [this](#) page on how to call external systems.

Note that validation scripts – or any script for that matter – can use the function `API.translate(...)` to translate a message before passing it to the `addValidationError` function.

For more information, please check [Additional info about the scripting API](#) on page 238.

8.4.1. Additional info about the scripting API

Sandbox

The scripts are run in a sandbox. Only a limited set of standard JavaScript functionality is available. Most global objects are not available. Available global objects are:

- Date
- Math
- JSON
- NaN
- isNaN
- Infinity
- isFinite
- parseFloat
- parseInt
- Error
- console (log, warn and info)

It is currently not possible to access/modify the DOM (e.g. window, document, jQuery, alert, confirm, ...). These globals will never become available but for all use cases we will try to provide alternatives through the API itself.

External systems can be contacted using the External API Connection functionality (`API.doExternalCall(...)`).

It is not possible (and never needed) to write asynchronous code, all methods of the API are synchronous.

Why is the sandbox so strict?

We know the sandbox is quite strict. This is intentional.

WebCenter will compile the scripts so they are run as optimal as possible. This means that behind the scenes all scripts run in parallel even if WebCenter actually guarantees sequential execution order

(see 'Script Execution Order' below). Also scripts are run asynchronous even though the API looks synchronous. There is a strong cache and WebCenter does batched requests to the server in case information is missing. These optimisations can go quite far but you should never notice this. For all practical purposes, just think of the API as synchronous and that all scripts are always run in a specific sequential order one after another, because that is what you will actually see.

The strictness of the sandbox allows us to do these advanced optimisations behind the scenes without you noticing. It also allows us to keep the API as simple as possible (synchronous) and also allows us to guarantee that all scripts will keep working when upgrading WebCenter.

Debugging

It is possible to write logs to the console with `console.log()`. You can debug your scripts by adding a *debugger*; statement at the line where you want to debug. If you have the browser's developer tools open and the script hits a *debugger*; statement, the browser will break code execution and allow you to investigate variable values and step through your code.

It is important to **remove all *debugger*; statements** when the script is used in production. If a script has a *debugger*; statement, WebCenter will disable all optimisations on the script to make debugging easier. Because optimisations are disabled this means that just having a *debugger*; statement will cause performance to decrease considerably.

Script execution order

We can divide scripts in two groups: scripts that can adapt values, e.g. Scripting Buttons, Before Validation scripts and On Change scripts and scripts that can only read what is on the page, e.g. Validation scripts and Visibility scripts (see [Scripting with forms](#) on page 236).

Scripts that can adapt values

For scripts that can do changes, WebCenter has a strong guarantee that scripts always produce results as if they are run sequentially one after one.

Example: Scripting buttons are executed when you click them. If you click another button immediately after clicking the first one we guarantee that the second button sees all the changes done by the first button when it is run (even in the rare situation when the first button would actually take a while to run and didn't finish yet). If the second button needs to wait because the first button is still running, a "Processing..." message will be shown.

Just like Scripting Buttons, Before Validation scripts and On Change scripts can also make changes and are run in a strict sequential order. The next script in this order will see all the changes of the previous script, and so on. Additionally, the first Before Validation script is guaranteed to see all changes done by previously clicked buttons and all changes previously done by the user.

For Before Validation scripts in particular, the order is as follows: we always start from the top-most dashboard in the form. In that dashboard different information blocks might have Before Validation scripts attached to them. These Before Validation scripts are executed in the strict order you get by sorting alphabetically on the name of the script. If script execution order is important to you, you can control the order that scripts are executed by changing their name with some alphabetic prefix. Note that you don't need to have unique names for scripts, even scripts with the same name are run in a consistent order which doesn't change unless you completely delete/re-add blocks in the dashboard. However, before the scripts on the blocks in the dashboard are run, the scripts of all subdashboards (re-usable dashboard, open popup button, tabs) are executed. Scripts in subdashboards are always executed before the scripts in the current dashboard. Different subdashboards/tabs are executed in the strict order you get by sorting the name of the dashboard alphabetically. Subdashboards are executed one by one, so first all scripts of e.g. "DashboardExample_TabA" execute, then all scripts of e.g. "DashboardExample_TabB".

If needed you can control the execution of different subdashboards by changing their name.

When saving the page, the page will wait for all Scripting Buttons, Before Validation scripts and Validation scripts to finish executing before the form is submitted.

Scripts that can only read what is on the page

For scripts that can only read what is on the page, execution order does not matter as you cannot see the difference.

Example: Validation scripts are reexecuted all the time to provide up to date validation messages. The first time they run after clicking Save they do however only start after all the Before Validation scripts have finished executing so they are guaranteed to see the latest results when doing the initial validation.

Autocomplete

The Script Editor provides autocomplete suggestion based on the context you are in (Project/Document/Task Dashboard) and the code you are writing. All methods are accessible from the global object API.

9. Managing Companies

Entering Company and Location information lets you further refine projects and users when they are created.

System History Logs

All Companies related events like

- **Companies Created**
- **Companies Deleted** and
- **Companies Changed**

are recorded and stored in System History. Read this page on how to access the [records](#)

9.1. Create a New Company

1. Click **Admin > Companies > New Company**.
2. Enter the information about the new company (**Company Short Name, Company Legal Name, Phone...**).

Fields with asterisks next to them are required to have information in them.

3. Do you want the users of this company 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. See [Menus](#) on page 40.



Note: Users linked to a company will always see the menu assigned to the company, when the **Default** menu is assigned to them as a user.

- If yes, choose the menu to assign to the company in **Menu**.
- If no, leave **Default** in **Menu**.

4. Click **Create**.

A status message saying the company was created successfully appears at the bottom of the page. You can create an additional company by filling out the form again and pressing **Create**.

9.2. Edit a Company

1. Click **Admin > Companies**.
2. Either type in a **Filter** or click **Go** to see the list of companies.
3. Click the name of the company to change.
This opens the **Edit Company** page.
4. In the **Name and Menu** tab, you can change:

- the **Company Short Name**,
- the **Company Legal Name**,
- the **Menu** that the users of this company will see (see [Menus](#) on page 40 for information about menus).

Click **Save** to save your changes before switching to another tab.

5. In the **Locations** tab, you can edit the company's location(s):
 - click a location to edit its details (**Location Name, City, Country...**),
 - to delete a location, select it and click **Delete Location(s)** in the actions menu,
 - to add a location, click the **New Location** link and fill in the new location's details.
6. In the **My Work Setup** tab, you can change what the company users will see on their **My Work** page. Click on **Setup Custom My Work** to customize the **My Work** page displayed for the selected company's users. Else the default My Work page is displayed for the users.

Read more on how to set up **My Work** page for Companies here [Set up My Work page](#) on page 244.

9.3. Merge Companies

You can merge two or more companies using the **Merge Companies** option in **Admin > Companies**.

1. Select the source company / companies which has to be merged.
2. Choose the **Merge Companies** field, to open the **Merge Selected Companies** pop-up window.
3. Choose the target the company from the **Merge to Company** drop down.
A warning message will be displayed when the source company / companies has one or more locations in common with the target Company. The source company locations will be renamed to <location_name>_<company_legal_name>.
4. Click **OK** to merge the companies.

9.4. Delete a Company

If the company you delete has users assigned to any of its locations, WebCenter issues a dependencies warning.

You must reassign the users to another location or delete the users before you can delete the company. There is no dependency check if there are no users assigned to any location.

If the company is only assigned as a customer, it will be deleted when you confirm the deletion.



Note: Attempting to delete multiple companies will stop on the first company that has dependencies. To delete the rest of the companies, reselect them and delete them.

1. Click **Admin > Companies**.
2. Either type in a **Filter** or click **Go** to see the list of companies.
3. Select the checkbox of the company to delete.
4. Click **Delete Company** in the actions menu.
5. Click **OK** to confirm the deletion. The company is deleted.

9.5. Add Locations New

Context for the current task

1. Click **Admin > Companies**.
2. Either type in a **Filter** or click **Go** to see the list of companies.
3. Click the name of the company for which you want to add a location.
4. Click the **Locations** tab. The current locations for the company are displayed.
5. Click **New Location** at right.
6. Enter the appropriate information and click **Add Location**. The new location is created.

All Location related events like

- **Location created**
- **Location merged**
- **Location deleted** and
- **Location changed**

are recorded and stored in System History. Read this page on how to access the [records](#).

9.6. Edit a Location

1. Click **Admin > Companies**.
2. Either type in a **Filter** or click **Go** to see the list of companies. Click the name of the company for which you want to edit a location.
3. Click **Locations** on the menu. The current locations are displayed.
In the location list, you can merge the two or more locations of the same company. Read how to [Merge Locations](#) on page 243 here.
4. Click the name of the location to edit.
5. Change the information as desired and click **Change**. The information is changed and a confirmation message appears.

9.7. Merge Locations

You can merge two or more locations of a company using the **Merge Locations** option.

1. Navigate to **Locations** tab in Company details page, to view the locations of a company.
2. In the location list, select the source location(s) that you want to merge.
3. Choose **Merge Locations** to merge the selected location(s) to a target location.
4. In the **Merge Selected Locations** pop up window, choose the target location from the **Merge to Location** drop down and select **OK** to merge.

9.8. Set up My Work page

Admin users can set up customized **My Work** page for all users in a company.

1. Navigate to **Companies** and select the company for which you want to set up **My Work** page.
2. In the company details page, open **My Work Setup** tab.
3. Click on **Setup My work** to open the **My Work** page in edit mode. If it is al
4. Follow the steps given here [Edit the Default My Work Page](#) on page 62 and **Save**.

9.9. Delete a Location

If the location you delete still has users assigned to it, WebCenter issues a dependencies warning. You must reassign the users to another location or delete the users before you can delete the location.

Attempting to delete multiple locations will stop on the first location that has dependencies. To delete the rest of the locations, reselect them and delete them.

1. Click **Admin > Companies**.
2. Either type in a **Filter** or click **Go** to see the list of companies. Click the name of the company for which you want to edit a location.
3. Click **Locations** on the menu. The current locations are displayed.
4. Select the location(s) to delete by selecting the checkbox next to the name.
5. Click **Delete Location(s)** in the actions menu.
6. Click **OK** to confirm the deletion.

10. Managing Users

10.1. Licensing and Users

WebCenter supports two types of licensing models. You can have counted licenses in the [Named User License Model](#) on page 248 or [Concurrent User License Model](#) on page 245 where you can have licenses that are taken up during a log-in sessions.

10.1.1. Concurrent User License Model

In this model, you can create as many users as you want. The number of users who may use the system at the same time is determined by your **Concurrent Licenses**. The licensing model distinguishes between three types of users: guaranteed users, concurrent users, and editor users.

Types of Users in Concurrent License Model

Guaranteed users

A guaranteed user can always access WebCenter, regardless of how many concurrent users are logged on at the time.

Concurrent users

Any other user who does not have guaranteed access can log on to WebCenter as long as the maximum number of concurrent users is not exceeded.

You can assign guaranteed sessions to users, even without having the **WebCenter Integration User licenses** and all guaranteed sessions are taken from the pool of concurrent licenses.



Note:

For every three guaranteed users you create, one concurrent user license is blocked permanently.

For example, if you have 25 concurrent licenses for 100 non-guaranteed (concurrent) users, 25 concurrent users can log in at any time.

If you give 25 users guaranteed access, these users will take up 8 concurrent licenses. This means that only 17 concurrent users (out of 100) can log in simultaneously, because 8 concurrent licenses would be permanently blocked by those 25 guaranteed users ($25 \times 0.333 = 8.333$).

Editor users

These are ArtiosCAD Enterprise users. They have guaranteed access but do not take away concurrent licenses.

You will have a fixed number of editor users, determined by the license you have purchased. When that number is reached, you cannot set more users to be editor users.

Generally, your system will either have guaranteed and concurrent users, or editor users.

If you have editor and concurrent users, and all your concurrent access licenses are in use, a concurrent user will not be able to access WebCenter, even if you have editor licenses left (a concurrent user cannot use an editor license to log in).

Integration Sessions

For your integration sessions (e.g. for the SDK or Automation Engine), you can allow **Multiple Open Sessions** (for SDK or Automation Engine) for a User.

Each of your workflow connections connected through tunnel clients will block one integration session license.

When all the Integration Licenses are utilized for integration sessions (for SDK or Automation Engine), then the concurrent license pool is used to allow further integration sessions. In such a case, one concurrent license is blocked for every three integration sessions.

Advance SSO

The Advanced Single SIGN ON is also a license for the concurrent license model. From WebCenter 18.1, license file received will have the Advanced SSO feature by default.

Multiple Guaranteed Sessions

You can allow **multiple open sessions** (such as the SDK user or Automation Engine user) as guaranteed sessions for a User. However, every three such sessions will block a concurrent license reducing the number of available concurrent access.

Workflow Connections

Your workflow connections connected through tunnel clients will block one concurrent license each.

What if the user limit is exceeded?

When the limit of users with concurrent access is reached, no concurrent user may log in until another user logs out.

To prevent users from blocking access for others, there is a configurable time limit of 30 minutes of inactivity. After any users (guaranteed or not) have been inactive for that amount of time, they are logged out automatically, thereby allowing other users to log in.



Note: The Admin user can always log in, even if the user limit is reached.

Check the Concurrent Licensing Status

1. Click **Admin** and navigate to **Users**. To see the users who are currently logged in, click on the eye icon.

You can filter on the Active users or currently logged in users.

Users who simply close browser windows do not actually log off until their sessions expire due to inactivity (usually after 30 minutes). Users should always click **Log Off** when they are done using WebCenter.



Note: To forcibly log off a non-guaranteed user to make more concurrent licenses available, click **Log user off** next to that user's licensing status. Use this with caution as it may result in data loss. It would be prudent to try contacting the user in question before using this command.

2. The Users page also shows this table, where the utilization of different licenses are detailed.

License Type	# Purchased	Reserved (Hide details)	Remaining
Concurrent Licenses	500	Total: 15 Guaranteed Access: 0/1 Guaranteed Sessions: 46/5045 Workflow Tunnels: 0/1	485
Editor/Named User Licenses	1	Total: 1 Guaranteed Access: 1/1	0
Integration Sessions	5000	Total: 5000 Guaranteed Sessions: 4999/5045 Workflow Tunnels: 1/1	0

- **Concurrent Users:** all users logged in currently apart from Guaranteed access users.
- **Editor Users:** the sum of Guaranteed Access (GA) users on the system.
- **Integration user sessions:** sum of all the reserved integration sessions and the number of workflow connections made.



Note: When the Guaranteed Access users and integration sessions and workflow connections licenses are exceeded then, they utilize concurrent licenses in a factor of three items using one concurrent license.

If the number of available licenses reaches a specific threshold, it is displayed in red to indicate the license pool is depleted. The following threshold is effective per license type:

- Concurrent Licenses: 5
- Editor Users: N/A
- Integration Sessions: N/A

If a license violation is effective, (no more free license to allow log in) a warning icon appears next to the appropriate license type and the **Remaining** count value are shown in the next column.

Structured Content Licensing for Concurrent Users

Structured Content licensing is separate from WebCenter Licensing. Structured Content can use either [Named User Licensing](#) or [Concurrent Licensing](#) depending on your setup, regardless of whether your WebCenter server is set up to use Named Configuration licensing or Concurrent licensing.

There are two types of Structured Content Users:

- **Structured Content Editors:** they can open the Structured Content Editor application in **Edit Mode**, and use it's full functionality to write and update documents.
- **Structured Content Reviewers:** they can only open the Structured Content Editor application on **Review Mode** to read and comment the documents.

Concurrent Licenses for Editors and Reviewers

As an Admin, you can make individual users **Structured Content Editors** or **Structured Content Reviewers** by adding them to the **SC_EDITORS** or **SC_REVIEWERS** group, respectively. These groups

are part of the [Deployment package](#). WebCenter users that are not part of either group cannot open documents in the Structured Content Editor application.

In the Concurrent Licensing model, there is no limit to how many users you can add to these groups, but the number of either **SC_EDITORS** or **SC_REVIEWERS** users that can use the Structured Content Editor application at the same time depends on the number of concurrent licenses you have for these user types.

You can see the number of **Purchased, Assigned** and **Remaining** licenses for these two groups on the **Users** page. See [Check the Licensing Status](#) topic).



Note:

- If an **Editor** (or **Reviewer**) opens the Structured Content Editor application while the maximum number of **Editors** (or **Reviewers**) already use it, that user will get a warning banner for their whole session, and the Admins will see it on the **Users** page.
- If a user is in both **SC_EDITORS** and **SC_REVIEWERS** groups, they can only take up an **Editor** license.

10.1.2. Named User License Model

Structured Content Licensing

Structured Content licensing is separate from WebCenter licensing. Structured Content can use either [Named User Licensing](#) or [Concurrent Licensing](#) depending on your setup, regardless of whether your WebCenter server is set up to use Named User Licensing or Concurrent Licensing.

There are two types of Structured Content Users:

- **Structured Content Editors:** they can open the Structured Content Editor application in **Edit Mode**, and use it's full functionality to write and update documents.
- **Structured Content Reviewers:** they can only open the Structured Content Editor application on **Review Mode** to read and comment the documents.

Named User Licenses for Editors and Reviewers

As an Admin, you can make individual users **Structured Content Editors** or **Structured Content Reviewers** by adding them to the **SC_EDITORS** or **SC_REVIEWERS** group, respectively. These groups are part of the [Deployment package](#) . WebCenter users that are not part of either group cannot open documents in the Structured Content Editor application.

You can see the number of **Purchased, Assigned** and **Remaining** licenses for these two groups on the **Users** page. See [Check the Named User Licensing Status](#).



Note:

- If a user is in both **SC_EDITORS** and **SC_REVIEWERS** groups, they only take up an **Editor** license.
- You cannot assign more Editor or Reviewer licenses than available.
- When disabling a user , their license is freed up.

Types of Users in Named User Licensing Model

Regular Users

These are the users who use the non-admin pages of WebCenter. The **WebCenter Regular user limit** determines how many regular users can be created in the system.

Project Creator

These are regular users but can also additionally create projects. They have no other rights on the project after creation. When the licenses of regular users are exhausted, the project creator licenses can be used for regular licenses.

Example:

When you have to create regular users and the number of Regular Users licenses has been used up, you can use the remaining Project Creator licenses for these extra users.

License Type 	# Purchased	Assigned	Remaining
Admin/Project Manager Users	250	86	164
Project Creator Users	300	Assigned to Project Creators: 116 Assigned to Regular Users: 81	103
Regular Users	100	 181	0
Integration Sessions	5	Sessions Assigned: 0 Workflow Tunnels: 0	5



Note: You can hover over the warning symbol to see the number of Project Creator Licenses used for Regular Users.

When there is no license for Regular Users, the licenses for Project Creator and Regular users are combined in the overview page.

Admin or Project Manager Users

These are users who will function as Administrators or Project Managers. The **WebCenter Admin/PM user limit** (as per your license pack) determines the maximum number of Admin and Project Manager users in the system. When the licenses of Regular Users and/or Project Creators are exhausted, the Admin/Project Manager license can be used for these users.

Integration Users

For your integration use cases (e.g. for the SDK or Automation Engine), you can allow Multiple Open Sessions for a user. The maximum allowed guaranteed sessions is determined by the WebCenter SDK session limit module.

Named users have guaranteed sessions and is determined by the **WebCenter SDK session limit** module. You can allow **Multiple Open Sessions** (for SDK or Automation Engine) for such a user.

The session limit licenses can be split over multiple users (without an upper limit), but the total number of guaranteed sessions cannot exceed the WebCenter SDK session limit.

Each of your workflow connections connected through tunnel clients will block one integration session license.



Note: There is an upper limit for the number of simultaneous sessions (maximum 5) for Admin / Project Managers and Regular Users.

What if the user limit is exceeded?

When adding more sessions to an Integration user, the system checks your session limit to see if this is feasible.

When the number of licenses available reaches a specific threshold, then it is indicated in red color. Threshold for concurrent users are fixed at five whereas for Editor Users or Integration sessions the threshold is not applicable.

You cannot create a new User of a Type when the limit has been reached. The limit also applies when you try to change a Regular User to Admin or Project Manager. You will get a **License Violation** error if the limit has been reached.




Note:

- Check the [Troubleshooting Tool](#) if you run into License limit related errors. This page has a License Check[WCR121_TST_700] test with more details about the current status.
- The System Administrator (ADMIN) can always login to verify and correct licensing issues.

Check the Named User Licensing Status

1. Click **Admin** to open the **Users** page. To see the users who are currently logged in, click on the eye icon. You can filter on the Active Users or the current users logged in.
2. **Users** page lists the number of **Purchased**, **Assigned** and **Remaining** license per user type. You can expand the **Assigned** column to view the details of the available licenses vs used at the moment.

License Type 	# Purchased	Assigned (Hide Details)	Remaining
Admin/Project Manager Users	1001	Total: 329	672
Project Creator/Regular Users	2500	Total: 358 <u>Assigned to Regular Users: 324/324</u> <u>Assigned to Project Creators: 34/34</u>	2142
Integration Sessions	503	Total: 146 <u>Guaranteed Sessions: 138/138</u> <u>Workflow Tunnels: 8/8</u>	357

- **Admin/Project Manager Users** (Assigned) is the number of Admin Users and Project Managers licenses utilized from the license type.
- **Project Creator Users/Regular Users** (Assigned) is the number of Project Creator Users and Regular Users licenses utilized from the license type.



Note: In case the Regular User licenses are exhausted, then Project Creator Users licenses are used instead.



Note: In case the Project Creator and/or Regular User licenses are exhausted, then Admin/Project Manager licenses are used instead.

- **Integration Sessions** (Assigned) is the sum of all the guaranteed sessions and workflow connections licenses utilized from the license type.

If the number of available licenses reaches a specific threshold, it is displayed in red to indicate the license pool is depleted. The following threshold is effective per license type:

- Admin/Project Manager Users: 1
- Project Creator Users and Regular Users: 10
- Integration Sessions: N/A

If a license violation is effective (no more free license to allow log in), appears next to the appropriate license type and the Remaining is shown in the Remaining column.

The following default users are not counted against the Purchased licenses.

1. ADMIN - the admin user, user with user name "ADMIN"
2. CADX user
3. CLEANUP user
4. WORKFLOW USER

Structured Content Licensing for Named User

Structured Content licensing is separate from WebCenter licensing. Structured Content uses [Named Licensing](#) (even if your main WebCenter licensing uses [Concurrent Licensing](#)).

There are two types of Structured Content users:

- **Structured Content Editors:** they can open the Structured Content Editor application in **Edit mode**, and use its full functionality to write and update documents.
- **Structured Content Reviewers:** they can only open the Structured Content Editor application in **Review mode**, to read documents and make comments on them.

Editors and Reviewers Licenses

As an Admin, you can make individual users **Structured Content Editors** or **Structured Content Reviewers** by adding them to the **SC_EDITORS** or **SC_REVIEWERS** group, respectively. These groups are part of the deployment package. For more details, see [Configure Structured Content](#). WebCenter users that are not part of either group cannot open documents in the Structured Content Editor application.

You can see the number of **Purchased, Assigned#** and **Remaining** licenses for these two groups on the **Users** page. For more details, see [Named User Licensing Status](#).

10.2. Users, Groups and Roles

Basic concepts

Access to projects and documents is controlled by user and group permissions.

User

Everyone who logs in to WebCenter is a user. Users log in using a username and password assigned to them by an Administrator.

Group

A Group is a logical set of users connected by a common element of your choosing, such as function or location. You can assign tasks to groups, you can set up groups as approvers or even as project managers.

Role

A Role is a placeholder object that project managers can use in their projects or templates to set up approvals, assign tasks to, use in workflows, etc., without being forced to use specific users and groups just yet. Upon project creation, or even later in the process, the project manager can assign the role(s) to the actual user(s) and/or group(s). This provides more flexibility in setting up templates/projects.

Default users

One user, admin, and two groups, Admins and Users, are created by default in WebCenter. Members of the Admins group are WebCenter system administrators and can perform any function.

10.3. Create a User

1. Click **Admin > Users > New 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 *.



Note: Under **Username** field, if the new username entered matches the email address of an unregistered user, a message appears to convert the unregistered user to a registered one. Clicking **Ok** converts the unregistered user into a registered user, and clicking **Cancel** enforces changing the username.



3. Do you want to use LDAP authentication (single sign-on) for this user?

- If yes, enable the **Use LDAP to Authenticate User** option. This will allow the user to use his regular Windows network user name and password to log on to WebCenter.
- If no, 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. See [Menus](#) on page 40.

- If yes, choose the menu to assign to the user in **User Menu**.
- If no, leave **Default** in **User Menu**.

5. Does the user need guaranteed access?

- If yes, enable the option **User Has Guaranteed Access or is an ArtiosCAD Enterprise User**.



Note: You can also use this option to make editor users, if you license allows it (see [Licensing and Users](#) on page 245).

- If no, leave the option disabled and proceed to the next step.

For more information on guaranteed access and its licensing implications, see [Licensing and Users](#) on page 245.

6. Does the user need multiple open sessions with guaranteed access?

- If yes, enable the option **Allow Multiple Guaranteed Sessions**.



Note: You can allow multiple open sessions (such as the SDK user or Automation Engine user) as guaranteed sessions for a User. However, every three such sessions will block a concurrent license reducing the number of available concurrent access.(see [Licensing and Users](#) on page 245).

7. Does the user need special permissions in WebCenter?

If the user needs...	Select the option...
no special permissions	Normal User
Project Manager permissions, but only for projects and users belonging to his or her own company	Project Manager with Limited Visibility of Companies and Groups
Project Manager permissions on the complete system	Project Manager with Full Visibility
Project Creator with permission on the complete system	Project Creator with Full Visibility
Project Creator permissions in restricted mode	Project Creator with Limited Visibility

8. Does the user need the ability to create new task types in WebCenter? (only if the user is a **Project Manager**)

- If yes, enable the option **User Can Create Task Type**.
 - If no, leave the option disabled and proceed to the next step.
9. Does the user need the ability to create new users? (only if the user is a **Project Manager**)
- If yes, enable the option **User Can Create User**, then click **Continue**.



Note: A Project Manager creating users will have less options than an Admin: for example he / she will not be able to give the new user LDAP (network) sign-on or guaranteed access.

- If no, click **Continue**.



Tip: You can keep track of users created by other users: the **Owner** column of the **Users** page shows who created each user.

10. 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.
11. If you:
- are creating a **Normal User** or a **Project Manager with Full Visibility**, the wizard is complete. Click **Finish** to create the user.
 - are creating a **Project Manager with Limited Visibility**, click **Continue** and proceed to the next step.
12. In **Step 3: Assign Visible Companies**, select the companies that this user should be able to see, then click **Continue**.

The selection you make here filters the list of users in the next step so that this Project Manager can never see users from the companies you did not select in this step. By default, only the company of the Project Manager himself (the one you selected in the previous step) will be selected.



13. In **Step 4: Assign Visible Groups**, select the groups the user should be able to see, then click **Finish**.
- Only groups containing members that belong to one of the companies you assigned in the previous step will show up in the list. In addition, some groups may be set to be visible to all users (such as the ADMINS group).

10.4. Editing Users and their Preferences

10.4.1. Edit a User

1. Click **Admin**.
2. On the **Users** page, filter the list of users if desired, and click the User Name of the user to edit.
The **Profile** page appears.
3. Make the required changes:

To edit the user's...	You should...
User info (including authentication details)	edit the fields on the Profile Page. Read also Edit User Authentication Settings on page 256.

To edit the user's...	You should...
Menu	choose a different menu in the User Menu list.
User Type	select the appropriate role from the options: <ul style="list-style-type: none"> • Normal User • Project Creator • Project Manager
Visibility	Select the visibility for the user from the options: <ul style="list-style-type: none"> • Limited Visibility of Companies and Groups • Full Visibility
Privileges	Also specify if: <ul style="list-style-type: none"> • User Can create Task Type • User Can Create User • User Has Guaranteed Access or is an ArtiosCAD Enterprise User
Company or Location	<ol style="list-style-type: none"> 1. Click the Company/Location link at the bottom of the Profile page. 2. Select a new company and click Finish.
Visible Companies or Locations (only applies to Project Managers and Project Creators with Limited Visibility)	<ol style="list-style-type: none"> 1. Click the Visible Companies or Visible Locations links. 2. Make a selection of visible locations and/or companies and click Finish.
Allow Multiple Sessions <i>The licensing and users overview page will explicitly show the number of guaranteed sessions and the number of licenses blocked.</i>	Enable this option to allow the user to login concurrently multiple times. <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;">  <p>Tip: Use this if you have heavy SDK integration with simultaneous tasks. This is also useful if you have a lot of shared users (e.g. for an external company).</p> </div> <ul style="list-style-type: none"> • Specify the Maximum Open Sessions allowed for the user. <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;">  <p>Note: This has an impact on your concurrent licenses. Every three such sessions take up one concurrent license. For example, if your integration user has 30 sessions, this will take up 10 concurrent licenses. Do not use this option for normal users.</p> </div>

To edit the user's...	You should...
	The admin users have the same number of multiple sessions as any other user. You can change this by setting a different Maximum Open Sessions .

4. Click **Change** to confirm.

Edit User Authentication Settings

An Administrator or a Project manager with rights can manage the SSO authentication details at the user **profile** page.

Go to **Admin > Users**. Select the **User** and go to the **Profile** page.

Users New User Login Tracking Profile Preferences My Work Setup Groups Download Projects User is in Delegation History

User Details

Username *

First Name


Last Name *

E-Mail *

Phone Number

Mobile Number

Function

Picture 

Authentication

Basic password authentication Default (Allowed) ▼

New Password *

Confirm New Password *

Require the User to change the password at first login.

token Default (Allowed) ▼

Authentication:

This section lists the available and disabled **authentication** types. You can allow / deny the User authenticating with any of the [Single Sign-On](#) Instances.

Read also [Single Sign-On Settings](#) on page 438.

Link Authentication:

To allow a User to authenticate via a link, configure [Token Authentication](#) on page 441 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.

Click **Mail Login Link** to send this link to the user.

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.

10.4.2. Change the Password for a User

1. Click **Admin**.

The Users page appears.

2. On the **Users** page, filter the list of users if desired, and click the User Name of the user to edit.
3. Click the **Password** tab.
4. Type a new **Password** and Confirm it.
5. Click **Change** to save the changes.



Note: While changing a user's password, all existing sessions of the respective user are logged off.

10.4.3. Change a User's License Status

1. Click **Admin**.

The Users page appears.

2. On the **Users** page, filter the list of users if desired, and click the User Name of the user to edit.
3. Select or deselect the **User has guaranteed access** option and click **Change**.



Note: Changing users' licensing is effective immediately.

Alternatively, to change many users' licensing status in a single operation:

1. Select the users on the User page.
2. In the actions menu, click **Grant Guaranteed Access** or **Remove Guaranteed Access** as desired.

10.4.4. Set the Preferences for a User

1. Click **Admin**.

The Users page appears.

2. On the **Users** page, filter the list of users if desired, and click the User Name of the user to edit.
3. Click the **Preferences** tab.

4. Configure the Preferences as needed. For more information on the settings and options, see [General Preferences](#) on page 24.

10.4.5. Copy Preferences to Users

Use this to quickly copy previously defined preferences to one or several users.

1. Click **Admin**.

The Users page appears.

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 user, or select **Default** to use the default settings for the preferences you selected.
5. Click **OK**.

10.4.6. Edit a User's Group Memberships

1. Click **Admin**.
2. On the **Users** page, filter the list of users if desired, and click the User Name of the user to edit.

The **Profile** page appears.
3. Click the **Groups** tab.
4. To add the user to one or more groups, select those groups (use Ctrl+click to multiple-select) in the **Available Groups** list and click the **>>** button.
5. To remove the user from one or more groups, select those groups in the Current Groups list (use Ctrl+click to multiple-select) and click the **<<** button.

The changes are effective immediately.

10.4.7. Set Available Download Formats for a User

1. Click **Admin**.

The Users page appears.
2. On the **Users** page, filter the list of users if desired, and click the User Name of the user to edit.
3. Click the **Download** tab.
4. Select or deselect the download formats you want to enable.



Note: User permissions for download formats take precedence over group permissions for download formats.

5. Click **Change**.



Note:

Alternatively, you can click **Use Group Permissions** to make the user inherit the download formats from his or her group membership(s).

10.5. Deactivating Users

An administrator user or a project manager with create user rights user can deactivate users. You may want to use this feature when you no longer need a user in the system or when you are inviting an external collaborator to an approval cycle temporarily. You can also do this when you need to free up [named user licenses](#).

Deactivated users cannot log in, become project members or stay as task assignees. This means that you cannot start a task or an approval cycle that has a deactivated user as its assignee or approver respectively.

The deactivated users are still in the Users list with a clearly marked **Deactivated** label. This allows you to keep track of what they did or reactivate them if there is a need. Click Deactivate User(s) after selecting the users you may want to delete.



Note:

- A project manager with create user rights can only deactivate the users he created.
- The user deactivation and activation events are logged in the User Management History.
- Admin User or PM users with **Create User** rights can deactivate users in bulk in the **Users** overview page, by selecting the users and clicking **Deactivate user(s)**.

The deactivated users will not receive notification or overdue e-mails even if they are included among the expected recipients of a Notification message (for example, deactivated Project members).

10.5.1. Deactivate Users

You can deactivate users either manually or automatically after a specified duration.

- To **deactivate** a user manually:

- a) Go to **Admin > Users > User > Profile** page.
- b) Disable the **Active User** option.

You will see a message warning you about pending approvals or tasks or if the user is currently logged in. To know more details about the pending work, click on the displayed message.

- c) **Save**.

As soon as you save, the deactivation happens even if the user is logged in or has pending work.




Note: It is not possible to deactivate:

- the built-in users (ADMIN, CADX, WORKFLOW, CLEANUP) that don't take up any licenses.
- the currently logged in user.



Warning: The manually deactivated users can be reactivated only after 24 hours.

- To set up **automatic deactivation**,
 - Go to **Admin > Users > User > Profile** page.
 - Select from the following options and **save**.

Options	Description
Deactivate after X working days	Specify the number of working days from the current date. You will see a message with the predicted date of deactivation.
Deactivate at a specified date	Pick a date using the date picker. <div style="border: 1px solid #ccc; padding: 5px; display: inline-block;">  Note: You can only set this up for active users. </div>
No automatic deactivation	The default option.

The automatic deactivation happens on the calculated/specified date after 23:59:59 server time.

- To create deactivated users, disable the **Active User** option in the user creation form. For example, you could create a deactivated user as a Template user.



Tip: You can create deactivated users with different deactivation dates as template users. Use these as template users to create different types of approver users (with varying deactivation periods).

10.5.2. Reactivate Users

To reactivate users, use any of the two ways listed below.

- From the User Profile page, enable the **Active User** option.
- Select deactivated user(s) in the **Admin > Users** page and click the **Activate User(s)** action button.



Warning: The manually deactivated users can be reactivated only after 24 hours.

10.6. Delete a User

When deleting a user, WebCenter checks for dependencies, such as being a Project Manager or being an Approval User on an ongoing Approval Cycle, before deleting the user.

If there are dependencies, WebCenter asks you whether you want to view them (with links so you can remedy the dependencies) or cancel the deletion.



Note: Attempting to delete multiple users will stop on the first user that has dependencies. To delete the rest of the users, reselect them and delete them.

1. Click **Admin**.
2. Select the checkbox next to the name of the user to be deleted. To delete more than one user at a time, select additional checkboxes of users to delete.
3. Click **Delete User(s)** in the actions menu.
4. Click **OK** to confirm the deletion.
5. If there is a Delete Dependency confirmation, choose the desired option and click **OK**.

Users cannot be deleted until any dependency issues have been resolved.

10.7. 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).



Note: These users will be created as Regular Users. The only exception is when an Administrator user creates a user using an Admin User as the **Approval User Template**.

If you have used up all your Regular User licenses, you will not be able to **Create and Invite User** from the approval page. Read about Named User License model in [Licensing and Users](#) on page 245.

- 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](#) on page 441 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.

10.8. Managing User Memberships in Projects

10.8.1. View a User's Project Memberships

1. Click **Admin**.
2. On the **Users** page, filter the list of users if desired, and click the User Name of the user to edit.
3. Click the **Projects User is in** tab.

The list of project for the user is displayed. You can filter the list of projects if needed, using the Show Projects, Manager Last Name, and Manager Group Name fields and the Modified list. Fill in the filter criteria and click Go.



Note: This does not show Projects for which the user is the Project Manager or those Projects in which the user is a member by means of belonging to an invited Group.

4. You may uninvite the user from any of the Projects shown in this list by selecting the Project(s), and clicking **Uninvite** in the actions menu. The user must not be an Approver in an active Approval Cycle.

10.8.2. Invite a User to Multiple Projects

1. Click **Admin**.
2. On the **Users** page, filter the list of users if desired, and click the User Name of the user to edit.
3. Click the **Projects User is in** tab.
4. Click **Invite to Projects**.
5. Select the projects you want to invite the user to, and click **Continue**.

6. Select the permissions the user needs in the project and click **Finish**.

10.8.3. Uninvite Users from Multiple Projects



Note: If the user is an Approver in an ongoing Approval Cycle in a selected Project, the entire removal action is canceled. You must stop the Approval Cycle and then perform the removal.

1. Click **Admin**.
2. On the **Users** page, filter the list of users if desired, and click the User Name of the user to edit.
3. Click the **Projects User is in** tab.

The list of project for the user is displayed. You can filter the list of projects if needed, using the Show Projects, Manager Last Name, and Manager Group Name fields and the Modified list. Fill in the filter criteria and click Go.

4. Select the Projects you want to uninvite the user from.
5. Click **Uninvite** in the actions menu.
6. Click **OK** to confirm.

10.9. Login Tracking

To get a simple overview of User Logins for a specified time period, click the **Admin > Users > Login Tracking** option.

- Specify the time units (**Detail Overview** in **days / hours / weeks**).
The overview table will display the time in the units you specified here.
- Select the **View** as **graph / table**.
- Select the time period by specifying the dates.
- Click **Search**.

You can use **Save to Excel** to export the login overview. You can view more details by clicking on Switch to **Advanced View**. Read in [Advanced Login Tracking](#) on page 264.

Read also [Failed Logins](#) on page 263 and [License Usage](#) on page 263

10.9.1. Failed Logins

Failed Logins column gives the count of the number of login attempts that were denied because of insufficient licenses. This count is measured during the period you specified.

10.9.2. License Usage

In the Login Tracking page, you can see the statistics regarding:

- used and free editor licenses

- used and free concurrent licenses

for the specified time period. You will see a warning next to the progress bar if there was at least one **Failed Login** due to shortage of licenses.

10.9.3. Advanced Login Tracking

The advanced page shows a list of individual User sessions (or Failed login attempts) that were active during the specified time period.

To view the successful login details, select **Show Login Sessions**. You can view the failed logins by opting to **Show Failed Logins**.

Use the custom filtering to limit the information to what you are looking for. For successful **login sessions** you can filter on:

- **Single Sign-On Instance**
- **Login Method**
- **Logout Method**
- **User** : You can type the
 - User Name
 - First Name
 - Last Name
 of the target User.
- **Company**
- **Location**: Use this filter to view the login statistics associated with one Company and in a specific location



Note: To show the system user sessions (“SYSTEM” and “CADX”), enable the option **Show sessions from system users**. This option is turned off by default.

If you are viewing **Failed Logins**, you can filter on:

- **Single Sign-On Instance**
- **Login Method**
- **Login Failure Cause**
- **User** Type any of the following:
 - User Name
 - First Name
 - Last Name

To see login attempts from unregistered users, enable **Show anonymous login attempts**.



Tip:

Use **Sort by** to sort the table based on the selected column.

To export the table as a .XLS file, click **Export to Excel** link.

10.10. Delegation

Delegation is the assignment of responsibility or privileges to another user to complete his / her work.

For example, when a Project Manager (P1) has planned a personal time off and wants to delegate his user account to another Project Manger (P2). In this case, the P1 is the delegator and P2 acts as a delegate of P1. P2 can perform and manage the work on behalf of P1.

You can configure a delegate for a specified time period or permanently. Actions performed by the delegate P2 will be tracked in the respective project history.

Delegation can be done only to users who are in the same hierarchy or above. An admin user can delegate only to another admin user and not to a normal user. Potential Delegates as per the User Access Level are

User Access Level	Can delegate to
Admin User	Admin only
Project Manager (with Limited and full visibility)	Project Manager or Admin User
Normal User	Normal User or Project Manager or Admin User

Delegation Restrictions

To ensure that your user(s) delegate to a limited list of users, you can use the **Delegation Restrictions** either as a system wide settings [Delegation Preferences- System Wide](#) on page 33 or per user.

The Administrators can specify the user level setting which overrides the system wide settings in that case. Admin users can place restrictions on delegation for a specific user based on various factors like

- **System Default**
- **No Delegation** is possible if you choose this option. This prevents your users from delegating their work.
- **All Visible Users** allows to delegate any user who are visible in his or her list.
- **Only Users in the same** allows you to restrict the choice to delegate, within the same company or location or group.

For example, you can specify that delegation is restricted within the members of a Company. This would mean that you cannot pick a user who is not part of the same Company as your delegate.

- **Any of the following Users or Groups** allows you to choose the delegates from a group(s) or any users with the **Add** button.



Note: All the delegation restrictions are copied when the option **Delegation Restrictions** is selected in **Apply Preferences**.

Your user's Delegation

As an Admin user or as a Project Manager who has a set of users, you can view, create or modify the delegation setup of your users. To do that, use the **Users > Profile > Delegation** page.

When a user assigns a delegate, the delegate can perform all the work actions. The delegate has to log-in on behalf of the delegator, to perform the tasks, approvals and permission settings.


Note:

1. You cannot delegate a deactivated user's work or delegate to a deactivated user.
2. A user can be the delegate to more than one user but cannot be logged in as more than one delegate at the same time.
3. Delegation works only in one level. The work delegated to a user cannot be delegated to his delegates.

10.10.1. Setting up Delegation for your Users

As an Admin user or as a Project Manager who has a set of users, you can view, create or modify the delegation setup of your users. To do that, use the **Users > Profile > Delegation** page.

1. If you are an owner of users, go to **My WebCenter > My Users > *Name* > Delegation** page. As an administrator, you can use the **Admin > Users > *Name* > Profile > Delegation** page.
2. To add one or more delegates for your user, select a user from the drop-down and click **Add Delegate**.
3. Optionally, if you are an admin and like to configure a specific restriction for a user or to add a custom list of users and group as potential delegates, you can edit the **Delegation Restrictions**. If you do not edit this field, the global [Delegation Restrictions](#) setting will apply.

You can revert to the global setting by selecting **System Default**.

The **My Delegates** section of your user will list the delegates authorized to act on his or her behalf. You can add new delegates here.

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.

11. Managing Groups


11.1. Create a New Group

1. Click **Admin > Groups > New Group**.
2. Enter the name of the group.
3. Choose who will be able to see this group: **All Project Managers**, **Administrators Only**, or **Selected Project Managers**.
4. Click **Continue**.
5. In **Step 2: Select Group Members**, select the members of the group by checking the checkboxes to the left of their names.
6. Is this new group visible to every Project Manager or only to Administrators:
 - If yes, click **Finish**. The group is created.
 - If no, click **Continue**. Then, in **Step 3: Assign group visibility to project manager(s)**, select the Project Managers that can see this group and click **Finish**.

Project Managers with Full Visibility are unavailable, as they can see all groups. By default, group members can see the group but you can still de-select the group members so that they don't know this group exists.

11.2. Add Users to a Group

1. Click **Admin > Groups**.
2. Click the name of the group to edit. Click **Add Users**.

When adding new members to a Group, you can filter on First Name, Last Name, User Name, Email of the User, Name or the legal name or the Company of the user or the Location of the User. You can add all active members in one go using **Select All Active Users** () option.



Attention: Members of the Admins group can perform any task and are not bound by any security restrictions and hence it is important to be cautious when adding users to groups. **Deactivated Users** can be activated and added to the group by the admin users.

The list of users who are currently not members of the group is displayed.

3. Select the user(s) to add to the group.
4. Click **Finish**.

11.3. Remove Users from a Group

1. Click **Admin > Groups**.
2. Click the group to edit.
3. Select the user(s) to remove from the group.
4. Click **Remove** in the actions menu.
5. Click **OK**.

11.4. Copy or Move Users Between Groups

1. Click **Admin > Groups**.
2. Click the group to edit.
3. Select the users to copy from the group.
4. In the actions menu, click:
 - **Copy users** if you want to copy users from one group to another.
 - **Move users** if you want to move users from one group to another.
5. Either filter or click Go to show the list of groups.
6. Select the new group(s) into which the users will be copied or moved.
7. Click **Finish**.

11.5. Rename a Group

1. Click **Admin > Groups**.
2. Click the group to edit.

The ADMINS and USERS groups cannot be renamed.
3. Enter the new name of the group in the **Group Name** field and click anywhere else on the page.
4. Click **OK**.

11.6. Grant Administrative Rights to a Group

This feature allows Administrator to grant administrative rights to a group of users for certain system components. The following components are listed:

- **Access Management**
 - **Users**
 - **Groups**

- Roles
- Companies
- CAD
 - Download Formats
 - Boards
- Setup
 - Attributes
 - Attributes
 - Attribute Categories
 - Restricted Sets
 - Lists
 - Characteristics
 - Search
 - Preferences
 - Dashboards
 - Menus
 - Project Management
 - Templates


Note:

- Adding or removing a user from an administrator group or changing permissions will result in the revocation of their administrative rights..
- Users with Administrator Group Rights can view only the items to which they have access in the administrator menu.
- Users with administrative rights other than Administrator can only modify or view pages for which they have been granted explicit permission.

To grant administrative rights:

1. Create a **New Group**. For details, see [Create a New Group](#) on page 267
2. Click **Admin > Groups > Rights**.
3. Select the list of components for which you wish to grant rights.
4. Click **Save**.

11.7. Change the Group Visibility

1. Click **Admin > Groups**.

2. Click the group to edit.
3. Click the **Visibility** tab.
4. Select the desired visibility choice: **All Project Managers/Creators**, **Administrators Only**, or **Selected Project Managers/Creators**.
5. Depending on your visibility choice, proceed as follows:
 - If you chose **Selected Project Managers/Creators**, you will be prompted to select the individual Project Managers who should be able to see this group. Click **Change** when you have made your selection.
 - If you chose one of the other options, go directly to the next step in this procedure.
6. Click **OK**.

11.8. Set Group Download Formats

Configure the available download formats in WebCenter Preferences (**Admin > Preferences > Download Formats**) before setting group download permissions.

1. Click **Admin > Groups**.
2. Click the group to edit.
3. Click the **Download** tab.
4. Select or deselect the download formats you want to enable.



Note: User permissions for download formats take precedence over group permissions for download formats.

5. Select or deselect checkboxes to grant or deny permissions as desired.
6. Click **Change**.

11.9. View Group History

Actions performed in the group including its creation, are recorded in the **History** tab of the group. You can access this from **Admin > Groups**. Now, select and open the **Group** for which you want to view the history and navigate to the **History** tab.

You can view the following actions in the **History** tab.

- Group Created
- Group Information changed (Renaming of the group/ changes to visibility setting of the Group)
- User added or removed from the group
- Group View Rights changed (changes to the list of Project Manager's/ Project Creators who can view the Group)
- Group Manager Changed



Note: When the Group is deleted, you can view the event history in **Admin > Group > View History**. This page lists the events of all the groups and it can be filtered on date and users.

11.10. Setting Group Notifications

As an administrator or a Group manager, you can set up notifications individually for every group member or to a single group e-mail address.

1. Click **Admin > Groups**.
2. Click the group to edit.
3. Click the **General** tab.
4. Select your preferred way of sending notifications or disable them altogether.
 - **Send notifications to everyone in the group:** When this option is selected, a group event will trigger notifications to all of the group members' e-mail addresses according to the individual language settings.
 - **Send notifications to a group e-mail address.** Specify the following info:
 - **Group e-mail address**
 - **Group-email language**

If this option is chosen, a single e-mail notification is sent to the specified Group e-mail address.
 - **Do not send notifications to this group:** Select this to deactivate email notifications altogether.
5. Click **Save**.

11.11. Managing Group Memberships in Projects

11.11.1. View a Group's Project Memberships

1. Click **Admin > Groups**.
2. Click the group to edit.
3. Click **Projects**.

11.11.2. Invite a Group to Multiple Projects

1. Click **Admin > Groups**.
2. Click the name of the desired group.
3. Click **Projects**.
4. Click **Invite to projects**.
5. Either filter or click **Go** to show the list of all projects to which this group is not invited.
6. Select the projects to which the group is being invited.
7. Click **Continue**.

8. Set the project permissions that this group will have in the projects to which it is being invited. The same permissions will apply to each project.
9. Click **Finish**.

11.11.3. Uninvite Groups from Multiple Projects

If a user in the group is an Approver in an ongoing Approval Cycle in a selected Project, the entire removal action is cancelled. You must stop the Approval Cycle first, and then perform the removal.

1. Click **Admin > Groups**.
2. Click the name of the desired group.
3. Click **Projects**.
4. Either filter or click **Go** to show the list of all Projects to which this group is invited.
5. Select those Projects from which the group is to be uninvited.
6. Click **Uninvite** in the actions menu.
7. Click **OK** to confirm the removal.

11.12. 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.

11.12.1. Group Task Manager

Every department has a Department Manager. In WebCenter Department Manager are referred 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.

11.12.2. Assigning a Group Manager

The **My Group's Task** page can only be accessed by a Group Manager. Only a member of ADMINS can turn a group member into a Group Manager.

1. Log in to WebCenter as an Admin user.
2. Click **Admin > Groups > Groups**.
3. Search for the required Group Name or click the Group Name from the list available.
4. Select the **Group Manager** check box for the desired group member.

You can assign multiple Group Managers to one group. The same user can also be Group Manager to multiple groups.

11.12.3. 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.

Search Tasks		Sort by	Due Date	Status	All but Completed
Members	Task Count				
DEKE_DEPENDENCIES	Before: 1(1 overdue)	After: 1(1 overdue)			
ArtiosCAD, ArtiosCAD (ARTIOSCAD)	Before: 0(0 overdue)	After: 0(0 overdue)			
deke_user2 (DEKE_USER2)	Before: 0(0 overdue)	After: 0(0 overdue)			
il, pm (IL_PM)	Before: 61(61 overdue)	After: 61(61 overdue)			
Keizer, Debbie (DEKE)	Before: 138(138 overdue)	After: 138(138 overdue)			
prma (PRMA_USER2)	Before: 0(0 overdue)	After: 0(0 overdue)			

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.

1.  **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**.

3.  **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.

2.  **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:

Due Date ↑

Jan 29, 2013

12. Managing Roles

12.1. Roles

A **Role** is an assignment that you can create in WebCenter to be used later on in Projects. You can assign a **Role** to **Project Templates, Projects, Tasks** and **Approvals**. You can set up project permissions, approval settings and tasks for a **Role** within a project or template.

You can assign these Roles to real users and groups when needed. When you assign a Role to a real **User** or **Group**, you are assigning the Role's settings.

You can create versatile Project Templates using **Roles** which will help you to reduce the number of Project Templates.

Roles are created as global. This helps the Project Managers (or Selected Project Managers) to use the Roles effectively in individual projects and templates. You can invite these **Roles** as in the case of **Users** and **Groups**.

Roles are effective after real members (**Groups, Users**) are assigned into 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.

- the notifications will be sent out correctly
- the task will be shown in the respective members' to-do list
- the necessary access rights will be assigned to the members to perform the task (depending on the Role)
- the approval notifications will be sent out correctly.

You can employ multiple assignments of a single **Role**. For example, you can invite a "Designer" **Role** to all the Projects requiring a designer either after creating a Project or via the Project Template with assigned Roles.

You can use **Roles**:

- **To combine with Workflows:**

The tasks assigned to **Roles** will be picked up by the users or groups who are assigned to these Roles either at the beginning or later during the project execution. The project manager can decide who will get assigned to the **Roles**. Since WebCenter keeps track of Role assignments:

- the notifications will be sent out correctly
- the task will be shown in the respective members' to-do list
- the necessary access rights will be assigned to the members to perform the task (depending on the Role)
- the approval notifications will be sent out correctly.

- **In Project Templates:**

Features associated with **Roles** will be inherited from Project Templates during project creation. Adding **Roles** (instead of user **Groups** or individual **Users**) to your Project templates makes them more versatile.



Note: Although the Roles are defined for entire WebCenter, the assignment of Roles is done per project and is independent of the User. Therefore, you can assign the same user or group to a "Designer" Role in one project and restrict the access for the same User/Group in other projects.

Read more in [Creating a Role](#) on page 278

12.2. Creating a Role

1. Click **Admin > Roles > New Role**.
2. Specify the name of the **Role**
3. Determine the visibility of the Role by selecting from **All Project Managers, Administrators, or Selected Project Managers**. Click **Continue**

Subsequent step depends on whether you selected **Selected Project Managers** visibility in this step.

Choice	Steps
Selected Project Managers	You should select which Project Mangers are allowed to see the Role
All other	The New Role is created.

You can view these roles in the list of Project Members even after being **resolved**.

4. Assign a **Viewer Workspace** from one of the existing workspace available in the drop down or you can create a new workspace for the role created.

12.3. Editing Role details

1. Go to **Admin > Roles**. You can see the list of available **Roles**, where the Role names are visible as links in this tab. To edit any Role details, click on the Role Name and this will lead you to the tab named **General** of Role Management page.
2. You can change the name of the **Role** in the General tab. Edit the name of the role in the **Role Name** field and click anywhere else on the page to save the change or click on **Save**.
3. You can also assign a new workspace from the drop down available in the **Viewer Workspace** field or change the workspace present. It is also possible to edit or delete the workspace present by selecting the gear icon. Click on save for the changes to be effected.

12.4. Changing the Role Visibility

1. Go to **Admin > Roles** . This will lead you to the tab named **General** of Role Management page. You can see the list of available **Roles** in this tab.
2. Click on the name of the Role (visible as a link) for which you want to change the **Visibility**.
3. Go to the **Visibility** tab and change the visibility.

You will have to choose from three **Visibility** choices: **All Project Managers, Administrators Only** and **Selected Project Managers**.

Options	Description
Selected Project Managers / Creators	You will be prompted to select the individual Project Managers or Project Creators. Click Change when you have made your selection.
All Project Managers/ Creators and Administrators Only	You will be asked to confirm the selection. Click OK .

12.5. Restricting Role assignment

If your WebCenter system has one or more Groups (visible to the current Project Manager) which have the same name as the Role followed by a space and a non-empty last part, then the list of Groups available for Role assignment is restricted to the Groups matching this name pattern. If no such Groups exist, the full list of visible Groups is available.

Example: A User wants to assign a Group to the Role SALES. If SALES BELGIUM, SALES FRANCE, SALES UNITED KINGDOM exist, the dropdown for selecting a Group to assign to this Role will only contain these Groups. Other Groups that do not match the pattern such as DESIGNERS, SALESFORCE (no space), MY SALES (does not start with SALES) are not selectable.



Note: In case this name pattern is used then direct User Role assignment is not possible unless one of the valid Groups is selected first.

12.6. Deleting Roles

1. Go to **Admin > Roles**. This will lead you to the tab named **General** of Role Management page. You can see the list of available **Roles** in this tab.
2. Select the **Roles** from the list of Roles by toggling the respective check boxes.
3. Click on **Actions > Delete Role(s)** from the list header.



Note: You will be warned if this Role is associated with an existing Project or Approval cycle.

12.7. Converting Empty Groups to Roles

Previous versions of WebCenter made use of empty **Groups** to create roles. From WebCenter 12 onwards this is replaced by **Roles**. However, you can also convert any empty **Group** that serves as **Role** into a full fledged **Role**. This will ensure that any reference to such empty **Groups** will be retained and shifted to the new **Role** that is created during this process.

To convert an empty group to a role you need to follow these steps:

1. Go to **Admin > Groups**.
2. Select those **Groups** which you need to convert into **Roles**.
You can use **Show** filter to filter out all the non-empty groups.
3. Go to **Actions** menu. Select **Convert Group to Role** action link in to execute the conversion into a **Role**.

You will be re-directed to a page detailing how many of the selected empty groups were converted and how many were not.



Note: The conversion can fail when:

- a non-empty **group** is selected for conversion. Only empty groups can be converted into roles.
- a **role** with the same name as the selected empty group exists. Role names must be unique.

12.8. Delegating Roles: Setting up Roles to Assign Roles

Project Managers and Project members (with permissions) can assign a Role within their Projects. The Project Manager or Member can do this from the **Manage Roles** page.

1. Click **Admin > Roles**.
2. Select the **Role** you want to assign permissions to.
3. Click the **General** tab.

Role: **CSR**

Roles | New Role | **General** | Visibility

Role *CSR*

Tip: * indicates required field

Role Name: *

Role is Visible by : <All Project Managers>

Role can invite following roles : Sales; CSR; Printer

- Click on the **Roles can invite following roles** link. This will open **Manageable Roles** page. **Role can invite the following roles** drop down will contain all the Roles present in the system.

Role: **MANAGEMENT**

Roles | New Role | General | Visibility | **Manageable Roles**

Roles Managed by Role *MANAGEMENT*

Role can invite the following roles:

- DESIGN
- FINANCE
- MARKETING

Role can invite the following roles list depends on the visibility rules. See below.

Admin and PM with full visibility	PM with limited visibility	Normal user
All Users and Groups	Visible Users and Groups	<ul style="list-style-type: none"> Users from his own company (all locations). Users and Groups present in the same Project (through individual or role assignments). Groups the user is member of.

- Save.

After setting up this configuration, the Project Member in that specific Role can invite other Roles. The same Project Member in different Roles can have individual configurations in **Role can invite the following roles** list. In this scenario, the list of Roles that this Member can assign will be the sum of these individual lists.

12.9. View Roles History

You can view the changes that are made to the Roles in the **History** tab. You can access this in the **Admin > Roles**. Now, select and open the **Role** for which you want to view the history and navigate to the **History** tab.

- Role Created
- Role Information Changed (renaming of the Role/ changes to visibility setting of the Role)
- Role View Rights changed (changes to the list of PM's/ Project Creators who can view the Role)
- Group Converted to Role. History of the group is transferred here and all details can be viewed now in the Role History



Note: When the Role itself is deleted, you can view the event history in **Admin > Roles > View History**. This page lists the events of all the roles and it can be filtered on date and users.

13. Discussions

Discussions helps users to communicate with each other better and enables to seamlessly interact at various levels like project, document or at task level. Discussions facilitates WebCenter users to have conversations, which facilitates collaboration and faster decision making.

You can start a discussions in WebCenter, in a **Project**, **Task** or at a **Document** level.

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.

Admin users have permission to view, edit the members, and delete the messages or the discussions itself in any of the project, or task or document. Admin Users, Project Managers of the Project where the discussion is in and the owners of the Discussion can make the discussion read only.


All members of the Project can start a new discussion. Read more on how to start a discussion or post a message in a discussion [Start a New Discussion](#).

13.1. Global Discussions

Admin users can communicate to all the users in the WebCenter using Global discussions. It is an one-way communication and can also be made read-only. By default, global discussions are for everyone but admin users can also restrict the audience by selecting the targeted users, roles or groups.

You can start a global discussion on either **My Discussions** page or in the **Discussions** widget on **My Work** page. Based on the setup of notifications, a notification is sent when a discussion is started or a message is posted.



Note: You can use the  read-only toggle button, to make an existing discussion read only.

13.2. Enabling Discussions in Task Type

To start Discussion in a Task, **Task Type** chosen for the task should have the field **Allow Discussions** enabled. Either Admin users or Project Managers with **Create Task Type** permission can do so. Refer to the steps here to create a task type [Create a Task Type](#).

To Enable Discussions in a Task:

1. Open any **Task Type** and enable **Allow Discussions** in the **Discussions** tab.
2. You can choose the Discussion contexts from the drop down list.
 - **Current Task** : Discussions are created in the current task and are visible in the task.
 - **Parent Workflow**: Discussions created on the tasks of the parent workflow are visible in all the tasks of the parent and the child workflows.

- **Root Workflow:** Discussions created on the task of the root workflow are visible in all the tasks of the related workflows or the workflow with this setting.
 - **Project:** Discussions created in the task are Project Discussions and are visible in the task.
3. Choose **Show Discussions of Documents linked to the Task** to view the discussions that happen at the document linked to this task.



Note: Once the task is completed, discussions are in read-only mode.

13.3. Copying Discussions from Project / Template

As an Admin user, you can create default templates of discussions and messages which are inherited to projects that are created from the template.

The discussions can be copied optionally, when a new project is created from another project.



Note: Notifications are not sent for discussion events triggered on a project template level.

Copying Discussions from the Project Template

When you create a Project based on a template, the new project is created with the discussions that were defined in the template. This will also include the users and messages in every discussion that is copied.

All Project, Document and Task Discussions from the source Template/Project are included in the target project.

Copying Discussions from another Project

Project Manager users can specify to **Copy Discussions**, when a new project is created from **Copy Project from another Project** option.

Copy setup from an Existing Project

- Copy Project Manager
- Copy Members
- Copy Approval Settings
- Copy Folders
 - Including Documents
 - Including Bill of Materials
- Copy Attributes
- Copy Characteristics
- Copy Tasks From Source Project ▾
- Copy Security Settings
- Copy Notifications
- Copy Discussions

Cancel

OK



Note: When **Copy Discussions** is enabled, Project discussions will be copied to the newly created project. Document and Task discussion will be copied, if the **Including Documents** and **Copy Tasks** options are also selected.

13.4. Deleting a Discussion or message

Admin users have the option to delete some of the discussions and messages that may not be required or redundant. For security reasons, this option is available only for Admin users and Project Managers.

1. To delete, open the discussion and click the delete button in the Action bar.
2. To delete a message, hover over the message and click the delete button.



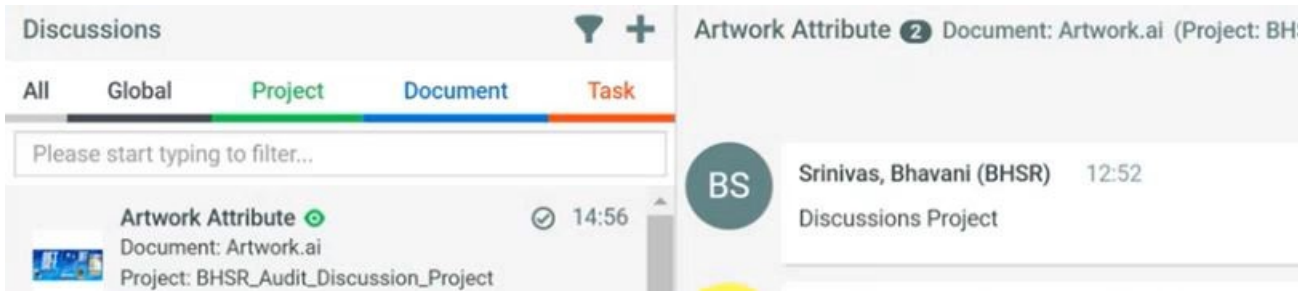
Tip: Depending on the notifications set up for discussions, an email notification is sent when a message or a discussion is deleted. You can set up notifications when a member is added or deleted from a discussion. Project history is updated when any changes are made to an existing Discussion or a message in the Discussion.

13.5. Resolving and Unresolving a Discussion

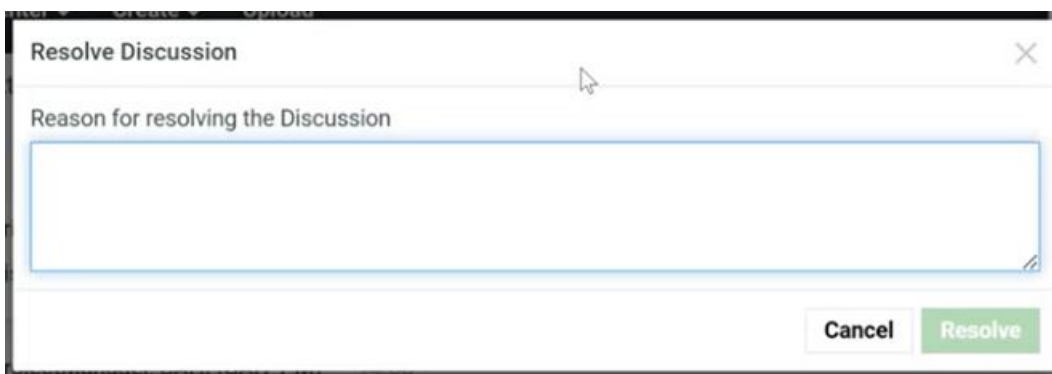
This feature allows users to indicate the resolution status of a discussion. This topic provides details on how to use the **Resolve** feature, its functionalities, and the behavior when a discussion is resolved or unresolved.

To resolve a discussion:

1. Open the discussion and locate the **Click to Resolve** button in the discussion header.



2. Clicking the **Click to Resolve** button triggers the appearance of the **Resolve Discussion** comment box.



3. Add a reason for resolving the discussion in the provided comment box and then click **Resolve** button. Alternatively, click **Cancel** to cancel the process.
4. After the discussion is resolved, the discussion panel shows as **Resolved the Discussion**.



Note: After a discussion is resolved, the status changes to **Resolved**, and clicking **Resolved** button will make discussion **Unresolved**.

To unresolve a discussion:

1. Open a resolved discussion and identify the **Click to Unresolve** button in the discussion header.
2. Clicking the Click to **Unresolve** button activates the **Unresolve Discussion** comment box.
3. Add a reason for unresolving the discussion within the designated comment box.
4. Confirm the unresolution by selecting the **Unresolve** button. Alternatively, choose **Cancel** to maintain the resolved status.

14. Project and 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.

For example, you could create a master characteristic for Electronics, and then various sub-characteristics for types of appliances, entertainment equipment, or computers, and so forth. They are presented in a tree format - main categories with expandable branches. The characteristics tree configures the available characteristic names as well as how they are organized.

System History Logs

All Characteristics related events like

- **Characteristics Created**
- **Characteristics Deleted** and
- **Characteristics Changed**

are recorded and stored in System History. Read this page on how to access the records [System History](#) on page 433

14.1. Create a Characteristic

1. Click **Admin > Characteristics**
2. Do you want to add a primary characteristic (a main category) or a secondary characteristic?
 - To add a primary characteristic, select the option button next to **Root** at the top of the tree and then click **New Characteristic**.
 - To add a secondary characteristic, select the option button for the characteristic under which to add the new one, and then click **New Characteristic**.

There can be up to 17 levels of characteristics or at most 256 characters for the entire characteristics path from the root characteristic to the deepest-level characteristic.

3. Enter the name of the characteristic in the **Name** field.
4. Click **Create**. The new characteristic appears in the list.

14.2. Edit or Delete a Characteristic

When deleting a characteristic, WebCenter checks if the characteristic or any of its child characteristics are assigned to any Projects or documents. If such a dependency is found, you are prompted to remove the dependency and delete anyway, or cancel the deletion.

1. Click **Admin > Characteristics**

2. Do one of the following:

- To edit a characteristic, click its name in the tree structure. Type a new name in the **Edit Characteristic** page and click **Change** to confirm.
- To delete a characteristic, select it in the tree and click the **Delete Characteristic** link.

If there are no dependencies, it is deleted immediately. Note that any sub-characteristics of the selected characteristic will also be deleted.

14.3. Export/Import Characteristics

When exporting a project or project template, the project characteristics are exported along with other project information. Upon import, the characteristics are restored on the target system. When the characteristic does not exist on the target system, it gets created automatically.

- In the source location, to Export **Characteristics**, go to **Admin > Projects**.
Select the Projects that you would like to export. Click **Export** to start a download of a XML file containing the characteristics.
Save this on your computer
- In the target location, to import **Characteristics**, go to **Admin > Projects >**.
Select **Import from File** and choose the XML file which was downloaded earlier.

15. Project and Document Attributes

Basic concepts

Attributes are a way to assign user-configurable fields and their values to documents and projects. They can be:

- **Prompted** so that the user has to set a value each time it is used,
- **Calculated** from an ArtiosCAD formula,
- restricted to a group of preset values (a **Restricted Set**).

The Restricted Sets must exist before you can use them when creating an attribute.

Attribute Categories group attributes together for convenience. An attribute must be put into an attribute category before it can be used; however, the same attribute can be in multiple categories.

You must create an Attribute Category before adding attributes to it.

15.1. Restricted Sets

15.1.1. Create a Restricted Set

1. Click **Admin > Attributes > Restricted Sets > New Restricted Set**.

2. Enter information in the fields as appropriate:

- **Name:** the name of the Restricted Set, up to 35 characters.
- **Type:** the data type of the Restricted Set. There are eight allowed types: **Area, Date and Time, Distance, Float, Integer, Text, Text (Right to Left), Volume, and Weight**.

A **Float** is a number containing a decimal point and an **Integer** is a whole number.



The labels in parentheses after the name of the type indicate the units of measurement used in Imperial and Metric systems.

- **Value:** an entry for the restricted set. Text values can be up to 255 characters long.

Click **Add** to add the value to the set and clear the **Value** field. Enter as many values as desired, clicking **Add** after each one.



Tip:

You can sort the **Values** list using  and , or click the **Sort** button to sort it alphabetically (for **Text Type** Restricted Sets).

You can also select one or more values and click **Remove** to remove them.

3. Click **Create** to create the Restricted Set.

15.1.2. Edit a Restricted Set

1. Click **Admin > Attributes > Restricted Sets**.
2. Either filter or click **Go** to show the restricted sets.
3. Click the name of the restricted set to edit.
4. Change the name, or add and remove values as desired. You cannot change the type.



Note: If you remove a value, the next time you access a project using the deleted value, you will be prompted to change it.

5. Click **Change** to make the changes.

15.1.3. Delete a Restricted Set

WebCenter checks if a Restricted Set is being used before deleting it. If it is in use, you will be prompted to either clear the restricted set from the attribute using it, or to cancel the deletion.

1. Click **Admin > Attributes > Restricted Sets**.
2. Either filter or click **Go** to show the restricted sets.
3. Select the checkbox of the restricted set to delete and click **Delete Restricted Set(s)** in the actions menu.
4. Click **OK** when asked to confirm the deletion.
5. If the restricted set is not being used, it is deleted immediately.

15.1.4. Export / Import Restricted Sets

You can **Export** and **Import restricted sets** .

- To **export**, go to **Admin > Attributes > Restricted Sets**:
 - a) Click on the **Import** link.
 - b) Browse to a previously saved XML file.
 - c) Select **Actions > Export**.
This will start a download of an XML containing the Restricted Set.
 - d) Save this on your computer.
- To **import**, go to **Admin > Attributes > Restricted Sets**:
 - a) Select the **Restricted Set** to export.
 - b) Select **Actions > Export**.
 - c) Click the **Import** button.
If the restricted set exists, it will be overwritten with the new values. If it does not exist, it will be created.



Note: This is similar to exporting / importing attribute categories and task types. The exported category will contain the exported restricted sets in the same XML file. While Importing this in a new system, the restricted sets and attribute categories will be created.

System History Logs

All Restricted Set related events like

- **Restricted Set created**
- **Restricted Set deleted** and
- **Restricted Set changed**

are recorded and stored in System History. Read this page on how to access the [records](#).






15.2. Attributes

15.2.1. Create an Attribute

1. Click **Admin > Attributes > New Attribute**.
2. Enter information in the fields as appropriate:

In the field...	Fill in the...
Name	name of the attribute (for example, Billable).
Label	text of the label which has to be displayed. To get the translated text of the label in the other languages chosen, select the blue icon to open Find or Create Translated labels on page 293.
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.

In the field...	Fill in the...
	<div data-bbox="699 320 1230 1016" style="border: 1px solid black; padding: 5px;"> <p>--- Select Attribute Type ---</p> <hr/> <p>--- Select Attribute Type ---</p> <p>Area(sq in.,sq cm)</p> <p>Area(sq in.,sq mm)</p> <p>Area(sq ft,sq m)</p> <p>Date and Time</p> <p>Distance(in.,mm)</p> <p>Distance(in.,m)</p> <p>Document Reference</p> <p>Float</p> <p>Integer</p> <p>Rich Text</p> <p>Text</p> <p>Text (Right to left)</p> <p>Volume(cu in.,cu cm)</p> <p>Volume(cu in.,cu dm)</p> <p>Volume(cu ft,cu m)</p> <p>Weight(lbs,gr)</p> <p>Weight(lbs,kg)</p> </div> <p>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 on page 343.</p> <p>Floats are numbers containing a decimal point (e.g. 3.1415) and integers are whole numbers (e.g. 42).</p> <p>Date and Time attribute added in the project attribute category allows to link a date/time to the project status.</p> <p>Text (Right to Left) attribute allows text to be written right to left always and this feature is available in 18.0.1 onwards.</p> <p>Rich Text attribute type allows you in entering long and/or rich text. You can:</p> <ul style="list-style-type: none"> • add set of least 16 different colors. • set the text bold and italic. • use bulleted and numbered lists. • Heading up to four levels and also add tables. <p>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. From WebCenter 18.0.1, there is also an option to change the text</p>

In the field...	Fill in the...
	direction using the buttons   (right to left or left to right).
Values	<p>choose either:</p> <ul style="list-style-type: none"> • 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). <div data-bbox="735 685 1426 947" style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;">  Note: You should set Calculated attributes to <i>read-only</i> 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. </div> <ul style="list-style-type: none"> • Restricted Set to limit the possible values. <div data-bbox="699 1032 1426 1308" style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;">  Note: To choose a Restricted Set, it must be created before defining the attribute (see Create a Restricted Set on page 289). Make sure that the Type of the Restricted Set is the same as the attribute type. </div> <div data-bbox="699 1330 1426 1417" style="border: 1px solid #ccc; padding: 5px;">  Note: For Document Reference attributes, you will have only Prompted as the value. </div>

3. Select **Attribute is also a task specification** if you want to be able to use the attribute as a task specification.

For more information about task specifications, see [Basic Concepts of Task Management](#)".

4. Click **Create**.

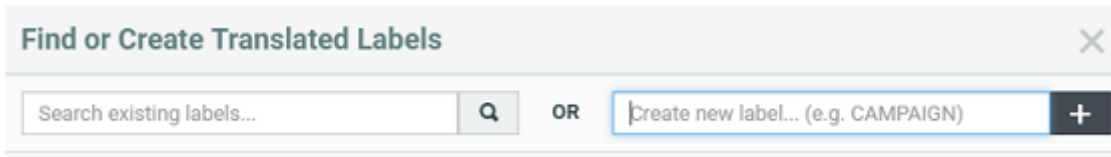
Find or Create Translated labels

Where will you find this option

This option may be found, when you

- Create an Attribute or a document reference
- Create or edit a Search using **Search Panel Design**

How to Create new translated label



You can either search for translations or create a new label in the language you require.

15.2.2. Edit an Attribute

1. Click **Admin > Attributes**
2. Click the attribute to edit.
3. Edit the attribute as desired (change the **Name, Description...**).



Note: You cannot change the attribute type.

4. Click **Change** to make the changes.

15.2.3. Copy and Paste Attributes

Attributes can be easily copied between attribute categories between two views in the same categories or between attribute categories and task type specifications. This can be done within the same WebCenter system or between different WebCenter systems.

To copy your selection of attributes in any view to the clipboard by either using keyboard shortcuts like Ctrl/Cmd+C, Ctrl/Cmd+X, Ctrl/Cmd+V, or by using a context menu (right click).




Note: Copy and paste of attributes is possible only in Grid Layout and this feature is not supported in the Header view of the Attribute Category.

When pasting the content in a cell, all settings including labels, rules, styles, document reference rendering configurations and lists are copied.

There can be conflicts detected when you paste the copied cells into another location. Following are the possibilities that may arise:

Conflict Detected	Action that can be performed
Target cells are already occupied	Choose to overwrite or cancel the operation
Copied cells are already existing in the new location	Choose to replace the existing one or skip the conflicting cells or cancel the operation
When the copied attribute has rules / styles that are already existing in the new location	Choose to <ul style="list-style-type: none"> • overwrite the rule/ style • keep both the rules/ styles. Copied rules/ styles gets a number added to its name • Use the existing rules/Styles or

Conflict Detected	Action that can be performed
<p>When a list entry is already assigned to a different set of attributes in the destination category</p>	<ul style="list-style-type: none"> cancel the operation <p>Choose to</p> <ul style="list-style-type: none"> overwrite the list keep both the lists merge values or cancel the operation
<p>When the copied Form property (Task execution or project creation view) already exists in the destination</p>	<p>Choose to</p> <ul style="list-style-type: none"> overwrite the selection Skip the action <div data-bbox="837 723 1426 846" style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;">  <p>Note: When a form property is placed in a view where it cannot be placed, it will be ignored</p> </div>

System History Logs

All Attribute related events like

- **Attribute Created**
- **Attribute Deleted** and
- **Attribute Changed**

are recorded and stored in the System History. Read this page on how to access the records [System History](#) on page 433

15.2.4. Delete an Attribute

When deleting an attribute, WebCenter checks if the attribute or any of its child attributes are used in any projects. If it is, you are prompted to remove it from the project and delete anyway, or cancel the deletion.

1. Click **Admin > Attributes**
2. Select the attribute to delete and click **Delete Attribute(s)** in the actions menu.

If the attribute is not being used, it is deleted immediately.

15.3. Attribute Categories

An attribute category is a set of attributes which are used together and is a way to apply attributes to a project or a document.

Attribute categories contain:

- attributes you selected

- lay-out elements (ruler, table, spacer, title)
- styling
- custom labels
- rules
- buttons (potentially automatically executed on events)

System History Logs

All Attribute Category related events like

- **Attribute Category Created**
- **Attribute Category Deleted** and
- **Attribute Category Changed**

are recorded and stored in the System History. Read this page on how to access the records [System History](#) on page 433

15.3.1. Create an Attribute Category

1. Click **Admin > Attributes > Attribute Categories > New Category**.
2. Enter the name of the Attribute Category to create, for example `Shipping Instructions`.
3. Click **Create**.

Once you have created the attribute category, you can add attributes to it, define views, etc.

To do this, click the **Attribute category was created successfully. Edit ...** link (see [Add Attributes to an Attribute Category](#) on page 296 for details).

15.3.2. Rename an Attribute Category

1. Click **Admin > Attributes > Attribute Categories**.
2. Click the attribute category to rename.
3. Type the new name in the **Edit Category** page.
4. Click **Save**.



Note: Click **Save As Copy** if you want to duplicate the attribute category under the new name, while keeping the original category as it was.

15.3.3. Add Attributes to an Attribute Category

1. Click **Admin > Attributes > Attribute Categories**.



The **Edit Category** page shows two columns: the available attributes (that you can add to the category) at left, and the attributes that are already in the category at right.

2. To add attributes to a category or remove them from it, use the chevron (<< or >>) buttons to move them between the two columns.


Note:

Moving attributes between columns takes effect immediately.
Attributes you have added to the category have an * in the left column.



Tip: Use the search field to filter the available attributes list, and the  and  buttons to change the order of the attributes in the category.

You can see a **Preview** of your attributes under the columns.

3. Click **Save** when you are done.

15.3.4. Attributes Views

You can use different layouts for the same **Attribute Category** in different locations or pages by creating custom **Attribute Views**. A View created for a particular context can have custom layout for that context. This way, different places in the user interface can show different levels of details of the attributes.

For example, you can choose to show very few attributes during **Document upload** using a **Creation View**. See more examples below.

You can use special Attribute Views such as Project Creation Form view to create request forms in WebCenter. You can completely customize these forms with your business terms without any default terminology from the application.

You can have multiple **views** for an **Attribute Category**. Essentially, these are subsets of the category with different layouts (if you have configured it that way).

You can configure the following views:

- Default view: used in project attribute details page and document attribute details page. You cannot delete this view.
- Creation view: used in the project creation and upload document pages.
- Header view: used in the headers of project details pages and document details pages
- BOM view: used in the Bill of Materials tab of projects
- Task Type views: For each task type you can define a view which will be used in the task execution page for documents attached to this task.
- Viewer Views
- Project Creation Form View
- Task Execution View (for Task Specifications)

Default View

When adding attributes to a category, only the **Default View** of the category exists at first (you can add other views). The **Default View** is the view that will be shown in the project or document details (on the **Attributes** page).

Documents (3) | Tasks (0) | Discussions (0) | Characteristics | **Attributes** | Project Information | Approval | Notifications | Members | Security

Show Attributes in Category *Package Information* [Change Category](#)

Name	Value	Type
Product name	<input type="text" value="Choc' Ice Cream"/>	Text
Country	<input type="text" value="Belgium"/>	Countries
Length in Inches or mm	<input type="text" value="220"/>	mm
Number of Spot Colors	<input type="text" value="2"/>	Integer

Save

Export to JDF file:

Import from JDF file:



Note:

- Users can edit attributes in the default view if they have **Change Properties** right on the project (for project attributes) or on the folder containing the document (for document attributes).
- When editing attributes, they **must** fill in attributes that are **required** (they have a red *).
- They cannot edit attributes that the Admin made **Read Only**.

Creation View

If you have added a **Creation View** of the attributes, users see it when they:

- create a project with attributes,
- create a document placeholder from a document template with attributes,
- upload one or multiple documents with attributes.

Create Project

Create:

Template: [Show Details](#)

▼ Details

Name:

Project Manager: Status:

Customer: Location:

Description:

Due Date:

► Documents

► Members

▼ Attributes

Name	Value	Type
Product name	<input type="text" value="Choc' Ice Cream"/>	Text
Country	<input type="text" value="Belgium"/>	Countries
Length in inches or mm	<input type="text" value="220"/>	mm
Number of Spot Colors	<input type="text" value="2"/>	Integer


Note:

- If you haven't added a creation view, users will see the default view instead when performing those tasks.
- When editing attributes, users **must** fill in attributes that are **required** (they have a red *). They will not be able to create the project / document placeholder if they don't!
Users cannot edit attributes that the Admin made **Read Only**.

Header View

If you have added a **Header View** of the attributes, users see it in the header of the project or document details page.

Project: *Choc' Ice Cream packaging*

Status: *Active*

Manager: Berg, Brune

Customer:

Due On:

Modified: Sep 22, 2010

Description:

Product name: Choc' Ice Cream

Country: Belgium

Length in inches or mm: 220 mm

Number of Spot Colors: 2


Note:

- If you haven't added a header view, users will **not** see attributes in the project or document header.
- Users cannot edit attributes in the header view.

Task Type View

If you have added a **Task Type View** of the attributes, users see it on the task details page for documents attached to a task of that specific task type.

Viewer View

You can create dedicated **views** to allow your users to view the active document's **attribute category** in the Viewer.

If you have configured your **attribute category** with such Views, your users can view this in the [Attributes widget](#).

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.

Read also: [Add Viewer Views](#) on page 301.

Add Attributes Views

- To add a creation view:
 - a) Click **Add Creation View** in the **Edit Category** page.
The attributes in the category are copied from the default view to the creation view.
 - b) Use << to remove any attributes you don't want to show in the creation view.


Note:

You cannot add attributes to the creation view if they are not already in the default view.

To add more attributes to the creation view, switch the **Current View** to **Default**, add the attributes, then switch it back to **Creation**.

- c) Use a grid layout if desired (see [Use a Grid Layout](#) on page 309 for more information).
- To add a header view:
 - a) Click **Add Header View** in the **Edit Category** page.
The attributes in the category are **not** copied from the default view to the header view.
 - b) Use >> to add attributes to the header view.


Note:

You cannot add attributes to the header view if they are not already in the default view.

To add more attributes to the header view, switch the **Current View** to **Default**, add the attributes, then switch it back to **Header**.



Note: You cannot use a grid layout for the header view.

c) Click **Save** to save all your views.

Add Viewer Views

You can create dedicated **views** to allow your users to view the active document's **attribute category** in the Viewer.

If you have configured your **attribute category** with such Views, your users can view this in the [Attributes widget](#).

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.

To create a Viewer View:

- Click **Add View** in the **Edit Category** page.
You will get a pop-up to type in the **view name**.
- Type the name of the View. You can create a general `Viewer` view for all users or views dedicated to a particular **role / group**.

You can create the following **views**:

- `Viewer` for a general Viewer view of the attributes.
- `Viewer [Role]` with the specific **role** name as a suffix. This view will be visible in the **Attributes** widget of the Viewer when a member of that **role** opens the document.
- `Viewer [Group]` with the specific **group** name as a suffix. This view will be visible when a member of that **group** opens the document.



Note: It is important that you name your **views** exactly as above

You will be switched to the newly created **view**. All your attributes from the **default view** will be copied into the new one.

- Use << to remove any attributes you don't want to show in the **Viewer** view.



Note:

You cannot add attributes to these views if they are not already in the default view. If you need more attributes in the Viewer view:

1. Select the **Default** view in the **Current View** drop down.
2. Add **attributes**.
3. Switch to the **Viewer** view in the **Current View** drop down.

The attributes added to `Viewer`, `Viewer [Role]` or `Viewer [Group]` will be visible in the Viewer.

- If your Viewer view is for [document reference attributes](#), create specific [source](#) and [rendering](#) configurations.
- **Save.**

If your Attribute Category View(s) are...	and your User Role / Group is...	The Viewer will have...
Only Default	Any	No widget
Viewer	None	Viewer View
Viewer, Viewer Designer	None	Viewer View
Viewer, Viewer Designer	Designer	Viewer Designer View
Viewer, Viewer Designer, Viewer Legal	Legal	Viewer Legal View
Viewer, Viewer Designer, Viewer Legal	Designer and Legal	Viewer Designer View / Viewer Legal View + selector to switch between the Views
Viewer, Viewer Designer, Viewer Legal	Marketing	Viewer View

[Viewing Attributes](#)

Edit the Terminology for Project Creation

It is possible to change the terminology used for project creation so that the Project Creation page talks about "Designs" instead of "Documents", or "Roles" instead of "Placeholder Groups", for example...

You can achieve this by customizing the terminology in the attribute category of the project or template used as a basis for project creation.

You need to:

1. Click the attribute category to use on the **Attribute Categories** page.
2. [Add a Creation or Header view](#) to your attribute category and click **Save**.
3. Click **Edit Terminology**.
4. In the **Edit Terminology** pop-up, fill in the custom terms you want use instead of the default project creation terms.

For example, fill in `Designs` in the **Documents** field if you want to show "Designs" instead of "Documents" on the project creation page.

Any field left blank will still use the default term.

Edit Terminology
✕

Change terms in all Project Creation Forms where this Attribute Category is used

Default Term	New Term
Details	<input type="text" value="Set Project Details"/>
Name	<input type="text"/>
Requestor	<input type="text"/>
Project Manager	<input type="text" value="Project Owner"/>
Status	<input type="text"/>
Customer	<input type="text" value="Division"/>
Location	<input type="text"/>
Description	<input type="text"/>
Due Date	<input type="text"/>
Bill Of Materials	<input type="text"/>
Documents	<input type="text" value="Attachments"/>
Document Template	<input type="text"/>
Members	<input type="text"/>
Role	<input type="text"/>
Invite Members	<input type="text"/>
Attributes	<input type="text" value="Enter Request Details"/>
Section Sequence	<input type="text"/>

Example: GABDM = Gen. Details | Attrs | BOM | Docs | Members



Attention: Your custom terms will not be automatically translated, and will show **as you enter them** for all languages in which you run WebCenter.

5. Optionally, you can specify **Section Sequence** if you want to alter the order of the sections. To do that alter the sequence of the GABDM (**General Details, Attributes, Bill Of Materials, Docs, Members**) in the way you want.
 - The system does not accept wrong combinations such as other letters, too many letters or repetitions.
 - If less letters are given, the system will order these sections first and then put the others in the normal sequence.
 - Section sequence is not applicable to project creation view since it displays the attribute category

In the Task Specifications of a Task Type, it's also possible to edit terminology, though more limited; it is not possible to change the section sequence. The edit terminology link is available in the Default view and the task execution view

If you configure the Project Creation form to have less sections than GABDM, these are simply taken out. For example, if you specify GABDM, but have configured the Project creation with no Documents section, you will have the following in that order:

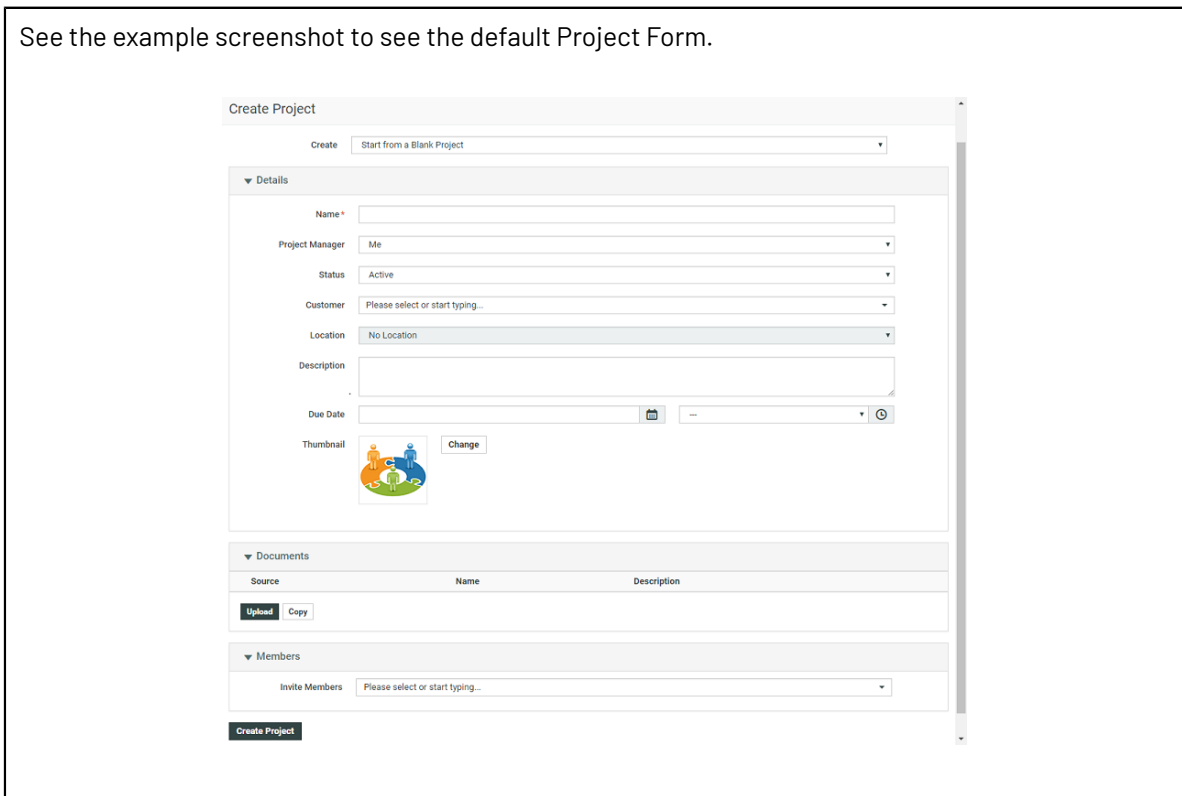
- General details
- Attributes
- Bill of Materials
- Members

Project Creation Form View

You can fully customize your Project Creation form in WebCenter. This way you can have a uniform customized look for the entire project creation form. You can combine **attributes** with project properties in an Attribute Category with a **Project Creation Form View**.

When you add this special view, this category will load default Project Creation Properties just like **attributes** in their default order (as in a default Project Form).

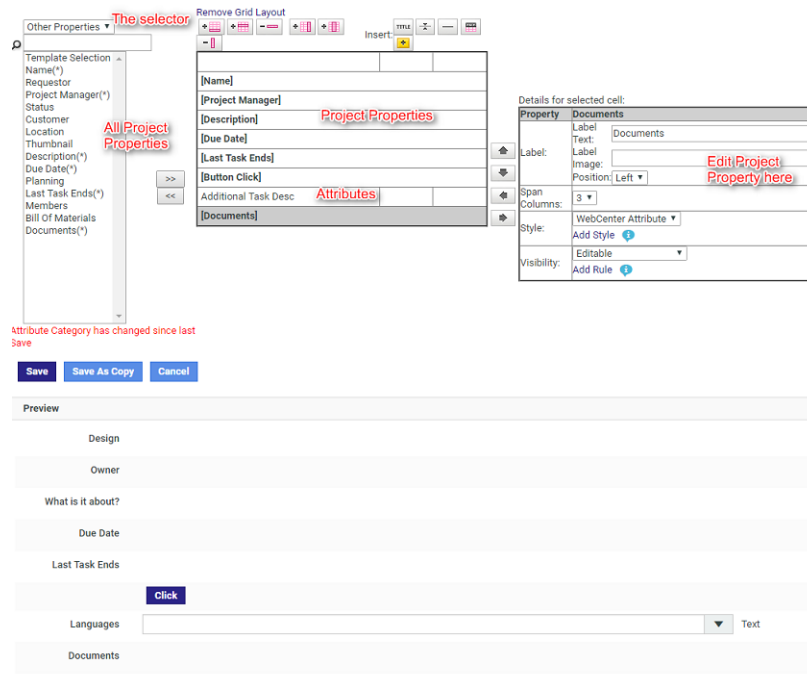
See the example screenshot to see the default Project Form.



The following **Project Properties** are available in this view and you can customize all of them. The fields from all sections are included in this view but without section titles (Members, Bill of Materials, Documents).

- **Template selector** on top of the Project Creation form
- **ProjectName**
- **Requestor**
- **Project Manager**
- **Thumbnail**
- **Customer**
- **Planning (backward or forward)**
- **LastTaskEnds (Date for Planning)**
- **Status**
- **Description**
- **Location**

- **Members**
- **Bill of Materials**
- **Documents**



In the attribute selector pane, you will see both the attributes and the project properties. You can use the selector to toggle between **Attributes** and **Project Properties**.

When the Attribute Category (with Project Creation View) is assigned to the Template or the Project, the new custom form fields will appear during project creation.

Notes

Use caution when customizing Project Property fields:

- When you remove **ProjectName** from the Attribute Category View, make sure that you have configured **Autonaming** in the Project Template.
- Make sure that **Project Details > Configuration > Project Creation** page is in line with your Project Creation view:

Show	Feature	Required
<input type="checkbox"/>	Feature	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Set Project Manager	
<input checked="" type="checkbox"/>	Set Status	
<input checked="" type="checkbox"/>	Set Customer	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Set Description	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Set Due Date	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Upload Documents	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Assign Roles	
<input checked="" type="checkbox"/>	Invite other Members	
<input checked="" type="checkbox"/>	Set Attributes	
<input checked="" type="checkbox"/>	Select Thumbnail	
<input checked="" type="checkbox"/>	Set Planning (Tasks)	<input type="checkbox"/>
	Default Planning Method <input type="text" value="Backward"/>	
<input type="checkbox"/>	Change Bill of Materials	<input type="checkbox"/>

- The **required** fields should be configured as **Visible**. Read more in: [Project Creation Settings](#) on page 129
- Make sure that the **Set Attributes** is enabled. If this field is disabled, the Project Creation Form will not load (when using Project Creation Form view).
- If some fields are disabled in this page, but added to the Project Creation Form view, they are not available during project creation.
- Planning fields are available only when the Project / Template has tasks. Also if the label of the field **LastTaskEnds** is not custom, the value will change to "First Task Starts" when planning is set to **Forward**.
- The **Requestor** field is available when there is a REQUESTOR role.

Add Project Creation Form View

Create the [Attribute Category](#) that you want to assign to the Project or Template from which your users will create Projects.

To modify the Project Creation Form, you have to **Add Project Creation View** to this Attribute Category.

To add a Project Creation Form view:

- Click **Add Project Creation View** in the **Edit Category** page.

The existing attributes (if any) and all default **Project Properties** are added to this view.

- Use << to remove any **Project Properties** or **Attributes** you don't want to show in the Project Creation Form. Read the notes in: [Project Creation Form View](#) on page 304 before you do this step.

You can also drag these Project properties and place them between the Attributes in the Attribute Category. When you remove properties, they don't appear in the Project Creation Form.

Name
DEKE_DSR_Form

Current View: **Project Creation** | Delete View | Add Creation View | Add Header View | Add View | Edit Terminology

Alternating background
 Show also Attribute types and Restricted Set types
 Keep session alive (avoid that people get logged off due to time out)
 Use Alternative Rendering (Gives more control over column width)

Attributes

- DEKE_Contact_DocRef(*)
- DSR_Customer(*)
- DSR_Description(*)
- DSR_Doc(*)
- DSR_Due Date(*)
- DSR_Location(*)
- DSR_Notes(*)
- DSR_Requested Task
- DSR_Sales Rep(*)
- DSR_Service Rep(*)
- DSR_Task Due Date
- DSR_Task Qty
- DSR_Task Type

Remove Grid Layout

[Project Manager]	[Location]	[Thumbnail]	DSR_Due Date
DSR_Sales Rep	DSR_Service Rep	DSR_Location	
DSR_Notes			
[Spacer]			
DSR_Doc			
[Spacer]	DSR_Customer	DSR_Description	
DEKE_Contact_DocRef			
[Button Fill in some Customer data]			

Details for selected cell:
No cell is selected or the selected cell is empty

Save Save As Copy Cancel



Note:

You cannot add attributes to this creation view if they are not already in the default view.

To add more attributes to the creation view, switch to the **Default** view, add the attributes and switch back to **Project Creation Form View**.

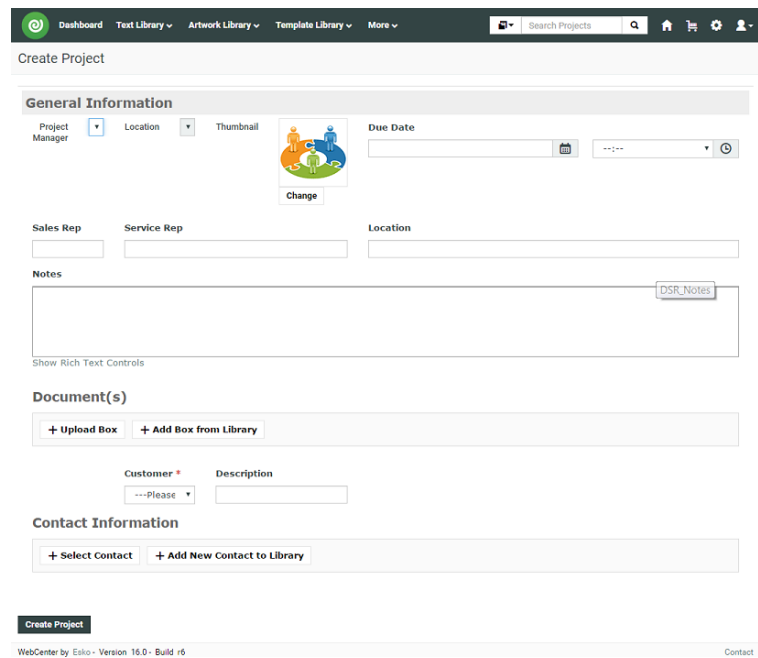
- Use a grid layout if desired (see [Use a Grid Layout](#) on page 309 for more information). Grid layout gives you the possibility to customize your **Project Properties** with advanced features.

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.

- **Save.**

When Project Creation Form View is defined in a Project's or Template's Attribute Category, the custom view is loaded when a user creates a Project (based on that Project or Template). When this view is loaded, the whole page will look like one continuous form. See the result of the example configuration:



15.3.5. Configuring Preview for Attribute Category

Preview the Attributes in the document

You can view the preview of any documents in the **Preview** tab of the document, which is enabled by default to all users.

When you navigate to the Preview tab of the document, a dashboard is loaded with two blocks displayed side by side, namely

1. Attributes block on the left side and
2. Preview block on the right side

Configure Preview Block

To configure the preview block to render, following attributes have to be created and configured:

Create Attributes	For
PREVIEW_TYPE	This text type attribute is to specify which type of preview user wants to see. It can hold value from a restricted set, which contains values CHILIPreview and StaticPreview.
PREVIEW_DOCUMENT	This document reference type of the attribute can hold a single HTML or Chili document to create preview.
LOCALE_#	Attributes to specify the locale index to prepare locale mapping for the languages. Create as many Locale attributes as per the number of languages you require.

In the **Preview > Attributes**, choose either of the following:

- **CHILI Preview:** This preview is applicable for Chili documents. When you enable this option, Chili viewer loads in the Preview block.



Note: You can view the Attributes and the Chili document in the preview mode, only if the option is enabled in the Chili set up. Read about Chili Setup [here](#). Admin user has to add the menu option for the required user groups.

- **Static Preview:** When this type is selected then the Preview block loads a HTML file and the values can be simultaneously updated.

Update Preview Block with Attribute values change

When any update is made to the attributes, the matching text/image placeholders in the preview block are updated in real time.

You can update the values for the Chili document along with the attributes and save either as new version of the document or retain it as a draft.

15.3.6. Delete an Attribute Category

WebCenter checks if an Attribute Category is being used before deleting it. If it is in use, you will be prompted to either clear the category from the projects or documents using it and delete the category, or to cancel the deletion.

1. Click **Admin > Attributes > Attribute Categories**.
2. Select the attribute category to delete and click **Delete Category** in the actions menu.

If the attribute category is not being used, it is deleted immediately.

15.3.7. Use a Grid Layout

Adding a grid layout to your attribute category allows you to customize the way your attributes will be shown to users.

It also provides more advanced features, like making an attribute required (users have to fill it in) or read only.

1. Click **Use Grid Layout** in the **Edit Category** page.

This shows extra options and buttons on top of your attributes column, and a **Details** table at right, containing information and extra options for the selected attribute.

2. Select **Alternating background** if you want your rows to have an alternating background color.
3. Select **Show also Attribute types and Restricted Set Types** if you want the types of the attributes / attributes restricted sets to be displayed after each attribute (like `Business Unit` in the example above).

When checked, pages having this attribute category or task specification layout will not keep the session alive. This allows you to fill out long forms without having to log in repeatedly.

4. Optionally enable **Keep Session Alive when user is inactive** to avoid getting timed out when there are signs of inactivity.

As long as the user is working on the form, the session will be kept alive. However, if the browser detects that the user is inactive, it stops keeping the session alive. When this flag is turned on, the session will be kept alive even if the user is inactive.

5. Add or remove columns and rows as desired:

- Click to add a row at the bottom of the table.
- Select a row and click to insert another row before it.
- Select a row and click to remove it.
- Click to add a column at the right of the table.
- Select a column and click to insert another column before it.
- Select a column and click to remove it.


Note:

6. If you want an attribute to be displayed across several columns, select it and enter the desired number of columns in **Span Columns** in the **Details** table.

Edit Category Package Information

Name:

Current View: Default

Alternating Background
 Show also attribute types and restricted set types

Remove Grid Layout

Attributes:

- 132456
- another new attribute
- Area in sq ft or sq m
- Area in Sq in or Sq cm
- Area in Sq in or Sq mm
- AreaRS 222
- att in build 19
- attandspec
- attribute_text
- Brand
- Brune's Attribute 1
- Brune's Attribute 2
- Comments
- ComponentID
- Country(*)
- DateTimeRS
- deke1
- deke2
- deke3
- DLMS_Code1

Product name	
Country	Length in inches or mm
	Number of Spot Colors

Details for selected cell:

Attribute	Product name
Attribute Type:	TEXT
Label:	Product name
Span Columns:	2
Row Size:	
Style:	WebCenter Attribute
Visibility:	Editable

Save

Preview

Product name

Country ---Please Select--- Countries Length in inches or mm

Number of Spot Colors

- You have the option to have a cell to span over multiple rows. You can increase or decrease the row in the **Row Span**. You can increase or decrease the row span for cells to have better layout.

Attribute Category has changed since last Save

Save Save As Copy Cancel

Preview

8. Format your grid as desired:

- To add a **Title** row, click then fill in the **Title**, choose the number of **Columns to span** and the title **Style** in the pop-up that opens.
- To add a **Spacer** bar, click then fill in the bar's **Height** and **Color** in the pop-up that opens.



Note:

- You can use color names or hexadecimal codes.
- If you don't enter a **Height**, the bar will have a default height.
- If you don't enter a **Color**, the bar will be white.

- To add a **Ruler**, click then choose the number of **Columns to span** and fill in the **Height** and **Color** in the pop-up that opens.

- To add a **Header Bar**, click .

The example below has a **Header Bar** on top (showing **Name**, **Value** and **Type**), then a **Title** (Packaging information), a blue **Spacer** bar, and a black **Ruler** after two attributes.

Preview

Name	Value	Type
Packaging information		
Product name	<input type="text"/>	
Country	<input type="text" value="---Please Select---"/>	Countries
Length in inches or mm	<input type="text"/>	
Number of Spot Colors	<input type="text"/>	



Note: You can edit the formatting (color, height...) in the **Details** table at right when you select the cell.

- You can change how an attribute will appear to the user by giving it a **Label** (in the **Details** table). For example, you could use a label to show `Manufactured in:` instead of `Country`. This is particularly useful if the users are not familiar with your attributes, or if you are using generic attributes for different purposes.

If you set the labels on top for at least an entire column, you will have a nice form layout.

- Select the **Position** of the Label as either **Left** or **Top**.

By default, the **Label** will be placed on the left side in the grid. But you can place it on top of the value to modify the form appearance.

A single cell will contain both the Label and the Value. Within this cell, you can manage alignment via the style options.

Component Type

- If you are using Date time Attribute, then you have an option to hide the time and display only the date by checking the box **Hide Time**.
- You can also format individual attribute cells using **Styles** (see [Define Styles](#) on page 314).
- If you are using Date time Attribute, then you have an option to hide the time and display only the date by checking the box **Hide Time**.
- If desired, change the visibility of individual attributes: select a cell and choose the **Visibility** parameter to use:
 - Choose **Editable** if you want the users (with the right permissions) to be able to edit this attribute.
 - Choose **Required** if you want to make it mandatory for users (with the right permissions) to fill in this attribute.

If a user doesn't fill in a **Required** attribute during project creation for example, he / she will not be able to save the project.

- Choose **Read Only** if you don't want **any** user to be able to edit this attribute.
- Choose **Hidden** if you don't want to show this attribute to users. The values will be deleted in this case.
- Choose **Hidden (Keep Values)** if you don't want to show this attribute to users but keep the value.



Note: You can also use visibility **Rules** to determine when an attribute will be hidden / required / read only... See [Set Visibility](#) on page 315.

15. Click **Save** when you are done.

Define Styles

Define styles to further customize your attributes layout.

1. Select the cell of the attribute to customize.

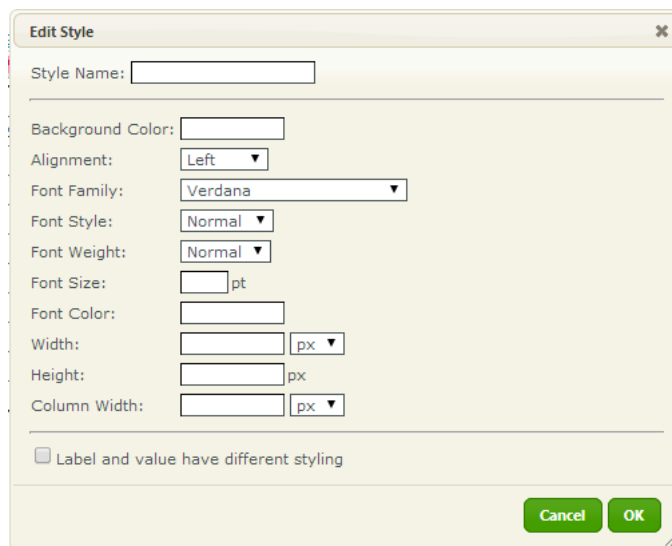
This show the **Details** table at right.

2. Click **Add Style** to define a custom style.



Note: You can also use one of the predefined styles (**WebCenter Attribute** or **WebCenter Title**) if you want your attributes to have the default WebCenter look.

3. Define your style: enter a **Style Name**, a **Background Color** (use the color name or the hexadecimal code), choose a **Font Family**, **Font Style**, **Font Weight**, **Font Size**, **Font Color**.



You can fix the **Column width** of the first column to keep the titles aligned.

Set the **Column width** lower than what you want as there is some margin for the columns. The total table takes the full width of the allowed/available space (depending on the browser). Therefore fixing the width of one column has an effect on the other columns.



Tip: Do not fix the width of all columns as it will lead to unpredictable results.

Click **OK** to update the style for the attribute..

You can see your style applied to the attribute cell in the **Preview**.

To apply it to another attribute cell, select the cell then select the style in the **Details** table.

You can edit or delete the style using the links in the **Details** table.

Set Style based on Rules

You can define styles for **Attributes** based on the rules set up.

This allows flexibility to display different styles based on the parameters defined in the rule. Rules can be set up with JavaScript or an Attribute value for both Styles and Visibility Rules. Style rules can be set up in the same way as visibility rules, except for the then and else section, where styles should be selected instead of visibility.

For example,

```
if (return att["Attribute1"] + att["current"] + att["Attribute3"] < 100) then the cell
is green, else, the cell is red.
```



Note: You can create a rule based on the value of the **Current Attribute**. In a style rule, **Current Attribute** is used to actually execute.



Note: Once you have defined a style in the **Default** view, you can use it in the **Creation** view, and vice-versa.

Set Visibility

If you want an attribute to be hidden or required or read only, depending on a condition, you should define a visibility rule for this attribute.

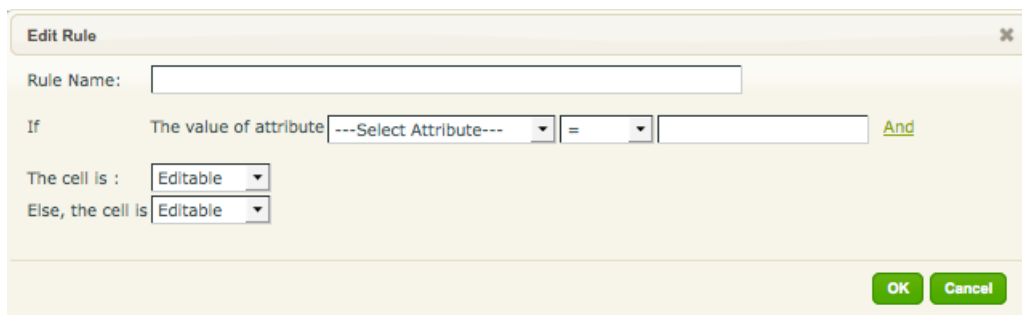
A rule makes the visibility of an attribute depend on one or more other attributes or a JavaScript snippet.

1. Select the cell of the attribute for which you need a visibility rule.

This show the **Details** table at right.

2. Click **Add Rule** to define a new visibility rule.

3. In the **Edit Rule** pop-up that opens, give your rule a name (choose a name that indicates what the rule does).



Edit Rule

Rule Name:

If The value of attribute: = [And](#)

The cell is :

Else, the cell is

4. Define your rule.

For example, you want the attribute `Number of samples` to only be visible (and filled in) if the `Sample Needed` attribute is set to `Yes`.

- a) You need to first define the condition: **If The value of attribute** `Samples Needed` = `Yes`.
- b) Then define what happens when this condition is fulfilled: **The cell is:** `Required`.
- c) Then define what happens when it is **not** fulfilled: **Else, the cell is** `Hidden`.

Area in sq ft or sq m	Length in in
Brand	Country
due date	Comments
Samples Needed	
Number of samples	

Edit Rule ✕

Rule Name:

If The value of attribute Samples Needed = Yes And

The cell is : Required

Else, the cell is Hidden

OK
Cancel

5. You can edit the Visibility rules and Styles rules based on Java Script rules. Instead of choosing an attribute value, you can add a JavaScript code snippet to create a rule for visibility or styles. This allows more flexibility and can have customized rules apart from the attribute values. Read more on how to set [Edit Styles / Visibility based on Java Script rules](#) You can also add chain rules for styles, where the conditions can be linked based on rules. Read more about [Chained rules](#).

6. Click **OK** when you are done defining your rule.

The **Preview** is updated to reflect the result of your rule.



Note:

The **Preview** is interactive: in the example above, you can choose `Yes` for the `Samples Needed` attributes in the **Preview**, and see the `Number of samples` attribute displayed. You can choose `No` (or nothing at all) and have that attribute hidden.

To apply the rule to another attribute cell, select the cell then select the rule in the **Details** table.

You can edit or delete the rule using the links in the **Details** table.



Note: Once you have defined a rule in the **Default** view, you can use it in the **Creation** view, and vice-versa.


Note:

You can create more complex rules by clicking the **And** link to add more conditions. Choose **AND** if **both** conditions should be fulfilled, or **OR** if **at least one** of them should.

Edit Rule
✕

Rule Name:

If The value of attribute = And ✕

The value of attribute = And ✕

The Required

Else, the cell is

You can define very complex rules if necessary.

In the example below, a warning message is made visible (but read only) when somebody requests more than 10000 samples or asks for more than 4 spot colors.

The warning message itself can be a title or an attribute (that you can use in several attribute categories).

Edit Rule
✕

Rule Name:

If The value of attribute = And ✕

The value of attribute > And ✕

If The value of attribute = And ✕

The value of attribute > And ✕

The cell is :

Else, the cell is



Note: You can add styles to based on the result of your rules set. Read for detailed explanation [Rules for Style and Visibility](#)

Style Rule based on Attribute Value

For example, If <Attribute Value (choose from the drop down) = X > then the style = **(Style Name A, else Style Name B)** where Style Name A and Style Name B are predefined

Change Cell Details for Multiple Cells

In the grid layout, when you click on a non-empty cell, details are shown to the right of the grid. You can change the details of multiple attributes by choosing the cells using CTRL /CMD and SHIFT keys or selecting individual attributes holding the CTRL key.

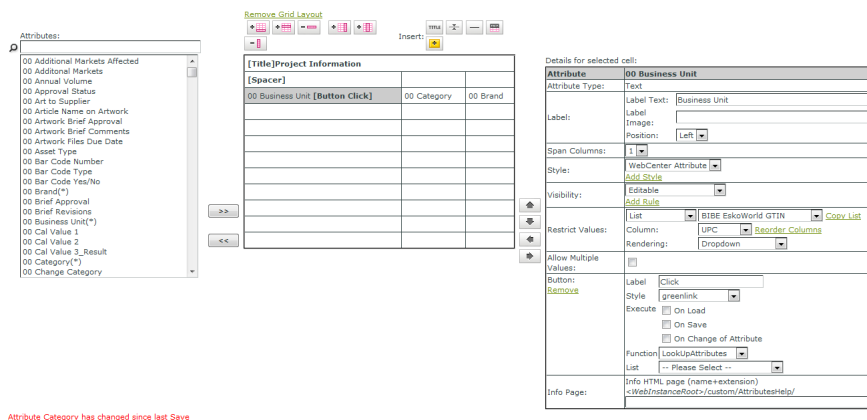
When multiple attributes are selected, only the details that are relevant for the selected cells are shown.

When the values of all the selected attributes are the same for an option, it is displayed in the details. A blank value is shown if the selected cells have different values. When selecting a value, and it is applied to all the selected cells.

15.3.8. Enhancing Attributes with Advanced Features from Grid Layout

You can enhance the attributes from the **Grid layout** view. You can restrict values to available cascading attributes, create multi-value attributes, add label images and add HTML help to the attributes.

- Click **Use Grid Layout** in the **Edit Category** page.
- You can add [LookUp Attributes](#) on page 319 button next to your Attributes in your form.
- Click on any of the attributes. Its details will appear on the right side.



- **Label Image:** You can add a representative image as a label image. Read more in [Create Image Label for an Attribute](#) on page 325.
- **Restrict Values:** You can restrict values to **list** containing [Cascading Dropdowns](#) as **columns** and select their **rendering**.
You can also [create check boxes, radio buttons and image selectors for text type list attributes](#).
- **Allow Multiple Values:** You can allow more than one value to an **attribute**. Read more in [Create a Multi-Value Attribute](#) on page 327.
- **Info Page:** You can provide additional information in an HTML page. Read more in [Create HTML Information for an Attribute](#) on page 328.

LookUp Attributes

You can use **LookUpattributes** button to fill multiple attribute fields based on one or more input attributes without a cascading dropdown. You can configure the list in the details of this button. You do not have to restrict individual attribute values to a list when using this button.


You can create a better user experience with this feature if a lot of properties must be loaded for something already well-known / unique. The typical example is loading product details or component details when you enter the product code. In this case, when you type the code and click the button, you will get all its details filled.


When you have partial / non-unique information, use [Cascading Dropdowns](#).

1. [Create and add attributes to an Attribute Category](#).

2. Select your **attribute** in the [Grid Layout](#).

3.

Click on the LookUpAttributes  button to add it next to the selected **attribute**. You will see the **Button** details in the **Details of selected cell** table.

Button: Remove	Label	<input type="text" value="Click"/>		
	Style	<input type="text" value="buttonprimary"/>	▼	
	Execute	<input type="checkbox"/> On Load		
		<input type="checkbox"/> On Save		
		<input checked="" type="checkbox"/> On Change of Attribute	<input type="text" value="NAPR_ATT4"/>	▼
			Add Attribute	
	Function	<input type="text" value="LookUpAttributes"/>	▼	
	List	<input type="text" value="ALL_LANGUAGES_1"/>	▼	
		Add Input Attribute		
		Add Output Attribute		

4. Modify the **button**'s details.

- You can specify the **Label** text you want to display next to your button.
- Pick a **Style** for the button to change its look.



Note: If you choose **Hidden**, you can **Execute** the button :

- **On Save**
- **On Load**
- **On Change of Attribute** where you need to specify the attribute

- Select a **list**.



Note: You can use the [lists created on the WebCenter database](#).

- Set **Function** to **LookUpAttributes**.
 - Add one or more **Input Attributes**. Select the attribute from a list of attributes in your category and match it to the right **list Column**. Click on **Add Input Attribute** to add more.
 - Enable **Exact** to only allow exact matches. For example, if the input attribute is country name and if you type Belg, you can get Belgium if the **Exact** is off. If this is on, you will find country details only if you type Belgium entirely.
 - Add all the **Output Attributes**. Select the attribute from a list of attributes in your category and match it to the right **list Column**. Click on **Add Output Attribute** to add more. This will correct your (typed) input attributes to the official value. If you type Belg and click the button, the entry value will be Belgium. This will also add the other details associated with this attribute.
5. You can now test the button and **save**.

Check Unique Values

This feature allows you to create a unique name for a component. It helps to create names which are different from existing names.

However, this is not useful if you are creating pure numbers (where you expect auto-numbering). Use auto-numbering in such cases.




Note:


This function does not guarantee that the values are unique throughout the system.

1. [Create and add attributes to an Attribute Category](#).
2. Select your **attribute** cell in the [Grid Layout](#).



Note: This function does not work for date attributes or rich text attributes. You will be warned if you use any of these types.

3. Click on the **Add button**  icon to add it next to the selected **attribute**. You will see the **Button** details in the **Details of selected cell** table.

<p>Button: Remove</p>	<p>Label <input type="text" value="Check if Unique"/> </p> <p>Style <input type="text" value="buttonprimary"/></p> <p>Execute <input type="checkbox"/> On Load <input type="checkbox"/> On Save <input type="checkbox"/> On Change of Attribute</p> <p>Function <input type="text" value="CheckUniqueValue"/></p>
<p>Info Page:</p>	<p>Info HTML page (name+extension) <WebInstanceRoot>/custom/AttributesHelp/ <input type="text"/></p>

4. Modify the **button**'s details.
 - You can specify the **Label** text you want to display next to your **attribute**.

- Pick a **Style** for the button to change its look.
- Set **Function** to **CheckUniqueValue**.

5. Now **save**.



Note: This function is difficult to test via the preview because the checks are done based on the current project, document or task. In the preview, you have no document, project or task.

In a project attribute category, it checks whether the filled out value already exists for another project in the system. If yes, you will be warned that it is not unique. The function will force you to choose another value before you can save the attributes or create the project (during project creation).

In a document attribute category, it checks whether the filled out value already exists for another document in the system.



Note: This function does not check the versions of the current document. So multiple versions of the same document may share the same attribute value.

In a task type, it checks whether the filled out value already exists for another task of any task type.



Note:

This verification happens when you click the button or when you save the checked attribute. This check will not happen if you change the attribute in any of following ways:

- via a system integration (WebCenter SDK)
- via Automation Engine
- when changing a group of attribute values via the project saved search operations
- when setting the attribute via a workflow
- when setting the attribute via ArtiosCAD

The check button must be in the visible view. This way you can have a check which only happens during creation or in a task type view.



Note: A unique value for a task does not guarantee that this value does not exist for a project. So this function is not of use while using **automatically set project attribute values from task specifications**.

Create JavaScript Button

A JavaScript button allows you to create a powerful additional functionality within a WebCenter form.



Warning: This is an advanced feature and we recommend that only Esko solution architects and advanced administrators use this.

Use this to:

- execute a calculation within the form
- copy information from a project to a document created in the project
- automatically fill out values for attributes (which are specified as read-only)


Note:

The JavaScript operation is done within the form. However, this may not be automatic in all cases. For example, when you copy project attribute values to documents, the JavaScript execution happens once. When the project attribute is changed, the document attribute will not be synchronized until the button is clicked again. This avoids issues related to full synchronization.

Read JavaScript examples in the [Esko Knowledge Base Article](#).

Button: Remove	Label	Brand
	Style	buttonprimary
	Execute	<input type="checkbox"/> On Load <input type="checkbox"/> On Save <input checked="" type="checkbox"/> On Change of Attribute <div style="display: inline-block; border: 1px solid #ccc; padding: 2px; margin-left: 5px;"> Brand </div> Add Attribute
	Function	JavaScript
JavaScript Code	<pre>if (att['BrandValue'] != "XYZ") att['Marketing'] = "No";</pre>	

In the screen shot, you can see a simple script in the **JavaScript Code** field.

`docref["Document Reference Attribute Name"]` could be used to access the attributes of a referenced Document.

- Do not return a value but set the value of `att['MyAttribute']`
- All attribute names must be surrounded by single quotes
- All attribute names are case sensitive
- Use the attribute name. This can be different from the attribute label visible in the form
- The property `att` is case sensitive.
- Technical info: `att` is an associative JavaScript array containing a copy of the current values for all placed attributes. At the end of the execution, (only) the changed values are copied back into the form.


Note:

- Use this only if you know JavaScript and its use. Consult your Esko Solution Architect in case you need JavaScript operations.
- The function is protected against misuse by only allowing to change attributes contained in the current attribute category. This also shows message boxes. The function cannot change any other data in WebCenter (for example it cannot execute web calls).

Advanced JS Button features

JavaScript Buttons can be programmed to access attributes of the referenced Document.

- `docref["Document Reference Attribute Name"]` could be used to access the attributes of the Attribute Category of a referenced Document.

This operator returns a JavaScript object with following properties:

```
count
```

Number of documents referenced by the selected Document Reference

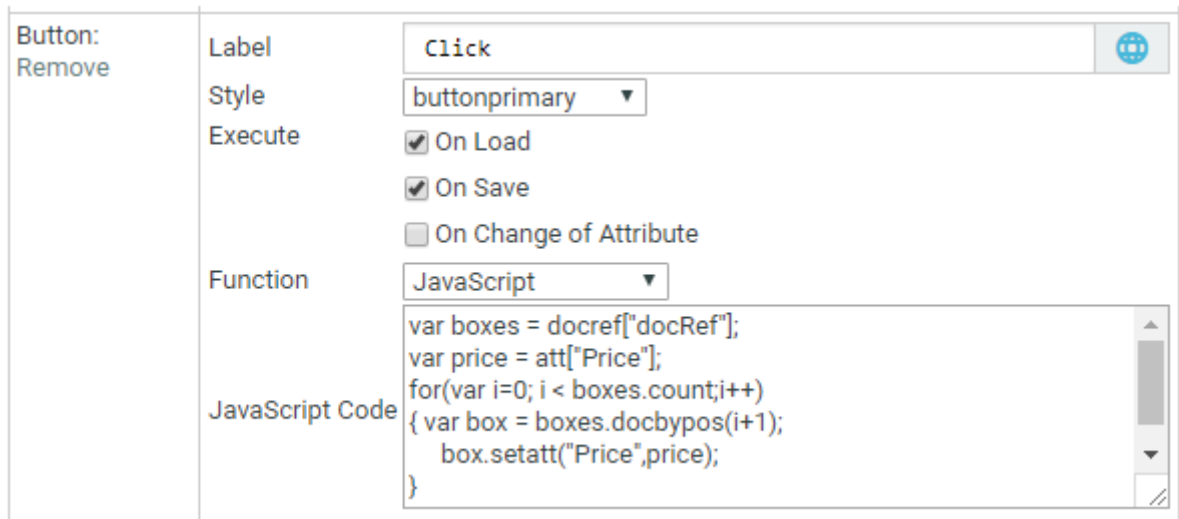
```
docbyname("Name of the Document") or docbypos(Position of the document)
```

Returns a JavaScript object representing the Attribute Category of the selected Document.

Properties of the Attribute Category object of the selected Document:

Property	Description
<code>att["attribute name"]</code>	Get the value of the specified attribute.
<code>setatt("attribute name", "value")</code>	Set the value of the specified attribute
<code>prop["reference property name"]</code>	Get the value of the referenced property
<code>setprop("reference property name", "value")</code>	Set the value of the referenced property

For example, the sample scripts below, shows how to push an attribute value to an attribute in the attribute category of all the referenced documents.



All the documents being referenced, are gathered using `docref["docRef"]` and stored in the `boxes` variable.

The for loop iterates over all these documents and for every document it updates the "Price" attribute in the attribute category.

- Another operator that was introduced for this functionality is "parent". It allows you to work with the parent Attribute Category (Category from where current Document is being referenced).

It returns a similar JavaScript object as "docref" with the following properties:

Property	Description
att["attribute name"]	Get the value of the specified attribute.
setatt("attribute name", "value")	Set the value of the specified attribute
docref["Document Reference Attribute Name"]	allows to go to the Attribute Category of a referenced Document
parent	allows to go to the parent Attribute Category (Category from where current Document is being referenced)

For example, the sample script below shows how to push an attribute value to a parent attribute category.

Button:
Remove

Label

Style

Execute

On Load

On Save

On Change of Attribute

Function

JavaScript Code

```
var newVal = "My new value";
parent.setatt("text",newVal);
```

Using both operators in combination makes it possible to iterate over the whole tree of Attribute Categories of referenced Documents.



Note:

1. It is not possible to change the value of Document reference attributes
2. It is not possible to access / change attributes that are not loaded on the page at the time the JavaScript Button is executed.
3. The expected result of the JavaScript logic should not be dependent on the order in which the JavaScript Buttons are executed.

You can access some basic information about the Referenced Document as follows

Property	Retuns the referenced document's
docRef.docposition	Document position
docRef.docname	Document name
docRef.docid	Document id

Property	Returns the referenced document's
docRef.docdescription	Description of the document
docRef.docversion	Number/index of the document version, not its ID (1st version -> 1, 2nd version -> 2, ...)
docRef.projectid	ID of the project, where the referenced document resides. (Helpful to find if the referenced document is linked to more projects)
docRef.projectname	Name of the project with docRef.projectid ID. Note this information might not be available in some cases and can return an empty String.

You cannot change the properties of a referenced document by assigning it a new value within JavaScript button script. They are read-only values.

For additional information on accessing document references and reference properties with JavaScript buttons, see [this](#) Knowledge Base article.

Create Image Label for an Attribute

You can create Project request forms or Order forms with graphical labels by setting image labels for specific **Attributes** in an **Attribute Category**. You can use this feature to make the form visually attractive and user friendly. In addition, you can add graphical (packaging) symbols and warnings to aid the user while filling in the forms.

1. Add the label images to the following folder on the WebServer: WebCenter\WebServer\tomcat\webapps\WebCenter_Inst\custom\AttributeLabelImages.

Create a new folder `custom` if it does not exist yet and create a folder named **AttributeLabelImages** under this folder.



Note:

- For the best user experience, use .jpg images. It does recognize .gif, .jpeg and .png.

2. Open your **Attribute Category** and select the **Attribute** for which you want to give an image label.
3. In the cell details, enter the correct image name including the extension in the **Label Image** field and save your attribute category.

Remove Grid Layout

NAPR_TASK_ATT1	NAPR_TEXTATT_2
vira_res_8155	MAKE PROJECT THUMBNAIL
napr_yes_no	napr_rich1
napr_docref_latest_version	NAPR_TEXTATT_3 [Button Click]
NAPR_ATT4	Text
NAPR_ATT6	

Attribute	NAPR_TASK_ATT1
Attribute Type:	Text
Label Text:	NAPR_TASK_ATT1
Label Image:	Danger.jpg
Position:	Left
Custom Unit Label	
Span Columns:	1
Span Rows:	1
Style:	WebCenter Attribute
Style Rule:	No Rule
Visibility:	Editable
Restrict Values:	Restricted Set: NAPR_RES1
Rendering:	Dropdown
Allow Multiple Values:	<input type="checkbox"/>
Info Page:	Info HTML page (name+extension) <Web/instanceRoot>/custom/AttributesHelp/

Note: The image name is case sensitive.

You can see image labels appearing instead of attribute names in the forms.

Regulatory Input / Briefing

Packaging Symbols

Packaging Code	Barcode type	Barcode	Approved for Use?
*	*	*	*
<input type="text"/>	---Please Select---	<input type="text"/>	---Please Select---

Required Legal Disclaimers / Warnings

[Show Rich Text Controls](#)

Tip: In case you wish to display a check box for the **attribute**, make sure you use an **attribute** with a **restricted set** containing only the values Yes and No.

Note: You can either have a text label or an image label, but not both.

Create a Multi-Value Attribute

There are situations when you are creating a new Project or filling in a Form, more than one value needs to be added as an **attribute**. For example, if you are producing a packaging that is intended for more than one market, you need to specify those markets as values in the respective attribute field. You can use a multi-value attribute for this purpose.

- Open your **Attribute Category** and select the **Attribute** for which you want to give more than one values.
- In the **Details for the selected cell** table (in the **Grid layout**), enable **Allow Multiple values**.

Move Grid Layout

Insert: TTT + - + + - +

PR_TASK_ATT1	NAPR_TEXTATT_2
_res_8155	MAKE PROJECT THUMBNAIL
or_yes_no	napr_rich1
or_docref_latest_version	NAPR_TEXTATT_3 [Button Click]
PR_ATT4	Text
PR_ATT6	

Attribute	NAPR_TASK_ATT1
Attribute Type:	Text
Label:	Label Text: <input type="text" value="NAPR_TASK_ATT1"/>
	Label Image: <input type="text" value="Danger.jpg"/>
	Position: <input type="text" value="Left"/>
	Custom Unit Label: <input type="text"/>
Span Columns:	<input type="text" value="1"/>
Span Rows:	<input type="text" value="1"/>
Style:	WebCenter Attribute <input type="text"/> +
Style Rule:	No Rule <input type="text"/> +
Visibility:	Editable <input type="text"/> +
Restrict Values: +	Restricted Set: NAPR_RES1 +
	Rendering: <input type="text" value="Dropdown"/> +
Allow Multiple Values	<input checked="" type="checkbox"/>
Info Page:	Info HTML page (name+extension) <WebInstanceRoot>/custom/AttributesHelp/ <input type="text"/>

In your Project (as a form), you will have the particular attribute with an option to select more than one (or all) values in its response field. See an example below.

Marketing Input

Marketing Project Name

Brand: Product Category: Product:

Product Description

Marketing Initiative Description

[Show Rich Text Controls](#)

Launch Market

- Asia Pacific
- EMEA
- North America

Select All
 Deselect All
 Show All
 Asia Pacific
 EMEA
 North America



Note:

Simple text attributes were limited to 255 characters until WebCenter 14. There is no character limitation from WebCenter 14 onwards. This allows for unlimited attribute values for a single multi-value attribute.

Create HTML Information for an Attribute

When you design Project request forms or new Order forms, you might want to provide additional information to the user who is filling in the information.


From WebCenter 12 onwards you can provide additional information as HTML help or information. This is especially useful when technical fields need to be supported with extended HTML help.

There will be an information  icon that is added next to the attribute name or attribute image label. When the user clicks on this icon, a pop-up HTML page with the information will appear.

1. Create an HTML file with the additional information you want to provide along with the attribute. You can create textual information as well as images to explain the attribute.
2. Place this HTML file in the AttributeHelp folder (`WebCenter\WebServer\tomcat\webapps\WebCenter_Inst\custom\AttributesHelp`).
3. Open the **Attribute category** and select the **attribute** for which you want to provide HTML help or information.
4. In the cell details, enter the correct file name (of the HTML file) in the **Info Page** field and save your **Attribute Category**.


Details for selected cell:

Attribute	w2p-Finishing
Attribute Type:	Text
Label:	Finishing
Label Image:	
Span Columns:	1
Style:	WebCenter Attribute Add Style
Visibility:	VisibilityRule Add Rule Edit Rule Delete Rule
Allow Multiple Values:	<input type="checkbox"/>
Info Page:	Info HTML page (name+extension) <WebInstanceRoot>/custom/AttributesHelp/ sheet-and-roll.html


If you have an HTML information page linked to an **attribute**, you can see an information icon next to the attribute in the form that you created. When you click on the information , you can see a pop-up window with the information to help the User.

▼ Order Information

Is this an Order?



Approval Required Before Print?




Label Shape --- ▼

Quantity

Varnish --- ▼

Specialties --- ▼

Finishing*  --- ▼

Add More Information? No ▼

[Create Project](#)



Check box, Radio button and Image selector in your Attribute Category

You can decide the **rendering** of choices for a **restricted set** (text) and for **list** attributes (text). The default **rendering** is a drop down with the options. You can show the options as :

- simple radio buttons or check boxes
- radio buttons or check boxes with images

This allows your users to see the options more clearly than in the case of a drop down.

Create Radio buttons and Check boxes

When you have a few options as the value for an attribute, you can present the options via radio buttons or check boxes instead of a drop down.



Note: Avoid doing this when you have a lot of options to select from. The form will load slow.

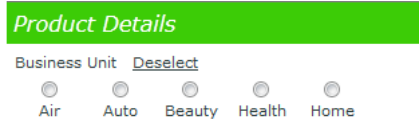
1. [Create and add attributes to an Attribute Category.](#)
2. Select your **attribute** in the [Grid Layout](#).
An item **Restrict Values** will be visible in the **Details** section.
3. Select the **Rendering** as **Radio / Checkboxes**.

Details for selected cell:

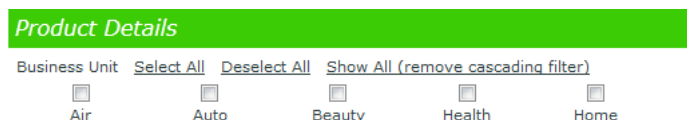
Attribute	00 Business Unit
Attribute Type:	Text
Label:	Label Text: Business Unit Label: <input type="text"/> Image: <input type="text"/> Position: Top <input type="button" value="v"/>
Span Columns:	1 <input type="button" value="v"/>
Style:	WebCenter Attribute <input type="button" value="v"/> Add Style
Visibility:	Editable <input type="button" value="v"/> Add Rule
Restrict Values:	List <input type="button" value="v"/> BO Brands <input type="button" value="v"/> Copy List Column: Segment <input type="button" value="v"/> Reorder Columns Rendering: Radio/Checkboxes <input type="button" value="v"/> Columns: 6 Alignment: Distribute over Width <input type="button" value="v"/> Labels: Below <input type="button" value="v"/>
Allow Multiple Values:	<input type="checkbox"/>
Info Page:	Info HTML page (name+extension) <WebInstanceRoot>/custom/AttributesHelp/ <input type="text"/>

In the Attribute Category Preview, you will see a set of checkboxes or radio buttons depending on the items in the restricted set or valid items in the list column.

You will get Radio buttons for a single-value attribute.



You will have check boxes for a multi-value attribute. Select the **Allow Multiple Values** option for this.



Note:

This is optimized for non-cascading type of restricted sets. You may also use them for cascading dropdowns with limited values. Avoid using it when more than two attributes cascade.

Do not use this option for **lists** with thousands of rows.

4. Select the **Column** numbers, **Alignment** and the **Label** position.

You get the best user experience when the number of columns equals the number of allowed values or one of its dividers. If you restrict it to one **column**, you will get a vertical array.

Product Details

Business Unit [Select All](#) [Deselect All](#) [Show All \(remove cascading filter\)](#)

- Air
- Auto
- Beauty
- Health
- Home

By default the columns will be aligned as per the **Distribute over Width** option. You can choose to align to the **left** or **right** depending on the appearance you prefer.

Create Image Selectors

You can use images just like *Radio/Check boxes*.

1. [Create and add attributes to an Attribute Category](#).
2. Select your **attribute** in the [Grid Layout](#).
An item **Restrict Values** will be visible in the **Details** section.

Restrict Values:	Restricted Set:	FC_Sizes
	Rendering:	Images
	Columns:	6
	Alignment:	Distribute over Width
	Labels:	Below
	Height of Images:	100 pix
	Height of Cell:	pix
	Image Type:	jpg

3. Select the **Rendering** as **Images**.

- The images must be placed on `webinstance\custom\AttributeValueImages`. You can use the same images used in the Asset Browser as selectors.



Note: The image names are case sensitive.



Tip: You can create Push Through Configurations to access the AttributeValueImages, AttributeLabelImages and AttributesHelp on the Web Server. This way your users do not have to access the web server to customize the attributes.

- **Height of Images:**

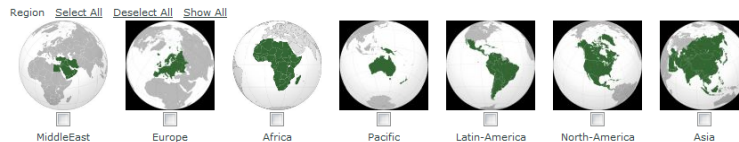
You can resize the images by adjusting the height. By default, resizing is always done proportionally and to 100 pixels. You can get high quality images when you create images with the sizing specified here.

- **Height of Cell:**

The grid of images can take a lot of screen space. If you want to limit the space use and use a scroll bar, limit the height of the cell. In this setting, the cell will have a fixed height and a scrollbar when the needed size to show all images extends to given height.

- **Image Type:**

You can choose the **Image Type** as **automatic** to display any of the image types. However, we recommend that you select an **Image Type** in this field.



Troubleshooting

- **When you do not see any images at all :** Verify the path where the images are located. If you have multiple web server instances, you must have the images on each instance (or at least on the instance where you try).



Note: Do not put your images for image selectors in the `AttributeLabelImages` folder.

Check the extension of the images.



Note: The name and the extension are case sensitive.

- **When some images are missing:**

Verify if there are any special characters. Avoid all the special characters (comma, %, ...etc) except space.

Check leading and trailing spaces and number of spaces in the names.

15.3.9. Restrict Attribute Values to Previously Selected Values

To setup a practical way to make a final selection from a previously made/calculated list of candidates, a new function has been introduced.

It applies to attribute categories or task specifications with a grid-layout having a first multi-value attribute (attribute A) and a second simple text, non-restricted set attribute (attribute B).

The result is Attribute B is restricted to the selected values of attribute A

This can be set up only by administrators and used by all users who can edit attributes.

Usage:

Select Attribute B in the grid layout. In the cell details, set the Restrict Values selector on Attribute. This will display a dropdown with candidates for attribute B (this list is all plain-text multi-value attributes).

Restrict Values:	Attribute ▼	-- Please Select -- ▼
Allow Multiple Values:	<input checked="" type="checkbox"/>	-- Please Select -- Board Country

Select one of the candidates. This results in a behavior as shown in the below example: Final Country (which is attribute B) is restricted to the selected values for Possible Country.

Possible Country

Denmark	▼
France	
Germany	
Ireland	

Final Country

---Please Select---
---Please Select---
Denmark
France
Germany
Ireland

Details/Limitations:

- This function only works in grid layout
- Attribute A and B must both be plain text attributes. Attribute A can be a restricted set or a plain text attribute (typically linked to a cascading dropdown).
- Attribute A must be multi-select
- Attribute B cannot be a restricted set or linked to a cascading dropdown
- Attribute B can still be multi-value, so you can select multiple values from the selected values of attribute A
- In search, attribute B is NOT shown as a dropdown, so it behaves as a simple text
- The dropdown only appears when the attribute is editable, else the selected value(s) is/are simply displayed as for a plain text attribute
- Auto-select: When attribute A has only 1 value selected, this value is automatically selected for attribute B.
- Auto-deselect: When attribute B has a value and attribute A's values are changed so that the value for attribute B is no longer a selected value for attribute A, the value for attribute B will be de-selected. In case attribute B is multi-value, this logic is applied to each value separately.
- It is allowed that attribute A is itself restricted by yet another attribute.
- This function works identically for task specifications
- It is allowed to set visibility rules on both attribute A and attribute B
- When attribute A is taken away from the attribute category or if it is deleted from the system, attribute B becomes a plain text attribute. All set values are however remembered (even if they are multi-value, they will be displayed in their base form "value 1 | value 2").
- When no values are selected for attribute A, nothing is displayed for attribute B (no empty dropdown either).

15.4. Cascading Dropdowns

Cascading Dropdowns contain a set of dependent attributes. The choice of one attribute limits the choice of other attributes in these Dropdowns.

These attributes will be visible as a drop down while building your forms and projects. This allows you to customize and build intelligent forms. Using these, you can:

- retrieve relationships among values (for example, brand-sub brand roles).
- auto-fill the values depending on the relationship (if you select a brand, a brand description will be filled in).
- do smart filtering (if you select a brand, you can filter the products that are available under the brand).
- use in advanced searching (Asset Browsing). Read more in [Asset Browser](#) on page 178.
- **Look Up attribute values** buttons in attribute categories and task type specification forms.

15.4.1. Lists

Lists contain a set of dependent attributes imported into WebCenter. The Lists data is added to the WebCenter database and maintained in a WebCenter Project or Template. Therefore, you can modify this data from WebCenter interface.

Also, you can control the access to this data by setting project permissions.

Adding a new List

- Upload your Excel (either .xls or .xlsx) or XML document to a project or template named **ListManager**. If this project does not exist yet, create a new project named **ListManager**. In this project, you can create folders for different departments, setup approval cycles to approve your lists before it is fully configured.



Note: If you are uploading your lists to the **ListManager** template, only your administrators can see the lists.

- Go to the **Admin > Attributes > Lists** page.
- Click **New List**.
You will see the **New List** configuration page.
- **General List Information:** Specify the **List Name** and a **Description**
- **Input Source Properties:**
 - Specify the **Input Source Type**. It can be either **Excel** or **XML** document. The **Select Document** drop down will list the Excel or XML files uploaded to the `ListManager` project.
 - **Excel:** Select the input Excel file from the **Input Source Type** drop down. Specify the **Sheet Name** of the Excel sheet containing the List data.
 - **XML :** Select the input XML from the drop down and specify the **XML Main Node**.

- a) You may enable the **Flush existing list data before updating the list** option to clear the old data from the List before updating with new data.

With this option on, whenever you upload a new version of the Excel / XML input document, the data from the List will get deleted before the List data gets updated.

- b) You can enable the **Database user name and password are required when deleting data from list** as a security measure.

If you have enabled this, you have to specify a database user who has the permission to change the database schema. The database SA (System Administrator) user can also change the schema.



Important: We recommend that you enable this option to avoid accidental deletion of Lists and List Data.

- **Log File Folder:** Select this from the drop down listing the folders in the **ListManager** project. This folder will contain the log files associated with individual Lists. The respective log files gets updated when you add or modify List data. You can also set permissions for this folder so that only your administrators can access the logs.
- **Database info:**
 - **Create new database table for storing the data:** Select this when you want a new database table for your list.

When this is selected, a WebCenter database table is created whenever you create a new List. You need to specify the database user credentials to be able create new database tables.



Note:

If you check the **Use the built-in 'webcenter' database user account to create the database table**, the SA user has to give the database **Create Table** rights to the default 'webcenter' user account. In this case, you do not have to specify the database SA user credentials for creating new list tables.

- **Use an existing database table for storing the data:**

Specify an existing table in the WebCenter database for storing the List data. The columns in this database table and your List need to match. You do not have to specify database user credentials to use an existing table for creating lists.
- **List Properties:** You can configure your **Input Columns** in the **List Properties** table.
 - Specify the columns relevant for the List here by selecting or deselecting.

By default, the column names of the database table will be the same as the input column names. You may also change the Column names.



Note: The List column names should be unique.

- You can select a particular column as **Unique Identifier**. When you enable this, each value in this List column has to be unique (for example, Product Names). It is possible to select more columns as **Unique Identifiers** (for example, Product Name-Product Variant combination).


Tip:

If you have selected more than one **Unique Identifier** columns, the combination of the values in these columns have to be unique. For example, in the case of Product-Variant combinations, you can have the same Product name repeated for each of its Variants.



Note: When you are updating the list, make sure that the new data matches the **Unique Identifier** column. If the new data does not match the identifier values, new rows will be created. This does not apply if you have enabled the **Flush existing list data before updating the list** option.

- Click **Create List**.

The Lists are displayed in the Lists overview page. Clicking on a specific List will lead to the [List Details](#) page. You can [inspect your List data](#) here.



Note: If you update the source XML or Excel document, the List Data will get updated.

Purging Lists

The document linked to a list can have newer versions created. When there are more than thirty thousand (30000) new versions of the document that is linked to the list, the older versions of the list up-to 20000 (that is 1 to 20000) are purged. This is to make space for the newer versions to be stored.



Note: Document versions can be linked into different projects. When purging, WebCenter will check if any of the purged versions of the document is linked into a project. Documents versions that are linked into a project are not purged.

Inspecting List Data

- Go to the **Admin > Attributes > Lists** page.
The Lists overview page displays all the existing Lists. The source document and the creator's name is also listed in this page.
- Click on the name of the List you want to inspect.
- In the [List Details](#) on page 337 page, click **Show List Data** to see all of your list data.
You can filter on a list column with a specific value to make the inspection easier.
- Click **Return to List Overview** to return to the general **Lists** overview page.

List Details

The List Details page contains an overview of the following :

- General List information
- Input source properties:
Use the Excel/XML **Document** link is to view the document's action history.
You can also access the **Log file** from the respective link.
- List properties

You can:

- [inspect a list's data](#) by clicking on **Show List Data**
- [delete a list or its data](#)

Unique Identifier

You can select a particular column as **Unique Identifier**. When you enable this, each value in this List column has to be unique (for example, Product Names). It is possible to select more columns as **Unique Identifiers** (for example, Product Name-Product Variant combination).



Tip:

If you have selected more than one **Unique Identifier** columns, the combination of the values in these columns have to be unique. For example, in the case of Product-Variant combinations, you can have the same Product name repeated for each of its Variants.



Note: When you are updating the list, make sure that the new data matches the **Unique Identifier** column. If the new data does not match the identifier values, new rows will be created. This does not apply if you have enabled the **Flush existing list data before updating the list** option.

Deleting a List or List Data

You can remove an existing **List** completely from the system or remove only the **List** data.

1. Go to the **Admin > Attributes > Lists** page.
2. Click on the **List Name** from the **Lists** table.
This will lead you to the List configuration page.
3. Choose either the **Delete List Data** option or **Delete List** option.
4. Enter the **Database User name** and **Password** if required.
If you are deleting one of the Lists, you always have to enter the database user credentials.



Note: If you are deleting the List Data, you have to enter the credentials only if the **Database user name and password are required when deleting data from list** option was enabled while creating the List.

5. Click **Delete List** or **Delete List Data** to confirm.



Note:

The deletion does not check if the List being deleted is in use by any of the attribute categories. This will result in malfunctioning of the features using that attribute category.
To restore the affected attribute category, create a List with the same name as the deleted List.
To restore your deleted List Data, update the corresponding input file in the Listmanager project with a new version.

Using Lists as Cascading Dropdowns

Cascading Dropdowns can be configured, using Lists.

1. [Add and configure your List.](#)

Go to **Attributes > Attribute Categories** or Task type specification form and click on any text attribute field.



Note:

- Make sure you are in **Grid Layout**.
- Bring a text **attribute** into one of the cells.
- Make sure that it is not a **restricted set**. You cannot view the lists of cascading attributes in the **restricted sets** category.

An item **Restrict Values** will be visible in the **Details** section. You can see the cascading attribute lists based on the web server (if any) and the database lists as **lists**. These are now available for use in your **Projects** and **Forms**



Note: You cannot re-use a column of a list in more than one attributes belonging to one attribute category. *You can replicate the list temporarily to add the same column to another attribute of the same attribute category.*

2. Do this for multiple attributes that are required and you will see the cascading behavior. When you select a value for one attribute, the other attribute values are restricted to what is allowed according to the List data.

Replicate List Data in an Attribute Category

If you have to use the same list data multiple times for multiple attributes, you can copy the list to these attributes. If you need two bar code selectors for your packaging component, you will need two fields in the form with the same drop down.

1. [Add and configure your List.](#)

2. In the Admin mode, go to **Attributes > Attribute Categories** or Task type specification form and click on any text attribute field.

An item **Restrict Values** will be visible in the **Details** section. You can see the cascading attribute lists based on the web server (if any) and the database lists as **lists**. These are now available for use in your **Projects** and **Forms**

3. Select the **List** from the **Lists** drop down. Click **Copy List**.

This way, you will get a second cascading drop down configuration without duplicating the data on the database. You will get a new entry in the list drop down with the same list name with **(2)** as suffix. You can do this multiple times and the suffix changes accordingly.

4. Add more attributes to the category and select values from the replicated Lists.



Note: These copies are only available in the attribute categories where the List was replicated. If you save the attribute category without linking any attributes to the copied Lists, they will be removed.

Configuring List Columns in an Attribute Category

You can customize the list columns in an attribute without changing the database list. You can:

- change the order of the columns in the cascading drop down. You can create cascading drop downs with different column ordering using the same database lists.
- allow other values in the list.

1. [Add and configure your List.](#)

Go to **Attributes > Attribute Categories** or Task type specification form and click on any text attribute field.



Note:

- Make sure you are in **Grid Layout**.
- Bring a text **attribute** into one of the cells.
- Make sure that it is not a **restricted set**. You cannot view the lists of cascading attributes in the **restricted sets** category.

An item **Restrict Values** will be visible in the **Details** section. You can see the cascading attribute lists here.

Details for selected cell:

Attribute	CountryCode
Attribute Type:	Text
Label:	Label Text: <input type="text" value="CountryCode"/>
	Label Image: <input type="text"/>
	Position: <input type="text" value="Left"/>
Span Columns:	<input type="text" value="1"/>
Style:	<input type="text" value="WebCenter Attribute"/> Add Style
Visibility:	<input type="text" value="Editable"/> Add Rule
Restrict Values:	<input type="text" value="List"/> <input type="text" value="Country list"/> Copy List
	Column: <input type="text" value="CountryCode"/> Configure List
	Rendering: <input type="text" value="Dropdown"/>
Allow Multiple Values:	<input type="checkbox"/>
Info Page:	Info HTML page (name+extension) <Web/InstanceRoot>/custom/AttributesHelp/

2. Click on the **Configure List** link.

Configure List ✕

Use the arrows to change the order of the columns.
Column ordering only has effect on the tree view in search results (asset browser)

	Column	Attribute
▼	Region	Region
▲	Country	Country

Correct the previous entries when a selection is not valid

Allow Other Values

Autoselect matching values when other values are filled out outside of attributes page (e.g. workflow)

OK

- In the resulting dialog, you can use the arrows to change the order of the columns in the cascading drop downs.



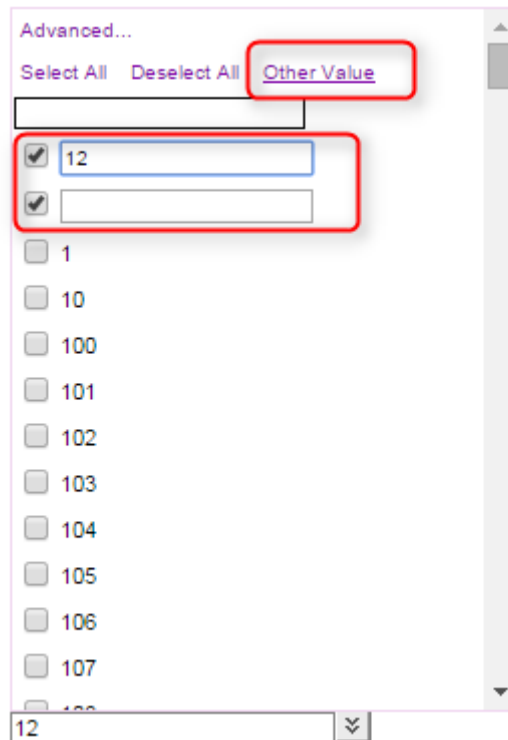
Tip: You can configure the list column order to create a cascading tree in search results for your asset browser. In the example above, you can change the `Region` to a higher level using the arrow to move up.

- By default, the cascading attribute values are corrected when one of the corresponding values change. Disable the **Correct the previous entries when a selection is not valid** option if you do not want your cascade to correct entries automatically. This allows you to select combinations that are not present in the referenced list.
- You can also specify whether the attribute values restricted to a list column should be allowed to have non-list values. Enable **Allow Other Values** to do so.
 - If you have turned the **Allow Other Values** option off, only the list column values can be selected as a value. This means that if you have an empty field, you cannot type anything there.
 - If the **Allow Other Values** option is on, you can type in an attribute value. The other attributes in the same cascade will not be filtered to the new value until you save the attributes.



Note: This configuration is **attribute category** specific. So the column in the database list remain the same.

- If the **Allow Other Values** option is on for a multi-value attribute, you can click on the **Other Value** link on the top to enter a non-list value. As a result, you will get an additional row to enter the new value. You can create multiple rows this way.



6. **Allow Adding Non-Matching Values in Case of Multiple Values** is on by default. If the option is selected, it is possible to add values that do not match other List values to your multi-value List Attribute. They will be shown under the section "Values requiring changes to other selections". If the option is not selected, this section will not be available.
7. Optionally, enable **Autoselect matching values when other values are filled out outside of attributes page (e.g. workflow)**. This checkbox is off by default.

When this option is on, if one value was filled out by a workflow or elsewhere, the entire cascading will be executed in the **attribute** page.

If the option is off, cascading will only occur when changes are done by a user in the attributes page.

15.5. Document References

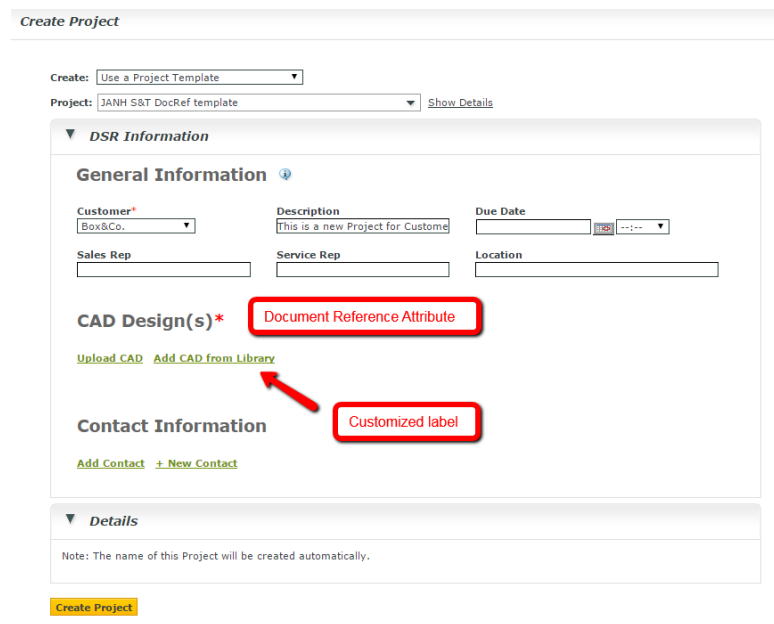
You can make use of **Document References** to specify product and its components or master-child relationships. Using this feature, you can create an attribute link to refer to a document that is located within another project or a document library.

The document reference attribute behaves like a normal attribute which can be added into any attribute categories. However, you can configure them to provide document sources for your projects. For example, when you are re-using your existing marketing statements or claims for individual packaging projects, you can store them in a library and use document references in your future projects to link to them.

Both **Projects** and **Documents** can have document references. You can also create and use [document reference task specifications](#).

You can:

- configure the document reference links to access specific projects designed as document libraries, or to access saved searches or asset browsers.
- store your text statements in a library project. Using document references, you can link to relevant text statements from each of your individual packaging artwork.
- configure the file types of documents for these links. You can link a 3D file to one or more CAD files as document references where the reference links are configured to add only .ARD files.
- configure a document reference attribute to point to multiple documents.
- refer to a CAD overlay from the Graphic file for 3D viewing. Read more in <https://wiki.esko.com/pages/viewpage.action?pagelId=170043393>.



The screenshot shows the 'Create Project' form. At the top, there are dropdown menus for 'Create: Use a Project Template' and 'Project: JANH S&T DocRef template'. Below this is the 'DSR Information' section, which is expanded to show 'General Information' with fields for Customer, Description, Due Date, Sales Rep, Service Rep, and Location. The 'CAD Design(s)*' field is highlighted with a red box labeled 'Document Reference Attribute'. Below it are links for 'Upload CAD' and 'Add CAD from Library'. The 'Contact Information' section has links for 'Add Contact' and '+ New Contact'. A 'Customized label' field is also highlighted with a red box. A red arrow points from the 'Customized label' box to the 'Document Reference Attribute' box. At the bottom, there is a 'Details' section with a note and a 'Create Project' button.

It is possible to specify attributes specific to the document reference attribute links. For example, your packaging project for a box can have a document reference link to an artwork PDF. The specific barcode can be linked to this document reference via a **reference category**.






Note: You will see warnings when deleting a document that is referenced elsewhere in WebCenter.

15.5.1. Create a Document Reference Attribute

Creating a **document reference attribute** is similar to [creating an attribute](#).

1. Click **Admin > Attributes > New Attribute**.
2. Enter information in the fields as appropriate:

In the field...	Fill in the...
Name	name of the document reference attribute
Label	text of the label which has to be displayed. To get the translated text of the label in the other languages chosen, select the blue icon to open Find or Create Translated labels on page 293
Description	description of the attribute contents (for example, <code>link to the CAD shape document</code>).
Type	<p>select document reference as the type.</p> <div data-bbox="699 674 1497 1727" style="border: 1px solid blue; padding: 5px;"> <p>--- Select Attribute Type ---</p> <hr/> <p>--- Select Attribute Type ---</p> <p>Area(sq in.,sq cm)</p> <p>Area(sq in.,sq mm)</p> <p>Area(sq ft,sq m)</p> <p>Date and Time</p> <p>Distance(in.,mm)</p> <p>Distance(in.,m)</p> <p>Document Reference</p> <p>Float</p> <p>Integer</p> <p>Rich Text</p> <p>Text</p> <p>Text (Right to left)</p> <p>Volume(cu in.,cu cm)</p> <p>Volume(cu in.,cu dm)</p> <p>Volume(cu ft,cu m)</p> <p>Weight(lbs,gr)</p> <p>Weight(lbs,kg)</p> </div> <p>Document References are attribute-links pointing to different document sources. When you select this option, you will have additional options.</p>
Values	will be set to Prompted by default.

In the field...	Fill in the...
Versions and Revisions	<p>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:</p> <ul style="list-style-type: none"> Latest Version: When you select this, the document reference link will be updated to the latest version of the document. <div data-bbox="735 607 1426 763" style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;">  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. </div> 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. <div data-bbox="735 1126 1426 1283" style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;">  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. </div>
Reference Category	<p>To apply a reference category to the document reference, select from the drop down listing all the attribute categories.</p> <div data-bbox="699 1406 1426 1496" style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;">  Note: Rich text attributes and document reference attributes cannot be used as reference attributes. </div> <p>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.</p>

3. Select **Attribute is also a task specification** if you want to be able to use the attribute as a task specification.

For more information about task specifications, see [Basic Concepts of Task Management](#)".

4. Click **Create**.

Document 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.



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.



Note:

When you upload a new **version** or **revision** of the reference document, your **Preferences > Security** settings will over-write the above settings.

- When the **Allow changing attributes of approved documents** option is turned off, the document references (as project attributes or task specifications) will not be updated to point to the latest versions.
- If the setting **Allow changing attributes of inactive projects** is turned off, the document references of such projects will not get updated to the latest **revision / version**.

Reference Category

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.

For example, you can:

- define the position of a text fragment (document reference link) in an artwork.
- size of a barcode on a box. The barcode is the document referenced in the box and the size of the barcode is an attribute of the document reference link.



Note: This feature is only available with the Lifecycle Management License.

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**.

Deleting Documents used as Document References

- When you try to delete documents being used as references elsewhere, you will get a warning message with a list of **Projects / Documents / Tasks**, where it is being used as a reference.

When you confirm the deletion, the documents with all their versions are deleted.



Note: You cannot delete individual document version when it is being used as a reference in at least one **Project / Document / Task**.



Note: However, you cannot delete documents when the **Preferences > Security** settings are turned off:

- When the **Allow changing attributes of approved documents** option is turned off as a security setting, the documents / versions referenced as project attributes or task specifications cannot be deleted.
You will get an error message and a list of **projects / documents / tasks** where the document or version is being used.
- If the setting **Allow changing attributes of inactive projects** is turned off as a security measure, the documents / versions referenced in those projects cannot be deleted.
You will get an error message listing the occurrences where the document is being referenced.

15.5.2. Edit a Document Reference Attribute

1. Click **Admin > Attributes**
2. Click the attribute to edit.
3. Edit the attribute as desired. You can change the **Name, Description, Versions and Revisions, Reference Category** and **Attribute is also a task specification**.

Edit Attribute properties and click **Change**.

Name *
Tip: Enter a name with a prefix to find it back more easily.

Description

Type * Document Reference

Value * Prompted
 Calculated
 Restricted Set

Versions and Revisions * ⓘ

Reference Category ⓘ

Attribute is also a Task Specification

Attribute Categories ACAD Test, ACAD Test Exported, ACAD Test Exported 2

Task Types test deletion of task specification

4. Click **Change** to make the changes.



Attention: When you edit the **versions and revisions** settings, the changes will not be reflected in the existing document references. The changes are updated for the future uses of the edited attribute.

15.5.3. Copying Document Reference Attributes from source Project or Template

When a project is created from an existing project or a template, the Document Reference Attributes that are copied from the template or the source project are copied into the documents in the newly created project. Documents that are local to the source project or template is local to the newly created project as well.

When a project is copied or created along with the documents,

- The documents are copied to the new project and the document reference attribute values of the documents point to the original documents.
- For all document reference project attributes, the referenced document is copied to the new project and attribute points to the new document, which is local to the new project.
- Remote documents in the template/source project remain remote in the new project with no change to corresponding document reference.

Project: demo_source Active

Upload
 Upload Multiple Documents
 Mail link to
 More...

Manager: BLSA_DOCREF: !!!napr_custlog_1.x
 Customer:
 Due On:
 Modified: Jun 18, 2018
 Description:

Documents 1 Bill Of Materials 0 Tasks 0 Discussions 0 Characteristics **Attributes** More...

Attributes in Category Demo_Cat

BLSA_DOCREF

+ Upload **+ Search**

Location of the document in the source

Thumbnail	Name	Project Name	Location
	!!!napr_custlog_1.xml	napr_app_1	Reference
	test1.xlsx	demo_source	Local

Project: demo_target Rightcrawler New Project created as a copy of demo_source

Upload
 Upload Multiple Documents
 Mail link to
 More...

Manager: BLSA_DOCREF: !!!napr_custlog_1.
 Customer:
 Due On:
 Modified: Jun 18, 2018
 Description:

Documents 1 Bill Of Materials 0 Tasks 0 Discussions 0 Characteristics **Attributes** More...

Attributes in Category Demo_Cat

BLSA_DOCREF

+ Upload **+ Search**

Location of the document in the new project

Thumbnail	Name	Project Name	Location
	!!!napr_custlog_1.xml	napr_taskmanagement	Reference
	test1.xlsx	demo_target	Local

Any document reference attributes which are referenced to documents when copied to the target project while creating a new project from a source project are remapped to the new project as local.

Documents added to the document references through the **Link** in the current project document source, will be also remapped to the document references to the new project created.



Note: When you copy a project without the documents, all the document references point to the source project or its referenced project.

Upload a New Version

You can upload a new version to an existing document only once. This restriction helps to ensure multiple versions of the same documents are not uploaded accidentally.

15.5.4. Delete a Document Reference Attribute

1. Click **Admin > Attributes**
2. Select the attribute to delete and click **Delete Attribute(s)** in the actions menu.

If the attribute is not being used, it is deleted immediately.

3. If the **document reference** is being used elsewhere, you will be asked to confirm the deletion. Choose from:

- **clear the attribute from the Project(s), Document(s), Document Reference Attribute(s) or Category(s):** When you select this option, your document reference attributes and its values are deleted from the projects / documents / where it is being used. However, the original document or its attributes are not deleted.
- **Cancel deletion.**

15.5.5. Document References in an Attribute Category

You can set up the document references with advanced options in the **attribute category** [grid layout](#) page.

Document reference attributes appear just like the other attributes in this page.

Read [Configure a Document Reference Attribute in a Category](#) on page 351.

Document References in One Column



Note: You need the Life cycle management license to place and edit the document references with its advanced features. If you do not have this, the list layout is the only available option. In the list layout, you will have a simple preview:

- multiple values are always supported
- default style
- drop down rendering when multiple values are added (when editable)
- document references are always rendered as a set of hyperlink read-only.

Configure a Document Reference Attribute in a Category

You need to use the **Grid Layout** for the advanced features associated with the document reference attributes within the cell of an attribute category.

- To add document reference attributes to a category or remove them from it, use the chevron (<< or >>) buttons to move them between the two columns.

You can see a **Preview** of your attributes under the columns.

- When you add a document reference attribute, you can setup advanced options in the **details** table:

Reference Category:	No Reference Category selected
Version Mode:	Latest Version
Document Source(s):	Components_Default ⓘ Edit Configuration
Rendering:	Table ▾ ⓘ Components_Default Edit Render Configuration

- Check **All Multiple values** to allow the reference to multiple documents. This feature is detailed in [Create a Multi-Value Attribute](#) on page 327

- Reference Category** is a read only field which refers to properties specific to this document reference link.

This field is set during the creation of the document reference attribute. You can specify an attribute category for each document reference attribute to define the properties of the reference / link. Read more in [Reference Category](#) on page 346.

- Version Mode** refers to the document version you are referencing to. This field is also set during the creation of the document reference attribute. Read [Document Versions and Revisions](#) on page 346.
- Document Source:** You can configure different types of document sources for a customized **document reference link**.

a) Click **Edit Configuration**.

You can configure [your document sources](#) in the **Edit Document Source Configuration** pop-up.

b) Click **Add document source** to add more document sources for this **Document Reference Attribute**.

c) If you have different [attribute views](#), you can setup different [source configurations](#).

Read more in:

- [Adding Document Sources for a Document Reference Attribute](#) on page 352.
- [Document Sources for Different Attribute Views](#) on page 354.
- Rendering:** You can setup a **Simple** or advanced **Table** display of the **document reference** links in a Project / Template / Forms.

If you select your rendering as:	The result will be...
Simple	

If you select your rendering as:	The result will be...
	<ul style="list-style-type: none"> • The document references will have: <ul style="list-style-type: none"> • the document name as a hyperlink. Click this link to open the document in a new tab. • a thumbnail. Click on the thumbnail to open the document in the Viewer. • a delete button • up/down arrow to re-order the document list.
Table	<p>An advanced table depending on your configuration. For example, you can configure editable attributes into your table.</p> <p>Read more details in: Create an Advanced Table Rendering on page 355</p>

- **Save** the **attribute category**.

A user with attribute update permissions can:

- delete a document from the list of document references.
- add a document. The **document sources** as configured will be available as a header to the simple / table rendering.



Note:

1. If **allow multiple values** is turned off, document source links will appear next to the added document in the same row.
2. Without the necessary upload rights to the folders of the project, a user cannot add documents to them.

- change the order of the referenced document.

Adding Document Sources for a Document Reference Attribute

You can configure your **document sources** (such as a Project/template which serves as a library of assets, a Saved search of your assets, or your document templates) in the **Grid layout**. Your configured sources will appear in the places (such as templates or forms you have designed) where you set the document reference categories.

Edit Document Sources Configuration						
DocRef1_Default						
Source	Label	Details	Operation	Target	Target Folder	
<input type="button" value="Browse"/>	Standard <input type="button" value="Upload"/>	Allowed Extensions Document Template selector: Any Document Template configured	Upload	<input checked="" type="checkbox"/> Add <input checked="" type="checkbox"/> Replace	Documents	
<input type="button" value="Document Templates"/>	Standard <input type="button" value="Browse"/>	Document Template selector: Fixed Document Template Template(s): VV_Template from a Project_VV1 Copy Operation: Basic Copy	Copy	<input checked="" type="checkbox"/> Add <input checked="" type="checkbox"/> Replace	Documents	
<input type="button" value="Current Project"/>	Standard <input type="button" value="Link"/>		Link	<input checked="" type="checkbox"/> Add <input checked="" type="checkbox"/> Replace		
<input type="button" value="Saved Search"/>	Standard <input type="button" value="Search"/>	Search Name: TL_WCR_16922 Bulk Operations - Find Docum Document Template selector: Any Document Template configured Copy Operation: Copy with All References	<input checked="" type="checkbox"/> Copy <input type="checkbox"/> Link <input type="checkbox"/> Move <input checked="" type="checkbox"/> Use by Reference <input type="checkbox"/> Create Assembly	<input checked="" type="checkbox"/> Add <input checked="" type="checkbox"/> Replace	Documents	

You can configure:

- a simple **Browse** link for the user to upload a document.



Note: You can also drag and drop multiple files to the upload button.

- **Document Templates** from the template library. This will serve as a place holder with pre-configured settings such as attribute categories. Read more about templates in [Document Templates](#) on page 127.
- **Current Project**
- **Saved Search:** Use this option to allow the user to select a file from a saved search. When the user clicks the document reference as a link (with a custom **label**), saved search results will appear in a pop-up with all the configured options.
- **Asset Management System:** Use this to allow selecting a file from the configured Asset Management Systems. Read more in [Configure Asset Management Connections](#) on page 410

You can specify settings for your users:

- the **Label**
- the **Details** such as:
 - the **document template** library
 - the name of the **saved search**
 - allowed file extensions
 - copy operation
- the type of **operation** depending on the document source. You can allow the users to:
 - **copy**
 - **link**
 - **move**

- **use by reference**
- **Create Assembly**
- **Target folder:** Every document source must have at least one target location selected.
Add and **Replace** options as targets are available for all the document sources.
 - **Add** target is used when you are uploading a new document or moving or copying or referencing an existing document with a Document source and adding it to a Documents table.
 - **Replace** target is used when an existing document is replaced by a new document (uploaded or already existing) within a Documents table.

Options are similar to the [Project / Template document creation settings](#).



Tip: You can [setup different configurations for different attribute views](#).

Document Sources for Different Attribute Views

There is always one document source configuration assigned to a document reference attribute in a category depending upon the **view**. In the **default view**, the name of this configuration will be "AttributeName"_Default.

You can create dedicated document sources for custom [attribute views](#). When you are in a custom **view**, click **Create Configuration for the Current View** to create a custom document source.

You will get an **Edit Document Sources Configuration** pop-up with a copy of the default setup.

Create a new setup for the current **view** and click **OK**. To revert to the default, click **Return to Default View Configuration**.



Note: **Return to Default View Configuration** will delete the current configuration and restore the default.

Document Sources Configuration

Labels_Default

	Label	Details	Operation	Target
Document Templates	Standard	Document Template selector: Any Document Template configured	Copy	<input checked="" type="checkbox"/> Add <input checked="" type="checkbox"/> Replace
	New	Copy Operation: Basic Copy		
Search	Standard	Search Name: -- Select Search -- Document Template selector: Any Document Template configured	<input checked="" type="checkbox"/> Copy <input type="checkbox"/> Link <input type="checkbox"/> Move	<input checked="" type="checkbox"/> Add <input checked="" type="checkbox"/> Replace
	Search	Copy Operation: Basic Copy	<input checked="" type="checkbox"/> Use by Reference <input checked="" type="checkbox"/> Create Assembly	

Source

In other views, the configuration name can be:

- "AttributeName" _Default if the configuration in the current **view** is inherited from the **default view**.
- "AttributeName" _ViewName if the **view** has its own configuration. If the configuration is shared with another **view**, ViewName can be from the other **view**.

Asset Management Connection as a Document Source for Document Reference

You can select **Asset Management System** as a Document Source. You can further add specific details from what has to be fetched from the asset management system by selecting **Configure** which opens the **Asset Management Configuration** window.

Following information has to be specified for the Configuration

- Choose either a Workspace that should be opened or workflow that should be called in the Asset Management.
 - When Workspace is selected: Choose the **Name Space** and **Parameter** from the drop down and value can be keyed in or filled using SmartNames
 - When Workflow is selected: Parameters should be added to the request, and values can be keyed in or filled using SmartNames



Note: This setup can be exported for reuse or another setup can be imported from file.

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.

Reference Category:	No Reference Category selected
Version Mode:	Latest Version
Document Source(s):	Components_Default Edit Configuration
Rendering:	Table Components_Default Edit Render Configuration

- 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.

	Name	color2 (prop)	City	Project
	Report test.pdf	<input type="text"/>		_DocRef project
	Name	color2 (prop)	City	Project
	mpp.txt	<input type="text" value="pitch black"/>	<input type="text" value="London"/>	_DocRef project

- 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	<input type="checkbox"/>
Up/Down			Read Only	auto	<input type="checkbox"/>
Document Property	Thumbnail 50 px	Thumbnail	Read Only	auto	<input type="checkbox"/>
Document Name	<input checked="" type="checkbox"/> Show Document Source <input checked="" type="checkbox"/> Show Document Description <input checked="" type="checkbox"/> Show Folder <input checked="" type="checkbox"/> Show Document Template	Name	Read Only	auto	<input type="checkbox"/>
Document Actions	Open 3D View View Open in ArtiosCAD Download Add Action		Read Only	auto	<input type="checkbox"/>
Document Property	Version <input checked="" type="checkbox"/> Allow uploading a new version <input checked="" type="checkbox"/> Allow updating to latest version	Version	Read Only	auto	<input type="checkbox"/>
Local/Remote Project	Project Folder Name <input type="checkbox"/> Copy Text Content Status		Editable	auto	<input type="checkbox"/>
Replace Button			Read Only	auto	<input type="checkbox"/>
Delete Button			Read Only	auto	<input type="checkbox"/>

- 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](#)

- 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...												
<ul style="list-style-type: none"> Description VersionRevision VersionAuthor Project ApprovalStatus ApprovalStage ModifiedDate Thumbnail 	<p>The selected document properties will appear in the table header with the custom label. For example:</p> <ul style="list-style-type: none"> 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. <table border="1"> <thead> <tr> <th>Version</th> <th></th> <th>estado de aprobación</th> <th>etapa de aprobación</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>⊗</td> <td>🔄</td> <td>Stage2</td> </tr> <tr> <td>1</td> <td>⊗</td> <td>✅</td> <td>Etapas 3</td> </tr> </tbody> </table>	Version		estado de aprobación	etapa de aprobación	1	⊗	🔄	Stage2	1	⊗	✅	Etapas 3
Version		estado de aprobación	etapa de aprobación										
1	⊗	🔄	Stage2										
1	⊗	✅	Etapas 3										
<p> Tip:</p> <ul style="list-style-type: none"> Create custom labels Specify the pixels for your thumbnail. Check the box Allow uploading a new Version button 	<ul style="list-style-type: none"> 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.

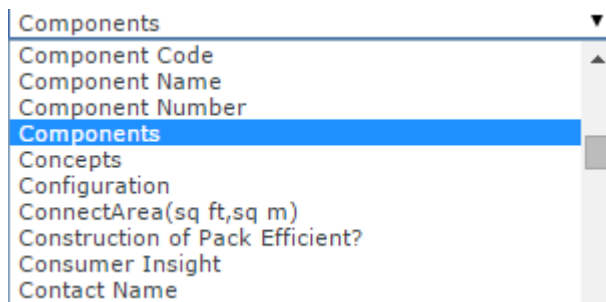
Choose Document Actions as...	The result in the rendering table will be...
<ul style="list-style-type: none"> View Open in 3D Open in ArtiosCAD Download 	<ul style="list-style-type: none"> A 3D button will be available only when there is an existing 3D perspective. Open in ArtiosCAD option will be available 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...
<ul style="list-style-type: none"> • Upload New Version • Update to Latest Version 	<ul style="list-style-type: none"> • 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. <div style="border: 1px solid gray; padding: 5px; margin: 10px 0;">  <p>Note: The Upload New Version  button can also be placed in the Version column by checking the Allow uploading a new version check box.</p> </div> <ul style="list-style-type: none"> • 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...
<ul style="list-style-type: none"> • Editable if you want the users (with the right permissions) to be able to edit this attribute. 	<ul style="list-style-type: none"> • The selected document attributes will be displayed in the table header and its values in the respective columns. <div style="text-align: center; margin-top: 20px;"> <div style="border: 1px solid gray; padding: 2px 10px; display: inline-block;">Width *</div> <div style="border: 1px solid gray; padding: 2px 10px; display: inline-block; margin-left: 10px;">Length</div> </div>

Specify the Visibility of the attribute as...	The result in the rendering table will be...				
<ul style="list-style-type: none"> • Required if you want to make it mandatory 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. 	<ul style="list-style-type: none"> • The users can type in the values for the editable attributes. <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="background-color: #f2f2f2;">Weight</th> <th style="background-color: #f2f2f2;">Date</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">1g</td> <td style="text-align: center;">May 26, 2015 13:30 ▼</td> </tr> </tbody> </table> </div> <div style="margin-top: 10px; border: 1px solid #ccc; padding: 5px; background-color: #f9f9f9;"> <p> Note: You can configure the Visibility also at the attribute level. If your settings differ, the most restrictive setting will be applied.</p> </div>	Weight	Date	1g	May 26, 2015 13:30 ▼
Weight	Date				
1g	May 26, 2015 13:30 ▼				



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...
<ul style="list-style-type: none"> • read-only • editable <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> Note: The user needs Change properties right to edit attribute values. </div>	<p>Click to expand the document attributes (which may also be document references):</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> Tip: Keep this editable, if your users have to edit the document reference's attributes. </div> <p>When the document attributes are expanded, you can use to collapse them.</p>

+/-	Thumbnail	Name								
-		BOXCO_00001.ard								
<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;">Customer Box&Co. ▼</td> <td style="width: 50%;">Box Brands BoxingBox ▼</td> </tr> <tr> <td>Description Blue box for Box&Co.</td> <td>CAD Number 1</td> </tr> <tr> <td>Display <input type="checkbox"/></td> <td>Style spark</td> </tr> <tr> <td></td> <td>Length 300</td> </tr> </table>			Customer Box&Co. ▼	Box Brands BoxingBox ▼	Description Blue box for Box&Co.	CAD Number 1	Display <input type="checkbox"/>	Style spark		Length 300
Customer Box&Co. ▼	Box Brands BoxingBox ▼									
Description Blue box for Box&Co.	CAD Number 1									
Display <input type="checkbox"/>	Style spark									
	Length 300									


- 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.

Reference Property ▼	DEKE_Ingredient Quantity (float) ▼
Reference Property ▼	DEKE_Ingredient Unit ▼


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...
<ul style="list-style-type: none"> • 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. 	<ul style="list-style-type: none"> • 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...
<ul style="list-style-type: none"> • Read Only if you do not want any user to be able to edit this attribute. <p>Hidden if you want to specify a Reference Property, but do not want to show it in the table.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;">  <p>Note: This option is specific to Reference Properties.</p> </div>	<ul style="list-style-type: none"> • No visible reference attributes in the table • The values (of the reference attributes) are retained when you <i>duplicate</i> or <i>replace</i> a document reference.



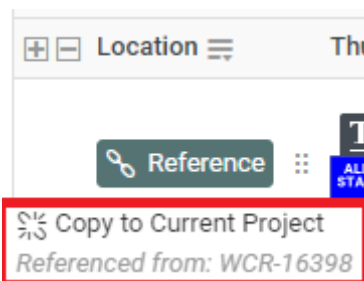
Note: Choose **Collapse** check box when you choose **Document Property, Reference Property, Reference Property Filter, Document Attribute, Project Property, Project Attribute, Master Text, Translation Text, Text Language Flags** fields for **Type**, to expand or collapse the column while rendering in the table.

	Photo	Ingredient	Quantity
▼		Blueberries	<input type="text" value="2"/>

- 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**.

+ Upload		+ Link		+ Search		+ Search	
Location	Thumbnail	Name			Version		
Copy All References into Current Project							
Reference		Reference ■ Allergen statement			1		
Reference		Reference ■ Best before date			8(F)		
Reference		Reference ■ Dosage instructions			1		
Reference		!!Carrot11.pdf			1		
Reference		00000002_Nutritional Facts_C.wcc			1		

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 369
- To configure the rendering with Project related parameters, choose from

- Project Property
- Project Attribute

Read more details in: [Project Properties in Advanced Table Rendering](#) on page 367

- 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](#) on page 366.
 - d) **Replace** button which allows the user to replace a document reference. Read more: [Replace a Document Reference](#) on page 366.
 - 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.

Advanced Table Rendering for Custom Views



Note:

You can create dedicated table (of document references) for custom *attribute views*. When you are in a custom **view**, click **Create Configuration for the Current View** to create a custom table.

You will get an **Edit Render Configuration** pop-up with a copy of the default setup.

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	<input type="checkbox"/>
:: Up/Down			Read Only	auto	<input type="checkbox"/>
:: Document Property	Thumbnail 50 px	Thumbnail	Read Only	auto	<input type="checkbox"/>
:: Document Name	<input checked="" type="checkbox"/> Show Document Source <input checked="" type="checkbox"/> Show Document Description <input checked="" type="checkbox"/> Show Folder <input checked="" type="checkbox"/> Show Document Template	Name	Read Only	auto	<input type="checkbox"/>
:: Document Actions	Open 3D View View Open in ArtiosCAD Download Add Action		Read Only	auto	<input type="checkbox"/>
:: Document Property	Version <input checked="" type="checkbox"/> Allow uploading a new version <input checked="" type="checkbox"/> Allow updating to latest version	Version	Read Only	auto	<input type="checkbox"/>
:: Local/Remote Project	Project Folder Name <input type="checkbox"/> Copy Text Content Status		Editable	auto	<input type="checkbox"/>
:: Replace Button			Read Only	auto	<input type="checkbox"/>
:: Delete Button			Read Only	auto	<input type="checkbox"/>

Add Column Revert to default configuration

OK

Create a new setup for the current **view** and click **OK**. To revert to the default, click **Return to WebCenter Default Configuration**.



Note: **Return to WebCenter Default Configuration** will delete the current configuration and restore the default.

In other views, the configuration name can be:

- **"AttributeName"_Default** if the configuration in the current **view** is inherited from the **default view**.
- **"AttributeName"_ViewName** if the **view** has its own configuration. If the configuration is shared with another **view**, `ViewName` can be from the other **view**.

Duplicate a Document Reference

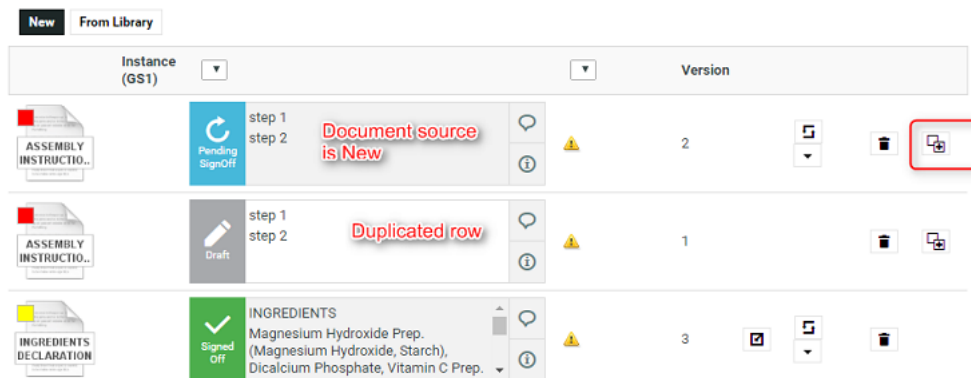
You can configure a **Duplicate** option in your document reference table in both **Attribute Category** and **Dashboard** pages. When the user **duplicates** a reference, a new row of document reference will be created. The duplicated document will have the same content, document **attributes** and **reference category** as the previous one.

In the case of Text Document, Content file, then each element status in the file will be reset to draft.



Note: Only users who are Project managers, Administrators or with Change Properties rights can replace the document reference.

Technical:



When you configure a **Duplicate** button, it will allow the users:

- to duplicate a document row with **Copy** and **New** as *document sources*.

The duplicate documents are created in the current Project where the copied or newly created documents are stored.

You cannot duplicate a document reference if the document source is:

- Browse / Link / Use by Reference / Remote.**

Behavior while duplicating document and its reference properties:

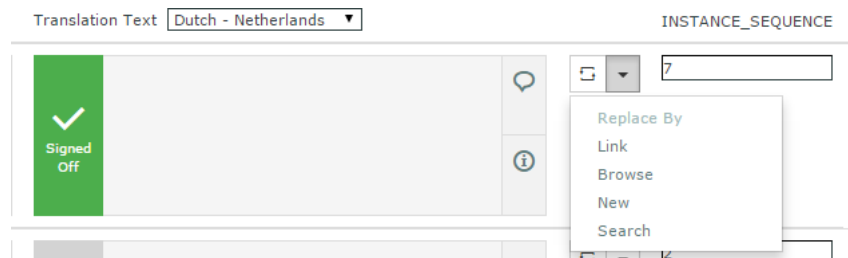
- If **Allow multiple values** is turned off in the attribute category, the duplicate will replace the original instead of adding a new document reference.
- The duplicated document will have the same Attribute category including the child document references. The Reference categories and its settings are copied at parent and child levels.
- The duplicated row inherits the entire hierarchy (if any) of the parent row including the attribute values.
- It is possible to duplicate a newly created document row.

Replace a Document Reference

You can configure a **Replace** option in your document reference table. When you **replace** the old reference, the new document reference will have the same **reference category** as the old one.



Note: Project managers, Administrators or users with Change Properties rights can replace the document reference.



When you configure a **Replace button**, it allow the you to

- replace the document via any of the configured *document sources* (**upload, browse**, etc.). If you do not select any option, the first source is taken as the default.
- **Undo the action** before saving the new document reference.

This document has its own **Attribute Category** but will keep the same **Reference Category** as the old reference.

You can also select **compact rendering** option for this button.

Project Properties in Advanced Table Rendering

You can configure the document's Project related details in the document reference rendering.

Project Property

If you select **Project Property** as the **Type**, you can specify the following parameters of the document's host Project in the document rendering.

- **Project Property**
 - Project Name
 - Project Due Date
 - Project Status. You can choose to:
 - Show Label and Icon
 - Show Only Label
 - Show Color Label
 - Show Only Icon
- **Project Attribute**: Specify the attribute that you want to show from the drop-down.

Bulk Operations on Document references

A single document can be referenced multiple-times from various Projects /Document Attribute Details, Project Creation Form or Task Execution Page.

To speed up and improve working in such a situation, you can perform the bulk operations on the documents referenced by a document reference attributes.

When you perform the following actions on a document references,

- Remove a document from a document reference attribute
- Replace a document referenced by a document reference attribute
- Make a document referenced by a document reference attribute local to the current project
- Update the reference of a document to refer to the latest version of the document (available only for "Selected version/revision" document reference types)

you can choose to perform only on the selected document or on all the documents it is referenced to. By all documents it is referenced, means a search is performed in the document reference tree structure for affected documents including the document references with bulk operations turned off.



Note: Bulk operations are not performed in

- BOM Documents
- Read-only and hidden document references

You can also enable the option **Limit Bulk Operations to Document References with matching Operations configured** in the **Edit Render Configuration** in Attributes Category page. When the option is chosen, document rows to be modified by any of supported bulk operations are in addition filtered based on document sources and actions configured for them. Only document rows where the bulk operation can be performed directly are filtered and are modified by the bulk operation.

Creating a Copy Sheet

Copy sheet is a term used to describe all the content that is 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 [here](#).

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.

Name	Master Text: English - International	Translation Text: French - France	Text Languages: Language Flags
Marketing copy Content: 001006.wcc	HIGH IN VITAMINS: B5, B6, B12, C		+
Marketing copy Content: 001007.wcc	REFRESHMENT WITH ZINC & CHROMIUM	RAFFRAICHISSEMENT AVEC ZINC ET CHROME	
Marketing copy Content: 001008.wcc	EXCELLENT SOURCE OF ELECTROLYTES	EXCELLENTE SOURCE D'ELECTROLYTES	
Recycle statement Content: 001009.wcc	RECYCLE PLASTICS	RECYCLER PLASTIQUES	
Variet Content: 001010.wcc	TROPICAL BLEND	MELANGES TROPICAUX	
Packaging claim Content: 001011.wcc	ENERGY DRINK	BOISSON ENERGISANTE	

Automatically add/remove languages in the Documents Table

Adding any of the available languages is possible based on permissions on all the local text content documents in the table, but for the remote documents (sitting in another project). Auto Addition of Languages can be enabled in the [PCM Deployment and Configuration](#).

When a new language is added in a Master/Translation language attribute, the language is automatically added into all the local text content documents. For the new text content documents in the local project, the missing languages are added and extra languages available in the text content are removed.



Similarly, when a language is removed from a language attribute, it automatically removes the languages which are added recently but not yet saved.

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...
<p>Master Text or Translation Text</p>	<p>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.</p> <div data-bbox="694 432 1426 806" style="border: 1px solid #ccc; padding: 5px;"> <p> 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.</p> <p>Master and Translation languages will either appear in a drop down or you can choose Show Side by Side view.</p> <p>You can also restrict the languages that will appear in the drop down, by mentioning the languages (pipe separated) specifically in the details tab.</p> </div>
<p>Text Language Flags</p>	<p>The language drop downs for Master and Translation Text columns.</p> <div data-bbox="694 920 1426 1090" style="border: 1px solid #ccc; padding: 5px;"> <p> Note: The master and translation languages are populated from the project attributes MASTER_TEXT_LANGUAGE and TRANSLATION_TEXT_LANGUAGE respectively.</p> </div>



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.

Edit Render Configuration

Name: PCM Text Reference_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
:: Document Property	Thumbnail	Thumbnail	Read Only	50 px	auto
:: Document Name	<input checked="" type="checkbox"/> Show Document Source <input type="checkbox"/> Show Document Description <input type="checkbox"/> Show Folder <input type="checkbox"/> Show Document Template	Name	Read Only	100px	
:: Replace Button	<input checked="" type="checkbox"/> Compact Rendering		Read Only	auto	
:: Reference Property	ARTWORK_VARIABLE	ARTWORK_VARIABLE	Editable	auto	
:: Reference Property	INSTANCE_SEQUENCE	Instance Seq.	Editable	75px	<input checked="" type="checkbox"/>
:: Translation Text	<input type="checkbox"/> Show Side by Side [Display Options: Status, Inheritance, Comments, Approval]	Translation Text	Editable	600px	
:: Master Text	<input type="checkbox"/> Show Side by Side [Display Options: Status, Inheritance, Comments, Approval]	Master Text	Editable	600px	
:: Delete Button			Read Only	auto	

- You can also enable the **Display Options** in the Edit Render Configurations. You have four icons buttons and are active by default.

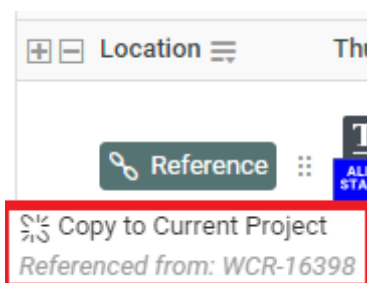
 - Status Button** Show status column in default manner like basic view page when active. When the button is inactive it shows status in the form of a colored strip based on the status of the content. Green for approved, red for rejected, blue for pending approval and grey for draft.
 - Inheritance Button** 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.
- 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**.

+ Upload + Link + Search + Search			
+ Location	Thumbnail	Name	Version
Copy All References into Current Project			
Reference		Reference ■ Allergen statement 0002_TextDoc_00000814_PCM.wcc	1
Reference		Reference ■ Best before date 123Best before date.wcc	8(F)
Reference		Reference ■ Dosage instructions 123Dosage instructions.wcc	1
Reference		!!Carrot11.pdf	1
Reference		00000002_Nutritional Facts_C.wcc	1

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.

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 514.



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**

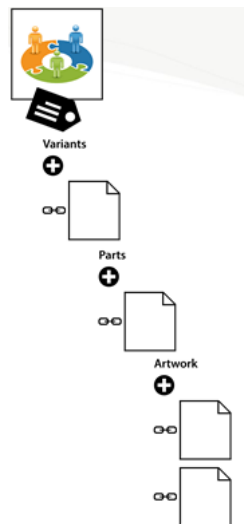


Note: The Text widgets, related languages and statuses are rendered only for Text Document References.

15.5.6. How to Create a Functioning Document Reference System

You can make use of **Document References** to specify product and its components or master-child relationships. Using this feature, you can create an attribute link to refer to a document that is located within another project or a document library.

This advanced feature allows you to create a system of references (like a "hanger" for your related assets) to keep a product and its parts together even when they are not located together. For example, the CAD file, the artwork, the die and its leaflet. For a display, its language variants, parts and artwork together.



To create such document reference system, you need:

- Reusable components stored in the form of libraries
- Document Templates
- Version / Revision aware Document Reference Attributes and other Attributes
- Attribute Categories with your document reference attributes and other types of attributes


Follow the steps below to create an advanced document reference system.

1. Create WebCenter Projects as Libraries and organize your assets in them.

Examples for your libraries






- Structural design files for your packaging shapes

Project: DEKE_DSR_Box_Library



Manager: Keizer, Debbie (DEKE)
Customer:
Due On:
Modified: May 13, 2015
Description:

ks (0) | Discussions (0) | Characteristics | Attributes | Project Information

<input type="checkbox"/>	Documents (15)	Actions ▾
<input type="checkbox"/>	 BOXCO_00001.ard (28KB)	
<input type="checkbox"/>	 BOXCO_00002.ard (28KB)	
<input type="checkbox"/>	 BOXCO_00003.ard (28KB)	
<input type="checkbox"/>	 BOXCO_00004.ard (28KB)	
<input type="checkbox"/>	 Boxes002.ard (28KB)	

- Graphical design files from the creative agency
- Standard design elements such as your brand logo, company logo etc.
- Symbols such as recycle symbols, warning symbols, Quality Symbols etc.

Project: DEKE_Icon Library



Manager: Keizer, Debbie (DEKE)
Customer:
Due On:
Modified: Mar 27, 2015
Description:

is (0) | Discussions (0) | Characteristics | Attributes | Project Informa

<input type="checkbox"/>	Documents (18)	Actions ▾
<input type="checkbox"/>	 Age0-3.png (167.1KB)	
<input type="checkbox"/>	 CE.png (52.6KB)	
<input type="checkbox"/>	 Dishwasher.png (58.4KB)	
<input type="checkbox"/>	 Fairtrade.png (86.4KB)	
<input type="checkbox"/>	 Flammable.png (88.5KB)	

- Text Content Documents

- Barcodes

To organize further, you can create [advanced saved searches](#) or [SmartName searches](#).

2. Create your Attributes and Attribute Categories for the specification / packaging request.

For example, Production quantities, count, budget, material type, ink coverage, color, language variants, Barcode etc. Read:

- [Create a Document Reference Attribute](#) on page 343
- [Reference Category](#) on page 346

3. Create Document Templates with Attributes.

Your Project Managers can use [Document Templates](#) on page 127 as document placeholders for future project documents.

Document Templates

Please select the Template or Project that will serve as a Document Library:

Select: Do not use a Document Library
 Template
 Project

When the Document library contains ARD files, how do you want to use these ARD files when creating a new Document?

- Always run the ARD as a standard
 Run the ARD as a standard when the IsStandard Attribute is set to 'yes'
 Never run the ARD as a standard

Save



Note: Link to the document templates in [document creation settings](#) of the Project Template.

4. Create your document reference attributes and enable advanced features in grid layout.

- Select **document reference** as the attribute type. **reference category** attribute (such as count) of the link. Read: [Create a Document Reference Attribute](#) on page 343.

Examples:

- Specify the **version / revision** of the document it should refer to.
 - Specify a **reference category** if you have properties that are specific to a document reference link. For example, count.
- Add the **document reference attribute** to an attribute category.
 - You can make the attribute **read-only / editable / required** by setting the **visibility**.
 - You can create a document reference where the user can add multiple documents by enabling **allow multiple values**.
 - You can use all the advanced features available in the **grid layout**.

Edit Category DEKE_Artwork

Name:

Current View: Default [Add Creation View](#) [Add Header View](#) [Add View](#) [Edit Te](#)

Alternating background
 Show also Attribute types and Restricted Set types
 Keep session alive (avoid that people get logged off due to time out)

[Remove Grid Layout](#)

Attributes:

- \$dl\$Dieline
- \$dl\$DocumentLink1
- \$dl\$DocumentLinkRich
- \$dl\$Material
- \$dl\$POA
- \$dl\$Search
- *tema_Rich_Text
- 00 Change Category
- 00 Change Order Number
- 00 Change Type
- 00 Description
- 00 Description of Changes
- 00 Initiator
- 00 Item Category
- 00 Item Number
- 00 Reason
- 00 Workflow
- 1
- 1 Admin per design
- 1 Analog flexo clichée / colour
- 1 Correct delivered AP
- 1 Courier charges TRN

Table structure:

[Title]Contact Information		
DEKE_Contact_DocRef		
[Spacer]		
[Title]CAD		
CAD_REFERENCE		
[Spacer]		
[Title]Color		
DEKE_Ink	DEKE_ICC Profile	
[Spacer]		
[Title]Icons		
DEKE_Icons		
[Spacer]		
[Title]Text Content		
DEKE_Text Content		

Buttons: **Save** **Save As Copy** **Cancel**

Details for selected cell:

Attribute	CAD_REFERENCE
Attribute Type:	DocumentReference
Label:	Label Text: <input type="text"/> Label Image: <input type="text"/> Position: Top
Span Columns:	1
Style:	Bold Add Style Edit Style Delete Style
Visibility:	Editable Add Rule
Allow Multiple Values:	<input type="checkbox"/>
Reference Category:	CAD_ALIGNMENT_ATTRIBUTES
Version Mode:	Selected Revision
Document Source(s):	CAD_REFERENCE_Default ? Edit Configuration
Rendering:	Table ? CAD_REFERENCE_Default Edit Render Configuration
Info Page:	Info HTML page (name+extension) <WebInstanceRoot>/custom/AttributesHelp/

c) Configure the **document sources** for the references. Choose the operation (copy, link, move, or use by reference). Read more in: [Adding Document Sources for a Document Reference Attribute](#) on page 352

The document references will be shown as links in the final rendering as per the **document sources** settings you configure here.

CAD

[Select CAD from Library](#) [↑↑ Upload CAD file](#) [Reuse from Current Project](#)

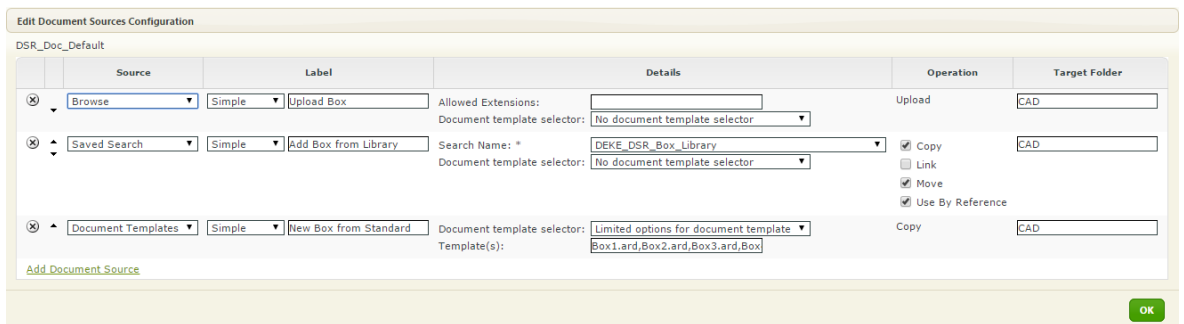
Color

[Add Ink\(s\)](#)

Icons

[Add Icon\(s\)](#)

- Create a custom **label** such as `Select CAD from Library`.
- Specify the source of the document. For example, a **saved search**.



	Source	Label	Details	Operation	Target Folder
⊗	Browse	Simple Upload Box	Allowed Extensions: <input type="text"/> Document template selector: No document template selector	Upload	CAD
⊗	Saved Search	Simple Add Box from Library	Search Name: * DEKE_DSR_Box_Library Document template selector: No document template selector	<input checked="" type="checkbox"/> Copy <input type="checkbox"/> Link <input checked="" type="checkbox"/> Move <input checked="" type="checkbox"/> Use By Reference	CAD
⊗	Document Templates	Simple New Box from Standard	Document template selector: Limited options for document template Template(s): Box1.ard,Box2.ard,Box3.ard,Box	Copy	CAD

[Add Document Source](#) OK

- Specify the type of operation you would like your user to do. You can configure **copy**, **link**, **move** or **use by reference**.
- d) Configure how the documents should be listed and whether the users can modify some of the document properties. To do this, [create an advanced table rendering](#).
- 5. Create Project Templates and apply the document reference attributes and other attributes in an attribute category.**

Source	Document Template	Folder	Name	Description
Upload Artwork: Choose File FireWorx_v1...v_clip2.pdf	Pantone CMYK Coated	Default (template)	FireWorx_vindow_clip2.pdf	

Contact Information

[Add Contact from Library](#)

CAD

[Select CAD from Library](#) [Upload CAD file](#) [Reuse from Current Project](#) 1

Preview	CAD file	Board	Version	Approval Status	Offset X	Offset Y	Orientation
	Select CAD from Library (Reference): fire.ard		1		<input type="text"/>	<input type="text"/>	

Color

[Add Ink\(s\)](#) 2

Ink	Ink Name	Hex	Ink Coverage (%)	Opaque?
	Pantone Process Cyan C	#00ffff	<input type="text"/>	<input type="checkbox"/>
	Pantone Process Magenta C		<input type="text"/>	<input type="checkbox"/>
	Pantone Process Yellow C		<input type="text"/>	<input type="checkbox"/>
	Pantone Process Black C	#000000	<input type="text"/>	<input type="checkbox"/>

[Select ICC Profile for Proof](#)

Profile	Standard printing condition	Separation
CGATS21_CRPC6.icc	ISO DIS 15339-2	TAC: 320% GCR: Medium+ Max K: 100% TVI: CMY 16%, K19%

Icons

[Add Icon\(s\)](#) 3

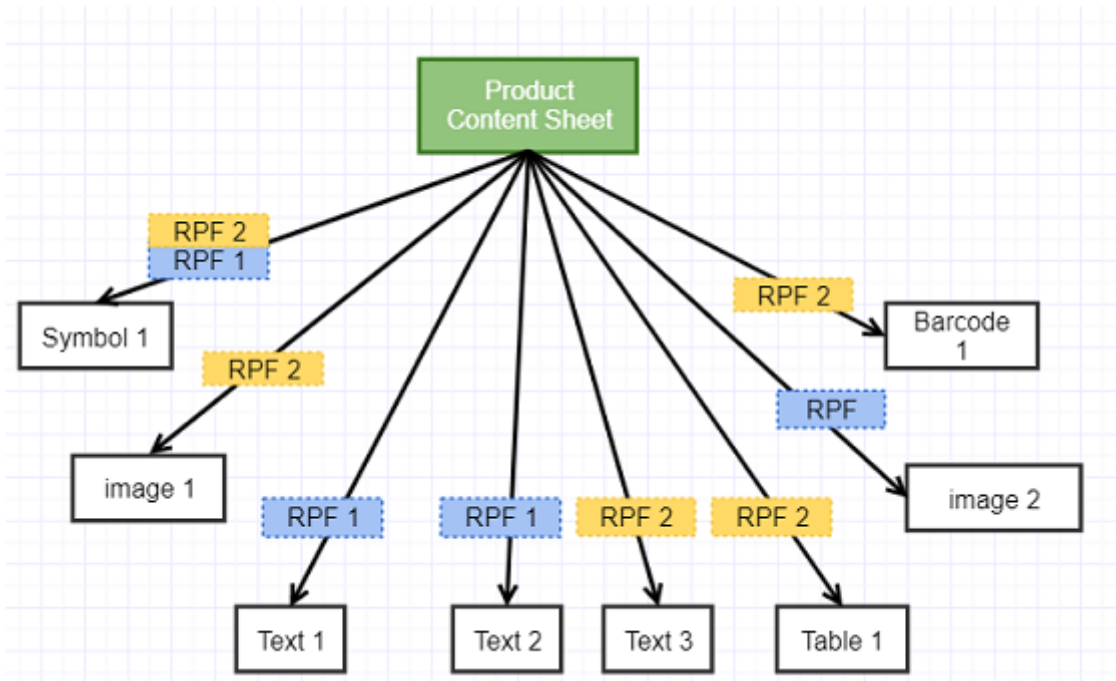
- Add Icon(s) (Reference): CE.png
- Add Icon(s) (Reference): Dishwasher.png
- Recycle2.png

- 1. CAD documents are rendered in a **Table** configuration. The header contains custom labeled **document sources**. You have editable reference properties such as offsets configured in the table.
- 2. The customized add ink link will take you to the inks library to choose your inks for the current project.
- 3. The configured Add icons link will take you to a saved search. This document reference attribute is rendered as **Simple**. Therefore, the references appear as a list.

You can have documents stored in the local folder or referred in document reference links. However, the user gets the view of both the local and referenced documents together.

15.5.7. Referenced Property Filter

Reference Property Filter (RPF) is a restricted view of the reference property attribute category. It filters the attributes that are both part of the Reference property Attribute Category and the Project Attribute Category. For example,



Multiple products or artworks can reuse the same content like text, recipes, images and so on. To specify the context of using the content as reference, you have to filter the context, in which the content sheet can be used in the artwork. To know more about **Product Content Sheet**, read [Product Content Sheet](#).

Configuring Reference Property Filter

Reference Property Filter is available only, when a reference property attribute category is defined for the Document Reference Attribute. It will show the attributes in the reference property attribute category which are also present in the Project Attribute Category of the document or in a Document Attribute Category and have values.

This configuration is used to display the column of the reference properties which defines the reference property filter of the document

+ Upload + New + Link + Search			
Thumbnail	Name	Scope Flavour	Scope
	Variant Variant_1.wcc	Chocolate X Apple + Lime Twist X Tropical Blend X	Multipack
	Marketing copy Marketing copy_3.wcc	Apple + Lime Twist X	Multipack
	Marketing copy Marketing copy_4.wcc	Tropical Blend X Coconut & Berry X	Multipack
	Recycle statement Recycle statement_1.wcc	Apple + Lime Twist X	Simple
	Marketing copy Marketing copy_5.wcc	Strawberry X	Multipack

reference.



Note:

It is important add the values as attributes in the Project or Document to render the same in the Reference Property Filter.

In the above image **Scope Flavor** and **Scope Outputs** are the **Reference property Filters** and the values Chocolate, Apple+ Lime Twist or multipack are the attributes defined in the attribute category of the project.

Reference property is allowed to have the values only from the project attribute category.

Viewing Reference Property Filter

Reference Property Filter can be viewed in the **Attributes** tab of a Project or Document.

+ Upload + New + Link + Search			
Thumbnail	Name	Scope Flavour	Scope Output
	Variant Variant_1.wcc	Chocolate X Apple + Lime Twist X Tropical Blend X	Multi Pack X
	Marketing copy Marketing copy_3.wcc	Apple + Lime Twist X	Multi Pack X Single Pack X

In the render configuration for the header row, the details and the label are not applicable and the width is always set to auto. You can collapse or expand the columns to view.

15.5.8. Copy Document References

You can create new projects from the template projects with an option to copy all the document references along with them. You have both the option to copy only the local references or copy all the references in multiple levels.

You can use this also in **Task Specifications**, "Documents" section of Project Creation page and Task Execution page.

While copying, along with the documents all the attributes including their values are also copied.

To enable copying of the Document Reference Attributes, the Document sources in the Attribute Category of the document has to be configured.

Edit Document Sources Configuration

ANKR_ATTR_DOCREF2_Default

Source	Label	Details	Operation	Target Folder
<input type="checkbox"/> Saved Search	Simple Basic Copy	Search Name: SOBK_Image Search Document Template selector: Any Document Template configured Copy Operation: Basic Copy	<input checked="" type="checkbox"/> Copy <input type="checkbox"/> Link <input type="checkbox"/> Move <input type="checkbox"/> Use By Reference	Folder2
<input type="checkbox"/> Saved Search	Simple Deep Copy	Search Name: SOBK_Graphics & ArtiosCAD Library Search Document Template selector: Any Document Template configured Copy Operation: Copy with Local References	<input checked="" type="checkbox"/> Copy <input type="checkbox"/> Link <input type="checkbox"/> Move <input type="checkbox"/> Use By Reference	Folder1
<input type="checkbox"/> Document Templates	Simple Deep copy All	Document Template selector: Any Document Template configured Copy Operation: Copy with All References	<input checked="" type="checkbox"/> Copy	
<input type="checkbox"/> Current Project	Standard Link		<input type="checkbox"/> Link	

Only the following document sources can be configured for **Copy Action**:

- Document Template (New)
- Saved Search

- Copy from Project

There are three options to copy that you can configure namely:

- **Basic Copy** – Only the selected document is copied to the destination project. Document references of the newly created (copied) documents are set to reference the same documents as the original/ source document(s).
- **Copy with Local References**– Selected document and all documents referenced by it that are from the same source project are copied to the destination project.
- **Copy with All References** Selected document with all document it references are copied to the destination project, irrespective of the project it is located.



Note: Copy Actions are not supported in BOM documents tables/sections and also when copying a document from Documents page in Project Details.

16. Create Assembly documents using Document References

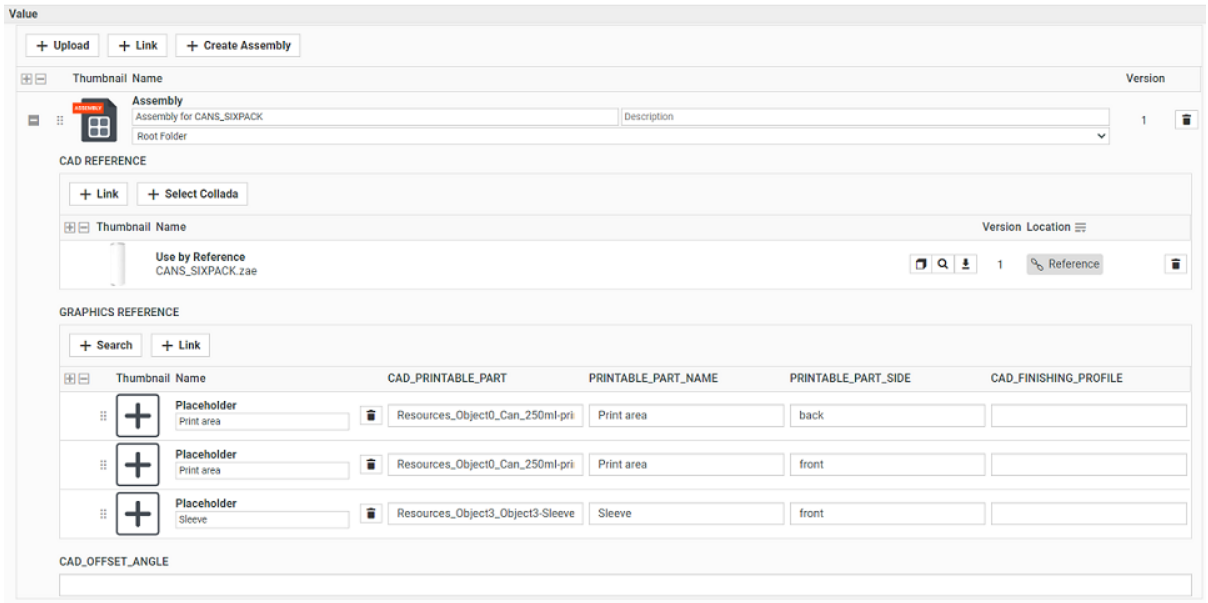
Assembly document is a component document that consists of a bunch of document references namely a structured document (a 3D model of a product with defined printable parts as attribute values to that document) and graphical references to the artworks required, that can be viewed and edited in the WebCenter Viewer. This is one of the critical and most important step in the process of creating and viewing pack shots in WebCenter.

Follow the steps below to **Create Assembly**:

1. Create a Saved Search for collada files(structured documents). Collada files should contain the printable parts referenced (added to it).
2. Create an attribute category representing the assembly called **DEFAULT ASSEMBLY CATEGORY**.
3. **DEFAULT ASSEMBLY CATEGORY** should have two Document reference attributes namely
 - a. **CAD_REFERENCE** attribute that can contain only one document.
 - b. **GRAPHICS_REFERENCE** should have a reference Category, e.g **CAD_REFERENCE_PROPERTIES**, that contains the following attributes. These attributes should also be added in the rendering configuration.
 - a. CAD_PRINTABLE_PART
 - b. CAD_PRINTABLE_PART_SIDE
 - c. CAD_PRINTABLE_PART_NAME
 - d. CAD_FINISHING_PROFILE

GRAPHICS_REFERENCE should be configured to accept more than one document as it can contain references to the multiple labels (like front, back, top) required for the structured document.

Using the specified Attributes and Attribute Categories, users with **Add** and **Change Properties** permissions can create an assembly file from a structural file. Upon selecting the Structure document, an Assembly document is created, containing the selected Structure Document in the CAD_REFERENCE attribute, and placeholders for graphics documents in the GRAPHICS_REFERENCE attribute, based on the printable parts of the Structure document. Before submitting the form, you are already able to replace these placeholders with the actual artwork.



Default Assembly Category has a Saved Search configured as a Document source with **Create Assembly** as an operation.

Create Assembly document operation can be used in all places, where Saved Search is used as a document source within a Documents table. You can set a different default target folder for Placeholder documents and Graphic documents when you are configuring the document source of the (document reference) attribute.

Operation	Target	Target Folder
<input type="checkbox"/> Copy		
<input type="checkbox"/> Link		
<input type="checkbox"/> Move	<input checked="" type="checkbox"/> Add	Assembly
<input type="checkbox"/> Use by Reference	<input checked="" type="checkbox"/> Replace	Placeholders
<input checked="" type="checkbox"/> Create Assembly		

17. CAD Options

Use the **CAD** menu to set options related to working with ArtiosCAD.

WebCenter allows you to:

- create a CAD document from a standard directly WebCenter
- view the CAD documents with folding angles in 3D
- view CAD documents in the Viewer
- search for CAD documents

17.1. CAD Download Format

Synchronize with Defaults

WebCenter administrators can download ArtiosCAD files in different formats as specified in **Defaults** of the ArtiosCAD instance running on the Application Server.

On the **CAD > CAD Download Formats** page, you can enable or disable download formats for all users.

Click the **Synchronize** button to import the settings from ArtiosCAD **Defaults**. A successful status message should appear after a few moments, and the list of formats is populated. Select the formats you want to make available for the users.



Note: The three native ArtiosCAD formats (ARD, MFG and ACD) do not require any configuration.

Download formats and users

User and group permissions for the download formats are set in **Users > select user > Download and Groups > select group > Download**, respectively. You must set permissions on the formats before users can download documents.



Note: Members of the Admins group are granted all download format permissions by default, and the Change and Use Group Permissions buttons are unavailable when attempting to change permissions for those users.

Non-cached ArtiosCAD Download formats

The WebCenter configuration has been extended with an option to not cache specific download formats to support dynamic ArtiosCAD download formats.

Currently, the CAD Download Formats for a given document version are by default generated and cached in the system when first downloaded by a user. Subsequent users downloading the same download format get the same cached file. The caching behavior is controlled for every CAD document type and download format.

Examples of dynamic download formats where turning caching off could be needed are Bill of Materials reports and reports that are based on meta-data that can be edited directly in WebCenter.

To turn off the caching for a given document type and download format:

1. Go to **Admin > CAD > CAD Download Formats**.
2. Go to the respective document type and download format and unselect the respective check box.
3. Save the changes to disable the caching and delete any cached data for the selected download type and document format system wide.

There is no Cache option for the ArtiosCAD format (native document) as this format is always available.

17.2. Boards

The **CAD > Boards** page shows the types of boards that can be used for CAD designs (paper, corrugated board, folding carton...).

These boards are defined in ArtiosCAD. They cannot be edited, created or deleted from WebCenter. However, you can set the boards' default location(s) and use them in a Restricted Set.

17.2.1. Assigning a Board to a Company or Location

You can assign a specific board to a **Company**, or a **Location** of that company.

1. In the **CAD > Boards** page, browse the Boards tree to find the board you are interested in.
2. Click that board to show the **Edit Default Locations for board ...** page.



Note: You can only assign boards to companies/locations, not boards folders.

3. On that page, select the companies/locations to associate with this board, and click **Finish**.



Tip: If you want to assign this board to all companies/locations, select the checkbox next to **Company** at the top.

The users in these companies/locations will see the board as default.

17.2.2. Creating a Boards Restricted Set

You can create a Restricted Set of boards, so that users can pick from a short list of relevant boards when creating a design.

To do this, click **Create Boards in Restricted Set**, then add boards to the Restricted Set as explained in [Create a Restricted Set](#) on page 289.



Note: The data **Type** is always **Text** in a boards Restricted Set.

17.3. Run a CAD Standard from WebCenter

A **CAD standard** is a default ArtiosCAD document, to be customized with **parameters** supplied by the user to make a design. This will be a 2D design, that can be made 3D if the standard has fold information.

In WebCenter, an **ARD document template** is used as the CAD standard, and **attributes** are used as the parameters needed to make the design.

In practice, you create a new document from the ARD document template, filling in the template's attributes' values to give your parameters.

17.3.1. CAD Standard Configuration

You need to:

1. Set up an attribute category containing the attributes necessary to create the design, and their default values.
2. Set up a document template with this attribute category.

Create an Attribute Category

You will need to create attributes that match the CAD standard's parameters in ArtiosCAD. They must have the **same name** as the corresponding parameters, and any parameter required in ArtiosCAD must translate into a **Required** attribute in WebCenter.


Generally, you will use at least **BOARD** (this is always **Required**), and mostly **L** (length), **W** (width) and **D** (depth).

BOARD parameter: Creating different board attributes will allow the usage of different board restricted sets. Attributes will be selected by WebCenter, if the name of the attribute starts with "**BOARD**".

Other parameters are less standardized. You need the person who built the standard to clearly indicate which parameters are needed.

Here is an overview table of the attributes you will probably need the most:

Attribute	Use case	Values
BOARD	The type of board to use for the design. Used for every CAD standard (this is a Required attribute).	A Restricted Set of Text type. Set your desired values in the Restricted Set.
L, W and D	Length, Width and Depth. Used for most CAD standards.	Prompted values (the user can set what he/she wants) of Distance (in,mm), Distance (in,m) or Float type.
ISSTANDARD	To indicate if an ARD document template should be used to run CAD standards or not. <ul style="list-style-type: none"> • ARD document templates to be used for CAD standards should have YES as ISSTANDARD value. • ARD document templates NOT to be used for CAD standards should have NO as ISSTANDARD value. 	A Restricted Set of Text type. The values in the Restricted Set must be YES and NO .

Attribute	Use case	Values
	This should be a Hidden attribute.	
UNITS	To set units other than the user's default units. If no unit is set, the standard will be run in the units set in My WebCenter > My Preferences by the user.	A Restricted Set of Text type. The values in the Restricted Set must be mm and in .  Note: Value of the Units attribute is not considered when using distance attributes for L,W and D.
ISCORRUGATED	To indicate whether the resulting design should be corrugated. If this attribute is not present, the design is understood NOT to be corrugated.	A Restricted Set of Text type. The values in the Restricted Set must be true and false .
GRAIN	To indicate the direction of the flute/grain of the design being created by running the standard.	A Restricted Set of Text type. The supported values for this attribute are Horizontal , Vertical and Standard . If the value chosen is Standard , then the created design will have the same flute/grain direction as the Standard that is being used. If no value is mentioned, then vertical is taken as default.
SIDE	To indicate the print side of the design that is created by running the standard.	A Restricted Set of Text type. The supported values for this attribute are Inside , Outside and Standard . If the value chosen is Standard , then the design created will have the same print side as the standard that is being used. If no value is mentioned, then the print side will be Outside .

1. Create the **Restricted Sets** needed by your attributes as listed in the table above.
See [Create a Restricted Set](#) on page 289 for details.
2. Create your attributes (the ones listed in the table above as applicable, and any other attribute you may need to run your particular CAD standards).
Assign the relevant Restricted Sets to your attributes. See [Create an Attribute](#) on page 291 for details.
3. [Create an attribute category](#) containing all the attributes you have just created.
4. [Add a Creation View](#) to your attribute category and click [Use Grid Layout](#).
 - a) Make the **BOARD** attribute **Required**.
 - b) If you are using the **ISSTANDARD** attribute, make it **Hidden**.

c) Change the **Visibility** of your other attributes as desired.



Tip: You can add use a **Label** to change how your attributes appear to the user (for example, you can show the **L** attribute as **Length**).



Note:

If you want to work with several CAD standards, you can either reuse this attribute category for more designs, or create more attribute categories.

Create an ARD Document Template

You now need to set up an ARD document template using the attribute category *you just created*.

For this, you need to use an ARD document corresponding to the CAD standard in ArtiosCAD (same default design).

1. Set up your **Document Library** as explained in [Create Document Templates](#) on page 127.
2. Upload your ARD file into the **Document Library**.
3. Link the attribute category you just created to this ARD file.
4. Point to the **Document Library** in:
 - existing projects in which you want to create a design from a CAD standard,
 - project templates that will be used to create projects with designs from CAD standards.

See [Create Document Templates](#) on page 127 for details.

17.3.2. Run a Standard in an Existing Project

To create a design from a CAD standard in an existing project:

1. If your project isn't already linked to the **Document Library**:
 - a) In the **Project Details** page, click **Configure** then **Document Templates**.
 - b) Select **Template**, then select your document library in the list.

Documents 0
Tasks 1
Attributes
Project Information
Approval
Members
Security
Configure

Workflow Connection
Document Templates
Project Creation
Document Types
Document Creation
Project Statuses

Please select the Template or Project that will serve as a Document Library

Do not use a Document Library
 Template
 Project PCM Text Templates

When the Document library contains ARD files, how do you want to use these ARD files when creating a new Document?

Always run the ARD as a standard
 Run the ARD as a standard when the IsStandard Attribute is set to 'yes'
 Never run the ARD as a standard

Save

c) Under **When the document library contains ARD files...**, select either:



Note: Run a Standard option for CAD documents is available with WebCenter Life cycle Management license.

- **Always run the ARD as a standard** if you want to be able to use any ARD document template in the document library to run a CAD standard
- **Run the ARD as a standard when the IsStandard attribute is set to 1** if you only want to use some ARD document templates to run CAD standards.

These ARD document templates must have the **ISSTANDARD** attribute assigned, with the default value set to **YES** (see [Create an Attribute Category](#) on page 388).

d) Click **Save**.

2. Create a design from your ARD document template:

- a) Click the **Upload** button.
- b) Select **New** in the **Source** list and select your ARD document template.
- c) Fill in the **Attributes** as desired.

For example, specify the **BOARD** to use, and the **L** (length), **W** (width) and **D** (depth) of the design.

d) Click **Upload**.



Note: This is only possible through the normal WebCenter upload (see [Uploading a Document via Upload](#) and [Copy / Create Multiple Documents](#)), not when uploading documents from other applications like Automation Engine and ArtiosCAD.

Your design is created. You can click its thumbnail to view it in the Viewer.

17.3.3. Run a Standard at Project Creation

To create a design from a CAD standard when creating a project from a project template:

1. If your project template isn't already linked to the **Document Library**:

- a) In the **Project Details** page, click **Configure** then **Document Templates**.
- b) Select **Template**, then select your document library in the list.
- c) Under **When the document library contains ARD files...**, select either:

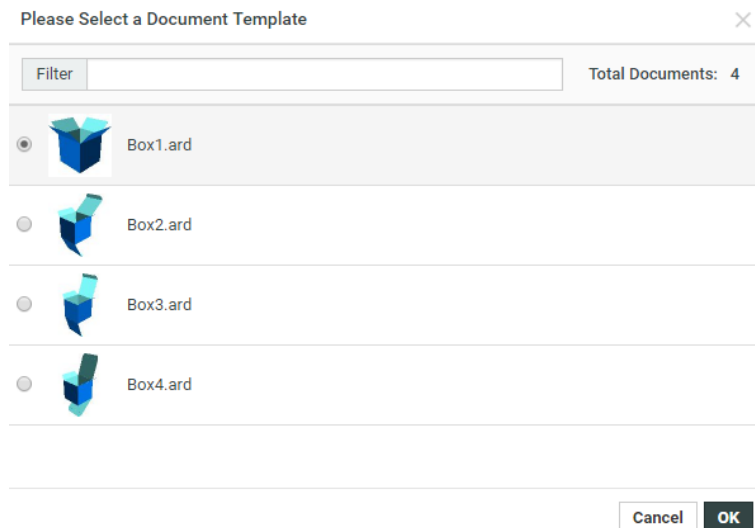


Note: Run a Standard option for CAD documents is available with WebCenter Life cycle Management license.

- **Always run the ARD as a standard** if you want to be able to use any ARD document template in the document library to run a CAD standard
- **Run the ARD as a standard when the IsStandard attribute is set to 1** if you only want to use some ARD document templates to run CAD standards.

These ARD document templates must have the **ISSTANDARD** attribute assigned, with the default value set to **YES** (see [Create an Attribute Category](#) on page 388).

- d) Click **Save**.
2. When [creating a project from your project template](#):
 - a) Click **New** in the **Documents** section of the **Create Project** page.
 - b) Select your ARD document template from the pop-up and click **OK**.



Tip:

If you have many ARD document templates, use the **Filter** field to filter them alphabetically on the file name.

You can also filter them based on document characteristics if you have created a custom project creation page to do so (see [Create a Project and Run a CAD Standard](#) in the Customization Guide).

- c) Fill in the attributes to use in the **Documents** section.
For example, specify the **BOARD** to use, and the **L** (length), **W** (width) and **D** (depth) of the design.
- d) Fill in the rest of the project settings as desired and click **Create Project**.

Your project containing your design is created.

17.4. Canvas related Attribute Categories

A **document reference** attribute and two attribute categories are created by default in WebCenter during the installation or upgrade.

These will create a document reference system to contain different Canvas parts saved to WebCenter:

- The default **document reference attribute** named as **CANVAS PARTS**.
- This default empty **CANVAS REFERENCE CATEGORY**. This category will contain the **reference attributes** associated with the **CANVAS PARTS** attribute.
- The default **DEFAULT CANVAS CATEGORY** will contain the the **CANVAS PARTS**. This allows the ArtiosCAD Enterprise client to save managed parts as individual document reference values.



Note:

During an update, these **attributes** will get created if they do not exist yet.

18. WebCenter Configuration

The Configuration menu contains entries for configuring e-mail notifications, LDAP authentication, push-through folders, BackStage / Automation Engine Approval clients, the System Info page, etc.

18.1. Configure E-Mail

You can set up e-mail configuration using the Admin module. All changes to the setup are effective immediately.

1. Click **Admin > Configuration > E-Mail Environment Setup**.

2. Provide the required e-mail settings:

Configuration Option	Description
E-Mail Service Protocol	Set to the SMTP protocol.
E-Mail functionality enabled	To enable/disable e-mail functionality.
E-Mail debugging output in log	To enable/disable e-mail debugging output in log files.
E-Mail Service Host	Address for the preferred mail server that will act as the server for dispatching e-mail notifications.
E-Mail Service Port Number	Port number on which the e-mail server is listening for incoming e-mails.
Outgoing E-Mail Notifications "FROM" Address	Supply a valid e-mail address. This will be used as the "From" e-mail header for every e-mail sent by the system. This information is important for returning undelivered mail (the filled-in address should belong to the administrator, since he will most likely be addressed with undelivered mail for troubleshooting).

Configuration Option	Description
E-Mail Session Authentication	Select this option if the mail server connection session should be authenticated using a username and password.
E-Mail Service Username	Mail account user name when authentication is required.
E-Mail Service Password	Mail account password when authentication is required. The password is stored in encrypted format.

3. Click **Send Testing E-Mail**.
4. Edit the contents of the test e-mail if required.
5. Click **Send E-Mail**.

A response will appear stating whether or not the e-mail could be sent successfully. There are 3 possible outcomes of the e-mail environment testing page:

- **Test E-Mail Sent:** The environment is set up correctly.
- **JMS System Error:** Communication with the JBoss proprietary messaging framework failed. An administrator should check the JBoss server configuration and/or log files for possible causes.
- **Mail Server Connection Error:** The connection to the specified mail server did not succeed. Either the data the administrator supplied on the e-mail environment setup page was incorrect, or the mail server is currently down. An administrator should either check the e-mail environment settings for possible misspellings or contact the mail provider as to the status of the mail server.

6. If necessary, return to the configuration page and correct the settings.



Note: System History Logs All changes/events in this page are recorded and stored in the System History page for Administrator users. Read this page on how to access the [records](#).

18.2. Configure Search Crawler Setup

You can change the **Search Crawler Setup** from **Admin > Configuration > Search Crawler Setup**. All the below mentioned actions can only be performed by the Admin users.

1. Enable **Rebuild Index on Restart** option to allow or disallow rebuilding the index upon search crawler restart (default is enabled).
2. Enable **Index Document Revisions** to index all the **Document Revisions**. If this is not enabled, only the **Latest Version** for every Document is indexed. If this option is enabled, users can search for the revisions on the Document Search page.
3. To skip the indexing of Workflow Tasks, you can disable **Index Workflow Tasks**. Changing this option will trigger re-indexing. When this option is disabled, you cannot search for workflows in the Task Search.
4. Enable **Index Any level Document Reference** to search the entire Document referenced within WebCenter and return in the search result when the document search is executed.
5. Enable **Index all currently referenced Document Versions** to add the earlier versions of the referenced document to the search index. The index will be rebuilt once this option has been changed in the setup.

6. Enable **Index all currently referenced Document Versions** to add the earlier versions of the referenced document to the search index. The index will be rebuilt once this option has been changed in the setup.
7. Enable **Include Live Text in Viewable Other, PDF and AI Documents** to search for live text in PDF, Illustrator and Microsoft Office documents in a **Document** search.

Status

Last crawl activity shows the date and time of the last search crawl activity and **Crawl Tasks**

Waiting shows the pending crawl tasks.



Note: System History Logs All changes/events in this page are recorded and stored in the System History page for Administrator users. Read this page on how to access the [records](#).

Prioritize indexing

When upgrading or making certain configuration changes, WebCenter needs to rebuild its search index. When Prioritized Indexing is enabled, more resources are allocated towards building the Index. This reduces the total time needed for a rebuild. Prioritizing Indexing may slow down other processes: user actions might become slower because more resources are used for indexing.

This feature can be enabled/disabled without restarting WebCenter. We recommend to only enable when a full re-index of the system is required and preferable when the system is not used for normal operation.

Backing up the Index—>

This feature enables Admin user to backup the Index. For backing up the Index, perform the following tasks:

1. Click **Start Index Backup**.
2. **Index Backup** page displays two options.
 - a. **Start:** use this button to begin the Index backup operation.
 - b. **Cancel:** use this button to cancel the Index Backup operation.
3. After clicking **Start**, confirmation message displays as **Index Backup started**.


Note:

- A new search index backup cannot be initiated while the Search Index Backup is active.
- The index cannot be rebuilt while the Search Index Backup is active.
- The Search Index Backup cannot be stopped, once started.
- The Index backup will not be automatically removed from the disc.
- Disk space availability is automatically checked by the system before starting the Index backup and a notification displayed as:

Starting a Search Index Backup will create a copy of the actual Search Index in the backup folder of the Search Index. Make sure there is enough disk space left. Are you sure you want to start the Search Index Backup? This action can take some time and cannot be stopped.

18.2.1. Index Live Text in Documents

Search Crawler Setup in the configuration menu has an option choose whether to **Index Live Text in Documents** or not. This allows enabling or disabling of **Document Content** indexing which is disabled by default.

Changing the state of the option, results in a full re-indexing of the document content. In such a case, Documents are not re-indexed but only the document content is re-indexed which means Document Search will find all results while the document content indexing is ongoing.



Note: When the option is turned off, the search index with document content is cleared to save space.

18.3. Configure External Web Connections

An external web connection is a connection to some data in an external system (usually a MIS system). The MIS system calculates the data (for example the cost/price information for an order) and WebCenter retrieves this data through the external web connection and displays it on a WebCenter page.

After configuring the external web connection, you can choose to add a link to it in a WebCenter top-level menu, project menu or a **My Work** section. See the Customization Guide for more details.

System History Logs

All External Web Connection events like

- **External Web Connection Created**
- **External Web Connection Deleted** and
- **External Web Connections Changed**

are recorded and stored in System History. Read this page on how to access the records [System History](#) on page 433

18.3.1. Create an External Web Connection

1. Go to **Admin > Configuration > External Web Connections**.
2. Click the **New External Web Connection** link in the **External Web Connections** page.
3. Enter the **Name** to give your external web connection.
4. Enter the **URL** of the data you want to retrieve in your external system. This needs to be accessible by either the WebCenter Application Server or Web Server.

You can use [SmartNames](#) in the URL. The supported SmartNames are:

- all basic project properties (see [List of Available SmartNames](#) on page 457),
- all project attributes,
- Requestor SmartNames ([Requestor UserName], [Requestor Location], etc...). Here, `Requestor` indicates the user who is logged in.

These SmartNames will be resolved when activating the connection, depending on the context. This means that for example:

- if you are using the `[Requestor UserName]` SmartName, it will be resolved to the name of the user currently logged in to WebCenter (the one clicking the link to the external web connection).
- if you are using the `[Project Name]` SmartName, it will be resolved to the name of the current project.

So if you are using an order ID as project name and you want to connect to an external system containing information about that order ID, whose URL is `http://ExternalSystem/OrderInformation.jsp`, then you can use `http://ExternalSystem/OrderInformation.jsp?orderID=[Project Name]` as URL here.

This will be resolved to for example: `http://ExternalSystem/OrderInformation.jsp?orderID=Order_83289`.



Note: When using SmartNames, you should take into account where the connection will be used from (where in WebCenter it will be integrated).

- You can use user-related SmartNames (such as `[Requestor UserName]`) if the connection is to be added to a top-level menu or a My Work section.
- You can use user-related and project-related SmartNames (such as `[Project Name]`) if the connection is to be added to a project menu.

See the Customization Guide for information about integrating a link to an external web connection into the WebCenter user interface.

5. In **Type**, select if your external system outputs **HTML** or **XML**.



Note: If your external system outputs **XML**, you will need an XSL (eXtensible Stylesheet Language) file to transform this to HTML and display it in WebCenter. Your WebCenter installation comes with an example XSL file, that you can customize.

See the Customization Guide for more details.

- Click the **Test** button to test the connection to your external system. You should see a green check mark if the connection is successful.



Note: The test button will only check whether or not the main URL is reachable. It will not take into account any SmartName used to pass on parameters, as SmartNames have to be resolved from a specific context in WebCenter.

In the example above, the test will try to connect to `http://ExternalSystem/OrderInformation.jsp`, and not to `http://ExternalSystem/OrderInformation.jsp?orderID=[Project Name]`.

18.3.2. Edit an External Web Connection

- To edit an external web connection, click its name in the **External Web Connections** page.



Attention: If you change the name of a connection here, you will also need to change it in the customization files used to integrate a link to this connection into the WebCenter user interface!

See the Customization Guide for more details.

Make Direct External Web Calls

You can directly call to a service instead of adding the External web calls to the menu or Homepage Sections. This can be done with the call:

```
GetExternalWebInfo.jsp
```

The call takes the same parameters as the previously mentioned calls. For example, this call can be used in a javascript button in the Attribute Category (using CustomFormExtensions).

Example: A SOAP call made out of JavaScript .This function could be added in CustomFormExtensions.js

```
soap: function(att) {
  var extWebConn = "SOAPService"; // name of connection

  var attr1 = att['attr1'];
  var attr2 = att['attr2'];
  var attr3 = att['attr3'];

  var body = "<?xml version='1.0' encoding='utf-8' standalone='no'?">"
+ "<soap:Envelope schema_params"
+ " <soap:Body>"
+ " <Operation xmlns='http://tempuri.org/'>"
+ " <Request>"
+ " <data>"
+ " <attr1>"+ attr1+"</ attr1>"
```

```

+ "      <attr2>"+ attr2+"</ attr2>"
+ "      <attr3>"+ attr3+"</ attr3>"
+ "      </data>"
+ "    </Request>"
+ "  </ Operation >"
+ " </soap:Body>"
+ "</soap:Envelope>";

var formData = new FormData();
formData.append("externalwebconfigname", extWebConn);
formData.append("requestbody", body);
formData.append("requestmethod", "POST");
formData.append("requestheader",
"Content-type:text/xml; charset=utf-8");
formData.append("requestheader",
"SOAPAction:http://tempuri.org/CalculateNewQuote");
formData.append("responsetype", "application/xml");
formData.append("callfromwebserver", "1");

$.ajax({
  url: "GetExternalWebInfo.jsp",
  dataType : "xml",
  type: 'POST',
  enctype: 'multipart/form-data',
  cache: false,
  processData: false,
  contentType: false,
  data: formData,
  async: false
})
.done(_bind(function(data){
  // Read and handle data
}, this))
.fail(_bind(function(err, status, errStr){
  alert("Request failed: " + errStr);
}, this));
}
    
```

Add Parameters to a direct call dynamically

Parameters cannot be always resolved by SmartNames. For example, when we make a calculation with attributes and need to pass this as a parameter.

To resolve this use the parameter **requestparams**. The content of this parameter will be appended to the URL called by the server. The content of the parameter should have the format **param1=value1¶m2=value2&...**

Note that URL encoding should be used when appending to the external web connection URL.

```

If ExternalWebConfig has URL https://www.google.com/, then
GetExternalWebInfo.jsp?
ExternalWebConfigName=ExternalWebConfig
&requestparams=q%3Dtest (URL encoded "q=test")
will resolve to https://www.google.com/?q=test
    
```

Change Request Method

It is possible to call a service both with the GET or with the POST method. The default method will be GET.

To choose the request method, add a parameter **requestmethod** which can have a value GET or POST. For example

```

GetExternalWebInfo.jsp?
ExternalWebConfigName=ExternalWebConfig3
&method=POST
    
```


The parameter is available for `GetExternalWebInfo.jsp`, `myexternalwebinfo.jsp` and `projdetailsexternalwebinfo.jsp`

Change Response Type

It is possible to have another result than HTML. To do that, you will have to pass which response type you want. This can be done by adding a parameter **reponseType**. The response type has to be a valid MIME type. For example,

```
GetExternalWebInfo.jsp?
ExternalWebConfigName=ExternalWebConfig3
&reponseType=application/json
```

The parameter is available for `GetExternalWebInfo.jsp`, `myexternalwebinfo.jsp` and `projdetailsexternalwebinfo.jsp`.

Add Request Headers

It might be required to add request headers to some calls. It is possible to pass these headers along. This can be done by adding one or multiple instances of the parameter **requestheader**.

These have to be in the following format: `<request_name>:<request_value`

```
GetExternalWebInfo.jsp?
ExternalWebConfigName=ExternalWebConfig3
&requestheader=Cache-Control:No-Cache
&requestheader=Pragma:No-Cache
&requestheader=Expires:0
```

The parameter is available for `GetExternalWebInfo.jsp`, `myexternalwebinfo.jsp` and `projdetailsexternalwebinfo.jsp`.

Add Request Body

For some calls, it might be required to add a request body to the call. It is possible to pass this body along.

This can be done by adding the parameter **requestbody**, with the needed request body as value.

```
GetExternalWebInfo.jsp?
ExternalWebConfigName=ExternalWebConfig3
&requestbody= <soap:Envelope ...></soap:Envelope>
```

The parameter is available for `GetExternalWebInfo.jsp`, `myexternalwebinfo.jsp` and `projdetailsexternalwebinfo.jsp`.

18.3.3. Delete an External Web Connection

- To delete one or more external web connections, select it/them on the **External Web Connections** page and select **Delete External Web Connection(s)** in the action menu.



Attention: Deleting a connection that is in use will break the pages that use that connection. The system will show an error message on these pages.

18.4. Configure External API Connections

An External API Connection allows you to connect to an external system through an HTTP/HTTPS REST API. The API Connection configuration can have secrets that are automatically injected when making calls to external systems. Having external API connections configured in WebCenter allows you to centrally manage these connections and to hide secrets from WebCenter users/administrators.

Configuration

Supported Methods:

- Token
- No authentication
- Bearer Token



Note: For Bearer Token based authentication, the **Value of the Token** settings need to be configured. The token will be added in the Authorization header of the HTTP request in the format Authorization: **Bearer <TOKEN>**.

A configured API has the following properties:

- a unique **Name**, which is used to refer to the service from within WebCenter
- a **Description**
- a **Base URL**, which is the URL of the endpoint that can be accessed on the external system. Scripts can execute requests to subpaths of the base URL. They cannot do calls that are outside the Base URL.
- (Optional) **Authentication Configuration**. Currently Token based authentication or no authentication is supported.

For token based authentication, the following settings need to be configured:

- the **Location** in the request where you want to use the authentication: this can be in the request header or in the query parameters.
- the request **Header Name** or the **Query Parameter Name** where you want to insert the token.
- the **Value** of the token.

Use

In dashboard scripts you can do a request to an external system by doing `API.doExternalAPICall(...)`. You can specify which HTTP method should be used to do the call (GET/POST/PUT/PATCH) and which path on the external system should be requested. The path is always relative to the Base URL in the External API Connection configuration. Optionally you can provide **headers**, **query parameters** and the **request body** (i.e. JSON object as a string or formdata as a map of key value pairs.). `doExternalAPICall` returns a result object which allows you to read the status code, body and headers of the response of the external system.

This functionality is also available in the **Execute Javascript** workflow node and **JavaScript RuleActions** in addition to dashboard scripts.



Note: Do not use secrets in scripts. Configure them in the API Configuration.



Note: Calls to external systems are slow and are not cached. Avoid using them in **Validation** and **Visibility Scripts**.

18.5. Configure Workflow Connections

With a workflow connection, creating a project in WebCenter can automatically create a linked job in Automation Engine or any JDF-enabled workflow.

This way, the project files can automatically be copied into the workflow job (if desired), and the job parameters can be defined from WebCenter, based on project information and attributes.

This means that:

- WebCenter can act as the single interface for your customers, CSR and sales,
- all the data collected through WebCenter is available for workflow automation.

You can also define when the project will synchronize with the workflow job automatically, and if the WebCenter Project Manager can synchronize them manually.

You can also use a workflow connection to save documents (only approved documents or all documents) and the XML metadata about the documents and project to a network folder. This allows you to archive your documents and metadata externally.

To Configure a Workflow Connection

1. [Create a connection.](#)
2. [Add that connection in a project template.](#)
3. [Define when the workflow jobs created will be automatically synchronized to the linked WebCenter projects.](#)

18.5.1. Workflow Connections

Use **Workflow Connections** to synchronise your WebCenter Projects/Documents information with Automation Engine and other third party workflow systems. You can send a JDF file containing information about WebCenter project/document to Automation Engine or other systems. In Automation Engine, this will result in an updated Job or a new Job.

In addition, you can use **Workflow Connections** to submit external workflows. For example, using this connection, the **Submit Workflow** node can execute external workflows on your workflow systems.

You can also use **Push Through Folders** to integrate with such systems. However, these folders copy the WebCenter documents to the specified destination.

When syncing with Automation Engine Jobs, the **Workflow Connections** map:

- Project / Document **attributes** to Automation Engine **Job Setup** parameters including the customer details.
- Documents to Automation Engine job documents.

System History Logs

All **Workflow Connections** related events like

- **Workflow Connections created**

- **Workflow Connections deleted** and
- **Workflow Connections changed**

are recorded and stored in System History. Read this page on how to access the [records](#).

JDF Service

Use **JDF Service** connection to export your projects as JDF files and automatically create jobs in your Automation Engine. In this case, projects and documents will be communicated to Automation Engine using JDF tickets. Also, you can execute a workflow in Automation Engine using this setup.

ZIP Folder

Enter the address of the network folder to use for archiving your documents and metadata. This must be in an accessible network share, in UNC format.



Note: The ZIP file generated will contain:

- [documentversion_id].[extension]: the archived document,
- [documentversion_id].[extension].xml: the XML file containing the metadata of the archived document,

where [documentversion_id] is a unique number corresponding to that version of the document and [extension] is the file extension of the original document.

JMF Service

A **JMF Service** is a service to which the JDF tickets can be posted encapsulated in JMF messages.

Setting up a JMF Service:

JDF Hot Folder

When your WebCenter drops a JDF file into the Hot Folder that is shared between WebCenter and Automation Engine, the Automation engine processes it. When processing is finished, it writes the result into the output folder associated with the JDF Hot Folder.



Note: This must be in an accessible network share, in UNC format (for example \\MyWorkflowServer\MyJobContainer\HotFolder).



Attention: The JDF hotfolder does not support the execution of external workflows. The **Submit Workflow** node in WebCenter workflows will fail when a Hot Folder is chosen for the connection.

18.5.2. Create a Workflow Connection

- Click **Admin > Configuration > Workflow Connections**.


The **Workflow Connections** page appears, listing the workflow connections already created (if any).


- Click **New Workflow Connection**.
- Enter a **Configuration Name**.
- Select your **Connection type**. Here you can choose **JDF Service / Zip Folder** or **both**:

New Workflow Connection

Configuration Name*


Connection Type

JDF Service(Synchronize Project / External Workflows) 

ZIP Folder(Synchronize Document + Metadata) 

Active Configuration


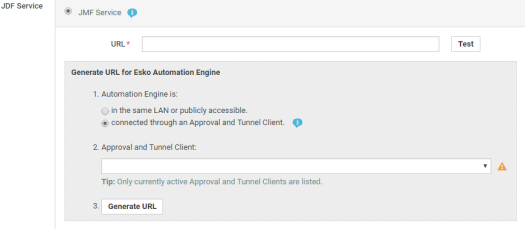

Create

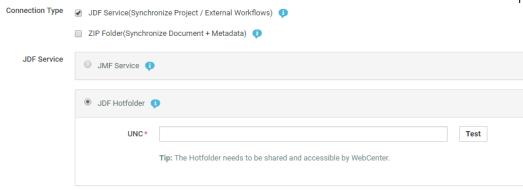
Options	Description
<p>To export your projects as JDF files (and automatically create jobs in your workflow system from your projects)...</p>	<p>Use JDF Service connection to export your projects as JDF files and automatically create jobs in your Automation Engine. In this case, projects and documents will be communicated to Automation Engine using JDF tickets. Also, you can execute a workflow in Automation Engine using this setup. Read more.</p>
<p>To automatically archive your documents and metadata (as a ZIP file) in a network folder...</p>	<p>Enter the address of the network folder to use for archiving your documents and metadata. This must be in an accessible network share, in UNC format.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p> Note: The ZIP file generated will contain:</p> <ul style="list-style-type: none"> • [documentversion_id].[extension]: the archived document, • [documentversion_id].[extension].xml: the XML file containing the metadata of the archived document, <p>where [documentversion_id] is a unique number corresponding to that version of the document and [extension] is the file extension of the original document.</p> </div>

- **JDF Service:**

Use **JDF Service** connection to export your projects as JDF files and automatically create jobs in your Automation Engine. In this case, projects and documents will be communicated to Automation Engine using JDF tickets. Also, you can execute a workflow in Automation Engine using this setup.

a)

If your JDF Service is...	Follow this procedure...
<p>JMF Service</p> <div data-bbox="316 405 379 472" style="float: left; margin-right: 10px;">  </div> <div data-bbox="395 405 852 557" style="border: 1px solid gray; padding: 5px;"> <p>Note: You need JMF Service to connect to Automation Engine if it is not in the same LAN or not publicly available.</p> </div>	<div data-bbox="890 405 1417 633" style="border: 1px solid gray; padding: 5px; margin-bottom: 10px;">  </div> <p>You can setup a JMF connection following the steps below:</p> <ol style="list-style-type: none"> 1. Select whether your Automation Engine is: <ul style="list-style-type: none"> • in the same LAN or publicly available. • connected through the Approval and Tunnel Client. Read in Configure Workflow Approval and Tunnel Clients on page 426 2. If your Automation Engine connection is: <ul style="list-style-type: none"> • in the same LAN / public, specify either the host address (e.g.: 192.168.1.1.1) or the host name (aeserver.brand.com). • via an Approval and Tunnel Client, select the client from the drop-down. 3. Click Generate URL. The URL field above will be filled in automatically. <div data-bbox="884 1397 1426 1559" style="border: 1px solid gray; padding: 5px; margin-top: 10px;">  <p>Warning: A Workflow Connection connected through an Approval and Tunnel Client will block one concurrent license.</p> </div>
<p>JDF HotFolder</p>	<p>Select this option if your JDF tickets should be placed in a shared Hot folder.</p> <ol style="list-style-type: none"> 1. In the UNC field that appears, enter the address of your workflow's JDF hot folders (in which to place the JDF file). <p>This must be in an accessible network share, in UNC format (for example \MyWorkflowServer\MyJobContainer\HotFolder).</p>

If your JDF Service is...	Follow this procedure...
	 <p data-bbox="879 539 1043 568">2. Click Test.</p>

- Enable the **Active Connection** option to activate this workflow connection.


Note:

If you disable this option, there will be no synchronization between WebCenter and your workflow system, but the connection data will be saved, so you can reactivate it later.

- Click **Create**.

18.5.3. Edit a Workflow Connection

1. On the **Workflow Connections** page, click the name of a workflow connection.
2. Change the workflow connection's [settings](#) as desired.
3. Click **Save**.

18.5.4. Delete a Workflow Connection

1. On the **Workflow Connections** page, select the workflow connection(s) to delete.
2. Click **Delete Configuration(s)** in the actions menu.

18.5.5. Add a Workflow Connection to a Project / Template

Once you have created a workflow connection, you need to add it to project templates that Project Managers will use to create projects. You can also add the connection to individual projects if desired.

1. On the Project Details page of the project or template, go to **Configure > Workflow Connection**.
2. Select **Connect this project to a workflow**.

This shows extra options.

3. In the **Workflow Connection** list, choose the workflow connection you defined.
4. Select **Allow manual synchronization by the Project Manager** if you want Project Managers to be able to synchronize the workflow job to the project on demand.

If you select this, Project Managers will have an extra action on the Project Details page: **synchronize with workflow**.



Note: Whether you enable manual synchronization by Project Managers or not, the workflow job will be automatically synchronized with the project when certain events occur (see [Define When the Project and Workflow Synchronize](#) on page 409).

5. Define when to automatically synchronize the workflow job to the project:

- select **Synchronize on all statuses** to synchronize whenever the project status changes,
- select **Only synchronize on a completed status** to only synchronize when the project has a completed status.



Note: There can be more than one completed project status defined in the system.



Note: Make sure you have selected **Project status change** as event that will trigger an automatic synchronization (see [Define When the Project and Workflow Synchronize](#) on page 409).

6. Select **Copy documents when synchronizing** if you want the project's documents to be copied to the workflow job.



Note: When you are using a workflow connection that automatically archives your documents and metadata in a network folder (see [Create a Workflow Connection](#) on page 404), **Copy documents when synchronizing** is always selected.

You can also choose to copy **Only approved documents**, or **Only documents in (a certain) folder** (select the project folder containing the documents to copy). This will work even you rename the folder later. If you try to delete the folder, you will get a warning.


7. Define **Additional Settings** for the workflow job.

In Automation Engine, you can see these settings in the **Job Setup**. See the Automation Engine documentation for more information.



Note:

You can use SmartNames to define those **Additional Settings**.

Click the Insert SmartName  button and select a SmartName in the list that appears next to the button. SmartNames are shown between brackets, like **[Project Name]**.

This list contains general project information (**[Project Name]**, **[Project ID]**, **[Customer Name]**...), and all the attributes defined in WebCenter. The attributes don't need to have been added to the project to be available here.

You can use several SmartNames if desired, or a combination of SmartNames and text, for example **WebCenter_[Project Name]_[Customer Name]**.

- a) Fill in the job's **Order ID**. This is mandatory as it allows WebCenter and Automation Engine to identify the job.

We recommend you use the **[AE_OrderID]** SmartName (corresponding to the WebCenter **AE_OrderID** attribute created automatically when you created the workflow connection) for the job **Order ID**.

- b) Fill in the job's **Suborder ID** if needed (this is optional).

We recommend you use the **[AE_SubOrderID]** SmartName (corresponding to the WebCenter **AE_SubOrderID** attribute created automatically when creating the workflow connection) for this.

- c) If you want to use a Automation Engine job template when creating the job (so that some of the Job Setup information is already defined), define the template to use in **Template Name**.



Attention:

If using SmartNames, make sure that they resolve to an existing Automation Engine job name.

SmartNames are resolved when the job is created via the JDF Hot Folder.

8. Click **Save**.

18.5.6. Define When the Project and Workflow Synchronize

Once you have created a workflow connection and added it to project templates, you need to define what events will trigger an automatic synchronization between the workflow job(s)/network folders and the WebCenter project(s).

You can set this *for your whole WebCenter system*, but you can also overrule *in specific projects or templates*.

System-Wide

1. Go to **Admin > Preferences > Notifications**.

The **Notifications** page has a column called **Synchronize with Workflow**.

2. Select the events that will trigger an automatic synchronization.

This means that when one of the events you selected occurs in a project, and the project is connected to another system, the synchronization will take place.

For example, if you select **Upload new document**, the workflow job created will be synchronized to reflect the project when a user uploads a new document into the project.

3. Click **Save**.

At the Project/Template Level

1. Go to the project or template's **Notifications** tab.

You can only do this as an Admin user.

2. Select the events that will trigger an automatic synchronization in the **Synchronize with Workflow** column.

When one of the events you selected occurs in a project, and the project is connected to another system, the synchronization will take place.

3. Click **Save**.

18.6. Configure Asset Management Connections

Asset Management Connections

You can configure Asset Management Connections to connect to external digital asset management (DAM) system like for example MediaBeacon or another WebCenter system. When you successfully configured a connection, your users can use it as a source for assets. You can also push a new version of an asset (or a new asset) back to the external DAM. This allows you to keep your repositories in an external system.

Once configured, these Asset Management connections can serve as **Document Sources** in WebCenter.

Configuration

To create a new Asset Management connection,

1. Go to the **Admin > Configure > Asset Management Connections** page.

If you already have Asset Management Connections, they will be listed in this page. To edit a connection, simply click the name of the connection.
2. Click **New MediaBeacon Connection** or **New WebCenter Connection** or **New ESKO Cloud Connection**.
3. **Name**, a unique name for the connection
4. Specify / edit:
 - **Name**, a unique name for the connection.
 - **URL** and the **API** key for a MediaBeacon connection or **URL**, **User name** and **Password** for a WebCenter connection.

To create a new **New Esko Cloud Connection**, follow the steps [here](#).
5. After specifying the parameters, click **Test Connection**. Select **Create** to finalise and create the connection.

Upload from external Asset Management connection

When successfully configured, you can use these connections as custom Document Creation sources. When a DAM is used as a source, the user is able to select documents (with meta data) from a MediaBeacon workspace or a WebCenter Saved Search.

These configurations allow you to push a new version of a document to the asset management system using a workflow node. Specify the Asset Management connection and a mapping between the WebCenter attributes and the meta-data of the external system, the node can be used in a workflow.

You can view the Asset management connection details in the Document information in WebCenter. In the **Document Details > Document Information** tab, view:

- **Asset Management Origin** – The name of the Asset Management Connection used to import the document (+ link).
- **Asset Management Document ID** – The ID of the original document that resides on the external asset management system.

System History Logs

All connection related events like

- **Asset Management Connection created**
- **Asset Management Connection deleted**
- **Asset Management Connection changed**

are recorded and stored in the [System History](#) on page 433.

18.6.1. Esko Cloud

Esko Cloud is a cloud server environment in which all Esko's cloud applications are deployed. Dedicated services are made available which provides functionality to other applications like e.g. WebCenter.

To connect to the cloud, the (service) URL needs to be provided together with the cloud token. The token is used to authenticate the person/system that makes the request.

In WebCenter context, you can connect to cloud for:

- Color
- Archiving of documents
- Packshots
- Open ID Connect



Note: To know more about creating an Esko cloud account read [here](#).

For the Color specific functionality, WebCenter connects to the Color service. The cloud stores colors/inks and color/ink books. We refer to these as Colors and Color Books. The colors and color books can be uploaded to the cloud by the Color Pilot. WebCenter can read the colors and color books by connecting to the Color Microservice.

18.6.2. Create an Esko Cloud Account

To be able to connect to the Esko Cloud, an account has to exist in the Esko Cloud. Most organizations may require only one Esko Cloud Account, however multiple Esko Cloud accounts can be maintained for independent environments for segregation of data.

Follow the steps below to create an account with Esko Cloud.

1. An Esko id is required to create an Esko Cloud account which is provided for every customer.
2. Create an Esko Cloud account in this URL <https://approve.next.dev.cloudi.city/createNewAccount.html>.
3. Cloud Account name can be given as required and the Cloud account number is auto generated.



Note: Creating a site within a Cloud account is optional for Color and Archiving services.

4. Once the Esko Cloud account is created you are directed to the **My Network** page.
Select **Add Equipment Network** option to create Equipment in the **My Network** Page.
5. Click on the **Equipment** folder and select **Add Equipment**. Select WebCenter as the **Equipment Type** and add an **Equipment Name**. An **Equipment ID** is generated.

The Equipment ID in the Cloud account is required to enable a connection to either the Color Service or the Archiving service from WebCenter.

18.6.3. Configure Esko Cloud Connection in WebCenter

An Administrator user can set up the connection to the ESKO Cloud. A Cloud Connection can be set up for a connection to Archiving, Packshot creation, Color or Open ID Connect services. Navigate to Admin > Configuration > **Asset Management Connections** and select **New ESKO Cloud Connection**.

Follow the steps below to configure the ESKO Cloud Connection in WebCenter.

1. Select **New ESKO Cloud Connection** to open the connection Details page.
2. Enter the **Name** of the Connection.
3. Enter the **URL** of the Connection.
4. Enter the **Cloud Token**.
5. Choose the **Cloud Service, Archiving, Color, Packshots or OpenID Connect**. Depending on the selected Cloud Service, the following extra configuration is required and mentioned [here](#).
6. Enter the **Repository ID** and **Equipment**. This is a mandatory field to be entered for Archiving and Packshots options only. Repository ID will contain the ESKO Cloud repository and the Equipment holds the name of the equipment [created in the Esko Cloud](#).
7. You can test the connection by clicking **Test Connection** before you click **Create**.

Configure Color in Esko Cloud

A connection to the Esko cloud account can be established by the WebCenter Administrator user via Admin > Configuration > **Asset Management Connections**.

Setting up a connection to the Esko Cloud with a Cloud Service for **Color** is the first step in the Cloud Trace Solution.

Enter connection details like the name, URL and Cloud token for the Esko Color Cloud connection. Select Color as **Cloud Service** and additional fields will appear.

- **Deployment Package: Import Assets** while setting up the Color Trace solution for the first time. These assets are part of the Deployment Package. Read more about it [here](#).
- **Color Information: Import Color Books** into WebCenter for the first time when setting up the Color service. There is also an option to **Force Update Color Books** based on the requirements to update the colors.
- **Automatically Update Color Books every day**: Select this option to update your Color books daily.
- **Details**: Expand to view the color books available at any point along with the last updated time. Also information on the number of color books and colors processed during the last update including the details of the number of color books that were updated or skipped or failed or obsolete and the PantoneLIVE connection status is shown (if configured in the Esko Cloud).
- **Connection Status**: Displays the status of the connection as **Connected** or **Not Connected**. Before connecting for the first time, you can check whether all information provided is correct by clicking **Test Connection**.
 - **Connected**: When the Cloud Service can be reached, and the validation of the token was successful.
 - **Connection Failed**: When the import was not completed or the token could not be validated.

- Select **Create** to save the information provided and create a new Color Service Esko Cloud connection.

Deployment Package

While setting up the Esko Cloud connection for Color service, the required WebCenter assets are imported as Deployment package. This is installed once initially using **Import Assets** option to setup the Color Trace solution in WebCenter and later these assets can be updated whenever required using **Check for Updates** option.



Note: Subsequent Color Service setups does not require Deployment Package to be downloaded but only updated if required.

Deployment Package comprises of WebCenter Projects and and Templates, Dashboards, Saved Searches, Categories, Restricted Sets, Groups and Roles.

Deployment Package

Info: Required assets are missing. It is strongly advised to import the Deployment Package.

Color Information

Tip: Only use 'Force Update Color Books' in case the Color Library is corrupted.

Automatically update Color Books every day

1. **Project and Templates:** Projects that are required to setup the Color Trace solution in WebCenter are
 - **#COLOR TEMPLATE** :Template project where utility documents are placed. It also can configure the landing page for the **"#COLOR LIBRARY"** project. This contains the following documents
 1. **#COLOR TEMPLATE**: Template document for creating a new color document. Any document
 2. **#COLOR THUMBNAIL**: Document used to create the color document thumbnail (SVG)
 3. **#COLOR CONDITIONS.xls** : Excel sheet containing valid values for the condition parameters (For example: printing technique, substrate, ink type and finishing)
 4. **#COLOR ColorCertJob.ccj**: Document that carries the category #COLOR ColorCertJob
 - **#COLOR LIBRARY**: Project where the documents representing colors are created. In this project, each folder represents a color book and each document is a colors in the books. Meta-data information of the color is added to the document attributes
 - **#COLOR PALETTES**: Project that serves as library for the palettes
 - **#COLOR PALETTES TEMPLATE**: Template for #ColorPalette Projects
 - **#COLOR COLORCERT RULES LIBRARY**: Library for the Color Cert Rules documents
 - **#COLOR COLORCERT RULES TEMPLATE**: Template for #Color Cert Rules library
 - **#COLOR ColorCertJob**: Attribute Category to hold attribute values for the ColorCert Job
 - **#Color PROFILES**

2. **Categories** Attribute categories for representing Color Palette or the Color or the conditions for printing .
3. **Groups and Roles** :For Admins for various purposes and others Users.
4. **Restricted Sets**: Consists of two restricted sets for Master/Dependent color and Color status
5. **Saved Searches**:Are available to access the color information as and when required.
6. **Dashboards**: To view the metrics of Colors, color books, Palettes, Rules profiles that are available.

18.7. Configure Structured Content

To configure a setup for Structured Content, Admin Users can navigate to **Admin > Configuration > Structured Content Configuration**

Usage of the Structured Content in WebCenter relies on some preexisting Attribute category, Attributes, Saved Searches, etc which are set up when the deployment setup is imported. You can configure different configurations for the Structured Content setup in this page.

Search

- **Saved Search for Reusing Documents**: select the Saved Search that will be used in the editor when re-using content, e.g. a topic or a map.
- **Saved Search for New Documents**: select the Saved Search (list of document templates) that will be used when adding a topic or map in the editor.
- **Saved Search for Artwork Templates**: this saved search finds InDesign Templates that can be used for artwork mapping. In most cases, you can use the default saved search included in the Structured Content deployment kit. However, if you need to create your own Saved Search for Artwork Templates, make sure that:
 - it has SmartNames enabled,
 - it only finds InDesign documents (Document Name = `"*.indd"`),
 - the InDesign documents it finds have a reference to the ditamap document you're working with (Reference = `"[Document Version ID]"`),
- **Saved Search for Artwork Templates That Have Been Mapped**:

this saved search finds InDesign Templates that have already been used to map content, and whose mapping you can reuse. As above, you can use the one included in the deployment kit in more cases. If you need to create your own, make sure that:

 - it has SmartNames enabled,
 - it only finds InDesign documents (Document Name = `"*.indd"`),
 - the InDesign documents it finds have a reference to the ditamap document you're working with (Reference = `"[Document Version ID]"`),
 - it specifies that the **SC_SOURCE_ID** attribute matches the current **SC_SOURCE_ID**.
 - it specifies that the **SC_HAS_MAPPINGS** attribute (that holds how many ditamap references are mapped to an InDesign File) is equal to or greater than 1.
- **Saved Search for Graphics**: select the Saved Search (list of graphic documents) that will be used when adding an image in the editor. This option comes up when the user clicks the **Figure with image** or **Inline image** options within the editor
- **Saved Search for Text Statements**: select the Saved Search that will be used when inserting a Text Statement in the editor. This option comes up when the user clicks Insert Content > Existing Content > Statement from the Structure menu within the editor.

- **Saved Search for Segments:** select the [Saved Search](#) that will be used when inserting a Segment in the editor. This option comes up when the user clicks Existing Content > Statement from the Inline menu within the editor.
- **Saved Search for DITA Conrefs:** select the Saved Search that will be used when inserting DITA conrefs in the editor.

Dashboards

When a document is opened in the editor, a side panel shows the information about the document. This side panel has an upper part which shows information about the root document which is opened and a lower part shows information of the document that is referenced from another document.

- **Root Document:** Select the dashboard that will be used in the editor's side panel (upper part) when opening a document. Information about the document which is opened in the editor is displayed.
- **Focus Document:** Select the dashboard that will be used in the editor's side panel (lower part) when selecting a section in the editor which is loaded from another document.
- **Allow users to resolve comments on documents in Review mode of the Structured Content Editor:** When this checkbox is enabled Reviewers will be able to resolve comments in Review mode. When this checkbox is disabled Reviewers will not be able to resolve comments in Review mode.
- **Elevate Permissions for Content Owners performing Inline Edits:** Select this option if you want topic owners to be able to edit their topics in different contexts where they would otherwise not have the rights to do so:
 - in the context of a map they don't have change properties or edit rights to (so that the map is updated with a link to their newer topic version).
 - when making a local copy of the topic and its parent map(s).
 - when creating a variant of the topic and its parent map(s).

When a user edits a topic using this change of permissions, this is logged in the Project History. This will update the links to these topics in that context (for example in the map) to point to the new version edited by the topic owner.



Note: When no dashboard is configured, it will not be visible in the editor. If only one dashboard is configured it will take up the full height of the side panel.

Deployment package

If all required assets are installed a message is displayed indicating that the assets are available. If this is not the case, a message is displayed indicating that required attributes are missing. Click **Check for Updates** to import all required assets. You are redirected to the **Import Dependencies** page, which lists all the required assets for structured content. You can choose not to update by not selecting the respective checkbox.

18.8. Configure Packaging Content Management



Note: User needs the Packaging Content Management license to be able to use this module.



Note: Users with **Admin** credentials, can configure Packaging Content Management.

Navigate, **Configuration > PCM Deployment & Configuration**

Packaging Content Management page displays following three sections:

- **Configuration**
- **Global Permissions**
- **Local Permissions**

Configuration

When user selects **Configuration**, following fields are available:

- **Permissions** field is used to select the permission model to be followed by Text/Table Content documents, there are three options:
 - **Only use local permissions**
Selecting this option allows content documents to only use **Local Permissions**, that are defined in the text content document under **Permission** tab.
 - **Only use global permissions**
Selecting this option will allow only content documents to use **Global Permissions**, under **Permission** tab, that are defined in the system.
 - **Allow both global and local permissions**
Selecting this option will allow content documents to use either **Global Permissions** or **Local Permissions** depending on the setting in an individual Content document.
Global Permissions will be selected by default, but the admin user can switch from **Global Permissions** to **Local Permissions** in the permission tab of a document by clicking **Manage Permissions** and selecting the **Use Local Permission** option.
- **Revision Raise** contains two options as:
 - **Never raise revision**
Select this if you do not wish to save master text changes as a new Revision.
 - **Raise Revision when Master Text is updated**
Select this to allow raising a revision, when master text is updated.
- **When Copying a Content Document** contains three options as:
 - **Keep Comments**
User can choose this option to copy all the comments.
 - **Remove comments if state reverted to Draft**
Comments are cleared if the state of the element is changed to draft, when the option is chosen.
 - **Remove Comments always**
Select this option for clearing all the comments in the elements, while copying.



Note: Same behavior is replicated in workflow when documents are copied using Copy/ Move Document. Move document option does not respect this setting.

- **Auto Addition of Languages**

Select whether or not you want to automatically [add missing languages](#) to documents in the document table.

- **Translation Service API Key**

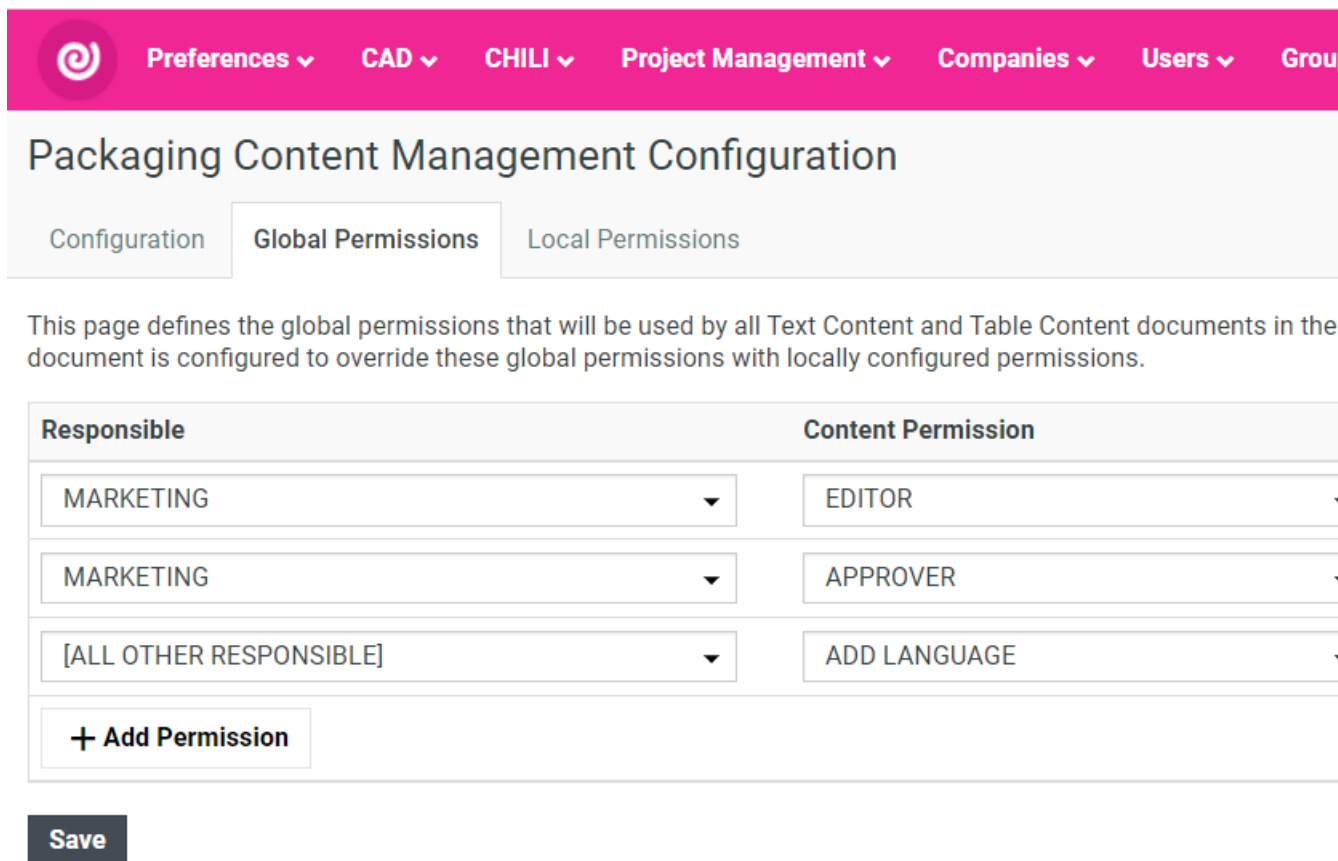
Enter the Translation Service API key that is required by the Translation Tool. This key will be used during [auto-translation](#) in the Documents Table.

- **Deployment package**

You can click **Check for Update** to import all the required assets for the Packaging Content Management. Before importing, verify that you have the ListManager project available on the server.

The Import Dependencies page lists all the required assets for packaging content management. You can choose to not update by unchecking the respective box. Verify if the ListManager Project is present in the Projects and Templates section of the page. If the ListManager Project is listed among the items that are already on the server, then uncheck the ListManager checkbox. If the project is listed among the items that will be imported, stop the import and make sure the project is available on the server.

Global Permissions



The screenshot shows the 'Packaging Content Management Configuration' page with the 'Global Permissions' tab selected. The page has a pink navigation bar with various menu items. Below the title, there are three tabs: 'Configuration', 'Global Permissions', and 'Local Permissions'. A descriptive paragraph explains that this page defines global permissions for all Text Content and Table Content documents. Below this is a table with two columns: 'Responsible' and 'Content Permission'. The table contains three rows: 'MARKETING' with 'EDITOR' permission, 'MARKETING' with 'APPROVER' permission, and '[ALL OTHER RESPONSIBLE]' with 'ADD LANGUAGE' permission. There is a '+ Add Permission' button below the table and a 'Save' button at the bottom left.

Responsible	Content Permission
MARKETING	EDITOR
MARKETING	APPROVER
[ALL OTHER RESPONSIBLE]	ADD LANGUAGE

+ Add Permission

Save

Under the Global Permissions tab, a table is accessible for configuring system-level content permission. The permissions table contains the columns shown below:

- **Responsible:** a dropdown input including all possible responsible(PCM RESPONSIBLE Colum) from the ELEMENT TYPES list, as well as two unique options "[All]" and "[All Other Responsible]".
- **[ALL]:** this content permission applies to all responsibles.
- **[ALL OTHER RESPONSIBLE]:** this Content Permission applies to Responsible who do not have a dedicated option for this Content Permission

- **Content Permission:** It contains four options.

- **CONTENT MANAGER**
- **EDITOR**
- **APPROVER**

- **ADD LANGUAGE**

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

• **Language:**

- From the language drop-down, user can select **All Other Languages** to create approver role with default name in one go.
- User can select **All Other Languages** to provide permission for all the languages.



Note:

- Even if some languages already have specific permissions defined, the permission row is still applicable to all languages.
- It is applicable for both **Local Permission** and **Global Permission**.

• **Role:**

Role field contains SmartName support. The supported SmartNames are Language code, Language description and Responsible values from the permission row where the role is configured. In preview mode the SmartNames will be resolved and mapped with the corresponding Roles. 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.



Note: 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.

Local Permissions

Smart Role Names for Editors and Approvers

To work with language specific [Smart Role Naming](#) on page 519 specify your:

- **Language Editor Role Prefix/Suffix**
- **Language Approver Role Prefix/Suffix**
- **Add Language Role Prefix/Suffix**

The specified prefixes and suffixes are used automatically to create **Role names** specific for each language in the Role Mapping > Manage Permissions page.

If the **Roles** column in **Manage Permissions** is left blank, the values in the **Language Editor Role Prefix**, **Language Editor Role Suffix**, **Language Approver Role Prefix**, **Language Approver Role Suffix**, **Add Language Role Prefix**, and **Add Language Role Suffix** are used to calculate the role names for the Editor, Approver Text Content, and Add Language permissions.



Note: This setting is independent of the **Allow raising Document Revision when uploading a new Document Version** setting.

18.9. Assisted QA

WebCenter Viewer now allows integration with third party external web QA (quality assurance) tools namely **InformaIT** and **TVT** for additional comparison features. You can configure a connection between the Comparison tool with WebCenter by navigating to **Admin > Configuration > Assisted QA**.

When the graphic documents (PDF's and Adobe Illustrator documents) are compared in WebCenter Viewer, additional buttons are enabled if any external QA tools are connected. Once the comparison session in the external tool is completed, reports and annotations are stored back into the WebCenter. You can read about how to configure an external tool [here](#).

You can read more about how it renders in the viewer [here](#) in the User documentation.

Navigation From other Menu locations

You can configure QA tools as Custom Action Buttons in the Menu Builder to make it available other than the Viewer. This can be added to all pages(locations) where the list of Documents are shown.

System History Logs

All Assisted QA Tool connection related events like

- **Assisted QA Tool Created**
- **Assisted QA Tool Deleted**
- **Assisted QA Tool Changed**

are recorded and stored in System History. Read this page on how to access the records [System History](#) on page 433

18.9.1. Configuring Assisted QA

As an Admin user, you can navigate to the configuring page from **Configuration > Assisted QA Tools > New QA Tool**. Depending on the QA Tool to be added, the configuration options may vary.

Following options are currently available to add:

- **GlobalVision Verify**
- **InformalT**
- **TVT**



Note: The user must have add, download, and check-in permissions for the current document.

Navigate to **Configuration > Assisted QA Tools** page to add a new QA tool or edit the details of already configured connection.

The parameters required for connection are:

1. **Name:** An unique name for the connection.
2. **Provider:** Choose the QA Tool that you want to connect to.
3. **URL:** URL to the QA Tool to be added.
4. Provider specific information:
 - a. **GlobalVision Verify:** This option allows users to upload files to GlobalVision Verify, compare them, and view the report with annotations.



Note: Only one current and one reference file are supported.

b. InformalT

- **User Group:** Add the User group in the InformalT. By default, the "CC Users" is given.
- **Compare Type:** Choose the type of compare you wish to use the connection for, either Text or Graphic or Hard Copy.
- **Configuration ID:** Enter the corresponding configured id in InformalT

c. TVT

- **User Name:** Enter username.
- **Password:** Enter password.
- **Options :** Choose from a set of options (type of document) defined and available in dropdown.
 - **Create Audit Trail Report:** Select this check box for a second report to be saved to WebCenter.
 - **Open TVT locally:** Select this check box to open TVT on the application installed on the local machine instead of a new tab.



Note: Only one current and one reference file are supported.

5. **Report Location:** Location to upload the external pdf report from the selected QA Tool after comparing the documents.

- **Project Root Folder:** Root folder of the project where the document resides
- **Folder of Current Document:** Same folder as the original document
- **Custom Folder:** Choose the folder where you want the report from the QA tool to be saved. Specify the location in the **Target Folder** field.

- **Report Name Suffix:** You can add a suffix for the report name in the field for the external report which is imported.

You can now **Test the Connection**, **Create** the connection and go back to the **Assisted QA Tools** page. by clicking **Return**.

There is also an option to **Delete** this connection on the **Assisted QA Tools** page.

18.10. Configure Push-Through Configurations for Workflow Folders

18.10.1. 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 Automation Engine, so that the file will automatically be processed by the workflow system.

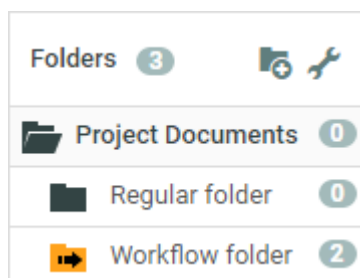


Note: The Configuration for workflow folders needs to be defined by an Administrator.



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](#).

18.10.2. Delete Push-Through Configurations

1. Click **Admin > Configuration > Push Through Configurations**.
2. Select the configuration you want to delete.
3. Click **Delete Configuration** in the actions menu.
4. Click **OK** to confirm.

18.11. Configure File Storage

The System Administrator (ADMIN) can configure the storage location for different kinds of files allowing for better management of the file repository.

Location Mapping

In this tab, the system administrator can define the storage location for a specific file type.

- **Document Data** extra exceptions can be made to store files of a specific document type on a custom storage location.

When the storage locations are configured and saved any file that is being uploaded to or created by WebCenter is stored in the new location. The initial values for these configurations are set based on the AppConfig.xml file.

Storage Locations

In this tab, the system admin can do one of the following actions:

- **Change Temporary Storage Location**

During normal operation of WebCenter, the application uses the location defined in the “**Location for temporary files**” to create temporary files. To improve the file handling performance, it is advised to point to fast NTFS Storage (e.g. SSD)

- **Change JDF Hotfolder Location**

A dedicated NTFS location has to be specified in order to make WebCenter < > OBGE data transfer possible (for processing View file generation tasks). This location has to be accessible both to WebCenter and OBGE.

- **Adding Storage Locations**

The system administrator can define new Storage Locations by clicking the Add button. When adding a new Storage Location, it is required to specify the type of the Storage Location. Currently NTFS and S3 storage are supported. Depending on the selected type, different fields become mandatory.

S3 storage location: Since WebCenter 23.07 the default AWS Credential Provider chain is also supported. For more information, check the AWS documentation.



Note:

- When **Only allowed read operations** is selected, users can only view and download data.
- A non-active storage location can be marked as read only.

- **Edit a Storage Location**

The system administrator can edit existing Storage Locations but the data that can be edited is limited.

It is not possible to change the type and the actual location of the Storage Location in order to prevent data loss.

- **Remove a Storage Location**

The system administrator can remove Storage Locations that are both inactive and empty. Only if a Storage Location matches both criteria, the delete option is visible.

- **Migrate a Storage Location** to the current Storage Location

The system administrator can migrate data from an existing Storage Location to the currently active Storage Location set in the **Location Mapping** tab. In order to do so, select the Storage Location(s) that need(s) to be migrated and click **Migrate Files**.

The migration will go over all the files in the selected Storage Location, determine the type of the file and place it in the currently active Storage Location defined for that type of file.



Note: WebCenter takes special care to ensure that this migration can happen while WebCenter is working as normal, so no downtime is required.

- **Show locations for unmanaged documents**

The old Storage Locations can be accessed by clicking the **Show locations for unmanaged documents** link. This overview only shows the locations that are still being read from the AppConfig.xml file.



Note: The Storage Locations prefixed with Default indicate the values as they were set prior to **WebCenter 21.07**. If WebCenter 21.07 is the first WebCenter version you are using, then these locations will not contain any files.

Migration Status

This tab provides an overview of all ongoing migrations. Here you can either pause, resume or cancel a migration.

After a successful migration, the files in the original location are cleaned up automatically one hour after the migration finished. In case you want to clean up immediately after having migrated the files, you can click the Cleanup button.

When an error occurred during a migration, a message will be displayed in this tab.



Note: For migrations that ended with an error, the files in the original location are not cleaned up automatically. They are removed if you click **Cleanup**.

18.11.1. View File Cache Size

This cache location can only be used if the View Files location (in Storage Configuration) is set to a non-NTFS location (e.g. S3).

When that is the case, the view files have to be dynamically pulled into the cache location when viewing a document in WebCenter.

The Cache Size input field allows the administrator to configure the maximum size of the cache.



Warning: The cache could take up more space on disk than configured in the Cache Size field because of the following two reasons:

- The cache evicts items only after adding them, this means that for a brief period the cache will exceed its maximum size when the new item is added and before the previous item is deleted from disk.
- Ghost files: in some situations it can happen that the deletion of the file from the cache location fails (e.g. an external process has a lock on the file). In this situation the cache will no longer include the size of that file in its max size calculation. This can typically be solved by force clearing the cache.

Because of these reasons it is recommended to make sure that the disk to which the cache points is at least ~20% larger than the configured Cache Size.

Specify Cache:

View files persisted on a non-NTFS storage location must be accessed from an NTFS location by the Graphical Viewer to maintain the expected viewing behavior. For this reason, a dedicated NTFS-only "View File cache" location is used.

The View File cache location can be specified by an Administrator by navigating to **Admin > Configuration > File Storage Configuration > Storage Locations** tab.

Like the "Location for temporary files" the **View File cache location** is a special setting that consists of two properties:

- NTFS location: an NTFS based location accessible by the WebCenter Application server; default value is the "Default View File location" path appended with an extra "cache" subfolder.
- Maximum Cache Size: specifies how much disk size can be used for View File cache purposes (if putting more View Files into the cache would result in this size being exceeded, the least used View Files in the cache that add up to the amount of size over the cache size limit are removed from the cache to accommodate the incoming view files); the value is stored in GB units; default value is 10.

Clear Cache:

A button to clear the View File cache is available on the same location. When clicking the Clear Cache button, the Administrator is presented with two options:

- Clear Cache: simply tries to clear out the cache by trying to delete the files ones. If the file is still being used by the View Server, it will not be possible to delete the file thus the file will not be removed from disk. These files are referred to as "ghost files".
- Force Clear Cache: a more aggressive way of clearing out the cache. In this mode the View Server will first be terminated, then the cache will be cleared and then the view server will be started again. Using this option will affect other users that are trying to view documents during the period that the cache is being cleared.

18.12. Configure Workflow Approval and Tunnel Clients

When WebCenter and Automation Engine are not on the same LAN, this **workflow approval and tunnel client** will establish a bi-directional communication.



Note: The Automation Engine Pilot needs to have the **workflow approval client** credentials to send messages to WebCenter.

This is configured through **Admin > Configuration > Workflow Approval Clients** in WebCenter, and, in the case of Automation Engine, in **Tools > Configuration > Web Sites** in the Automation Engine Pilot.



Attention:

Configure the WebCenter account first so that it can be tested from within the workflow approval server.

WebCenter and the workflow approval server must use the same user name and password!

This is completely separate from a normal WebCenter user. Workflow approval clients may not log in to WebCenter.

Two manual configuration steps must also be performed outside of WebCenter to ensure proper communication between the workflow approval client and WebCenter systems that are not on the same LAN.

System History Logs

All **Workflow Approval and Tunnel Client** related events like

- **Workflow Approval and Tunnel Client created**
- **Workflow Approval and Tunnel Client deleted** and
- **Workflow Approval and Tunnel Client** changed

are recorded and stored in System History. Read this page on how to access the [records](#).

18.12.1. Create a Push-Through Configuration

1. Click **Admin > Configuration > Push-Through Configurations**.

The **Push Through Configurations** page appears, listing the push through configurations already created (if any).

2. Click **New Push Through Configuration** to add a new configuration.

3. Enter a **Configuration Name**.

4. In the **Destination UNC** field, type the path to the target folder in UNC format (for example `\\MyWorkflowServer\Container_Data\WebCenter`).

5. Choose a **File Naming** option:

- **Document name:** documents copied to the destination folder will keep their original WebCenter name.
- **[Project_name]_[Document_name]:** the copied documents will get a file name consisting of the project name, an underscore and the original document name.

- **[Customer_name]_[Project_name]_[Document_name]**: the copied documents will get a file name consisting of the Customer name, an underscore, the project name, another underscore and finally the original document name.
6. Choose the **Workflow Type** to enable additional integration functionality: Automation Engine
 7. Enable the **Active Configuration** option to activate the push-through mechanism for this configuration.

If you disable this option, files will no longer be copied, but the configuration data will be saved, so you can reactivate it later.
 8. Click **Create**.

18.12.2. Create a Workflow Approval and Tunnel Client

1. Click **Admin > Configuration > Workflow Approval and Tunnel Clients**.
2. Click **New Workflow Approval and Tunnel Client**.
3. Enter the **User Name** and **Password** for the workflow approval client user.
4. Click **Create**.



Note: If you have several Automation Engine sites communicating with WebCenter, you need to create a separate Workflow Approval Client for each site.

18.12.3. Change the Password for a Workflow Approval and Tunnel Client

1. Click **Admin > Configuration > Workflow Approval Clients**.
2. Click **Change Password** link next to the name of the client user.
3. Change the password and click **Change**.

18.12.4. Delete a Workflow Approval and Tunnel Client

1. Click **Admin > Configuration > Workflow Approval Clients**.
2. Select the client.
3. Click **Delete Client(s)** in the actions menu.
4. Click **OK** to confirm.

18.12.5. Configure the Workflow Approval and Tunnel Client Software

Configure the access to WebCenter in the client application for your workflow server.

For instructions, please consult the documentation of your workflow server (Automation Engine).

18.13. Upload Saved Search Results Template

You can upload an Excel file (.xls) to be used as template when users [download search results to Excel files](#).



Note: This will only be used when downloading the results of **global saved searches** (you can upload one template per global saved search).

1. Go to **Admin > Configuration > Upload Saved Search Results Template**.
2. **Browse** to the Excel file to use as a template for a saved search.



Note: Name it exactly as the saved search you want to use it for (ignoring the extension)!

3. If you want to update an existing template file (uploaded with the same name), select **Overwrite if template file already exists**.
4. Click **Upload**.

When downloading search results using that template, you will find the results data in a sheet called "Search Results".



Note:

You can upload a template containing charts and additional sheets referencing the main "Search Results" data sheet (for example through Pivot tables).

In this case, remember to put referencing elements to "auto-update on open" to update the sheet automatically when the Excel document is opened.

System History Logs

All changes/events in this page are recorded and stored in the System History page for Administrator users. Read this page on how to access the [records](#).

18.14. View System Information

The System Info page lists various system statistics. Click **Admin > Configuration > System Info** to view the system statistics and properties.

System Info

WebCenter usage info

Number of Projects 113342

Number of Documents per type

Graphics 21354

Digital Film 53

Cape 256

CHILI Package 599

Other 34012

Text Content 126

ArtiosCAD 9110

Page List 208

Collada 1681

User management info

Number of licences 45

Number of Users 11812

Number of guaranteed access Users 13

18.15. Troubleshooting Tool

If you experience some problems with WebCenter, or if you want some real-time information on your WebCenter system, you can run the **Troubleshooting Tool**. To do this, you can either:

- Go to **Admin > Configuration > Troubleshooting Tool** in the WebCenter user interface.
- Go to `http(s)://<server>/<instance>/tstools/index.html` in your web browser.


Note:

- You can run the tool from this web page even if your WebCenter server is not running (some tests will fail if WebCenter is not running).
- When running this tool as a non-Admin user, you can only execute simple tests (advanced tests require Admin access).
- You can execute all troubleshooting tests from localhost without the need to log in as an administrator. This can be done by accessing the Web Server machine and navigating to: <http://localhost:8081/<instance>/tstools/index.html>.

The tool starts automatically. For each test, the tool gives a status and some extra information. You can use this information to troubleshoot your WebCenter installation and, if you cannot solve the problem, to call Esko customer support.

Test status	Meaning
OK	The test was executed and everything works as expected.
BAD	The test was executed, it could be working, but something requires attention.
FAILED	The test failed. It is very likely that there is something wrong with the system.
SKIPPED	The test wasn't executed due to a lack of rights (you didn't log in as an Admin user) or because a previous (related) test failed.

18.15.1. Workflow Troubleshooting

If you run the test on the [Workflow Engine](#) at the [Troubleshooting Tools](#) page, it will result in :

- **OK** if the Workflow Engine is running
- **Bad** if the Workflow Engine is still starting up
- **Failed** if the Workflow Engine is not running.

You can also see the Workflow Database states such as :

- The total number of running workflows in the Workflow Engine
- The total number of tokens in these workflows
- The total number of triggers in these workflows
- The total number of wait triggers in these workflows

When you have a problem workflow, click on the **Details** section to know more about the specific **tasks** and **projects** creating issues. You will also see a tip describing how to resolve the problem.

Read <https://wiki.esko.com/pages/viewpage.action?pageId=170037353>.

18.16. Workflow Engine

Use the WebCenter Workflow Engine page when the workflows get stuck, fail to complete or when a workflow loops cause the system to crash. This is a convenient way to troubleshoot workflows.



Note: Since version 14, this component runs as a background process of JBoss running the workflows in WebCenter. For versions before WebCenter 14, the Workflow Engine runs along with the JBoss. Because of this, you have to restart the JBoss to restart the Workflow Engine.

To see the status of the Workflow Engine, go to **Admin > Configuration > Workflow Engine**.

- **Started** when the Workflow Engine is running (green)
- **Starting** when the Workflow Engine is still starting up (orange)
- **Stopped** when the Workflow Engine is not running (red)

To change the status, use the following controls:

- **Restart**
- **Start**
- **Stop**

This page also displays the data on:

- **The total number of running workflows in the Workflow Engine**
- **The total number of tokens in these workflows**
- **The total number of triggers in these workflows**
- **The total number of wait triggers in these workflows**
- **The number of workflow events per second:** This is the average number of Workflow Events per second generated by the Workflow Engine within the past 20 seconds.
- The Workflow Engine queues (**Queue Name**) and their **sizes**:
 - **Internal Event Processing Queue**
 - **Total items in Workflow Step Processing Queue**
 - **Low Priority Items in Workflow Step Processing Queue**
 - **Normal Priority Items in Workflow Step Processing Queue**
 - **High Priority Items in Workflow Step Processing Queue**
 - **Trigger Processing Queue**



Note: The low, normal, high workflow step processing queue counts are only shown if there have been steps executed from workflows with this type of priority since starting the Workflow Engine.

System History Logs

All changes/events in this page are recorded and stored in the **System History** page for Administrator users. Read this page on how to access the [records](#).

18.17. Cleanup Tool

When objects are deleted, they remain in the database marked as “Deleted”. To permanently clear this data, an off-line tool is used which can be scheduled for a time when the server load is low.

The Clean Up tool has to be run by System Administrator with operating system access to the WebCenter Application server. To run the tool at regular intervals, the Windows Task Scheduler can be used.

Running the Cleanup tool

- On the WebCenter Application Server operating system, navigate to `<WebCenter_install_directory> \ApplicationServer\Cleanup`.

- Execute the batch script 'cleanup.bat' (either by double clicking or executing in a command prompt). This will connect to WebCenter and instruct it to scan through the database and purge obsolete records.

The clean-up tool produces progress feedback in the displayed command prompt and also stores it in the log file. To view the log, go to:

- `<WebCenter_install_directory> \ApplicationServer\Cleanup\logs
 \cleanup.log`

Inspecting Cleanup Tool Status from browser

You (Admin) can view the status in the **Admin > Configuration > Cleanup Tool** page. The following states are possible:

- **Running.** You can stop the tool by clicking the **Stop** button. You will be asked to confirm your stop action.
- **Stopping** – a stop request was submitted to the server, but the cleanup tool is not yet stopped. In this state, you cannot execute any action.
- **Stopped**

If the status is **Stopped**, you will be able to:

1. Specify the **Minimal age of items to clean** (in hours). The default is 0 hours.
2. Start the cleanup tool by clicking the **Start** button. If you **Start** the process, you will be asked to confirm your start action. As soon as the cleanup tool starts up, the status will change to **Running**.

Altering ProfileDefaults

You can prevent Stopping or Starting the Cleanup tool from browser.

- To prevent Stopping the Cleanup tool from browser, change the ProfileDefaults record WC_CLEANUP_ENABLE_STOPPING to "0" by either of the following methods:
 - Use the URL:


```
<WebCenterInstance>/siteconfig.jsp?key= WC_CLEANUP_ENABLE_STOPPING &value=0
```
 - or directly by a SQL script.
- To prevent Starting the cleanup tool from the browser, set the ProfileDefaults record WC_CLEANUP_ENABLE_STARTING to 0. You can use either of the following:
 - Use the URL:


```
<WebCenterInstance>/siteconfig.jsp?key= WC_CLEANUP_ENABLE_STARTING &value=0
```
 - or directly by a SQL script.
- To re-enable the Cleanup of Users, set the ProfileDefaults record WC_CLEANUP_USERS to true. You can use either of the following:
 - Use the URL:

```
<WebCenterInstance>/siteconfig.jsp?key= WC_CLEANUP_ENABLE_STARTING &value=true
```
 - or directly by a SQL script.



Note:

Once set, the value can no longer be changed from the siteconfig.jsp, but only altered in the database directly. This allows efficiently blocking these features from being executed from the browser.

System History Logs

All changes/events in this page are recorded and stored in the **System History** page for Administrator users. Read this page on how to access the [records](#).

18.18. Site Service

18.18.1. View Log Files

Go to **Admin > Configuration > Site Service** to:

- see system settings (click **Show Site Defaults**),
- set the maximum number of days to retain log files:

You can specify the **Max Age of JBoss Log Files** field as the number of **days** you want to retain the logs.



Important: If you set a very high number of days, it will affect your hard drive disk space over time. You have to watch the disk space and delete the log files manually.

- download **JBoss** and **Tomcat** log files.

18.19. System History

WebCenter system configuration changes can be viewed in one location by Administrators. Navigate to **Admin > Configuration > System History** and view the following information:

- Event Date
- Type of the event
- User who made the change
- Comment (system generated)
- Change comment (provided by the user)

The events can be filtered and viewed based on the date, the operator or the delegate or the event type.

You can choose to view all the events or can specifically choose the events in which you are interested. By default, the first 200 records matching the filter and sorting option are shown, however, this can be increased or decreased, and it is possible to print the results matching the filter.

Events are tracked in the following pages in WebCenter

All Events	
▶ Asset Management Connection Events	
▶ Assisted QA Tool Events	
▶ Attribute Category Events	
▶ Attribute Events	
▶ Characteristic Events	
▶ Company Events	
▶ Dashboard Events	
▶ External API Connection Events	
▶ External Web Connection Events	
▶ File Storage Configuration Events	
▶ Generic Configuration Events	
▶ Global Saved Search Events	
▶ JavaScript Rule Action Events	
▶ Location Events	
▶ Menu Events	
▶ My Work Section Events	
▶ Project Events	
▶ Project Status Events	
▶ Push Through Configuration Events	
▶ Report Events	
▶ Restricted Set Events	
▶ SSO Instance Events	
▶ Specification Events	
▶ Task Status Events	
▶ Task Type Events	
▶ Workflow Approval and Tunnel Client Events	
▶ Workflow Connection Events	

Each of the page has different set of events captured and stored in history based on the nature of the event.

18.20. Authentication

Single Sign-on allows you to use a centralized system for authentication. For instance, you can use a single credential on many systems including WebCenter.

You can configure:

- a single set of credentials for all systems (like LDAP)
- free access to WebCenter without a separate login page.


The two previously existing authentication mechanisms ([LDAP](#) and simple password authentication) have been modified adding extra flexibility. You can either make all users authenticate with LDAP by default or configure multiple LDAP servers.



Note:

You need a WebCenter Advanced License to configure more than a simple password authentication and one LDAP server.

Table: Single Sign On Definitions

Single Sign-On System	The system providing authentication, (e.g. yammer, SAML, LDAP)
System Administrator	The administrator who deals with WebCenter from both an application point view and from an IT (operating system and database) point of view.
Administrator	WebCenter Administrator
SSO plug-in (SSOP)	The full deployment of an integration with a Single Sign-On system. Will also be used as synonym for the implementation of the Java 'ServiceProvider' concept. The Service Provider is in fact part of the deployment of the plug-in.
Single Sign-On Instance configuration	Defines an Instance and its place (priority and availability) in the system.
Plug-in specific Instance configuration	Part of the instance configuration that may differ depending on the plug-in.
Single Sign-On Instance	A plug-in can have multiple instances. Its behavior is determined by the plug-in and the instance configuration.
User Configuration	Configuration information for a specific user
Instance Specific User Configuration	The user configuration dependent on the SSO instance.
	 Note: This configuration is dependent on the instance and not the plug-in.
Standard Login Page Instance	The standard login page.
Custom Login Behavior Instance	The alternate page (or dialog) when a user is not authenticated.
Default Single Sign - On Instance	The instance that will be selected by default.
User	Has access to WebCenter after login.

Database	Relational database. The primary location for persisting data in WebCenter.
----------	---

18.20.1. Add a plug-in to the system

You can add plug-ins that are not WebCenter standard by placing a set of `.jar` files in `<installation_root>/ApplicationServer/JBoss/sso-plugins` folder.

These files contain the plug-in implementation and the associated libraries. To remove a plug-in, you have to stop the application server. Restart the application server after replacing the `.jar` files.



Note:

1. You do not have to restart any of the WebCenter servers after installing a new plug-in.
2. When an Application Server is being updated, any existing SAML plugin version that might have been there already when updating is replaced with the latest version provided by the WebCenter installer.

18.20.2. Add a Single Sign-On Instance

1. From the **Configuration > Authentication (SSO)** page, click on the **New SSO Instance** link.



Note: You cannot have more than one **basic** authentication.

2. Give the new Instance a **Name**.
3. Select the **Plug-in** from the drop down.
The **Plug-in** drop down will display all the SSO Plug-ins available in that particular WebCenter.
4. Click **Create**.

When the instance is created successfully, you will return to the **Single Sign-On Instances** list. The new instance is also displayed as the last instance.

18.20.3. Manage Instances

Go to **Configuration > Authentication (SSO)** to get an overview of the configured **Single Sign-On Instances**.

Enabling the **Allow Project Managers to change their users' access to SSO instances** option will allow the Project Managers to modify their users **authentication** settings at the user **profile** page.

When this is disabled, Project Managers will be prevented from changing their user's access to SSO instances. The PMs will not be able to see the **Authentication** drop downs to the user's profile. In addition, the disabled instances will be hidden.

Single Sign-On Instances											New SSO Instance
<input type="checkbox"/> Allow Project Managers to change their Users' access to SSO instances.											
Name	Plug-in	Password Recheck	ID	Priority	Enabled	Listed	Try Next	Configure	Default	Delete	
Basic password authentication	Basic password authentication	Yes	00002_0000000244	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Allow	delete	
SAML Esko	SAML 2.0 (v1.0.11)	No	00002_0000000247	2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	edit	Allow	delete	
LDAP	LDAP password authentication	Yes	00002_0000000245	3	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	edit	Deny	delete	
Test SAML	SAML 2.0 (v1.0.11)	N/A	00002_0000000248	4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	edit	Deny	delete	

Name: Name of the Single Sign-On Instance. Will be used for display in multiple places.

Plug-in: Name of the plug-in to which the Single Sign On Instance belong.

Password Recheck: Whether a particular instance supports password re-entry (upon submitting approval) or not.

- **Yes** or **No** : if the system supports password re-entry
- **N/A**: indicates that the information is currently not available. For example, if the instance is not enabled or fails to load.

ID: the internal ID. As an administrator, you can use this while addressing an SSO provider directly. For example, when redirecting from an external system.

Priority: determines the order in which the Instances are attempted for authentication. Also determines the display order in several places (user settings and log-in page).

Enabled: indicates whether the instance is operational. You have to enable an instance to use it for authentication. The options to change Instance specific user settings is only available for the enabled Instances.

Listed: indicates that an explicit log-in button will be available when the Instance is enabled.

Try Next: when this is enabled, the next Instance will be tried after the default log-in fails. The log-in attempts will stop at the first enabled Single Sign-On Instance when the **Try Next** option is disabled.

Configure: displays the **Edit** links to configure the plug-in specific instance configuration.

Default: you can configure whether a user is allowed to or denied from using an Instance. You can allow some users to authenticate at a specific Instance. The default can be changed in the user specific configuration.

Delete: use the **Delete** link to delete an Instance.

18.20.4. Configure a Single Sign On Instance

To access the Single Sign On Instance configuration page, click the **configure** link from the instances row.

1. Go to the **Configuration > Authentication (SSO)** page. You will see the *overview table* of the configured **Single Sign-On Instances**.
2. Click **Edit** link in the row corresponding to the Instance to be configured. This opens a plug-in specific configuration of an existing Single Sign On Instance.



Note: You cannot edit the **Basic Password** configuration.

3. Modify the configuration details.

4. **Save.**

To make it active, you need to check the **enabled** option. To make it listed on the login page, enable **listed**. When you create a new User, the login options are determined by the status in the **default** column.

If an instance is in the **denied** status for a user, he/she will not get that option listed on the login page. The status specified in this page becomes the default in the user profile page.

18.20.5. 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.

18.20.6. Configure LDAP(S)

LDAP

LDAP (Lightweight Directory Access Protocol) is an application protocol for querying and modifying directory services running over TCP/IP.

In the context of WebCenter, it allows you to let users sign on to WebCenter with the same user name and password they use to log on to the corporate network.

LDAPS

LDAPS is the more secure variant of the protocol, and it uses SSL connections instead of plain (i.e. Unprotected) connections. It requires you to install certificates on the server, as described in [Install Certificates for LDAPS on the Application Server](#).

While logged in to the WebCenter web interface as an administrator:

1. From the **Configuration > Authentication (SSO)** page, click on the **New SSO Instance** link.
2. Give the new Instance a **Name** and select the **Plug-in** as **LDAP password authentication**.
3. Click **Create**.
A new LDAP instance will be created.
4. In the [overview table](#) of the configured **Single Sign-On Instances**, click **Edit** link corresponding to the LDAP instance.
5. Modify the configuration details.
6. Enter the name or IP address of the **LDAP Server**.

Example: esko.com.

7. Type the **User Distinguished Name (DN)**.

Example: CN=BG System,OU=Users,OU=Gent,OU=Belgium,OU=Locations,DC=esko,DC=com.

8. Provide the **Password** for the user you specified in the **User Distinguished Name** field in the previous step, and confirm it.

9. Enable the option **Use secure connection (LDAPS)** to encrypt all communication between WebCenter and the LDAP server.

10. You can specify additional elements in the **Advanced settings** field. For example, you can change the default port that is used in the case of LDAP over SSL. Use the various lookup keys to match the LDAP field against the WebCenter properties and then change the default LDAP keys. See below:

Options	Description
ssl.port	Default LDAP secure connection port The default value is 636.
lookup.userinitials	AD path used for LDAP login name lookup. The default value is <code>sAMAccountName</code> .
lookup.firstname	First name key <code>givenName</code> (default)
lookup.lastname	Last name key <code>sn</code> (default)
lookup.mailid	Mail id key <code>mail</code> (default)
lookup.phonenumber	Phone Number key <code>telephoneNumber</code> (default)
lookup.mobilenumber	Mobile Number key <code>mobile</code> (default)
lookup.title	Maps to the Function in WebCenter <code>title</code> (default)
autoupdate	Enable this to look up user info and to update during log in (values: 0 or 1). Specify the value as 1 The default is 0.
enforce	Enable this to make the user info read only for the user (values: 0 or 1). The default is 0.

11. Click **Save** to save the setup.



Note: Every time you change a setting on the **LDAP Setup** page, you must re-enter the full LDAP credentials.

18.20.7. Single Sign On Log-in types

You will have different SSO login behavior depending upon the configuration and priority of the Single Sign On Instances.

- **Standard Login Page Instance (SLPI):**

This will show the login page when not logged in. LDAP and plain password authentication are examples.

- **Custom Login Behavior Instance (CLBI):**

CLBI might redirect you to a portal or show a dialog. SAML is an example of the CLBI type.

WebCenter 14.0.1 supports the SAML plug-in. Using this plug-in, WebCenter can communicate over the SAML 2.0 protocol with Shibboleth, PingFederate and Active Directory Federation Services (ADFS). WebCenter users can authenticate using their company-wide account. This will provide seamless access to WebCenter.



Note:

You need WebCenter advanced license to enable this feature.

The plug-in supports the following SAML 2.0 profiles:

- SP POST – IdP POST
- Unsolicited SSO (SP POST – IdP HTTP Redirect)



Note: SAML Artifact binding is not yet supported



Important: We recommend that you contact Esko solution architects for configuring the SAML plug-in.

You can also access the login page by directly navigating to login.jsp. The different login behaviors can again be triggered if the buttons for the wanted instances are listed on the login page.

A plug-in may override the logout behavior. For example, logging out may lead you to a portal.

18.20.8. Single Sign on Passwords on Approval

When the [Require password for approvals/rejections](#) setting is enabled, your user is required to provide his password during approval. This depends on the Single Sign On Instance used by the user.

When the Instance supports this setting, the password is the same as the one required for the Single Sign On authentication.

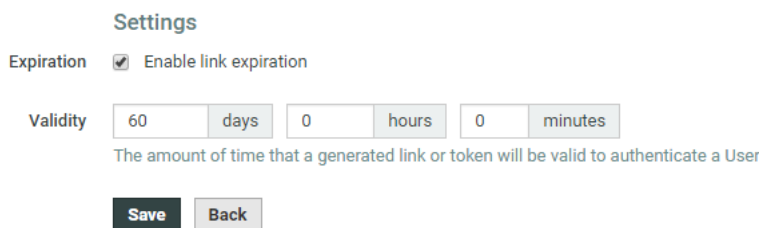
18.20.9. Token Authentication

You can use **Token** based authentication to grant access to WebCenter without user credentials. For instance, you can grant access to the document approval page for approval actions using a document link.

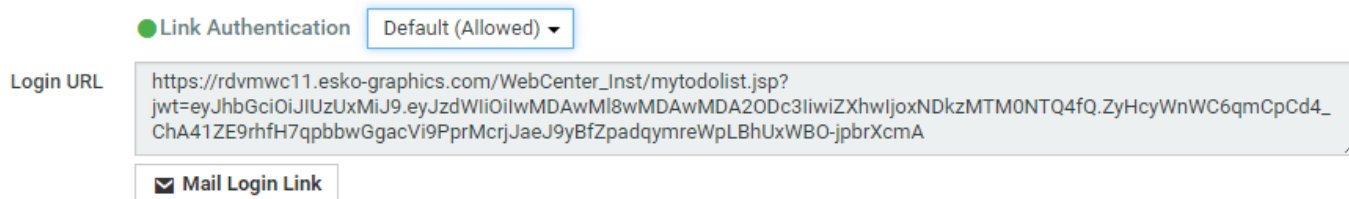
- **Token:** A token is a piece of string that encodes various user data (username, expiration date, signature, etc.) which acts as a substitute for credentials.
- **TokenAuth:** The WebCenter SSO plugin that is able to generate such tokens for WebCenter users and authenticate users based on these tokens. This is installed during WebCenter installation.:

To allow Token based authentication, follow the steps below

1. [Add a Single Sign-On Instance](#) on page 436 specifying a **Token Authentication** plugin.
2. [Configure a Single Sign On Instance](#) on page 437. Make sure that the instance is in the **Allow** status.



3. Specify the **Enable link expiration** and **Validity** parameters and Save.
The **Enable Link Expiration** is on by default and the **Validity** is set to 60 days. This means that all the links sent to authenticate using this instance will be expired after the **validity** period.
4. To send a login link to a User, click **Mail Login Link** from the User **Profile** page. The user can click on this link to login.



The default landing page is the **My Work** page. If the token is expired, the user will see the Login page with an error.

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.

18.20.10. SAML Authentication

The SAML plugin will make it possible for WebCenter to communicate over the SAML 2.0 protocol with Federated Identity Provider Services such as Shibboleth, PingFederate and Active Directory Federation Services. This allows the users to authenticate through a Single Sign On (SSO) mechanism with WebCenter using their federated identity.

The configuration page of an instance of the SAML 2.0 (v1) plugin consists initially out of four sections:

- **SAML Profile** – Used to specify which SAML profile to use.
- **Identity Provider Details** – Used to specify and submit metadata of the Identity Provider, as well as configuring general customer specific settings.
 - **Identity Provider Metadata:** Update the URL to the meta data of the IdP or alternatively upload a file containing the information.
 - **Identity Provider Entity ID:** Specify the ID to be selected from the metadata
 - **Links WebCenter Username to :** specify the field where WebCenter will look for the User name in the response. It can either be Subject Name ID or the Attribute where you specify the Attribute Name.
 - **On error URL :** specify the URL where the user will be redirected when error occurs in the authentication process
 - **On Logout URL:** specify the URL where the user will be redirected during the Logout process
- **WebCenter Service Provider Details**
 - **Entity Id:** This id will be auto generated when you save this page. By Default it points to the current WebCenter Instance.
 - **Assertion Consumer URL :** This URL will be auto generated when you save this page.
 - **Name Id Format:** Specify the format of Name Id of the subject.
 - **Formatting:** Select **Use URL Parameters** if URL parameters has to be used in Assertion Consumer Service URL.

Example:

https://domain.com/WebCenter_Inst/sso.wcr?ssoiid=00002_0000000004

Or:

https://domain.com/WebCenter_Inst/sso.wcr/00002_0000000004/end.wcr

- **Signing:** If the request has to signed, upload the signing certificate.

To be able to sign these outgoing authentication requests, WebCenter needs a private key and its corresponding certificate. These can be uploaded in a Java keystore in the **"SP Keystore"** field. This field appears along with the **"Keystore Password"**, the **"Key Alias"** and the **"Key Password"** fields when the **"Sign Authentication Requests"** option is enabled.

- **User Action Digital Signature:** By selecting this option, you can use your SAML for credential validation, when Approving Documents or for completion of Tasks.
- **User Provisioning:** Enable the option **Allow User Creation on First Login** to create new user in WebCenter.

Following SAML attributes are required for the new user creation.

Attribute name	Type	Containing	Required
WCR_USER_FIRST_NAME	String	The first name of the user.	No
WCR_USER_LAST_NAME	String	The last name of the user.	Yes
WCR_USER_EMAIL	String	The email the user.	Yes
WCR_USER_PHONE	String	The phone number of the user.	No
WCR_USER_MOBILE	String	The mobile number of the user.	No
WCR_USER_FUNCTION	String	The job title of the user	No
WCR_USER_GROUPS	(Multi) String	The names of the WebCenter groups to which the user should be added.	No

- **Authorization:** Select **Synchronize User Groups on login** to synchronize the user membership with the groups when the user log-ins to WebCenter.
- Save the changes and enable the SSO Instance in **Single Sign-On Instances** page.

Now the IdP details from the URL or the uploaded file is displayed.

Check the information updated by clicking on **WebCenter Service Provider Metadata** which is used to display the Service Provider metadata of WebCenter. This information can now be shared with the Identity provider.

18.20.11. How to Login to WebCenter when the Single Sign On is broken

You can access WebCenter overriding the Single Sign On configuration in emergency situations. This can happen when the configured external system is down or when a mistake occurs leading to a broken configuration.

Use basic password authentication locally from the web server to gain access to WebCenter.



Note:

- You need direct access to the web server operating system to execute this.
- You have to remember a basic authentication password of a WebCenter Admin user. Or you should have enabled **Forgot Password** feature.

System History Logs

All Single Sign on related events like

- **Single Sign on Instance created**
- **Single Sign on Instance deleted** and
- **Single Sign on Instance changed**

are recorded and stored in System History. Read this page on how to access the [records](#)

18.21. Named Configurations

A **Named Configuration** is a collection of Configuration items. These items can be Project Templates, Task Types, Dashboards, and so on. Using Named Configurations eases the configuration of WebCenter.

To navigate to **Named Configuration**: go to **Admin > Configuration > Named Configurations**.

The following features are available:

- Named Configurations can show all the dependencies of the items in the Configuration. This allows for a deeper understanding of the way the system is configured. See [Creating a Named Configurations](#) as mentioned below.
- Named Configurations can be compared with other systems. This is useful when migrating a setup to a different environment. See [Compare Systems Using Named Configurations](#).
- Named Configurations can be used to filter the System History to show changes related to your Configuration. See [View History using Named Configurations](#).

Creating a Named Configuration Bundle Configuration Items in Named Configurations

When creating a named configuration, you bundle configuration items and give the bundle a name. You can search for the configuration items per type, e.g. Dashboards, Projects, Attribute Categories and many more. Once these are added and saved, you can easily get an overview of the configuration items and the other configuration items that are part of the configuration because of dependencies.



Note: Documents can be included per project. To include documents to the Named Configuration you can add a Project or Template to the configuration and click **Include Documents**.



Note:

- Only non-started tasks are included in a Named Configuration.
- There is a limit of 1000 documents and a 1000 tasks per Named Configuration. If there are more documents or tasks in a Named Configuration, a warning is shown on the Named Configuration Summary page. In this case only the first 1000 items will be part of the Named Configuration.

Supported Configuration Items

Top-level Configuration Items. These items can manually be added to a Named Configuration.

- Dashboards
- Projects
- Templates
- Attribute Categories
- Task Types
- Saved Searches
- Roles

Configuration Items that can be included via a top-level Configuration Item (as dependency):

- Attributes and Restricted Sets: these come along when including Attribute Categories or Task Types
- Task Statuses come along with Task Types
- Characteristics
- Companies/Locations
- Documents: come along with projects and templates, but only when configured (see tip above)
- Tasks: only non-started tasks will be part of the Named Configuration
- Groups
- Icons
- Project Statuses
- Task Statuses
- Workflow Connections / DAM Connections / Asset Management Connections

For more details on what data is included in Named Configurations, have a look at the following Knowledge Base Article: [What is supported in Named Configurations?](#)

Compare Systems using Named Configurations

When comparing two systems using System Comparison, it is possible to select a Named Configuration. When a Named Configuration is selected, only the items inside that Configuration, along with their dependencies, are compared to the other system. That way, you can see only the information that is relevant to you.

View History using Named Configurations

For any Named Configuration in the system, it is possible to view the Configuration History. This takes you to the Configuration's History page, where all the events of the items inside that Configuration, along with their dependencies, are displayed. It combines both System History Events and Project History Events. That way, you have clear history of your full configuration without System History information that is not relevant to you and at the same time, you can see a combined view of the Project History Events of all projects you're interested in.

The Configuration History only displays entries from your named configuration. Tasks that have already started are never part of a Named Configuration, only non-started tasks are. Documents are only included when configured with a checkbox per Project/Template on the Named Configuration Edit page.

It is possible to filter the events based on date, event type and user (last) name.



Note: The history of when items are added and removed from a Named Configuration can be seen by clicking the **View History** button at the top of the list of Named Configurations.

Exporting and Importing Named Configurations

This feature enables an Admin user to export named configurations from a system, and then import those to a different system.



Note: Only when the file contents are different on the target system, a new version of the document is created.

Exporting Named Configuration

Supported items for exporting Named Configuration:

- Attributes and Restricted Sets
- Attribute Categories
- Projects/Templates
- Documents

- Characteristics
- Task Types
- Named Configuration Object
- Dashboards
- Saved Searches

To export a named configuration, perform the following steps:

1. Navigate to **Configuration > Named Configurations**.
2. Select a named configuration.
3. **Named Configuration Summary** page opens. Click **Export**.
4. **Named Configuration** gets downloaded.

Importing Named Configuration

Supported items for importing Named Configuration:

- Attributes and Restricted Sets
- Attribute Categories
- Projects/Templates
- Documents
- Characteristics
- Task Types
- Named Configuration Object
- Dashboards
- Saved Searches

For more details, see [What is supported in Named Configurations?](#)

To Import a named configuration, perform following steps:

1. Navigate to **Configuration > Named Configurations**.
2. Click **Import Configuration**.
3. **Configuration Import** page opens. To know more about Configuration Import page, see [Understanding the User Interface - Configuration Import](#).
4. Click **Browse**, and select the named configuration you wish to import.



Note: The following items are not imported, but they are correctly linked to the imported configuration on the target system if they exist:

- DAM Connections
- Workflow Connections
- Company/Location
- Push through folders
- Jasper Reports
- Lists
- JavaScript Rules
- Menu
- Content Languages



Note: If the chosen named configuration is not supported, **Import** button remains disabled.


Note: Reasons for the import to be blocked/disabled

- The item is not supported: If there are items in the Named Configuration that are not supported for import, the import is blocked/disabled. This is done to prevent users from importing damaged partial configurations.
- Conflict with items in the target system: There are instances where the system should not replace an existing item on the target system. When this occurs, we call it a blocking conflict. The import is disabled.
- Target system is not configured: In some cases, the Named Configuration refers to configuration items that are environment specific. In such case it does not make sense to import these items into the target system. The set up does not work, if the items are unavailable. For this reason, the import is blocked/disabled until the configuration is created (manually) on the target system.

5. Click **Import**.

6. After the named configuration is successfully imported, **Import Successful** message is displayed.

Limiting the extent of Named Configurations by implementing Boundaries.

At times, administrators may prefer excluding specific dependencies from a Named Configuration item, to minimize the extent of modifications made during import. This can be done by adding boundaries to a Named Configuration. This functionality enables administrators to selectively omit certain dependencies, narrowing down the range of changes made when importing these configurations.

For a Named Configuration with a boundary and an excluded dependency:

- On Export: The excluded dependency will not be included in the export.
- On Import: The excluded dependency will not be included and modified during the Import. The Named Configuration can be imported solely if the excluded items are preexisting on the target system.



Note: When the excluded item is not available in the target system, a warning will be shown, and the Import will be disabled.

- Comparison: For an excluded dependency, the comparison will be limited to their names, and no further in-depth comparisons will be conducted.

The configuration history does not encompass entries for items that have been excluded, along with their respective dependencies.

Any dependency that has been excluded will be struck through in the Details panel and it will be added to the **Manually Excluded Dependencies** section.

The items listed below can be excluded or re-included in the named configurations:

- Project/Template
- Dashboard
- Attribute Category
- Task Type
- Saved Search
- Roles
- Groups
- Lists
- JavaScript Rule Actions

How to identify which entity to exclude?

To establish an appropriate boundary for your configuration, start by identifying an irrelevant item. Then, move upwards using the **referred by** information in the details panel until you find a relevant item that should be included. The last irrelevant item you encounter during this process will serve as a suitable boundary for your configuration.

Steps to enable and disable boundaries:

Dependencies can be excluded in the Named Configurations by performing the following steps:

1. Navigate to **Configuration > Named Configuration**
2. Select a Named Configuration item.
3. On the Named Configurations page, under **Dependencies**, select an item.
4. A panel displaying details about the item opens, revealing its dependencies and indicating which other items are referencing the selected item. You can navigate to these related items by clicking them.
5. Select the item that you want to set a boundary. Click **Exclude Item**.

To re-include an excluded item, click the excluded item, and then click **Do Not Exclude**.

18.21.1. Understanding the User Interface - Configuration Import

This section provides information about Configuration import page explaining the features that can be utilized by users ensuring smooth impact analysis process.

Configuration Import

Exported File Name
TL_WCR-18399 NC_Export_1707213901595.zip

Export Date and Time
Feb 6, 2024 at 15:35

Exported
Maithri

Imported File Name
TL_WCR-18399 NC_Error zip (1) (2).zip

Import Date and Time
Mar 13, 2024 at 12:05

Imported
User1 A

Import Successful

1

 Show Details

Attribute (11)

File

- TL_WCR-18399 Area Att
- TL_WCR-18399 D&T Att
- TL_WCR-18399 Distance Att
- TL_WCR-18399 DocRef Att
- TL_WCR-18399 Float Att
- TL_WCR-18399 Integer Att
- TL_WCR-18399 RichText Att

4

Import Successful

#	Date (GMT+05:30)	Type	Object
1	Mar 13, 2024 at 12:05:38		
2	Mar 13, 2024 at 12:05:39		

SL NO	Description
1	Show Details: When enabled, expands the items, providing a detailed comparison of the differences between the uploaded named configuration file and the targeted system.
2	Search: This function enables users to locate items based on their names.
3	<p>Filter: This function allows users to filter items based on labels, such as Modify, Add, Warning, Error, and No Change, providing a clear view. The Labels can be listed as follows:</p> <ul style="list-style-type: none"> • Modify: Indicates that the item exists in the system but with a different value or properties. This item will be modified during the import. • Add: Denotes that the item is absent in the targeted system and will be added on import. • Warning: Alerts users that the item cannot be imported, with a warning message displayed. • Error: Indicates that the item has an error that blocks the import. • No Change: Signifies that the item already exists and requires no modification.
4	Log Report: Navigating to this tab displays Impact analysis report.

19. Configure Microsoft Office Files for Viewing

You can view Microsoft Office documents (and other file types) in WebCenter (16.1 onwards). This feature requires configuration where you should specify the file extensions and corresponding OBGE Workflow tickets.

Read in [Configure Viewable Other File Types](#).

19.1. Steps to Configure Viewable Other Files

1. Modify: `WebCenter_Instance/custom/customizationConfig.xml`.

Inside this configuration file, add a 'SupportedViewableOther' section. Within that tag, you can place multiple instances of the extension tag, where you can define the file extension and the value for ViewGenerationTicket (which refers to a Ticket on the OBGE).

```
<SupportedViewableOther>
    <extension value=".doc"
    ViewGenerationTicket="MSOffice_to_SVG"/>
    <extension value=".docx"
    ViewGenerationTicket="MSOffice_to_SVG "/>
    <extension value=".ppt"
    ViewGenerationTicket="MSOffice_to_Pixel"/>
    <extension value=".pptx"
    ViewGenerationTicket="MSOffice_to_Pixel"/>
    <extension value=".xls"
    ViewGenerationTicket="MSOffice_to_SVG"/>
    <extension value=".xlsx"
    ViewGenerationTicket="MSOffice_to_SVG"/>
</SupportedViewableOther>
```



Note:

WebCenter allows deployment of multiple web instances on one server and the configuration of customizationconfig.xml is done per instance. However, the Workflow Engine and Dashboards are shared across all instances. To make sure the settings work in a Workflow and in Dashboards, add the following to the customizationconfig.xml file:

```
<MainInstance
    value="true"/>
```

This should only be added to one WebCenter Instance. If it is added to multiple instances, these configurations will overwrite each other. If it is not present in any instance, the extension list will be ignored in Workflows and Dashboards.

2. You need to create Custom Workflow Tickets (with a ScriptRunner Node) for OBGE according to the mapping made in the customizationconfig.xml. See the examples for such Workflow Tickets in [Recommendations and Examples](#) on page 453.

- The ScriptRunner node should refer to the right server (can be the OBGE itself) where the right conversion Script is located.

Read more in: [Pixel Based Viewing Vs SVG Viewing](#) on page 452

19.2. Pixel Based Viewing Vs SVG Viewing

You can view documents in pixel based or vector based formats depending on the view files that are generated (as specified in the [configuration](#)).

Pixel based viewing

Use the pixel based setup if you need the graphical compare and channel information for the documents. This setup will not render sharp text or text extraction.

To enable pixel based viewing, we propose the following structure in the OBGE Workflow Ticket:

- A **Scriptrunner** node to convert *Other* document to a viewable type, e.g. PDF.
- A **Select Document** node to select the generated document.
- A **Prepare for Viewing** node to generate the pixel-based view files.
- A **Scriptrunner** node to remove the temporary files created in the first step.

See [Recommendations and Examples](#) on page 453.

Vector based viewing

A vector based setup will enable you to extract text and view sharp text in deep zoom viewing. However, the graphical compare and channel information are deactivated in this setup.

To enable vector based viewing, we propose the following structure in the OBGE Ticket:

- Configure **Scriptrunner** node to convert *Other* documents to SVG files.
- For single page documents, an SVG should go straight into the **Job** folder, which is passed as a parameter to the script.
- For multi-page documents, an SVG for each page should go into a sub-directory of the Job Folder with the page number as folder.
- We recommend generating a thumbnail for each page in the Script file. These need to go in the same folder as the SVG file. The following files are needed:
 1. <Document_name>.JPG, which is 200x200 pixels
 2. <Document_name>_50.JPG, which is 50x50 pixels
 3. <Document_name>_100.JPG, which is 100x100 pixels

See [Recommendations and Examples](#) on page 453.

19.3. Recommendations and Examples

The setups detailed below will create 'viewable files' in two steps. The Microsoft Office documents will be converted to PDF. In the next step, the PDF documents will be converted into SVG view files or pixel based view files.

We recommend LibreOffice to convert the document to a PDF. This will just execute a "Save as PDF" on the document. You can use MS Office which requires licensed MS Office to be present on the server.

The recommended solutions given below refers to the Tickets and Scripts given in the example folder.



Note: Remember to fill out the file paths mentioned in each of these Scripts.

See this [KB Article for example scripts and tickets](#).

20. Connecting to Automation Engine

You can connect to your or a client's Automation Engine from WebCenter. Using this connection, you can:

- send files
- push metadata
- launch a workflow

To establish a successful connection, you need to configure both the Automation Engine and the WebCenter settings.

Read about configuring the Automation Engine [here](#).

You can connect to Automation Engine:

- in the same LAN or publicly available through an **Automation Engine Host Address**



Tip: The Host Address may look like '192.168.1.1' or 'aeserver.brand.com'.

- via a tunnel when not publicly available or not in the same LAN. Read in: [Create a Tunnel between WebCenter and Automation Engine](#) on page 454

20.1. Create a Tunnel between WebCenter and Automation Engine

When the Automation Engine is not situated in the same LAN and not available publicly, you need a tunnel to send exchange workflow commands and data between WebCenter and Automation Engine. To create such a tunnel, follow the steps below:

Web

1. [Create a **Workflow approval and tunnel client**](#).

When WebCenter and Automation Engine are not on the same LAN, this **workflow approval and tunnel client** will establish a bi-directional communication.



Note: The Automation Engine Pilot needs to have the **workflow approval client** credentials to send messages to WebCenter.

2. Enter the **Workflow approval and tunnel client** credentials in the Automation Engine configure tool.

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

3. **Save** this configuration.

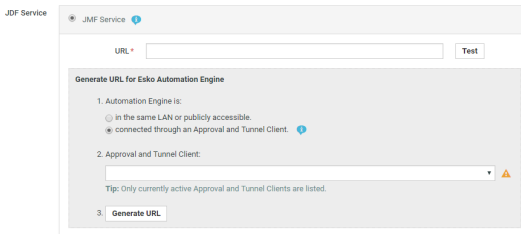


Tip: After configuring a new WebCenter site, it is recommended to close your Pilot and start it again in order to see the updated list of WebCenter sites in your tickets.

4. Optionally, you can check the connection between Automation Engine and WebCenter from the **admin > configurations > workflow and tunnel clients** page. Click the **Start Monitoring** link to see if the connection is active.
5. Click **Admin > Configuration > Workflow Connections**.
The **Workflow Connections** page appears, listing the workflow connections already created (if any).
6. Click **New Workflow Connection**.
7. Enter a **Configuration Name**.
8. Select the **Connection type** as **JDF Service**.
9. Now, specify the **JDF Service** as **JMF** service.



Note: You need **JMF Service** to connect to Automation Engine if it is not in the same LAN or not publicly available.



10. Specify that your Automation Engine is connected via the **Approval and Tunnel Client** created in step 2. Select the **Approval and Tunnel Client** from the drop-down and click **Generate URL**.



Warning: A **Workflow Connection** connected through an **Approval and Tunnel Client** will block one concurrent license.

11. Enable the **Active Connection** option to activate this workflow connection.



Note:

If you disable this option, there will be no synchronization between WebCenter and your workflow system, but the connection data will be saved, so you can reactivate it later.

12. Click **Create**.

21. SmartNames

A SmartName is a variable that refers to a value that is resolved according to the context, for example [Project Creation Date] refers to the creation date of the current project. It is a placeholder value for a property which will be replaced with an actual value when placed in the right context.

You can use SmartNames in different pages in WebCenter. They are displayed between square brackets.

Folder:


You can also combine them with plain text.


Folder:

Using SmartNames to specify a setting ensures that you can use the existing information without having to remember it and thereby reducing errors.

For example, if you use [Parent Project Name], the smartname will resolve to the name of the existing Parent project(s) taking the current Project as the search context.

21.1. Using a SmartName

You can use SmartNames anytime you see the SmartName symbol  in a text field.

1. Click .
2. In the **Select to append a SmartName** field or **Insert a SmartName** dialog, select the desired SmartName using one of the following methods:
 - a) During the **autoname** generation, browse to the desired SmartName in the **Select to append a SmartName** field and select.
Alternatively, you can also double-click the SmartName.
 - b) In the **Search** using SmartNames, you can scroll in the main **sections** list and double-click on the desired SmartName.
You can also search for a SmartName.
 - The search field has support for AND and OR operators.
 - Spaces can be used and will act as AND operators.
 - Semicolons can be used and will act as OR operators.
 - You can place your search term inside double quotes (") when an exact match is required.



Tip:

- You can type the first letters of the SmartName you are looking for to show it in the list.

21.2. List of Available SmartNames

The following is the list of available SmartNames

Section	SmartName Available	Workflow	Search	AutoName
Attributes (Document)	All WebCenter attributes are available in both Workflow and search	#	#	
Attributes (Project)	All WebCenter attributes are available in both Workflow and search	#	#	
Document	[Document Description]	#		
	[Document Extension]	#		
	[Document ID]	#		
	[Document Name]	#	#	
	[Document Version ID]	#	#	
	[Document Version Number]		#	
	[Input Document Version Ids]	#		
	[All Document Version IDs of Document]		#	
	[All except Latest Document Version ID]		#	
	[Document Version Revision]		#	
	[Document Version Project]		#	
Other	List	#	#	
Project	[Customer Legal Name]	#		
	[Customer Location]	#		#
	[Customer Name]	#		#
	[Customer ShortName]	#		#
	[Due Date]	#		
	[Project Description]	#		
	[Project ID]	#	#	
	[Project Name]	#	#	
	[Project Manager]	#		
	[Project Manager Name]		#	#

Section	SmartName Available	Workflow	Search	AutoName
	[Project Manager Location]		#	#
	[Project Manager Location Code]		#	#
	[Project Manager Last Name]		#	#
	[Project Name]	#	#	
	[Project Template Name]		#	#
	[Parent Project ID]		#	
	[Customer Location Code]			#
	[Salesperson]	#		
	[Project Creation Date]			#
Specifications	All WebCenter Specification available only in Workflow	#		
Task	[Workflow ID]	#		
Text/Table Content	[Content Status]	#		
	[Element Type]	#		
	[Language Status]	#		
	[Master Languages]	#		
	[Text Content Value]	#		
	[Table Content Value]	#		
Dates	[Current Date]	#		
	[Project Due Date]	#		
	[workflow Due Date]	#		
	[workflow Start Date]	#		
User	[Requestor User Name]		#	#
	[Requestor First Name]		#	
	[Requestor Last Name]		#	#
	[Requestor Location]		#	#
	[Requestor Company]		#	#
	[Requestor Company Location Code]		#	#
Email	[Project Manager (E-mail)]	#		
	[Sales Person (E-Mail)]	#		
	[Workflow Task Owner (E-Mail)]	#		

Section	SmartName Available	Workflow	Search	AutoName
Groups	All Groups available in WebCenter	#		
Roles	All Roles available in WebCenter	#		
Users	All Users available in WebCenter	#		
Iteration	Iterator Value	#		



Note: The **EditField** SmartName can be used only in the Suffix.

22. Bill of Materials

22.1. What is a Bill of Materials?

A Bill of Materials (or "BOM") is a list of all parts and assemblies required to build a complete shippable product. It shows what will be created and delivered during a project.

In WebCenter, this is a list of documents representing the deliverables. The documents can be actual production files or placeholder documents.

22.2. Enabling the Bill of Materials Feature

By default, the Bill of Materials functionality is disabled for the entire WebCenter system. This means that Bill of Materials features will not be visible.

To enable it, do the following:

1. Go to **Admin > Preferences > General**.
2. Under **Bill of Materials**, select the **Use Bill of Materials** option.
3. Click **Save**.

22.3. Viewing a Project's Bill of Materials

Every project has a Bill of Materials, which is by default empty.

If [the Bill of Materials feature is enabled](#), you will see a **Bill of Materials** tab on your Project Details page. The tab header indicates how many documents are linked to the Bill of Materials.



Note:

You will only see the document(s) in the Bill of Materials (and their attributes) if you are either:

- an Administrator,
- the Project Manager,
- invited to the Project, with view permissions on **all** documents in the Bill of Materials.

Otherwise, you will see a message stating that you don't have permissions to view the document(s) in the Bill of Materials.

Project: Drupa16_Library for Folding Carton Active

Upload | Upload Multiple Documents | Mail link to | More...

Manager: Kelzer, Debbie (DEKE)
 Customer:
 Due On: Jul 6, 2016
 Modified: Jul 6, 2016
 Description:

Documents | Bill Of Materials | Tasks | Discussions | Characteristics | Attributes | More...

View and Annotate | Compare in Viewer | Download | Delete Document(s) | More...

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Documents	Count	Folder	Order	Version	Approval
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	LUMI_PLUS_CARTON_BLUE.pdf (4.2MB)	1	Root Folder	1	1	Setup Approval Cycle
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	LUMI_PLUS_CARTON_GREEN.pdf (5.4MB)	1	Root Folder	2	1	Setup Approval Cycle
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	LUMI_PLUS_CARTON_ORANGE.pdf (13.6MB)	1	Root Folder	3	1	Setup Approval Cycle
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	LUMI_PLUS_CARTON_PINK.pdf (4.8MB)	1	Root Folder	4	1	Setup Approval Cycle
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	LUMI_PLUS_CARTON_PURPLE.pdf (4.8MB)	1	Root Folder	5	1	Setup Approval Cycle

Upload | Copy | Add to Bill of Materials

Save

When clicking this tab, you see the documents in the Bill of Materials, with information about the documents (folder, version, approval cycle, tasks...) and their **Count**. This indicates how many copies of that document are required for that project's Bill of Materials.



Note: The count is specific for a document within a project. This means that the same document can be linked in multiple projects with a different count.

If a document has an attribute category assigned, you will see a **+** button. Click it to show its attributes (in list view), and click **-** to hide them again. To show/hide the attributes of all documents in the BOM, click **+** or **-** in the header of the table.



Tip: By default, the "Default" view for the attribute category is displayed, but if the attribute category has a view called "BOM", this view is shown.

22.4. Editing the Bill of Materials

22.4.1. Who Can Edit the Bill of Materials?

Administrators and the Project Manager can always change the Bill of Materials. Other members can be allowed to change it, if they have the **Change BOM** permission. This permission can be set on the project's **Security** page (see [Project and Document Security](#) in the User Guide).



Note: You can only set the **Change BOM** permission at the Project level, not at the folder level.

If a user can change the attributes on the attributes page, he/she can also change them on the Bill of Materials page.

Table: Permissions on Bill of Materials Documents

	Administrators	Project Managers	Users with Change BOM Permission	Users without Change BOM Permission
Can add/remove documents to/from the BOM in active projects	YES	YES	YES	NO
Can add/remove documents to/from the BOM in inactive projects	YES	YES	NO	NO
Can change the count of BOM documents	YES	YES	YES	NO

22.4.2. Adding Documents to the Bill of Materials

You can only add documents to the Bill of Materials if:

- you are an Administrator,
- you are the Project Manager,
- you have **Add** and **Change BOM** permissions on the Project.

Adding Documents to the Bill of Materials at Project Creation

If you want Project Managers to be able to already add documents to the Bill of Materials when creating a Project, do the following:

1. As an Administrator, go to the Project or Template that Project Managers will use to create Projects, and click the **Configure** tab then **Project Creation**.



Tip: Use a Project or Template that contains a Bill of Materials with documents if you want Project Managers to have the option to copy these documents into their new Project's Bill of Materials.

2. Select the **Show** check box for the **Change Bill of Materials** option.

If you want Project Managers to have to add **at least one** document to the BOM when creating the Project, also select the **Required** check box.

Click **Change**.

3. When a Project Manager creates a Project from that Project or Template, he/she will see a **Bill Of Materials** section on the Project creation page.

- when creating the Project from a Template, that section will contain the documents in the Template's Bill of Materials.
- when creating the Project from a Project, he/she will have to choose whether to copy the documents from that Project's Bill of Materials into the new Project's Bill of Materials.

To copy them, the Project Manager should select **including BOM** in the **Copy setup from an existing project** pop-up.



Note: A Project Manager will not see a **Bill Of Materials** section on the Project creation page when creating a blank Project.

4. The Project Manager can still edit the Bill of Materials while creating the Project. He/she can:
 - add documents using the [Upload](#), [Copy](#) and [New](#) links,
 - remove documents by clicking the - buttons in their rows,
 - change the **Count** of Bill of Materials documents,
 - edit the documents' attributes (by clicking + and filling them in).

Add Documents from the Bill of Materials Tab

From the Project's **Bill of Materials** tab, you can:

- [Upload a new document from your computer or network](#).
- [Copy a document from another Project](#).
- [Create a placeholder document from a document template](#).
- [Add a document already in the Project to the Bill of Materials](#).

Upload a Document from your Computer or Network

To upload a document into your Project's Bill of Materials:

1. Click **Upload** at the bottom of the **Bill of Materials** tab.
2. Click the **Browse** button and browse to your document.
3. If desired, select a [document template](#) to use for your document.



Note: This is only available if the Project has been created from a Project/template containing document templates, or if the Project itself has document templates configured.

The template you choose will determine what attributes are associated with the document.

If you don't select a document template, the document will have the attribute category associated with its document type in the **Configure > Document Creation** tab of the Project (see [Document Types](#) on page 132).

4. Fill in the attributes associated with the document (at least the required ones).
5. If desired, enter a new **Name** and a **Description** for your document.



Note: If [Automatic Document Naming](#) is set up for [document creation](#) in the Project, the **Name** will be created automatically (you cannot enter it).

6. Enter the **Count** of this document (how many copies are needed for the Bill of Materials).
This can be a fraction or a decimal number.

7. Choose where to upload the document (in the Project's **Root Folder** or one of its sub folders).
Choose **Default (Template)** if you want to use the folder defined in the document template you selected.
8. Click **Save**.

Copy a Document from Another Project

To copy a document from another project into your Project's Bill of Materials:

1. Click **Copy** at the bottom of the **Bill of Materials** tab.
2. Select a Project (or start typing a Project name) in the second drop-down list.
3. Select a document in that Project (or start typing a document name) in the third drop-down list.
4. If desired, select a [document template](#) to use for your document.



Note: This is only available if the Project has been created from a Project/template containing document templates, or if the Project itself has document templates configured.

The template you choose will determine what attributes are associated with the document.

If you don't select a document template, the document will have the attribute category associated with its document type in the **Configure > Document Creation** tab of the Project (see [Document Types](#) on page 132).

5. Fill in the attributes associated with the document (at least the required ones).
6. If desired, enter a new **Name** and a **Description** for your document.



Note: If [Automatic Document Naming](#) is set up for [document creation](#) in the Project, the **Name** will be created automatically (you cannot enter it).

7. Enter the **Count** of this document (how many copies are needed for the Bill of Materials).
This can be a fraction or a decimal number.
8. Choose where to upload the document (in the Project's **Root Folder** or one of its sub folders).
Choose **Default (Template)** if you want to use the folder defined in the document template you selected.
9. Click **Save**.

Create a Placeholder Document from a Document Template

To create a placeholder document from a [document template](#):



Note: This is only available if the project has been created from a project/template containing document templates.

1. Click **New** at the bottom of the **Bill of Materials** tab.
2. In the pop-up that opens, select the document template to use and click **OK**.
The template you choose will determine what attributes are associated with the document.
3. Fill in the attributes associated with the document (at least the required ones).
4. If desired, enter a new **Name** and a **Description** for your document.



Note: If [Automatic Document Naming](#) is set up for [document creation](#) in the Project, the **Name** will be created automatically (you cannot enter it).


5. Enter the **Count** of this document (how many copies are needed for the Bill of Materials).
This can be a fraction or a decimal number.
6. Choose where to upload the document (in the Project's **Root Folder** or one of its sub folders).
Choose **Default (Template)** if you want to use the folder defined in the document template you selected.
7. Click **Save**.

Add a Document Already in the Project to the Bill of Materials

To add a document already in the Project to the Bill of Materials:

1. Click **Add to Bill of Materials** at the bottom of the **Bill of Materials** tab.
2. Select the Project document to add to the Bill of Materials.
3. Enter the **Count** of this document (how many copies are needed for the Bill of Materials).
This can be a fraction or a decimal number.
4. Click **Save**.



Tip: In the Project's **Documents** tab, documents that are in the Bill of Materials have a BOM icon . You can click this icon to see the Bill of Materials.

Add Documents from the Documents Tab

You can add documents that are already in the Project to the Project's Bill of Materials.

To do this, select the document(s) to add and click **Actions > Add to Bill of Materials**. This adds the document to the Bill of Materials with a count of 1.

Add Documents from the Upload Page

You can also add a document to a Project's Bill of Materials while uploading a document using the **Upload** button. You just need to select **Add to Bill of Materials** and specify a **Count** (see [Uploading a Document via Upload](#)).



Note:

You can only do this if:

- you are an Administrator,
- you are the Project Manager,
- you have the **Change BOM** permission.

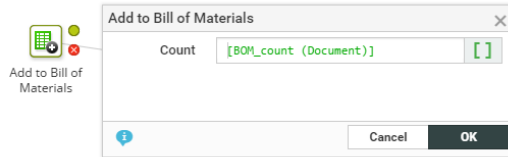
Add Documents from a Workflow

You can add documents to the Bill of Materials automatically using the workflow's **Add to Bill of Materials** task.

In the task's **Parameters**, you can set the documents' **Count**.



Tip: You can use a SmartName (for example a document or project attribute) to set the count.



Here is an example workflow using the **Add to Bill of Materials** task:



Tip: You can use the **Select Document** task to select all the documents in the BOM (select the **Documents in the Bill of Materials** option in the **Parameters**).

Add Documents from Automation Engine

You can add documents to a WebCenter Project's Bill of Materials using the Automation Engine **Publish on WebCenter** task (from Automation Engine 12.1).

When you publish an Automation Engine **Product** to WebCenter, the **Product Properties** and **Product/Product Part Parameters** will be taken as WebCenter attributes.

If there are existing WebCenter attributes with corresponding names, their values will be updated during publishing.

The following Product (Part) properties and Product (Part) Parameters are synchronized with WebCenter attributes:

Automation Engine Properties/Parameter	WebCenter Attribute (Internal name)
Product Customer Reference	ae.p.cusref
Product Custom Field 1	ae.p.category1
Product Custom Field 2	ae.p.category2
Product Custom Field 3	ae.p.category3
Product Internal ID	ae.p.id
Product ID	ae.p.prodid
Product Name	ae.p.name

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

When a **Product** or **Product Part** is published, corresponding WebCenter documents are automatically added to the **Bill Of Materials** of the Project.

The **Product Amount** for the Job (if given) becomes the **Count** property of the **Bill of Materials**.

22.4.3. Removing Documents from the Bill of Materials

To remove a document from the Bill of Materials, select it in the **Bill of Materials** tab and click **Actions > Delete from Bill of Materials**.



Note: Removing a document from a Project (or moving it outside that Project) removes it from the Project's Bill of Materials as well.

22.5. How to Search for a Bill of Materials

22.5.1. Search for Projects that have a Bill of Materials


















When searching for Projects using the *normal search*, you can specify that you only want to see Projects that have a Bill of Materials. To do this, select **Only Projects with Bill of Materials** in the **Bill of Materials** option.

22.5.2. Viewing the Bill of Materials in a Project Search

When searching for Projects, you can view a summary of the Bill of Materials documents per approval status for each Project found.





To do this, just select the **View (List)** option for **Bill of Materials** on the **Search For Projects** page. See [Search Result Options](#) in the User Guide for more information about displaying search results.

Search Results Save This Search Save Search Results


Name ↑	Status	Bill of Materials
<input type="checkbox"/>  Demo_00001	Platemaking	     
<input type="checkbox"/>  Demo_00002	Platemaking	  
<input type="checkbox"/>  Demo_00003	Platemaking	
<input type="checkbox"/>  Demo_00004	Active	
<input type="checkbox"/>  Demo_00005	Active	

In the **Bill of Materials** column on the **Search Results** page, you can view the number of:


- ✓ approved documents,
- ✓ force approved documents,
- ✗ rejected documents,
- ✗ force rejected documents,

-  documents waiting for approval,
 -  documents with a paused approval setup,
 -  documents without an approval setup,
 -  (all) documents,
- ... in each Project's Bill of Materials.



Tip: Click one of the approval statuses' icons (for example pending ) to show the BOM documents with this status.

22.6. How to See if a Document is Part of a Bill of Materials

In the Project's **Documents** tab, documents that are part of the Bill of Materials have a BOM icon . You can click that icon to go to the Project's Bill of Materials page.

On the **Document Details** page, the BOM icon  indicates whether the document is a part of a Bill of Materials. You can also click that icon to go to the Project's Bill of Materials page.



Note: A document can be part of more than one Project's Bill of Materials (if it is linked into multiple Projects).

22.7. Bill of Materials History

You can see all changes made to your Project's Bill of Materials in the **Project History**.

You can see for example:

- new documents added to the Bill of Materials,
- documents removed from the Bill of Materials,
- changes to a document's count.

22.8. Email Notifications for Bill of Materials Changes

To send email notifications when something has changed in your Bill of Materials:

1. In your Project, go to the **Notifications** tab and select who to **Notify by E-Mail** in the **Bill of Materials Changed** row.
2. Click **Save**.

The recipients will get emails when:

- a document is added to the Bill of Materials,
- a document is removed from the Bill of Materials,

- a document's count is changed.

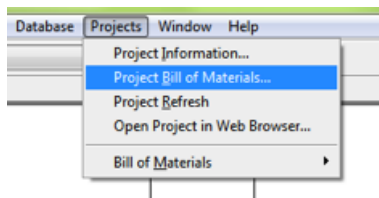
22.9. Working on the Bill of Materials from ArtiosCAD Enterprise

With ArtiosCAD Enterprise, you can see all your Projects and (ArtiosCAD) documents from WebCenter.

If you open a document in ArtiosCAD Enterprise, you can go to the Project's Bill of Materials and see a list of all the Bill of Materials documents.



Note: You need ArtiosCAD Enterprise 12.1 to work with WebCenter Bills of Materials.



In ArtiosCAD Enterprise, you can:

- change the count of ArtiosCAD files in the Bill of Materials,
- add a document revision (A, B, C...) to an ArtiosCAD file (this is shown in the **Version** column of the **Bill Of Materials** tab, and in the document's **Action History**),



Note: When you work with revisions on a Bill of Materials document, the latest version within a revision is the version in the Bill of Materials.

- add a print item to an ArtiosCAD file (this is shown in a separate column in the **Bill Of Materials** tab),
- change the order of the Bill of Materials documents.

Once you click **OK**, this is updated in WebCenter.



Note: You cannot add a document revision or a print item to an ArtiosCAD file, or change the order of the Bill of Materials documents from WebCenter.

23. Autonaming

23.1. Autonaming Projects / Documents

An administrator can configure a setup for automatically naming the projects and documents. You can specify the rules for both **Project** and **Document Autonaming**.



Note: By default, this feature is not enabled.


23.1.1. Autonaming Structure

An **Autoname** consists of a **Prefix**, **Suffix** and **Counter Length**.

A **Counter** keeps track of the count when a new project is created or when a new document is uploaded. The **Counter Length** is the fixed length of the Counter.

For example; If the **Prefix** is **begin_**, **Suffix** is **_end** and the **Counter Length** is set to **4**, then the Autoname will be **begin_0001_end**. The next one will be **begin_0002_end**.

begin_0001_end





Note:

The Project / Document **Autonames** are generated during the Project creation or Document submission.



Note:

- The Prefix field cannot be empty. The Prefix and Suffix fields are limited to 150 characters for Counter Length field is 20.
- If the counter length is 0 or left empty, no numeric part will be added to the Autoname. The maximum characters for Counter Length is set to 20.

23.1.2. Autonaming Projects

You can configure Autonaming for Projects in the following ways:

- [Systemwide Project Autonaming](#) on page 472
- [Autonaming in Projects / Templates](#) on page 472

Systemwide Project Autonaming

You as an administrator can enable/disable systemwide **Project Autonaming**.

1. Log in to WebCenter as an Admin user.
2. Click **Admin > Preferences > General**. The General page appears.
3. In the **Project Autaname Generation** section, specify appropriate **Prefix, Suffix** and **Counter Length**.

Click  to select required SmartNames. The **EditField** SmartName can used only in the Suffix.

Enable **Use Automatic Naming for Creation of Blank Projects** to apply the autoname generation settings for projects created from a blank template.

4. Click **Save** to make the changes.

Autonaming in Projects / Templates

Use template based **Autonaming** setup to apply automatic naming to the Projects created from a Template or another Project.



Note: If you setup **Autonaming** in an existing template, only the future Projects will be named automatically.




Note: When you setup Autonaming in a template, only the future projects will be named automatically. It does not alter the existing Projects created from the same template.

1. Log in to WebCenter as an Admin user.
2. Click **Admin > Project Management > Projects** or **Templates**.
3. Choose the Project or Template and go to **Configure > Project Creation** tab. Enable the **Use Automatic Naming** option. Then select:
 - **Use Custom Automatic Naming** to specify an automatic naming setup just for this **Project** or **Template**.
 - **Use Default Automatic Naming**, if you have configured [Systemwide Project Autonaming](#).

You can apply the same settings by selecting the **Use Default Automatic Naming** option.

4. If you select the **Use Custom Automatic Naming** option, you have to enter the text boxes with appropriate **Prefix, Suffix** and the **Counter Length**.



Note: Click  to select required SmartNames. The **EditField** SmartName can be used only in the Suffix.

5. Click **Change** to make the changes.

23.1.3. Systemwide Autonaming for Different Document Types

The administrator can set up the document **Automatic Document Naming** settings per Document Type in the following ways:

- [System-Wide Document Autonaming](#) on page 473
- [Template/Project-based Document Autonaming](#) on page 474

System-Wide Document Autonaming

The administrator can set up the document **Automatic Document Naming** settings per Document Type.

The options available are None or Custom Automatic Naming options. The Custom option allows you to customize the required autoname setup.

The option **Apply Automatic Naming to Documents in Blank Projects** allows you to setup autoname generation for blank documents also. The **Apply Default Attribute Categories to Documents in Blank Project** option allows you to add the default attribute category to documents which exists in blank projects. For example: If you upload abc.ard file and the Prefix is **[FolderName]** the Counter Length is set to **4** and the Suffix is empty, then the autoname will generated as **DESIGN_0001.ard**.

Using the **Scope of the Counter** option the administrator can specify whether the counter will continue counting system wide, or whether it will reset for every project. If the option **Reset per Project** is selected then, autoname will be generated as begin_0001_end and next document will be begin_0002_end and so on.


If **System wide Counter** is selected and files already exists, autoname will be generated as begin_0098_end and next can be begin_0112_end. The counter here depends on the number of files which are uploaded to the system and not on each of the project.

1. Log in to WebCenter as an Admin user.
2. Click **Admin > Preferences > Document Types**. The Document Types page appears.
 - Select the **Apply Automatic Naming for Creation of Blank Projects** check box to apply the autonaming setup to the Projects created from blank template.
3. Set the corresponding **Automatic Document Naming** field to **Custom..** Read more in: [Document Type Preferences](#) on page 38
 - a) Specify a **Prefix, Suffix** and the **Counter Length**. Read also: [Autonaming Structure](#) on page 471
 - b) Specify the **Scope of the Counter**.
 - c) Optionally, you can enable **File Extension Specific Counter** for autonaming. This will make sure that you have different counters for different types of documents.

If the option **Reset per Project** is selected, the Autonaming will be reset in every project and the counter depends on the documents uploaded to any single Project.

If **System wide Counter** is selected, the Autoname will be generated counting the existing files (for example: begin_0098_end). The counter here depends on the number of files which are uploaded to the system and not on each of the project.



Note: Click  to select required SmartNames. The **EditField** SmartName can used only in the Suffix.

If you upload abc.ard file to the folder Design where the Prefix is **[FolderName]**, the Counter Length is set to **4** and the Suffix is empty, the name of the document would be **DESIGN_0001.ard**.

4. Click **Save** to make the changes.

Template/Project-based Document Autonoming

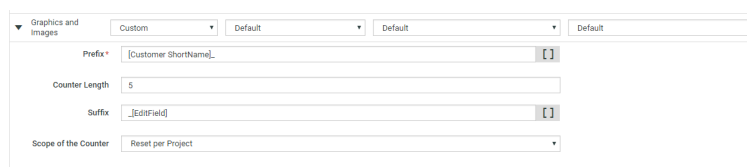
- **Template/Project-based document autonoming:** The administrator can set up the document auto name settings per document type on the Document Types page. The Document Types page allows to enable/disable specific document types and is extended to also have a section for setting auto naming details per document type. The administrator can specify Prefix, Suffix and Length for each of the Document Types available.



Note:

Only newly uploaded documents will have the correct auto naming settings applied to them.

When the option **Apply automatic naming to Documents in Blank Projects** is selected, the default settings will be used when uploading documents in projects which are created without a template.



The screenshot shows a configuration form for document auto naming. It includes several dropdown menus and input fields:

- Graphics and images:** A dropdown menu set to 'Custom'.
- Prefix:** An input field containing '[Customer ShortName_]'. To its right is a small square icon with a plus sign.
- Counter Length:** An input field containing the number '5'.
- Suffix:** An input field containing '._EditField'. To its right is a small square icon with a plus sign.
- Scope of the Counter:** A dropdown menu set to 'Reset per Project'.

Using the **Scope of the Counter** option the administrator can specify whether the counter will continue counting system wide, or whether it will reset for every project.

If the option **Reset per Project** is selected then, autoname will be generated as begin_0001_end and next document will be begin_0002_end and so on.

If **System wide Counter** is selected and files already exists, autoname will be generated as begin_0098_end and next can be begin_0111_end. The counter here depends on the number of files which are uploaded to the system and not on each of the project .

The SmartName [Project Attribute] and [Document Attribute] contains an extra option. When selecting these options, an extra drop-down appears to select the attribute. It is advised to set such attributes required in the creation view of the attribute category, else this part of the name will remain blank.



Note: Changing or modifying the attribute value after creation of the project or document will not change the existing name.

1. Log in to WebCenter as an Admin user.
2. Click **Admin > Project Management > Templates**. The list of available templates appears in the Template Management page.
3. Click one of the required templates and then click **Configure > Document Creation**. The Document Types page appears.
4. Select the required Document type and then in the **Automatic Document Naming** section choose between None, Default or Custom options.
 - a) If you select the **None** option, the autonaming option is not selected.
 - b) If you select the **Default** option, the setting as per **System wide Document Auto Naming Settings** are taken into consideration.

- c) If you select the **Custom** option, you can enter the text boxes with appropriate **Prefix**, **Suffix** and the **Counter Length**. The **Scope of the Counter** specifies whether you want the counter to work on all the documents in the system, or only to work on the documents of the project when a new document is created.



Note: Click to select required SmartNames. The **EditField** SmartName can used only in the Suffix.

The SmartName [Project Attribute] and [Document Attribute] contains an extra option. When selecting these options, an extra drop-down appears in which an administrator can select a required attribute.

5. Click **Save** to make the changes.



Note: When the Document Autonaming settings for a Template are changed, these are not applied to all projects already created from this template.

23.1.4. Using SmartNames in Autonaming

You can use **SmartNames** to set the prefix and suffix in AutoNaming.

The SmartNames list contains general Project information and all the Attributes defined in the system. You can use several SmartNames or a combination of SmartNames and free text.



Note: To know more on configuring project information see [Project and Document Attributes](#) on page 289.

- Click the **Insert SmartName** button and select a SmartName from the list that appears next to the button.

Project Autoname Generation

Prefix [Customer ShortName]

Counter Length 5

Suffix

[Project Attribute]

Select to append a Smartname...

- [Customer Name]
- [Customer Short Name]
- [Customer Location]
- [Customer Location Code]
- [Edit Field]
- [Project Attribute]
- [Project Template Name]
- [Project Creation Date]
- [Project Manager Last Name]
- [Project Manager Name]
- [Project Manager Location]
- [Project Manager Location Code]
- [Requestor Username]
- [Requestor Last Name]
- [Requestor Location]
- [Requestor Company]
- [Requestor Company Location Code]

If you select:

- [Project Attribute],
- [Document Attribute],
- or [Project Creation Date],

you will get another **Select to append a SmartName** field in which you can select a required attribute.

See below some examples of SmartNames in Autaname Generation:

Project Autaname Generation

Prefix [] ⓘ

Counter Length

Suffix [] ⓘ

The result will be, for example: Chicago_23.12.12_0001_printpromotion.

ArtiosCAD Design Custom

Prefix* [] ⓘ

Counter Length

Suffix [] ⓘ

Scope of the Counter

The result will be, for example: CAD_0001_printpromotion_Chicago.



Note:

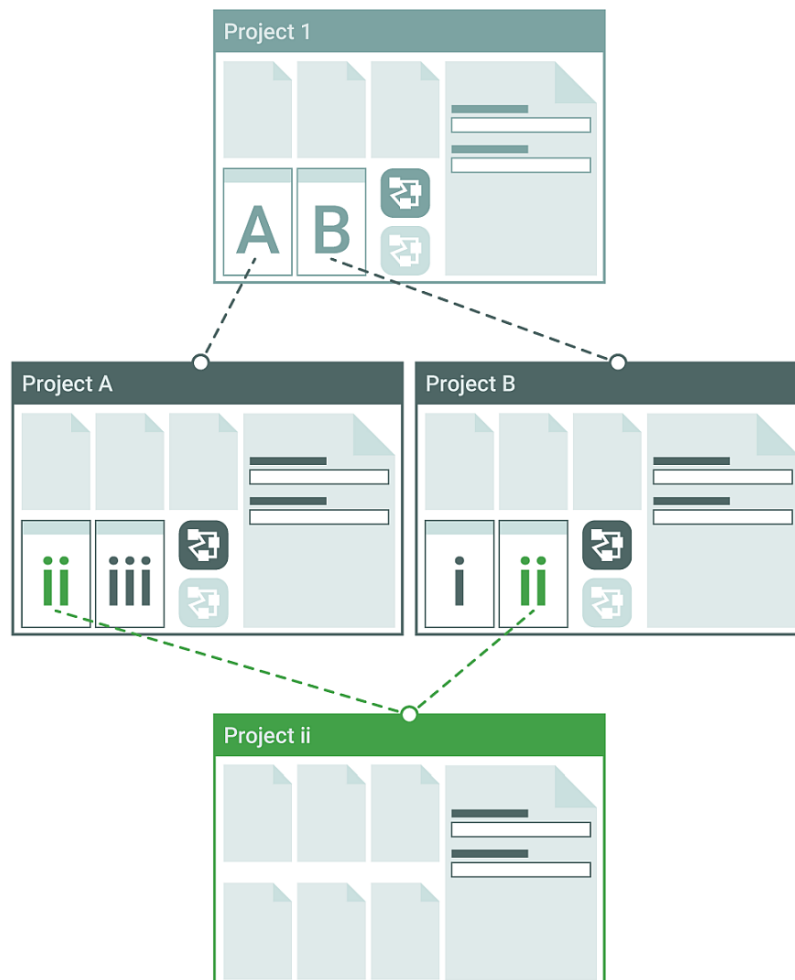
- The [EditField] SmartName can used only in the Suffix and if required, the administrator can edit this field. If the [Edit Field] is empty, then it is not replaced by any text, but left blank.
- Ensure that you do not use square brackets [] for other fields. The system will take it as a SmartName.
- You can use several SmartNames if desired, or a combination of SmartNames and text.
- If a SmartName is selected and if it is empty or not found, the field will be blank in the Autaname.

24. Program Management

24.1. Introduction

Many Brand Owners are tackling large, complex packaging programs (campaigns) which span across packaging ideation to delivery of individual packaging to specific markets. Typically these efforts involve several parallel and sequential projects. While a packaging project involves dealing with a relatively short-term objective, a Packaging Program (Campaign) is much more complex and deals with several short-term and long term objectives and requires a large pool of resources.

Accomplishing a program's objectives involve planning and conducting a number of related projects, multiple work streams with their own requirements and planning, the results of which are components of the overall outcome.



24.2. Program Management Related Components

WebCenter has features to specify components, create a group of projects in a Program hierarchy and modify them as needed.

WebCenter Program management offers:

- [Component definition and approval](#)
- [Creation of Child Projects under the hood of a Program](#)
- [Attach Project Action in a Program](#) on page 484
- [Communication between the Program and its Projects.](#)
- Features to support multiple levels: for example, a Project/ Grouping /SKU/Component.
- Shared Projects and Components among different Programs
- A Program Overview with [drill-down](#) and [Dashboard](#). The program overview will provide the status and risk indicators.

24.2.1. Definition and Approval of Components

Program planning may require multiple iterations and produce multiple work products and components. As a first step, you need a Program (Parent Project) setup which describes the outline, rationale, launch criteria, important dates and involved regions and suppliers. The second part deals with the individual or child projects within the Program which are entirely dependent on the products and component planning.

Defining Products and Components in the Briefing Phase

To start a Program with new Products and Components, the Program Manager can use a placeholder document([Document Templates](#) on page 127). To define existing components, just refer to them as [Document References](#) on page 342 or copy them to the current scenario. You can source the components from existing libraries, contextual saved searches, or from a previous program.

If you have configured a [duplicate](#) action, the user can easily create a copy of the component (for example, variants) including its meta-data and document references values.

See the example below. The following structure can be built into your Program Template using its **Attribute Category**'s document sources.

Thumbnail	Name	Version
	Get Set.png	1

Product components

	Get Set_Multivitamins.png	1
--	---------------------------	---

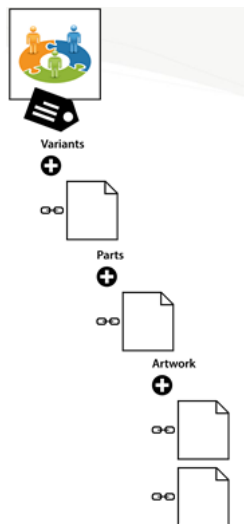
MileStone Dates

Due Date Briefing	<input type="text"/>		--:--
Due Date Legal Approval	<input type="text"/>		--:--
Final Delivery	<input type="text"/>		--:--

Roles

For example, when you initiate a Program for multiple SKUs, you can use Document Templates for new SKUs. The Products can keep common approved Components as document references. Using the document reference table, you can:

- Define products and components along with their master-child relationships,
- Easily duplicate a Component with its meta-data
- Process them through an approval process if needed



See details about how to create Projects based on these documents in [Adding/Creating Projects in a Program](#) on page 480.

Create Components

To streamline your Program's product and component definition, follow the steps below:

- Create an Attribute category for the Parent Project Template with document references and other Attributes.



Note: Read more about shared Attributes in: [Create a Child Project](#) on page 483.

- [Add Document References to the Program Template's Attribute Category.](#)
- [Define Document Sources for your Documents](#)
- [Define how these documents should appear in the Template](#)
- [Configure duplicate option in the rendering of the document references](#)

24.2.2. Adding/Creating Projects in a Program

Once you have defined a Program or Parent Project with components, you can add multiple Child Projects as members in a few ways. You (as an admin user) need to configure **actions** in the menu for any of these options to become available.

You can:

- **Create Projects individually based on a Child Project Template.**

This provides an interactive way of creating a child Project from the Program context. If you have common Attributes configured in both the Program and Child Template, they can be shared between the Parent and Child. For example, Program's Attributes such as milestones set in the Program and Role setup.

The administrator has to configure a Create Child action for a Program Manager.

The Child Project Template can have Attributes and documents that are not shared with the Program.



Note: The Child Projects are independent WebCenter Projects that can have their own planning, workflows, folder structure etc.

Read more in: [Create a Child Project](#) on page 483.

- **Create Projects using a workflow.**

You can use workflow to create multiple Child Projects in one go. You can either add this step into a workflow or create a dedicated workflow action in Project details page.



Tip: Create a [custom workflow](#) action for Project detail and apply it to the Program Manager's menu. You can then select multiple documents and launch a workflow. You can use this more than once if you want to launch your Program in waves.

Project: Multi Vitamins_Barrlia_2017 02_00001 Create Child Auto-Create Child Projects Attach Child Project(s)

Brief Creation

Upload

- Upload Multiple Documents
- Search
- View History

Manager: PROGRAM MANAGERS EMEA
 Customer: Esko
 Due On:
 Modified: Feb 23, 2017
 Description:

Project Status: On Track
 # Children: 1
 Nr Projects Completed: 0

All Child Docs 1 Child Projects 1 Project Information Tasks 5 Attributes Approval DocByPID 2 Characteristics More...

Success!
 Created Workflow Task: Program Management - Create child projects_1

Folders 2

- Project Documents 0
- Products 2

View and Annotate Compare in Viewer Download Delete Document(s) More...

Documents 2	Version	Approval	Uploaded	Tasks
Get Set.png (3.4MB)	1	Setup Approval Cycle	Feb 23, 2017 at 11:16 AM Keizer, Debbie (DEKE)	Complete Products list
<input checked="" type="checkbox"/> Get Set_Blue Bottle.png (755.4KB)	1	Setup Approval Cycle	Feb 23, 2017 at 11:16 AM Keizer, Debbie (DEKE)	Complete Products list

Add an existing Project.

You can add existing Projects to a Program. For example, you may want to use an approved SKU-project in a Program. The **Attach** action lets you select and add an existing Project as a child.

Read more details in: [Attach Project Action in a Program](#) on page 484

- Create a Sibling Project.** Create sibling action allows you to copy the setup from your existing Child Project to create exact replicas or variants with slight modifications. For instance, after creating component Projects, you may see that you need an extra component with the same requirements.

It is possible to modify some Attributes after creation of a variant. Or you can disable copying of some elements by unchecking them. The options are the same as in [Create a Project Based on Another Project](#)

This action will be used when creating variants of the child project.



Note: All these actions are configurable and you can configure the actions that are most relevant in your Program-Project hierarchy.

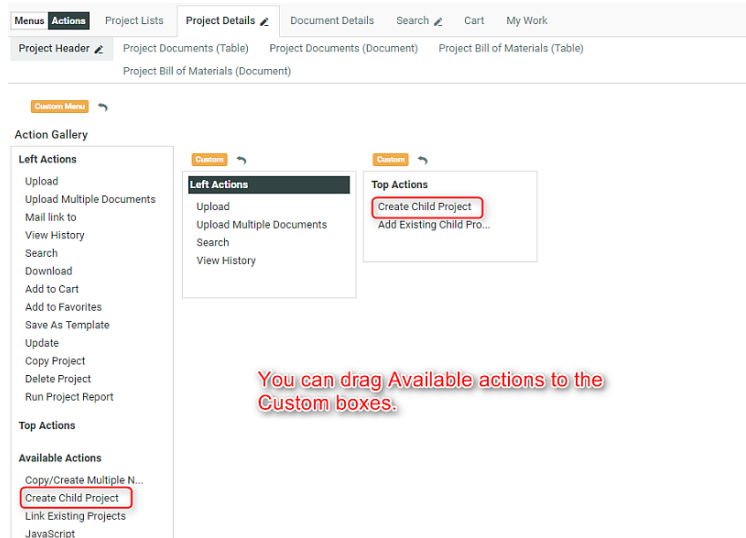
Notes

- You need **Change Property** rights (in both levels) to establish a relationship between parent and child.
- A project can have multiple children and can have multiple parents.
- All relationship changes are logged in the Project history.

Configure Create Child Action in Program's Details

As an Administrator user, you can customize the **Project Details** actions to include a **Create Child Project** action.

- Go to **Admin > Preferences > Menu > Actions > Project Details > Project Header**.
- Select the **Menu** you want to edit.
- From the **Action Gallery**, drag the **Create Child Project** to one of the **Custom** boxes.



Read more in: [How to Create a Custom Action Button](#) on page 54

- Edit the settings of this **Action**. You can customize this to suit your needs. See more in: [Action Settings](#) on page 52.

Edit Menu: Create Child Project

Create Child Project

Label Type:

Label *:

Visible To *: 1

All Users

Administrators

Project Managers

Create Task Rights

Create User Rights

Normal Users

In Groups ?

All Groups

Specific Groups

Action Type: Built-in

Project Template 2:

Priority:

Rendering:

Icon:

Color:

Project Visibility ? 3:

Parent Menu: Top Actions

We recommend that you do the following optional steps:

- Select the users for whom you want to make this **Action Visible To**. In the example, this Action is set only for Project Managers.

- b) Select a Child Project Template. This will be the Template that will be loaded when a Project Manager (user) click on this action.



Note: If a Template is not specified in this action, your user can:

- either select a Template that is available in the system
- or create a Project without a Template

- c) Specify a Project Visibility characteristic.

1. [Create a specific Characteristic](#) for configuring a menu item. You can create characteristics for your custom menu items as well as the default ones.
2. Select the specific Characteristic in the **Project Visibility** field of the action. You can select this from the drop down list.

This menu item will appear in the **Project Details** page only if the specified **Characteristic** was assigned to the **project** or the **template**.

As an administrator, you can switch this on and off in the **Project Details > Characteristics** page.

- Save.

Create a Child Project

To create a new Project as a child project of a Program, you (admin) can configure a **Create Child Action** in the Program. Once configured, the Program Manager and the Project Members will be to create Child Projects in your Program.

The Child Projects inherit the **attribute** values, **role** assignments and **company** information from the Program, and they can have their own set of **attributes** and **workflows**.

The Project creation uses the Template configured in the [menu](#).

For example, if the custom **action** links the template "Child Project Template", then this is used in creating the child Project.

The child inherits most of the setup from the Template except the values of:

- **Company / Location**
- **Attribute Values**
- **Role Assignment**


Note:

- The Attribute categories are inherited from the Template (used to create the child Project) and the **values** of the common Attributes (present in both Parent and Child Templates) will be inherited from the parent.


Note:

- If a common attribute has an empty value in the Parent, the value will be taken from the Child's template.

- Similarly, the Roles are taken from the Template but the assignment of the Roles will be taken from the Parent. If the Roles are not assigned in the parent, the assignment will be inherited from the Template.


Caution:

If the Parent and the child Project's template have different role assignments, the assignment of the parent project is taken.

- If a Template is not specified in this action, your user can:
 - select a Template that is available in the system.
 - or create a Project without a Template

You can have a document source with a SmartName search to point to the parent Project

Attach Project Action in a Program

To add Projects to a Program, you need a Saved Search configured in your Program to list 'related' Projects.

The administrator can specify the Saved Search that should be used to search and find these possible child projects.

To create a custom **Link Existing Projects** Action in the Project Details (of the Program), follow the steps below:

- Go to **Admin > Preferences > Menu > Actions > Project Details > Project Header**.
- Select the **Menu** you want to edit.
- From the **Action Gallery**, drag the **Link Existing Project** to one of the **Custom** boxes.
This Action is available in Project Search Results by default.
- Edit the settings of this **Action**. You can customize this to suit your needs. See more in: [Action Settings](#) on page 52.
 - Select the users for whom you want to make this **Action Visible To**. In the example, this Action is set only for Project Managers.
 - Select a **Saved Search**. This will be displayed in the pop-up to select a Project.
Specifying a Saved Search (for example, based on common attribute values) in the **Attach** action allows you to configure a pop-up dialog with the most relevant projects.
 - Optionally, specify a Project Visibility characteristic. Select the specific Characteristic in the **Project Visibility** field of the **action**.

This menu item will appear in the **Project Details** page only if the specified **Characteristic** was assigned to the **project** or the **template**.

As an administrator, you can switch this on and off in the **Project Details > Characteristics** page.

In the Program's details, you can use this Action to select Projects (from a Saved Search) and add to the Program.

Add Sibling Projects

If you want to clone a Child Project within the context of a Program, configure the **Create Sibling Project** action in the Project details page.

You have to configure the action in the Child Project Details and make sure that it is applied to the Project Managers' menu.

The cloned sibling will be a copy of the child Project from which the action was started and it will also have the same Parent Project.

Notes

- If the child Project has multiple parents, the cloned Project inherits all the parents where the Project Manager has "change property" permissions.
- In the original parent project, an entry in the action history is added to indicate that the new project was added as a child.

Create a Sibling Project

1. Click the **Create Sibling** action button from a child Project of your Program.
2. In the **Copy setup from an Existing Project** pop-up, select what you want to copy (and deselect what you don't want to copy).

Copy setup from an Existing Project

- Copy Project Manager
- Copy Members
- Copy Approval Settings
- Copy Folders
 - Including Documents
 - Including Bill of Materials
- Copy Attributes
- Copy Characteristics
- Copy Tasks From Source Project ▼
- Copy Security Settings
- Copy Notifications
- Copy Discussions

Cancel
OK

For Tasks, you can choose to copy the **Tasks** from the original Project or from another project by typing in the template name. The default setting is to copy Tasks from the Project that is being copied.

Click **OK**.

3. Fill in the new project's [Details](#).
4. If desired, add [Documents](#) to the project.
5. Add [Members](#) to the project.
6. If the template has attributes defined, fill them in the [Attributes](#) section.
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.

24.2.3. Remove Projects from a Program

You can configure and use [Detach](#) and **Delete** actions in a Program.

- If you want to remove child Projects **permanently** from the system, select them in the child Projects tab of a Parent Project and click **Delete** action.
- To remove some child Projects from a Parent, use the **Detach** action. This action removes them from the parent, but does not delete them from the system.

This is a configurable action that has to be set up in the Saved Search displaying child Projects. Read more in: [Detach Child Projects](#) on page 231.

Detach Child Projects

You can configure **Detach Child Project(s)** operation in a Saved Search. Program Managers can use this in a contextual Saved Search configured in the Parent Project's details. The use case is that the Project or Program Manager can select existing Child Projects displayed in the search tab and detach them from the Parent Project.



Note: The action is only available to the users with **Change Permissions** of the parent and child project.

- Create a global [Saved Search](#) to search on child Projects. Enable the **Search Result Layout** option **Allow Detaching Child Projects**.
- Apply the Saved Search into the Project Details menu of the Parent Project Manager.
- To detach child Projects, go to the Child Projects tab with the saved search, select child Projects and click **Detach Child Project(s)**.

24.2.4. Program Dashboard with a Drill-down View

You can also build different types of overview on on-going programs as a way to easily monitor your Program and Projects. The solution allows you to build overviews at all levels of your Program hierarchy.

The admin can create searches with any relevant criterion and use them in different levels of the Project drilldown.

To build a high level overview, use the following advanced the Saved Search features:

- [Drilldown](#)
- [Dashboard](#)

The drill-down feature allows you to quickly access the specific Projects or Components that require special attention.

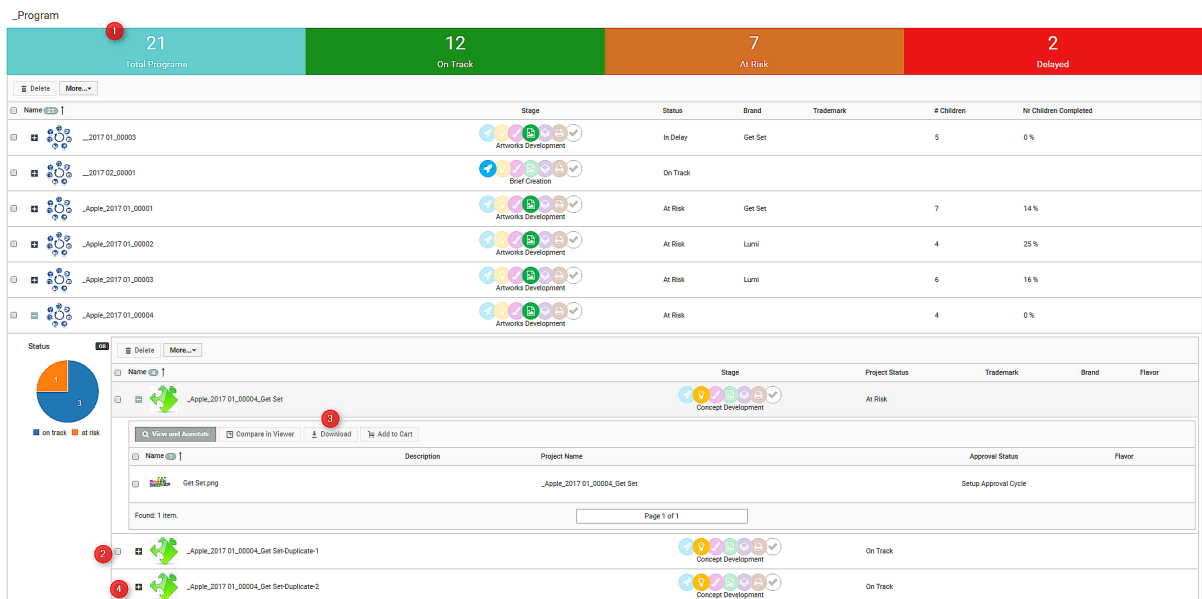
Drilldowns

You can use Project search based **drilldowns** to set up a:

- Drilldown into all levels of Projects. This feature allows the Program Manager to explore project data beyond the overview. If you have a nested structure (Project / Grouping / SKU / Components) in your Program, an expand button lets you access the next level.
- Drilldown into Components (documents) or Tasks.

Read more in: [Configure a Drilldown Search](#) on page 214

The example screenshot gives an overview where the Program Manager can quickly zoom into Programs based on their status (which in turn is based on the status of their child Projects).



1. The parent Search with Programs. This example shows a [Search Results Dashboard](#) on page 215 with **counters**.
2. The second level of Drilldown executes the **Saved Search** specified in the parent search. This search contains a **Dashboard** with a **Facet Graph**. [Configure a Drilldown Search](#) on page 214
3. The third level of **Saved Search** with a **Document Search**.
4. The expand button to execute the drilldown.

Dashboards

The interactive **dashboards** can be configured with:

- **Counters.**

You can, for example, build a diagnostic overview of the status of your Program using counters. You can, for example, show the Project Statuses in these traffic light counters (at risk, in delay, or on track). With a simple click on one of these counters, you can zoom into the relevant Projects.

In the example above, a click on the “On Track” counter will display the search results for specified in the counter configuration. The status is only an example, you can build your counters based on any relevant Attribute that you may want to monitor. Each counter has it's own saved search and displays the count of the results.

Read more in: [Building a Search Based Counter](#) on page 219.

- **Charts** to visualize your Program data.

You can configure facet based Charts in dashboards and use them in your Program hierarchy to visually display the Program data. The Charts(based on facets) shows the distribution of values.

A simple click on a chart section(value) will refine the results. In the screenshot, the counters provide the most high level overview where as the first level drill-down displays a pie chart which shows the distribution based on Project Status.

Overview from Programs and Projects

In addition to the overview of all Programs and their drilldowns, you can also configure contextual saved searches for your Parent Project Details menu. If you are a Program Manager working in a

Program's details page, you may need direct access to the child Projects. Likewise, from each of the Child Project, there should be access to the parent or Program.

To configure this:

1. Create a [Saved Search for Parent Projects](#). Similarly, create another Saved Search for Child Projects and plug this into the Parent's Project Details menu.



Tip: Use SmartNames to use Saved Searches in the context of a Program or Project. If you set the **Parent Project** as the [Project id], your results will list all the Child projects of the current project. See more in: [SmartNames in Search](#) on page 208

2. Plug these searches into Project Details menu and apply it to the relevant users (Program Managers and Project Managers).

24.2.5. Communication Channels-Rules

Since the projects are children or sub-projects of the overall program (campaign), there is a need for communication among all levels, program to projects, projects to program and among projects. The updates happening in a program have mutual consequences and therefore should be communicated in both ways. You may want to setup the following channels:

- Alert the parent or a related project about a new deliverable
- Alter the status of a related Project depending on another
- Notify Program when a child Project encounters change: a status update or metadata change.

Rules in Programs and Projects

The Administrator of the system can configure "actions" "triggered" by an "event". These are **Rules** that can be specified in the Program/ Project's templates. Rules enable you to start tasks automatically based on events in your project.

The triggered actions will be implemented in the Program or Project specified in the attached "action" (**Task based Action**). You can use the JavaScript node in the Task to execute these actions.

The configuration of the Rules is based on Program/Project Template and therefore, once setup, can be reused (or exported) in future Programs.

See some examples of Task based Actions below:

- If a child Project's status changes to Overdue, change the status of the Program to At Risk
- Change attribute values in a Program based on the values in the child Project
- Calculate task overdue status every hour and send reminders

The JavaScript node allows you to enables you to update crucial parameters of related Projects. See details in the Workflow section.

Configure Rules in a Project

What is a Rule?

You can configure a **Rule** to execute specific **Actions** based on one or more Trigger events. The Rule sets reside in Project Templates and will be applicable in all Projects created from them, including the previously created ones. This administrator feature lets you establish communication between Child and Parent Projects or between any two Projects. See an example use case at the end of this chapter.


Note:

You need the **WebCenter Task Management Advanced** or **WebCenter Life Cycle Management** license to be able to define Rules.

To set up **Rules**, go to **Project Template > Configure > Rules Setup** tab.



Note: Although Rules are configured within a Project Template, you can create Rules that are triggered after the project is created from the template.

Triggers

A **Trigger** is an event that happens in the system (for example, the Child Project Status changes to **Completed**). A successful Trigger condition will execute a Task based **Action**.

You can specify multiple triggers and actions in a Rule. When one Trigger event (as specified in the Rule) happens, the system evaluates the Rule and executes the corresponding Action(s).

See the supported Triggers below:

- **Project Status Change:** The **Action** is executed when the Project Status changes.
- **Project Attribute Change:** The **Action** is executed when the specified Project Attribute changes. You can specify the attribute from a drop-down.
- **Project Due Date Change:** Any change in the Project Due Date will trigger the specified **Action**.
- **Date/Time Reached** trigger lets you define an exact time stamp to execute the Rule. When the server time passes the Trigger time, the Rule will be executed. There are 2 options:
 - Specific Date: the actions will be executed on the specific date and time
 - Date in Project + Offset: the actions will be executed on the selected Project Due Date or Date/Time attribute plus or minus an offset of days and/or hours.



Note: The calculation is done in working days/hours.

Actions

- **Start Task:** This action launches a Task in the same Project where the Rule is configured. Specify the **Task** by selecting it from the drop-down.
- **Execute Javascript:** This action launches a specified **JavaScript Rule Action**. You can specify one from the **Javascript Rule Actions** configured in the system.

It is possible to configure multiple actions by clicking on the '+' sign. Use 'x' to remove existing actions.

Example

See the example of a Project Template's Rule below. This Rule gets executed when the specified Date/Time Reached.

Edit Rule

Rule Name *

Enabled

Description

Order

When any of these Triggers occur

Warning: Calculating date/time triggers can potentially take a while. This rule will be applied in 4 projects.

The Javascript Rule Actions are configured in **Admin > Project Management > JavaScript Rule Actions**. See the example script below.

```
var children = API.getProject().getChildProjects(); if(children.length >
    0){ var atRisk = false; var inDelay = false; for(var i = 0;
    i<children.length; i++){ var child = children[i];
    if(child.getStatusName() !=
    'Completed'){ atRisk = true; } else if(child.getStatusName() ==
    'Non-active'){
    Campaign
    inDelay = true; } } if(atRisk){ API.getProject().getAttribute("mvbe
    State").setValue('At risk'); } else if(inDelay){
    delay'); }
    API.getProject().getAttribute("mvbe Campaign State").setValue('In
    State").setValue('On
    schedule'); } }
```

Two days before the milestone, this Rule will get executed. Depending on the child Projects' statuses, the Program Project's status will be updated.

25. Color Trace Solution

Color Trace structures the collection of color specifications, communicates it automatically to the supply chain and returns a scorecard of each job. Automation and standard procedures ensure that reporting is created with integrity, scoring the actual production against realistic specifications.

This solution is built by integrating the capabilities of software and cloud applications including Esko Cloud, PantoneLIVE, Color Pilot, WebCenter, WebCenter Connector (for Adobe Creative Cloud), Automation Engine, ColorCert and ColorCert ScoreCard Server. Most parts of this solution are automated with workflow tasks and has the flexibility to allow you to do custom updates as required.

Detailed description of WebCenter parts can be found in the following pages.

1. [Configure Cloud Connection in WebCenter](#)
2. [Configure Color in WebCenter](#)
3. [Import Deployment Package](#)
4. Workflow Nodes that perform various automated tasks for Color Trace in WebCenter
 - [Color Preflight](#)
 - [Create ColorCert Job](#)
 - [Save Document Colors in Attribute](#)
 - [Create Graphics Placeholders](#)

26. Packaging Content Management in WebCenter

26.1. 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

26.2. Basic Concepts

26.2.1. Text Document and Text Elements

Text Content Document

The WebCenter Text Content Document (`webCenter Copy Content`) is an XML file that contains:

- Text that goes on Artwork. This includes the master text and the translated versions.
- Approval states
- Clearly defined ownership rights
- Element Types

A Text Document is a WebCenter **Document Type** and can have:

- Revisioning
- The documents are housed in projects or libraries (for re-use)
- Attributes
- Can be streamed through a workflow
- Download rules
- Document references from other documents. For example an artwork can refer to various text content documents.

- Text Content Template. Read about it here [Text Document Template](#) on page 496

Text Content Statement

A Text Content document has two elements: the Master text and its translated statements. When a Text statement is specified as the Master, it needs to be approved before approving the translation.

The Master and Translation Statements can be viewed together.

26.2.2. 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**.

26.2.3. Text Document Template

Text Document Template

An Administrator or Project Manager can [create Text Document Templates](#) using which the users can generate new text documents.

You can create a Text Document Template with pre-configured:

- Element Type
- Master and Translation Languages
- Approval Setup

These templates can be later reused as Document Sources.



Note:

It is not possible to create Text Documents without configuring the **Document Templates** and **Document Sources**.

When configuring a text document reference for a **Task / Project Template**, you have the option to specify [document sources](#). These are buttons that will allow you to create, or link, or copy or reference documents in their respective documents tables.

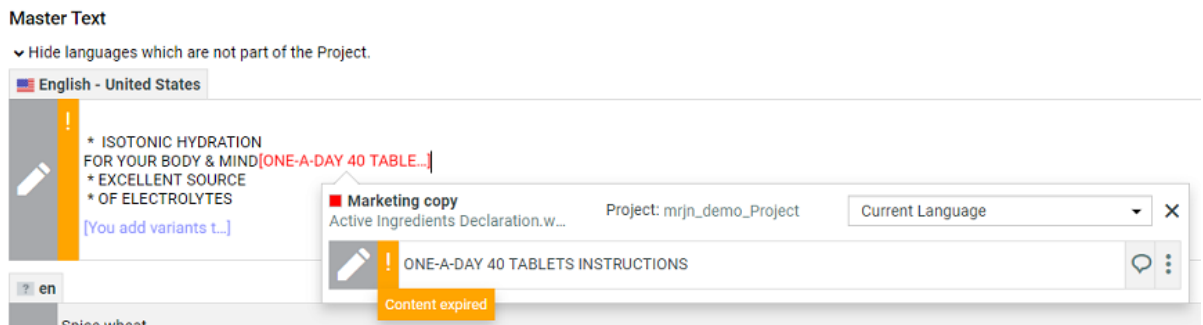
26.2.4. Text Content Validity

Text statements may get obsolete over a period of time and to avoid using the redundant statements, set a validity date for the content. A warning message is given when the statements are no longer valid.

To set up the validity for Text content, add the Date time attribute **EXPIRY_DATE** to the Attribute category of the content document.

A warning message is shown for a document as Expired, when either of

- the current document or
- it's smart reference at any level has expired.



For example, let us assume there are three documents named Doc1, Doc2, Doc3 and Doc1 references Doc2 and Doc2 reference Doc3 .

In this case, Doc1 is considered as expired, if any of the documents out of Doc1, or Doc2, or Doc3 is expired.

26.2.5. Text Content Element Types

Text Content Element Type

WebCenter uses the **Element Types** concept and terminology from the GS1 standard to categorize the Text Documents. The Text Content Element Type categorizes the documents and maps to the WebCenter **Content Types**.

See the Element Type categorization below.

Header Information	Product Identity	Marketing Copy, Claims & Endorsements	Nominal Content	Global Warning & Caution Statements	Usage Instructions & Consumer Relations Info	Ingredients and Technical Facts	Distribution & Manufacturing	Patent, Trademark, Copyright, Legal	Various
Countries of Sales	Additional Product Variant Information	Content Claim	Gross Content Statement	Warning Statements	Recycle Statements	Ingredients Header	Distribution Statement	Patent Statement	Sweepstakes Offer
	Brand Name	Disclaimer	Net Content Statement	Allergy Warnings	Contact Information	Ingredients Declaration	Manufacturer Statement	Patent Numbers	Product Display Disclaimer
	Product Form	Marketing Claim	Package Count		Website	Active Ingredients Header	Importer Statement	Copyright Trademark Statement	Cross Sell
	Product or Statement of Identity	Marketing Copy			Disposal Information	Active Ingredients Declaration	Location of Origin	Under License Statement	Diet Exchanges
	Product Variant	Not for Sale Statement			Opening Instructions	Inactive Ingredients Header	Lot Number		Consumer Guarantee
	Sub Brand Name	Packaging Claim			Usage Instructions	Inactive Ingredients Declaration	Manufacturing Site		Recipe
		Pricing Statement			Storage Instructions	Drug Facts	Internal Package Identifier		
		Product Features			Assembly Instructions	Nutrition Facts	Packaging Statement		
		Promotional Copy			Preparation Instructions	Nutrition Claims	Regional Contact Information		
		Third Party Endorsements			Other Instructions	Registration Information	Local Contact Information		
		Violator				Quality Statements	Online Printer Header		
		Warrenty				Environmental Statements			
						Preservatives			
						Technical Facts			
						Shelf Life Statement			
						Product Use			

It is possible to add custom Element Types other than GS1 types. Read more in [Configure Element Types as a List](#) on page 509.

These are used when extracting Dynamic Content into WebCenter as well as exporting the artwork's GS1 XML.

26.2.6. Text Content Translation

You can configure workflows to draft, translate and approve text in this module. To translate Text Elements (statements), in a translation software that uses XLIFF content (e.g. Trados or SDL), you can export them in XLIFF format. To do the review and final approval, you can import the translated content back in the same format.

You can either:

- automate the export-import process using the Workflow nodes
- or use [actions](#) to manually export an XLIFF file and later import it back.



Note:

XLIFF is an industry standard format used in the industry to exchange data in a translation project.

Invariant Text Document

If translations are not required, the Content Manager can specify the Document as an invariant to avoid translating a Master statement. For example, a Text Document containing the Brand name.

You can set the **Invariant** status on a Text Document or Template.

Documents marked as invariant can have only one master language and are no longer considered as invariant if there are more than one master language



Note: Invariant content which existed prior to 18.1 and which has more than one master language will become non-invariant.

See: [Text Content Tab](#)

26.2.7. Inherit Content

Whenever a new language is added to a Text content document, it is easy to follow the contents of either the master or translation language that already has the content. This could also prove very useful in cases where the two languages have mostly similar content like English-International and English US.

You can choose:

- **None** to follow language, but no language is selected by default at the text content element level for the newly added language.
- **Default** to follow the language in the language list. If no language is defined in the language list, then **None** is selected at the element level. Language lists for Master and Translation languages are configured initially when setting up the content management. To know more, read [Configure Master and Translation Language Lists and Attributes](#) on page 511
- **Always Master** to follow the current master language. Inheritance will be updated automatically when the master language is changed.
- **Master Language** to follow the master language in the element widget.



Note: Irrespective of the option chosen at the content configuration, you can still change the option at the element level.

You can choose to inherit only the SmartText content, when you want to inherit the content from another language. While inheriting, if the text in the source language contains plain text or SmartName, then the text in the target language are cleared but still follows the source language. List of allowed special characters are maintained in **SMART_INHERIT_WHITELIST**. Only the characters mentioned in this list are allowed with the smarttext.



Note: If the **SMART_INHERIT_WHITELIST** is not available, then the default whitelist is considered.

26.2.8. 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.

26.2.9. Dynamic Content in WebCenter

Dynamic Content- Linking with Adobe® Illustrator®

Esko's Dynamic Content for Adobe® Illustrator® brings the power of XML-based automation to Adobe® Illustrator® on Mac and Windows.

Dynamic Content helps designers to be more efficient and win client confidence by minimizing the errors. By eliminating the process of copying and pasting the 'revised text', this minimises the errors.

In a typical case, the designer creates a design in **Adobe Illustrator** with "placeholders" for text content. These are tagged with appropriate GS1 Element Types (Content Types). You (brand owner) can process and approve the corresponding text content (with Element Type tagging) in WebCenter.

Dynamic Content can keep this link active and import the dynamically tagged content into Copy sheets. The edited and approved content can be exported back in GS1 format.

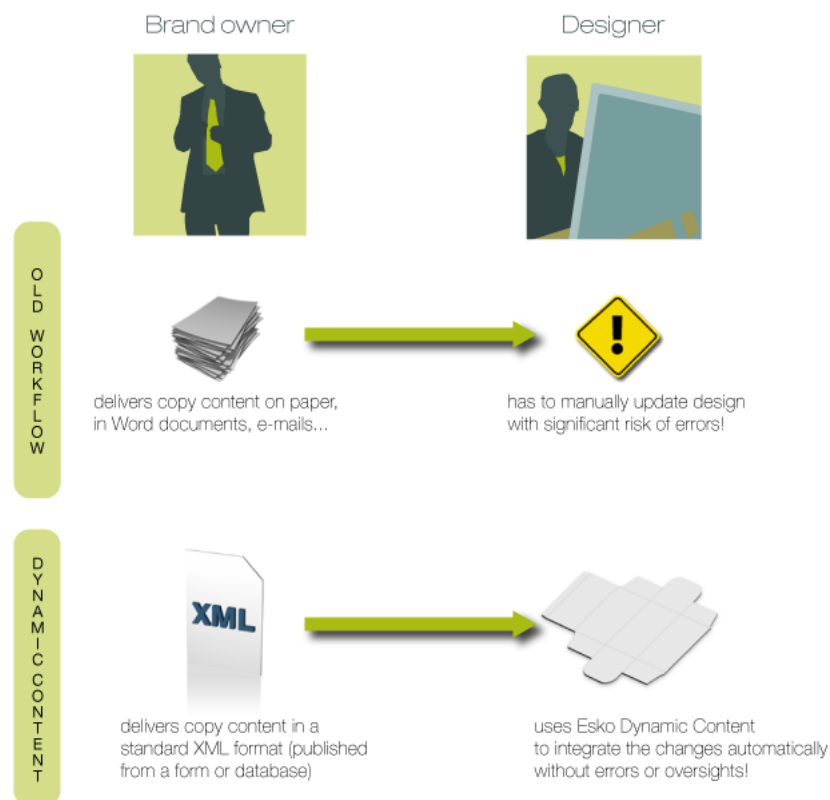
Why Dynamic Content?

Esko Dynamic Content allows packaging designers to add externally maintained content elements such as legal copy or nutritional information to a packaging design. This solves an increasingly common problem in the designer's day to day work: human error in copied content.

The ever growing number of stock keeping units that are brought onto the market by brand owners has resulted in an explosive growth in the **volume of artwork** that needs to be created for all the packaging of each unit. At the same time, the designs themselves become more and more complex in their competition for the consumer's attention.

Many designs share pieces of content. Some content is **mandatory**, required by regulatory instances such as the FDA, EMEA, or national bodies. Other content simply **recurs** on different variants of a shared design.

The end result is the same: an **increasing number of human interactions**, often of the "copy-paste" type, that at the same time increases the risk of errors slipping into the design. Errors in artwork are wasteful, generating rework, delays in product launches and sometimes even requiring product recalls.



Benefits of Using Dynamic Content

The Dynamic Content plug-in helps automate the insertion and updating of externally maintained content into a design. This prevents a number of common problems, and it saves valuable production time by eliminating repetitive manual tasks.

Some **typical problems prevented by a Dynamic Content workflow**:

- Typing errors;
- Wrong versions of copy text or barcodes are used in the final design;
- Cut-and-paste errors (e.g. when copy text is provided in a Microsoft Word document or PDF, and the designer has to manually copy this into the Illustrator document);
- Text overflows;
- Shared elements on design variants are not synchronised.

Because Dynamic Content allows you to keep this mandatory or shared content separated from the Illustrator document, it also **eliminates repetitive and time consuming updates**: simply modify the external XML file to update the text, barcodes, and nutrition tables on the design. Review cycles have never been this easy.

A Typical Workflow in Dynamic Content

A typical Dynamic Content-based design workflow includes an exchange of information between brand owners and designers. Often, the content to be used in a design will change multiple times during the design and production process, and it is in these cases that Dynamic Content will prove its worth.

A sample workflow for the use of Dynamic Content could be the following:

Stage	Description
1	The brand owner's marketing department draws up the text that needs to appear on the packaging design. The text is entered into a PDF form or a content management system, which can export an XML file.
2	The brand owner sends the PDF form or XML file containing the text to the designer.
3	The designer produces a packaging design in Adobe Illustrator and links the text elements from the XML file to text objects in the Illustrator template. In the GS1 workflow, the designer can generate the "Response" XML and send it back to the brand owner. This Response message tells the brand owner what items were used in the artwork and how many times.
4	Later, the brand owner makes changes to the text, produces a new XML file and sends this to the designer.
5	The designer replaces the original XML file on his disk with the new version. Dynamic Content automatically detects the changes, and immediately alerts the designer. It clearly shows exactly what has changed, and where.
6	Based on the alerts displayed in Dynamic Content, the designer can very quickly accept automatically updated text, or make any required formatting changes. There is no need for copying, pasting, or any other manual and error-prone operations, and Dynamic Content alerts the designer to problems such as text overflow.
7	Thanks to Dynamic Content, stages 4 - 6 can occur repeatedly without losing time or introducing errors.

XML Basics

XML stands for Extensible Markup Language, and it is a markup language similar to HTML. However, where HTML describes the layout of a web page, XML markup describes the contents and the structure of a document.

Below is an example of a basic XML document:

```
<?xml version="1.0" encoding="UTF-8"?>
<body>
<p> This is a very cool product! </p>
</body>
```

XML documents are often used to exchange data or textual content.

In the context of the Dynamic Content plug-in, XML is a useful format because:

- it separates content- the text itself- from layout and presentation, which will be defined by Illustrator text objects.
- it describes and contains the structure of the text that must be used on a design.

For more information on the XML format, please refer to the Appendix “An Introduction to XML”.

26.2.10. Flexible Master Language

Flexible Master Language functionality is introduced in the Package Content Management module of WebCenter 22.03 and allows more flexibility in setting the master language of a certain project or sheet.

Prior to WebCenter 22.03, the master language list could not hold the same languages as the translation language list. This meant that it was impossible for a language to be both a master language in one project and a translation language in another project. So, if a Latin-American market wanted to use “Spanish” as a master language in their project they had to name it “Spanish - Master” for it not to conflict with the “Spanish” language used by European markets as a translation. The big downside of this approach (aside from the extra complication) is that no content can be shared between the “Spanish - Master” language and the “Spanish” translation language.

Flexible Master Language functionality makes it possible to use the same language as a master language in one project and as a translation language in another. However, lifting this limitation has introduced some edge case scenarios. What should happen when a text statement has a master language that conflicts with a project’s translation language? This can happen when you are copying statements or content sheets between projects. For example, a text statement that internally has “English” as a master language, but this statement is copied to a project that has “English” as a translation language? How should this be displayed to the user and can the user rectify this? Please refer to the [Convert Translation to Master](#) page for more information.

26.3. Essential Configuration Steps to enable Packaging Content Management

To setup the foundation of a working Content Management System follow the steps below:

1. Enable [the Text Content Document Type](#). Optionally also specify the [Language Editor and Approver Prefixes](#).
2. Configure Packaging Content Management related attributes. You can migrate the essential configuration into your WebCenter or do it as follows:
 - a) [Configure Element Types](#)
 - b) [Configure Master and Translation Language Lists and Attributes](#) on page 511
 - c) [Configure Text Reference Attributes](#) on page 511
 - d) [Create Text Document References with Rendering](#)
 - e) [Configure Language Index Attributes](#). These will be used when you Import Dynamic Content.
 - f) [How to Configure a Setup to Extract Images, Symbols and Graphics](#) on page 536

26.3.1. Configure Packaging Content Management



Note: User needs the Packaging Content Management license to be able to use this module.



Note: Users with **Admin** credentials, can configure Packaging Content Management.

Navigate, **Configuration > PCM Deployment & Configuration**

Packaging Content Management page displays following three sections:

- **Configuration**
- **Global Permissions**
- **Local Permissions**

Configuration

When user selects **Configuration**, following fields are available:

- **Permissions** field is used to select the permission model to be followed by Text/Table Content documents, there are three options:
 - **Only use local permissions**

Selecting this option allows content documents to only use **Local Permissions**, that are defined in the text content document under **Permission** tab.
 - **Only use global permissions**

Selecting this option will allow only content documents to use **Global Permissions**, under **Permission** tab, that are defined in the system.
 - **Allow both global and local permissions**

Selecting this option will allow content documents to use either **Global Permissions** or **Local Permissions** depending on the setting in an individual Content document.

Global Permissions will be selected by default, but the admin user can switch from **Global Permissions** to **Local Permissions** in the permission tab of a document by clicking **Manage Permissions** and selecting the **Use Local Permission** option.

- **Revision Raise** contains two options as:
 - **Never raise revision**
Select this if you do not wish to save master text changes as a new Revision.
 - **Raise Revision when Master Text is updated**
Select this to allow raising a revision, when master text is updated.
- **When Copying a Content Document** contains three options as:
 - **Keep Comments**
User can choose this option to copy all the comments.
 - **Remove comments if state reverted to Draft**
Comments are cleared if the state of the element is changed to draft, when the option is chosen.
 - **Remove Comments always**
Select this option for clearing all the comments in the elements, while copying.



Note: Same behavior is replicated in workflow when documents are copied using Copy/ Move Document. Move document option does not respect this setting.

- **Auto Addition of Languages**
Select whether or not you want to automatically [add missing languages](#) to documents in the document table.
- **Translation Service API Key**
Enter the Translation Service API key that is required by the Translation Tool. This key will be used during [auto-translation](#) in the Documents Table.
- **Deployment package**
You can click **Check for Update** to import all the required assets for the Packaging Content Management. Before importing, verify that you have the ListManager project available on the server.

The Import Dependencies page lists all the required assets for packaging content management. You can choose to not update by unchecking the respective box. Verify if the ListManager Project is present in the Projects and Templates section of the page. If the ListManager Project is listed among the items that are already on the server, then uncheck the ListManager checkbox. If the project is listed among the items that will be imported, stop the import and make sure the project is available on the server.

Global Permissions

[Preferences](#) ▾
 [CAD](#) ▾
 [CHILI](#) ▾
 [Project Management](#) ▾
 [Companies](#) ▾
 [Users](#) ▾
 [Groups](#) ▾

Packaging Content Management Configuration

- [Configuration](#)
[Global Permissions](#)
[Local Permissions](#)

This page defines the global permissions that will be used by all Text Content and Table Content documents in the document is configured to override these global permissions with locally configured permissions.

Responsible	Content Permission
MARKETING ▾	EDITOR ▾
MARKETING ▾	APPROVER ▾
[ALL OTHER RESPONSIBLE] ▾	ADD LANGUAGE ▾
+ Add Permission	

[Save](#)

Under the Global Permissions tab, a table is accessible for configuring system-level content permission. The permissions table contains the columns shown below:

- Responsible:** a dropdown input including all possible responsible(PCM RESPONSIBLE Colum) from the ELEMENT TYPES list, as well as two unique options "[All]" and "[All Other Responsible]".
 - [ALL]:** this content permission applies to all responsibles.
 - [ALL OTHER RESPONSIBLE]:** this Content Permission applies to Responsible who do not have a dedicated option for this Content Permission
 - Content Permission:** It contains four options.
 - CONTENT MANAGER**
 - EDITOR**
 - APPROVER**
 - ADD LANGUAGE**
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

• **Language:**

- From the language drop-down, user can select **All Other Languages** to create approver role with default name in one go.
- User can select **All Other Languages** to provide permission for all the languages.



Note:

- Even if some languages already have specific permissions defined, the permission row is still applicable to all languages.
- It is applicable for both **Local Permission** and **Global Permission**.

• **Role:**

Role field contains SmartName support. The supported SmartNames are Language code, Language description and Responsible values from the permission row where the role is configured. In preview mode the SmartNames will be resolved and mapped with the corresponding Roles. 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.



Note: 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.

Local Permissions

Smart Role Names for Editors and Approvers

To work with language specific [Smart Role Naming](#) on page 519 specify your:

- **Language Editor Role Prefix/Suffix**
- **Language Approver Role Prefix/Suffix**
- **Add Language Role Prefix/Suffix**

The specified prefixes and suffixes are used automatically to create **Role names** specific for each language in the Role Mapping > Manage Permissions page.

If the **Roles** column in **Manage Permissions** is left blank, the values in the **Language Editor Role Prefix**, **Language Editor Role Suffix**, **Language Approver Role Prefix**, **Language Approver Role Suffix**, **Add Language Role Prefix**, and **Add Language Role Suffix** are used to calculate the role names for the Editor, Approver Text Content, and Add Language permissions.



Note: This setting is independent of the **Allow raising Document Revision when uploading a new Document Version** setting.

26.3.2. Configure Element Types as a List

You can categorize the packaging content using the **Element Types** list in WebCenter. You can use the categorization from the GS1 / IPC standard or any other.



Note:

GS1 is an international non-profit association dedicated to the design and implementation of global standards and solutions. The GS1 system of standards is the most widely used one in the packaging supply chain standards system.

You can create a [WebCenter List](#) for configuring the **Element types**.



Note: Only Administrators can configure Lists.

- Create and upload your Excel (either .xls or .xlsx) document containing the element types to a project named [List Manager](#).

	A	B	C	D	E
1	ELEMENT_TYPES	HUMAN READABLE FORM	ELEMENT CATEGORY	PCM_ELEMENT_TY	COLOR
2	ACTIVE_INGREDIENTS_DECLARATION	Active ingredients declaration	Ingredients and Technical Facts	TECHNICAL	yellow
3	ACTIVE_INGREDIENTS_HEADER	Active ingredients header	Ingredients and Technical Facts	TECHNICAL	yellow
4	ADDITIONAL_PRODUCT_VARIANT_INFORMATION	Additional product variant information	Product Identity	MARKETING	red
5	ALLERGEN_STATEMENT	Allergen statement	Global Warning & Caution Statements	LEGAL	blue
6	ASSEMBLY_INSTRUCTIONS	Assembly instructions	Usage Instructions & Consumer Relations inf	MARKETING	red
7	BRAND_NAME	Brand name	Product Identity	MARKETING	red
8	CONSUMER_GUARANTEE	Consumer guarantee	Various	LEGAL	blue
9	CONSUMPTION_CONTEXT	Consumption context		MARKETING	red
10	CONTACT_INFORMATION	Contact information	Usage Instructions & Consumer Relations inf	MARKETING	red
11	CONTENT_CLAIM	Content claim	Marketing Copy, Claims & Endorsements	MARKETING	red
12	COPYRIGHT_TRADEMARK_STATEMENT	Copyright trademark statement	Patent, Trademark, Copyright, Legal	LEGAL	blue
13	CROSS_SELL	Cross sell	Various	LEGAL	blue
14	DECLARATION_CONTEXT_FOOTNOTE	Element Type Drop-down in the interface		Optional	Color used in Thumbnail
15	DIET_EXCHANGES	Diet changes	Various	TECHNICAL	yellow
16	DISCLAIMER	Disclaimer	Marketing Copy, Claims & Endorsements	LEGAL	blue
17	DISPOSAL_INFORMATION	Disposal information	Usage Instructions & Consumer Relations inf	MARKETING	red
18	DISTRIBUTION_STATEMENT	Distribution statement	Distribution and Manufacturing	TECHNICAL	yellow
19	DRUG_FACTS	Drug facts	Ingredients and Technical Facts	TECHNICAL	yellow
20	ENVIRONMENT_STATEMENTS	Environment statements	Ingredients and Technical Facts	TECHNICAL	yellow
21	FUNCTIONAL_NAME	Functional name	Product Identity	MARKETING	red
22	GROSS_CONTENT_STATEMENT	Gross content statement	Nominal Content	TECHNICAL	yellow
23	ICON_VARIABLE_TEXT	Icon variable text	Various	MARKETING	red
24	IMPORTER_STATEMENT	Importer statement	Distribution and Manufacturing	TECHNICAL	yellow
25	INACTIVE_INGREDIENTS_DECLARATION	Inactive ingredients declaration	Ingredients and Technical Facts	TECHNICAL	yellow

a) Add the following mandatory columns to your worksheet:

- ELEMENT_TYPES should contain the Element Type tags.
- HUMAN_READABLE_FORM with the Element Type names.



Note: This will appear as the Element Type drop-down in the interface. For example, in the [Text Document Details](#) on page 519 page.

- b) Optionally, you can add an ELEMENT_CATEGORY column. This column can contain the categories used to group Element Types.
- c) Optionally, add the PCM_ELEMENT_TYPE_RESPONSIBLE (this name can be different) column. This is column can have the Role names who would be responsible a particular Element Type. For example, a role Legal would have the responsibility for the Element Type Consumer Guarantee.



Tip: In your Workflow configuration, you can look up in this list to find the Role matching a particular Element Type. Read more in the Workflow section.

d) Add the COLOR column. Use this to specify the color coding for the Element Types.

If you have specified Red corresponding to Brand Name, your Text Document Thumbnail will be color coded as Red.

- [Create](#) a List named ELEMENT_TYPES.
- When configured, the **Element Types** will appear as a drop down in Text Document Details page.
- If the Element Types are color coded using the COLOR column, you will see Text Document Thumbnails in the system.

Configure Thumbnails for Text Documents

When you upload a **Text Content Document**, a thumbnail with it's name gets generated according to the color code specified in the [Element Types](#) list.

If you update the color code of an Element Type in the List, the existing thumbnails will not be updated immediately. Update the document's Element Type to generate a new thumbnail.

If color code column is not defined, thumbnail will not have color code in it, but still Element Type will be displayed.



Note:

If the Element Type name is longer than the thumbnail, it is truncated to fit in the thumbnail size.



Note:

Supported colors: green, blue, red, yellow, white, black, orange, cyan, magenta, pink, light gray and dark gray. RGB colors (rgb(x,x,x)) are also accepted in the **Element Types** list.

26.3.3. Configure Text Reference Attributes

You need to create two attributes which are used in mapping the Dynamic Content data. When Dynamic Content is imported, these are used to map the location and the instance sequence of the text. These are later used in exporting the Content into GS1 format as well.



Note: These are not visible to your users.

1. Create the following **Attributes**.
 - **INSTANCE_SEQUENCE** This will be a reference attribute (of a text document reference) keeps the instance sequence (a number) of the Text Statements.
 - **LOCATION_LIST** This reference attribute stores the specific location of the Text Element on the artwork for each dynamic Text Element.
 - **EXPECTED_NUMBER_OF_OCCURRENCES** This reference attribute store the number of expected occurrences of a particular content(image, text, table, Barcode in an artwork.
2. Create an **Attribute Category** which will be used as a **Reference Category** when configuring [Text Document References \(Copy Sheet\)](#).



Note: Specify the **Visibility** as **Hidden (Keep Values)**.

[Creating a Copy Sheet](#) on page 368

When you are viewing an artwork document in the Viewer, the Text Documents are highlighted when you click on them. The reference property Location_List is used in rendering this feature.

Add this reference category to Text Document attributes used in Copy Sheets.

26.3.4. Configure Master and Translation Language Lists and Attributes

You have to configure Master and Translation Lists for setting up the Packaging Content Management module.

The master and translation languages can be added as [WebCenter Lists](#) and your users can easily access and select the appropriate languages in the Attributes tab.



Note: Only Administrators can configure Lists.

1. Create and upload your Excel (either .xls or .xlsx) documents to the [ListManager](#) project.
 - a) Create the Master Language document in Excel. Add the following mandatory columns to your worksheet:
 - For example, English- United States.
 - LANGUAGE_CODE: Specify the code of the languages that you want to include
 - DESCRIPTOR: Describe the language code you specified
 - FLAG_FILENAME: Specify the name of the image file which has the flag of the country the language is used. For example fr-ca will have Canadian flag whereas fr-fr will have French flag.
 - LANGUAGE_INDEX: 1, 2, etc...
 - DIRECTION: Specify if the language is written right to left or left to right. This ensures that the cursor is placed appropriately.
 - FONT_FAMILY: Specify the font family that you want to use for the language



Note: Specify the name of the font family that you want to add as a customized font for the PCM. To add a customized font in Packaging Content Management, follow the steps given in the KB article <https://wiki.esko.com/display/KBA/KB196429311%3A+WebCenter+-+How+to+support+custom+fonts+and+languages>.

And also add the fonts in the application server `pcm/TablePreviews/custom/fonts` folder location.

- [LANGUAGE_INDEX](#): This is the corresponding field to locale Sequence tag in GS1 XML standard. This is used in **Import Dynamic Content** node to map the GS1 XML coming from Dynamic Content.



Note:

When you add a language code in these Lists, a corresponding flag image will be available for you in the interface. The flags are installed in the `WebCenter\WebServer\tomcat\webapps\WebCenter_Inst\images\country_flags` folder. When you add a custom language to the Lists, place a corresponding flag image in this folder.

The flags are 16x16 in size. The subfolder `WebCenter\WebServer\tomcat\webapps\WebCenter_Inst\images\country_flags\big` contains same flags in bigger (32x32) sizes.

- b) Create the Translation Language document in Excel. Add the following mandatory columns specified in the Master text Language excel sheet.
2. [Create](#) Lists named `MASTER_TEXT_LANGUAGE` and `TRANSLATION_TEXT_LANGUAGE`.

General list information

List Name* MASTER_TEXT_LANGUAGE

Description

Input Source Properties


Document MasterLanguageList.xlsx

Sheet Name Sheet1

Log File MASTER_TEXT_LANGUAGE_11.log

- Flush existing list data before updating the List. The existing data will be replaced by the new data!
- Database Username and password are required when deleting data from List

List Properties

Input Columns	List Columns	Unique Identifier 
LANGUAGE_CODE	LANGUAGE_CODE	<input type="checkbox"/>
DESCRIPTOR	DESCRIPTOR	<input type="checkbox"/>
FLAG_FILENAME	FLAG_FILENAME	<input type="checkbox"/>
LANGUAGE_INDEX	LANGUAGE_INDEX	<input type="checkbox"/>
DIRECTION	DIRECTION	<input type="checkbox"/>
FONT_FAMILY	FONT_FAMILY	<input type="checkbox"/>

[Return](#) [Show List Data](#) [Delete List Data](#) [Delete List](#)

3. Create the following attributes in **Admin > Attributes > Attributes**

- MASTER_TEXT_LANGUAGE
- TRANSLATION_TEXT_LANGUAGE

These attributes define the languages that are used by the Text Content as part of the Project's Attribute Category.

4. Create an **Attribute Category** and add the language attributes to it.

5. Restrict Values to the language lists. And specify the **Column** as **Descriptor**.

To select more than one language, you need to enable **Allow Multiple Values**.

These attributes has to be added to the Project's or Templates **Attribute Category**. The User can then select the Master Language and Translation Languages according to that Project's needs.

26.3.5. Configure Language Index Attributes

To map the **Language Index (Locale Index)** from Dynamic Content, you can create attributes. These attributes are needed when you configure *Import Dynamic Content* node in the workflow.



Note: Without setting these attributes, the import node will use default indices from the [language lists](#). We recommend that you create these attributes to be able to specify the language indices for each project.

- Create the language attributes and add them to the Attribute Category.

See the example screen shot:

The screenshot shows a web editor interface. On the left, a table is displayed with the following content:

[Title]Select the artwork languages.	
[Spacer]	
PCM Artwork Language 1	PCM Artwork Language 6
PCM Artwork Language 2	PCM Artwork Language 7
PCM Artwork Language 3	PCM Artwork Language 8
PCM Artwork Language 4	PCM Artwork Language 9
PCM Artwork Language 5	PCM Artwork Language 1
[Spacer]	
[Title]Metadata	
[Spacer]	
PCM Market	PCM Brand

On the right, the 'Details for selected cell:' configuration panel is shown for the attribute 'PCM Artwork Language 1':

Attribute	PCM Artwork Language 1
Attribute Type:	Text
Label:	Label Text: Artwork Language 1 Label: <input type="text"/> Image: <input type="text"/> Position: Left ▾ Custom Unit Label: <input type="text"/>
Span Columns:	1 ▾
Style:	Field ▾ Add Style Edit Style Delete Style ⓘ
Visibility:	Editable ▾ Add Rule ⓘ
Restrict Values:	List ▾ ALL_LANGUAGES_1 ▾ Copy List ⓘ Column: DESCRIPTOR ▾ Configure List ⓘ Rendering: Dropdown ▾ ⓘ
Allow Multiple Values:	<input type="checkbox"/>
Info Page:	Info HTML page (name+extension) <WebInstanceRoot>/custom/AttributesHelp/

- Configure **Restrict Values** as a Language List to get the attribute selector drop down listing all languages.
Use this in the Template that is used to import Dynamic Content and the workflow step [Import Dynamic Text](#).

26.4. 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.

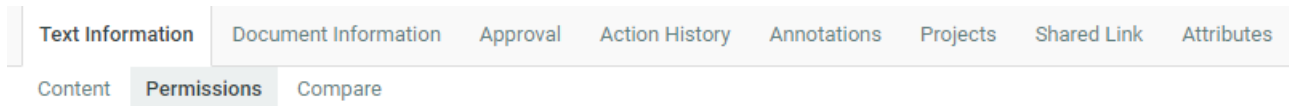
1. To manage Permissions, go to the **Document details > Text Information > Permissions**.

When you click on a Text Content Document Type icon, the **Document Details** will have the **Text Information** tab with the following sub-tabs:

- **Content**
- **Permissions**
- **Compare**

2. The **Manage Permissions** is only applicable when document is using **Local Permission**.

3. The checkbox **Use Local Permissions** is shown only when the Global permissions configuration is set to **Allow both global and local permissions**.



Local Permissions

The document is configured to override the global permissions and use local permissions.

Manage Permissions

Content Permission	Language	Role
CONTENT MANAGER		CONTENT MANAGER
EDITOR	Dutch - Belgium	EDITOR
EDITOR	French - France	EDITOR
APPROVER	Dutch - Belgium	APPROVER
APPROVER	French - France	APPROVER
ADD LANGUAGE	Dutch - Belgium	ADD LANGUAGE
ADD LANGUAGE	French - France	ADD LANGUAGE

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



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.

- 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 519. To do this for the editor permission:

- Ensure that the **Admin** preference section has the right Prefixes. Read [here](#).
- 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

- Define the **Approver** permission and assign it to a role. From the **Language** drop-down: Select **All Other languages** to assign all the languages in the project except for the languages that are already assigned. Select **All Languages** to provide permission for all the languages.



Note:

- Even if some languages already have specific permissions defined, the permission row is still applicable to all languages.
- It is applicable for both **Local Permission** and **Global Permission**.
- 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**.

- To edit Content Permissions, click **Manage Permissions** and edit or change the assignment of a permission.
 - The **Permissions** 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)



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.

26.4.1. 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**.

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

The names of the Roles will have the specified **prefix** and **Suffix** (In the example screenshot, Language Editor) and the respective language code.

26.4.2. 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:

- [Content](#)
- [Permissions](#)
- [Compare](#)

Text Information | Document Information | Approval | Action History | Annotations | Projects | Attributes | References | Characteristics | Discussions | Test doc view

Content | Role Mapping | Compare

Preparation instructions | M: | T:

Master Text

English - International

English - United States

ISOTONIC HYDRATION
FOR YOUR BODY & MINDISOTONIC HYDRATION
FOR YOUR BODY & MINDEACH 200 mL. SERVING CONTAINS: FOR BEST BEFORE END DATE AND LOT NUMBER SEE BASE OF PACK

ISOTONIC HYDRATION
FOR YOUR BODY & MINDISOTONIC HYDRATION
FOR YOUR BODY & MINDEACH 200 mL. SERVING CONTAINS: FOR BEST BEFORE END DATE AND LOT NUMBER SEE BASE OF PACK

ISOTONIC HYDRATION
FOR YOUR BODY & MINDISOTONIC HYDRATION
FOR YOUR BODY & MINDEACH 200 mL. SERVING CONTAINS: FOR BEST BEFORE END DATE AND LOT NUMBER SEE BASE OF PACK

Translations

Dutch - Belgium

French - France

fr

> Show languages which are not part of the Project.

26.5. Creating a New Text Document

An Administrator or Project Manager can [create Text Document Templates](#) using which the users can generate new text documents.



Note:

It is not possible to create Text Documents without configuring the **Document Templates** and **Document Sources**.

When configuring a text document reference for a **Task / Project Template**, you have the option to specify [document sources](#). These are buttons that will allow you to create, or link, or copy or reference documents in their respective documents tables.

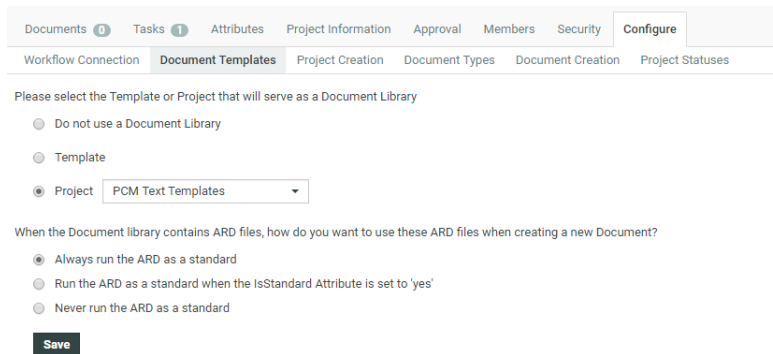
1. Create a **Project** or **Template** to host all your **Text Templates** (a Text Document Template library).
2. To create text document templates:
 - a) Upload Text Documents (.wcc) into this Project or Template. We recommend that you create Templates per Element Type. This allows the users to create a new Text Document for each of the Element Type.
Make sure that you have enabled the text document type in the [Preferences section](#).
 - b) Go to **Document Details > Text Information > Text Content** tab of the Template and add the corresponding Element Type to the template.
 - c) Also, specify Master and Translation languages for each template.
 - d) Specify the **Approval Type** as:
 - **Default**: Even if one user approves, the document is approved.

- **One of Role:** At least one user per role assigned should approve the text content document
 - **All of Role - One per Group:** From every group, at least one user should approve
- e) In the **Role Mapping** tab, assign the [Content Permissions](#).
- f) Repeat for all the text document templates you want to create.


Note:

- New documents created from this document template will inherit the settings.
- The approval cycle is different from other document Types. Read more about Text Document Approval in our KB.

3. Create a Project Template for each kind of project that may be required by Project Managers.
4. In each of these Templates **configure** the **Document Library** as follows:
 - a) In the **Project Details** page, **Configure > Document Templates**.
 - b) Select **Project** or Template and select your document template library from the drop-down.



Documents 1 Tasks 1 Attributes Project Information Approval Members Security **Configure**

Workflow Connection **Document Templates** Project Creation Document Types Document Creation Project Statuses

Please select the Template or Project that will serve as a Document Library

Do not use a Document Library

Template

Project

When the Document library contains ARD files, how do you want to use these ARD files when creating a new Document?

Always run the ARD as a standard

Run the ARD as a standard when the IsStandard Attribute is set to 'yes'

Never run the ARD as a standard

Save

- c) Click **Save**.

When creating a Project from this Template, the user can click **New** and select a **Text Document Template** from the Templates library to create new documents.

5. 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.
6. To allow the user to create new documents from the Copy sheet (document references) attached to this template, configure [document sources](#) for the individual reference attributes.



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.

The user will be able to add **New** Text Documents from **Template > Attributes** section when creating a Project.

PCM Text Library Update
Show Details

▼ Details

Note: The name of this Project will be created automatically.

Requestor

Me

Description

▼ New / Update

Master Text Language(s) English - United States

Translation Language(s) --Please Select--

Document Sources configured with a Template

+ New
+ Update

26.6. Creating a Copy Sheet

Copy sheet is a term used to describe all the content that is 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 [here](#).

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.

Name	Master Text: English - International	Translation Text: French - France	Text Languages
Marketing copy Content: 001006.wcc	✓ MICHU VITAMINÉ: B5, B6, B12, C	⊘	+
Marketing copy Content: 001007.wcc	✓ REFRESHMENT WITH ZINC & CHROMIUM	✓ RAFFRAICHISSEMENT AVEC ZINC ET CHROME	+
Marketing copy Content: 001008.wcc	✓ EXCELLENT SOURCE OF ELECTROLYTES	✓ EXCELLENTE SOURCE D'ELECTROLYTES	+
Recycle statement Content: 001009.wcc	✓ RECYCLE PLASTICS	✓ RECYCLER PLASTIQUES	+
Variant Content: 001010.wcc	✓ TROPICAL BLEND	✓ MÉLANGES TROPICAUX	+
Packaging claim Content: 001011.wcc	✓ ENERGY DRINK	✓ BOISSON ÉNERGISANTE	+

Automatically add/remove languages in the Documents Table

Adding any of the available languages is possible based on permissions on all the local text content documents in the table, but for the remote documents (sitting in another project). Auto Addition of Languages can be enabled in the [PCM Deployment and Configuration](#).

When a new language is added in a Master/Translation language attribute, the language is automatically added into all the local text content documents. For the new text content documents in the local project, the missing languages are added and extra languages available in the text content are removed.



Similarly, when a language is removed from a language attribute, it automatically removes the languages which are added recently but not yet saved.

26.6.1. 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	<p>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.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;">  <p>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.</p> <p>Master and Translation languages will either appear in a drop down or you can choose Show Side by Side view.</p> <p>You can also restrict the languages that will appear in the drop down, by mentioning the languages (pipe separated) specifically in the details tab.</p> </div>
Text Language Flags	<p>The language drop downs for Master and Translation Text columns.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;">  <p>Note: The master and translation languages are populated from the project attributes MASTER_TEXT_LANGUAGE and TRANSLATION_TEXT_LANGUAGE respectively.</p> </div>



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.

Edit Render Configuration

Name: PCM Text Reference_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
Document Property	Thumbnail	Thumbnail	Read Only	50 px	auto
Document Name	<input checked="" type="checkbox"/> Show Document Source <input type="checkbox"/> Show Document Description <input type="checkbox"/> Show Folder <input type="checkbox"/> Show Document Template	Name	Read Only	100px	
Replace Button	<input checked="" type="checkbox"/> Compact Rendering		Read Only	auto	
Reference Property	ARTWORK_VARIABLE	ARTWORK_VARIABLE	Editable	auto	
Reference Property	INSTANCE_SEQUENCE	Instance Seq.	Editable	75px	<input checked="" type="checkbox"/>
Translation Text	<input type="checkbox"/> Show Side by Side [Display Options: Status, Inheritance, Comments, Approval]	Translation Text	Editable	600px	
Master Text	<input type="checkbox"/> Show Side by Side [Display Options: Status, Inheritance, Comments, Approval]	Master Text	Editable	600px	
Delete Button			Read Only	auto	

- You can also enable the **Display Options** in the Edit Render Configurations. You have four icons buttons and are active by default.

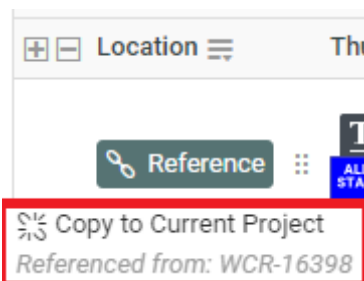
 - Status Button** Show status column in default manner like basic view page when active. When the button is inactive it shows status in the form of a colored strip based on the status of the content. Green for approved, red for rejected, blue for pending approval and grey for draft.
 - Inheritance Button** 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.
- 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**.

+ Upload + Link + Search + Search			
+ [-] Location	Thumbnail	Name	Version
Copy All References into Current Project			
Reference		Reference ■ Allergen statement 0002_TextDoc_00000814_PCM.wcc	Q [Download] 1 [Delete]
Reference		Reference ■ Best before date 123Best before date.wcc	Q [Download] 8(F) [Delete]
Reference		Reference ■ Dosage instructions 123Dosage instructions.wcc	Q [Download] 1 [Delete]
Reference		!!Carrot11.pdf	Q [Download] 1 [Upload] [Delete]
Reference		00000002_Nutritional Facts_C.wcc	Q [Download] 1 [Upload] [Delete]

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.

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 514.



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.

26.6.2. Configuring Document Sources for Text Documents

You can configure your **Document Sources** (such as a Project/template which serves as a library of Text Documents / Artworks), a Saved search of your Text Documents, or your Document Templates) in the **Grid layout** of an Attribute Category or Project Template.

Edit Document Sources Configuration

DEKE_DocRef_Symbols_Default

Source	Label	Details	Operation	Target	Target Folder
Document Templates	Standard New	Document Template selector Any Document Template configured Copy Operation Basic Copy	Copy	<input checked="" type="checkbox"/> Add <input checked="" type="checkbox"/> Replace	Documents
Saved Search	Standard Search	Search Name -- Select Search -- Document Template selector Any Document Template configured Copy Operation Basic Copy	<input checked="" type="checkbox"/> Copy <input type="checkbox"/> Link <input type="checkbox"/> Move	<input checked="" type="checkbox"/> Add <input checked="" type="checkbox"/> Replace <input checked="" type="checkbox"/> Use by Reference <input checked="" type="checkbox"/> Create Assembly	Assembly Graphic Placeholder

Add Document Source

Your configured sources will appear in the places (such as templates or forms you have designed) where you set the document reference categories. Read more in: [Adding Document Sources for a Document Reference Attribute](#) on page 352.

26.6.3. Replace a Document Reference

You can configure a **Replace** option in your document reference table. When you **replace** the old reference, the new document reference will have the same **reference category** as the old one.



Note: Project managers, Administrators or users with Change Properties rights can replace the document reference.

Translation Text Dutch - Netherlands

INSTANCE_SEQUENCE 7

Signed Off

Replace By
Link
Browse
New
Search

When you configure a **Replace button**, it allow the you to

- replace the document via any of the configured [document sources](#) (**upload, browse**, etc.). If you do not select any option, the first source is taken as the default.
- **Undo the action** before saving the new document reference.

This document has its own **Attribute Category** but will keep the same **Reference Category** as the old reference.

You can also select **compact rendering** option for this button.

26.6.4. Duplicate a Document Reference

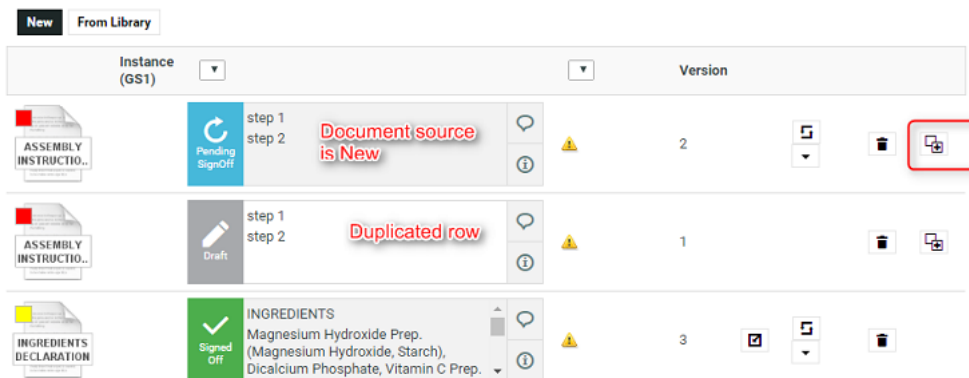
You can configure a **Duplicate** option in your document reference table in both **Attribute Category** and **Dashboard** pages. When the user **duplicates** a reference, a new row of document reference will be created. The duplicated document will have the same content, document **attributes** and **reference category** as the previous one.

In the case of Text Document, Content file, then each element status in the file will be reset to draft.



Note: Only users who are Project managers, Administrators or with Change Properties rights can replace the document reference.

Technical:



When you configure a **Duplicate** button, it will allow the users:

- to duplicate a document row with **Copy** and **New** as *document sources*.

The duplicate documents are created in the current Project where the copied or newly created documents are stored.

You cannot duplicate a document reference if the document source is:

- **Browse / Link / Use by Reference / Remote.**

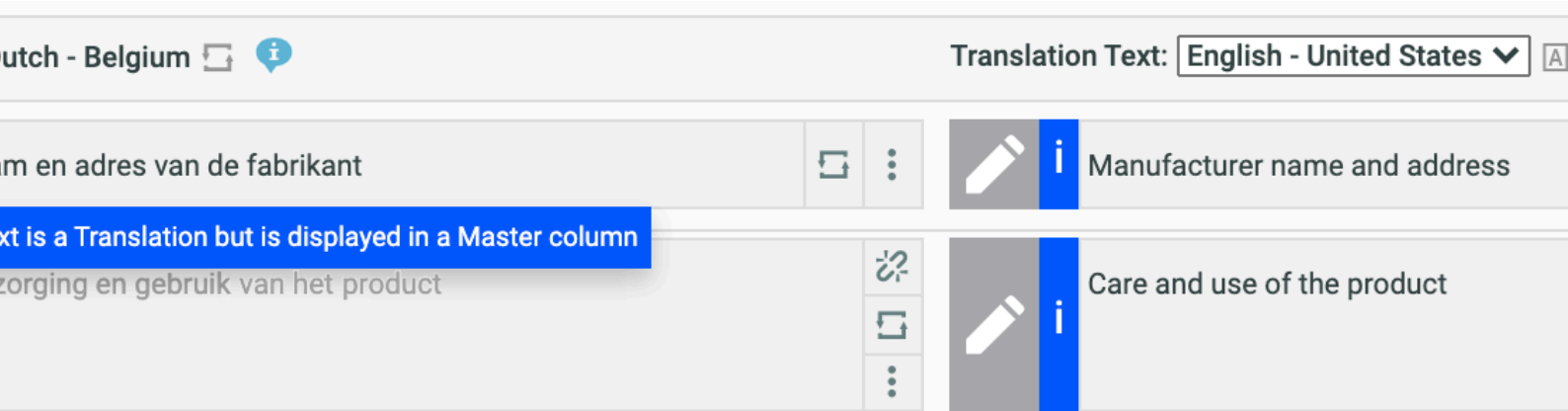
Behavior while duplicating document and its reference properties:

- If **Allow multiple values** is turned off in the attribute category, the duplicate will replace the original instead of adding a new document reference.
- The duplicated document will have the same Attribute category including the child document references. The Reference categories and its settings are copied at parent and child levels.
- The duplicated row inherits the entire hierarchy (if any) of the parent row including the attribute values.

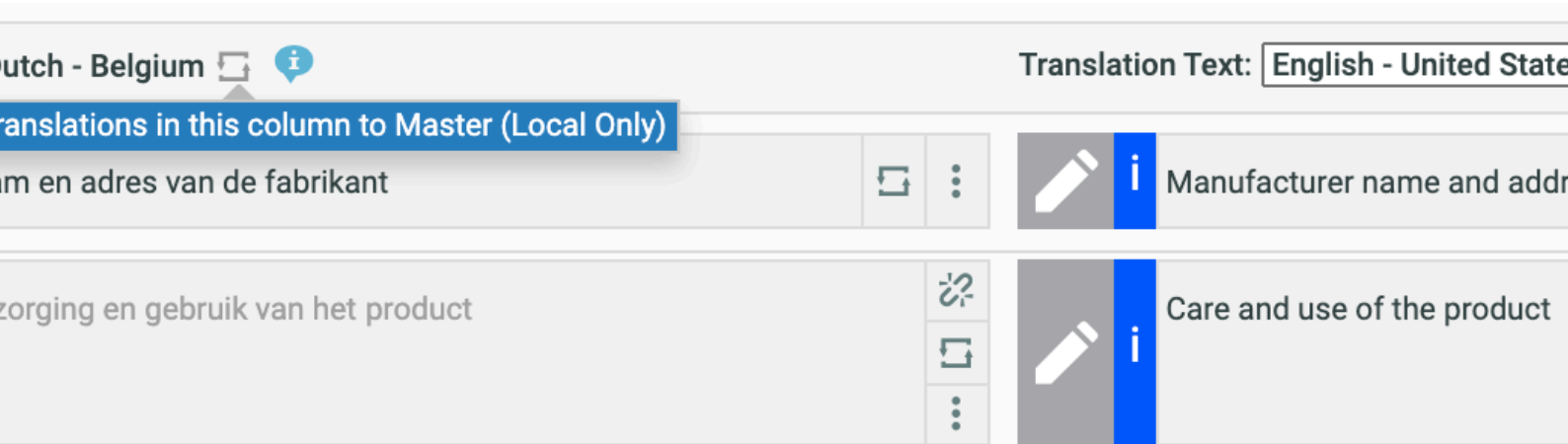
- It is possible to duplicate a newly created document row.

26.6.5. Convert Translation to Master

Master and Translation columns will render the languages available in the Text Content documents even if there is conflict in type, e.g. a translation language will be displayed in a Master column and vice versa. In this case an indication is shown in the widget as shown below.



A **Convert to Master** option is available in the widget. This allows you to convert a translation to a master language for a single document. Similar to the option on document level, this button is also available in the documents table column header. Clicking the button in the header will do a bulk conversion for all the local documents.



For more information on Flexible Master Language, please check [this page](#).

26.7. How to Configure a Setup to Extract Dynamic Content

This chapter provides an overview of what needs to be configured to have a functioning Content Management setup in WebCenter.

To efficiently manage the content, you need a setup that addresses the packaging content in the context of packaging artwork. To create such a system you need:

- Reusable text documents stored in the form of libraries
- Text Document Templates
- Artwork libraries and Templates
- Attribute Categories with Languages to be attached to the Projects
- Copy Sheet or Text Document References attached to Artworks

The steps below describe how to create a setup to import Artwork templates from Adobe Illustrator (With Dynamic Content) along with the Text Content mapped to a Copy Sheet.



Note: This is an example configuration. Other than the essential steps, all other steps meant as recommended, not mandatory.



Note: To get you started, we have created a migration setup that you can import into your system and start on it. See in: [Knowledge Base article](#).

1. **Follow the Essential steps to configure the module.**
2. **Create Text Document Templates. You need these templates to create new Text Documents.**



Important: You can create Text Templates with all the necessary configuration automatically. This is recommended if you require a large number of templates. Contact Esko Professional to configure your Text Templates automatically.

You can now start using these templates to create new Text Content Documents.

Project: PCM Text Templates Active Project 2 of 2

Manager: Daemen, Karsten (KADA)
 Customer:
 Due On:
 Modified: May 4, 2016
 Description: This project contains all the content document templates. New content files are created based on these templates.

Documents **101** | Bill Of Materials **1** | Tasks **1** | Attributes | Project Information | Approval | Members | Security | Configure

Folders **2** | Project Documents **101** | Text Document Templates **1**

View and Annotate | Create Report | 3D Packshots | **Inspect & Update** | Compare in Viewer | More...

Documents 101	Version	Approval	Uploaded	Tasks
Active ingredients declaration.wcc (2.1KB) WCC Template Document	1	Setup Approval Cycle	May 4, 2016 at 3:05 PM Daemen, Karsten (KADA)	
Active ingredients header.wcc (2.1KB) WCC Template Document	1	Setup Approval Cycle	May 4, 2016 at 3:05 PM Daemen, Karsten (KADA)	
Administration route.wcc (2.1KB) WCC Template Document	1	Setup Approval Cycle	May 4, 2016 at 3:05 PM Daemen, Karsten (KADA)	
Allergen statement.wcc (2.1KB) WCC Template Document	1	Setup Approval Cycle	May 4, 2016 at 3:05 PM Daemen, Karsten (KADA)	
Assembly instructions.wcc (2.1KB) WCC Template Document	1	Setup Approval Cycle	May 4, 2016 at 3:05 PM Daemen, Karsten (KADA)	

3. Create WebCenter Projects as Text Libraries and Artwork Libraries and organize your assets in them.

Do this for:

- Text Content Documents,
- Artworks,
- and more...

See more examples [here](#).

To organize further, you can create [advanced Text Searches](#).

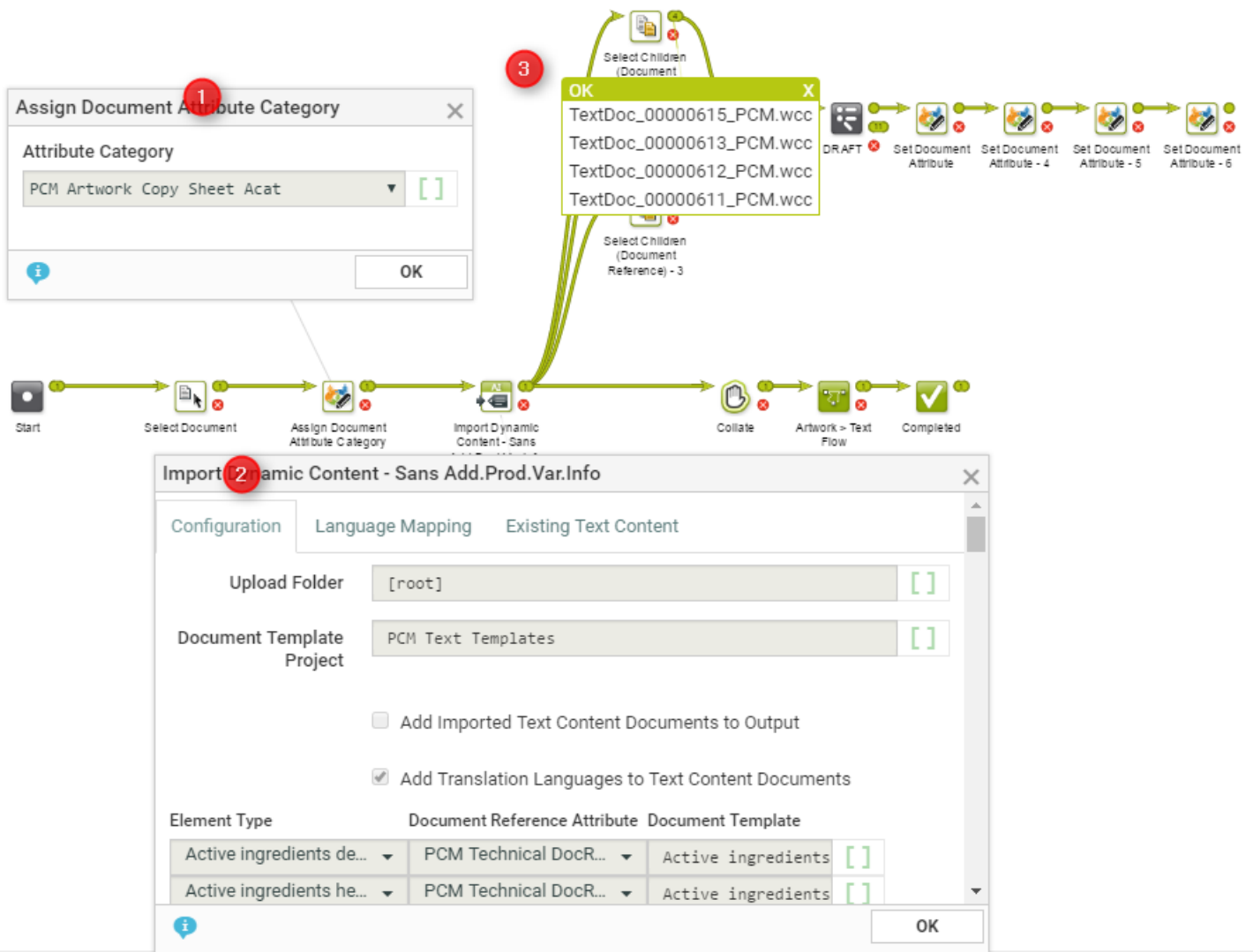
4. Create copy sheets. They are Attribute Categories with Text Document References.

- Create your **text document reference attributes** and add them to an **Attribute Category**. You can use the advanced features available in the **grid layout**.
- Add the mandatory [Reference Category](#) to these document references. This is used in matching the Artwork's Dynamic Content elements to text references.
- [Create a table rendering](#) with text related options. You can configure Master and Translated Text widgets for your copy sheet. You can use all the advanced features available in the **grid layout**.

Depending on the User's permission (Editor, Approver or Content Manager), they can do content actions in this page.

- Make the attributes **editable** (the **visibility** setting) to allow for text editing.
 - Allow adding multiple documents by enabling **allow multiple values**.
 - d) Configure the **document sources**. Choose the operation (copy, link, move, or use by reference). Read more in: [Adding Document Sources for a Document Reference Attribute](#) on page 352
- document sources** settings you configure here will be rendered in the text document table.
- Create a custom **label**.

- Specify the source of the document. For example, a **Saved search** of text documents for adding approved text. To create new text documents, the source will be **Document templates**.
 - Specify the type of operation: **copy, move** (move content to the local folder) or **use by reference** (to use approved content from a library or saved search).
5. Create other attributes necessary for the document as per the requirement.
 6. **Create Import setup for Adobe Illustrator design files with Dynamic Content.** This workflow will map the content to the copy sheet attributes (text document references) created in the previous step.
 - a) Create a Task Type for the import workflow.
 - b) Configure your workflow [step](#) to assign the Copy Sheet attribute category to
 - c) Create a step to extract the [text content as Copy Sheet references](#) of the artwork.
 - d) Configure the [Import Dynamic Text](#) step with document reference and document template mapping. Specify the reuse policy for partial matches in this step.
 - e) [Route the workflow depending on the text document status](#).



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.

Later in the production process, you can supply the approved textual content in the form of an XML file. Read in: [Export to GS1 Format](#). Using the Esko Dynamic Content plug-in, the designer can add the approved content to the Illustrator document.

7. Create Approval Workflows to assign Tasks for different approval stages.

When you have assigned Content Permissions and assigned them to Roles, the assignees can manually go into each text document and approve it. However with a workflow, you can assign [Tasks with Text Documents](#) to those Roles automatically.



Note: You need to configure these Workflows according to your business needs.

Read more in the KB article:

8. Create other Workflows depending on your business needs.
9. Configure Project Templates to create projects to update or create new Artwork templates with content.
 - a) Configure the Project Creation Form.
 - b) Invite **Members** (Roles and Groups) who will perform various tasks in the Project context. These are important for activating the Content Permissions (from Document Templates). Read more in: [Managing Text Permissions](#) on page 514
 - c) In **Configure > Document Templates**, link [the text document templates](#) to allow creating new text documents.
 - d) Optionally create a custom setup for document sources in **Configure > Document Creation**.
 - e) Assign an **Attribute Category**. It should contain the following attributes and any other attribute relevant to your Projects.
 - MASTER_TEXT_LANGUAGE
 - TRANSLATION_TEXT_LANGUAGE



Note: The MASTER_TEXT_LANGUAGE and TRANSLATION_TEXT_LANGUAGE attributes determine the languages of the Text Content documents located in that Project.

- [Language Index](#) attributes.



Note: If the Language Index values are not specified, the default values (from the Language Lists) will be used as indices.

To determine the Master and Translation languages of a Project, you need to define these in the **Template > Attributes** page.

- f) Add the Workflow Tasks to the Template. The workflow tasks configured for import and approval are configured to launch right after the project creation.

26.8. How to Configure a Setup to Extract Images, Symbols and Graphics

You need to create attributes which are used in mapping the Images, Symbols and Barcode to the document templates. When images, symbols and Barcode are imported, these are used to map the location. These are later used in exporting the content into GS1 format as well.



Note: These are not visible to your users.

1. Create the following **Attributes**.

For Symbols

- **SYMBOL_NAME:** This is an attribute commonly used for storing the name of the symbol present in the artwork.

For Images

- **EXTERNAL_IMAGE_PATH:** This is an attribute commonly used for storing the path of the image present in the artwork.



Note: If the incoming document is a chili document, ensure that the attribute **ARTWORK_VARIABLE** is available.

For Barcodes

1. **BARCODE_TYPE:** This is an attribute for storing the type of Barcode present in the artwork.
 2. **BARCODE_BASECODE:** This is an attribute for storing the base code of the Barcode present in the artwork.
 3. **BARCODE_COMPOSITE_COMPONENT:** This is an attribute to store the composite component for GS1 Barcodes.
2. Include the above attributes as required in the **Attribute Category** of the Document Template / Document.
 3. Ensure the following attributes are part of **Reference Property** of the document references.
 - **INSTANCE_SEQUENCE :** This will be a reference attribute for the document.
 - **LOCATION_LIST:** This reference attribute stores the specific location of the document.

You can view the imported images, symbols, and graphics in the Attribute category for the document.

26.9. How to Configure Auto Translation Service API Key

The translation service API Key can be configured in Admin > Configuration > PCM Deployment and Configuration > [Configuration Tab](#).

27. Migrating your Data

As an Administrator, you can migrate your WebCenter data to a different WebCenter server, for example, to:

- test a new version on a test server where you create new configurations. You can copy this to the production server later.
- perform some tests on a test system with production data. You can export your production data (for example a large number of groups with their visibility and download permissions) to the test system.
- rapidly deploy a solution developed by Solution Architects.
- copy data between different WebCenter installations.
- migrate the data to a third party system to archive them.



Note:

Before migrating a configuration, you need to migrate Users:

- Create Users in the target system
- Optionally remove Users

27.1. Comparing WebCenter Configurations

One of the major challenges of WebCenter is making sure all environments (Dev, QA, Production, ...) are in sync. The **Compare Configurations** tool will look for differences between both systems and show the results in a comparison overview. It allows you to easily compare the WebCenter system with another WebCenter system running the same version.

27.1.1. Connecting to a remote WebCenter

To set up a connection to another WebCenter system:

1. Click **Select System**. This will open a login dialog.
2. Enter the base URL of the remote WebCenter Installation, e.g. 'https://xyz.com/WebCenter_Inst'.
3. Enter the credentials of a user with Administrator rights on the remote system.
4. Click the now active **Select and Compare** button.

The dialog closes and the comparison process starts.

27.1.2. Verifying the results page

The top of the comparison page shows you the local and remote system URL.

After clicking the **Select and Compare** button, results will gradually be added to the page. It may take some time to complete the comparison process. Progress is indicated by a radial progress indicator next to the system info at the top.

On the left side an overview of all compared items is displayed. For each section, badge counters indicate the number of actual differences (red) and/or the number of entries that were missing either on the remote or on the local system (grey). The sections act as hyperlinks and clicking will take you to the corresponding tabular view. A red exclamation mark indicates an issue was detected during comparison. The tabular view will display more information on the issue. A section without a badge counter or error icon indicates no differences were observed.

On the right side, tabular views will show the results for each compared type. The number in brackets, next to the section title, displays the number of records shown.

There are two types of comparison:

- **Settings or global configuration comparison** (General Preferences, Password Settings, ...): all the fields of the configuration that do not match are displayed.
- **Named configurations** (Attributes, Task Types, ...): the following situations can occur and are reported:
 - The configuration with a given name cannot be found on the remote system.
 - The configuration with a given name cannot be found on the local system.
 - The configuration with a given name is present on both systems, but the configurations differ. A collapsible set of rows is added to the record and displays all the specific differences.

Filtering controls can be found at the top right corner of the tabular view. The filters become active once the processing is completed. Data can be filtered on textual matches and/or on difference type.

The difference types are:

- **Different (Not Equal)**: An entry for which the value differs on the local and the remote system.
- **Missing Locally**: An entry for which the value is absent on the local system.
- **Missing on Remote**: An entry for which the value is absent on the remote system.
- **Equal**: An entry with a value that is the same on both the local and the remote system. Note that by default equal values are not shown. Selecting this filter updates the page and shows all values that were equal as well.

When updating the filter settings, the badge counters next to the section title will also update to indicate the number of matching records.

When scrolling down, a button at the lower right of the page will become visible to quickly navigate back to the top.

System to System Comparison

System to System comparison allows to compare configuration of two WebCenter Installations. The comparison only compares configuration items in WebCenter. System-to-System comparison cannot compare how external systems (i.e. Automation Engine, Workato, ERP, ...) are configured, these need to be validated separately.

This page summarizes what is compared when doing system-to-system comparison.

Two types of comparisons exist:

- Settings or global configuration comparisons (General Preferences, Password Settings, ...): For this type of configuration the tool will simply show all the fields that are different.
- Named entities (Attributes, Task Types, ...): A pairwise comparison of entities which can be referred to by a unique 'name' or key. For this type of comparison, the following situations can occur and are reported:
 - The entity with a given name cannot be found on the remote system.
 - The entity with a given name cannot be found on the local system.
 - The entity with a given name is present on both systems, but differences are observed. A collapsible set of rows underneath the record will display all the specific differences found.

- The entity with a given name is present on both systems with the same results.

System comparison can be limited to a named configuration or work at a global level.

When named configuration comparison is enabled, all (WebCenter) dependencies that are needed for the named configuration are compared. Details on which dependencies are considered can be found on [What is supported in Named Configurations?](#)

If entries are found on either the remote or the local system with duplicate/non-unique names (for example Menus) the comparison will fail with a clear error message.

When comparing fields containing complex data, such as xml or json, differences will be reported as 'binary data (cannot be displayed)', indicating the results have been compared and are different but the actual differences are too complex to be shown.

When all results have been processed, filter controls are enabled that allow the results view to show only entries matching a partial string and/or selected difference type(s).

The following table provides a high-level overview of the system-to-system comparison types, see the information below for more detailed information on what each section includes:

Comparison Section	Comparison Type	Notes
General Preferences	Settings	
Password Settings	Settings	
Security Settings	Settings	
Document Types	Named Entities (document types) + Settings (document type settings)	
Notifications	Named Entities (events) + Settings (notification settings)	
Menus	Named Entities	
Workspaces	Named Entities	
Dashboards	Named Entities	
My Work Configuration	Named Entities	
Customizations	Settings	
Reports	Named Entities	
Project Statuses	Named Entities	
JavaScript scripts	Named Entities	
Companies	Named Entities	Company comparisons do not consider location differences (reported separately, see below)
Locations	Named Entities	Unique 'name' identifier is the location name + the company name.
Characteristics	Named Entities	
Attributes	Named Entities	
Restricted Sets	Named Entities	

Categories	Named Entities	
Lists	Named Entities	
Task Statuses	Named Entities	
Task Types	Named Entities	
Saved Searches	Named Entities	
Email Configuration	Settings	
Search Crawl Configuration	Settings	
External Web Connections	Named Entities	
Workflow Connections	Named Entities	
Asset management Connections	Named Entities	
Push Through Configurations	Named Entities	
QA Tools	Named Entities	
Structured Content Configuration	Settings	
Packaging Content Management Configuration	Settings	
File Storage Locations	Named Entities	
File Storage Location Configuration	Named Entities	
Approval and Tunnel Clients	Named Entities	
Single Sign-On Settings	Settings	
Groups	Named Entities	Visibility Users and Download formats are not compared
Roles	Named Entities	
Named configurations	Named Entities	

General Preferences

Compares system 'general preferences', also known as profile defaults. The following fields are compared:

- Language
- Start Page
- Default Project Page
- Default Document Page
- Units
- Show Thumbnails
- Clear Cart on Logout
- Default number of rows of Project Lists
- Default Document List Layout
- Default number of rows in a Document Grid layout
- Default number of columns in a Document Grid layout
- Default number of rows in a Document List layout

- Default number of rows in a Search List layout
- Default number of cards in a Search Card layout
- Show date and time for Date Attributes/Specifications
- Default Document Search layout
- Number of items in a Document Search Grid layout
- Thumbnail Position
- Default Project Search layout
- Number of items in a Project Search Grid layout
- Thumbnail Position
- Invite Group Default
- Use Bill of Materials
- My Approvals Assignee Filter
- Show Forwarded Approvals
- My Tasks Assignee Filter
- Show Non Started Tasks
- Viewer Type
- Viewer Applet
- Viewer Style (Java Viewer)
- Viewer Workspace
- Unregistered User Viewer Workspace
- Annotation Color
- Annotate Approved Documents
- Viewing Quality
- Log out User when inactive in the Viewer
- Stream video through WebCenter proxy
- Show Discussions in Viewer
- Task Type for Bulk Text Replace
- Statements for Text Replace
- PCM Attribute for linking Text Statements
- Prefix
- Counter Length
- Suffix
- Use Automatic Naming for Creation of Blank Projects
- Start Approval when Uploading New Document or Version
- Always allow the Document owner to start/stop the Approval cycle
- Allow the uploader to override the Approval cycle start option
- Require Approval Comments on Viewable Documents
- Block Approval when an annotation was set/changed on the current version
- Reason(s) for Rejection List
- Open ArtiosCAD Documents
- Allow raising Document Revision when uploading a new Document Version.
- Allow instant uploading when selecting Documents
- User Template
- Delegation Restriction
- Delegator receives e-mail notifications during delegation period
- Include indirectly visible private Discussions for PM/Admin
- Default Participants
- First Day of Week

- Minimum Days in First Week
- Host URL
- Host URL for internal use

Password Settings

Compares system 'password settings'. The following fields are compared:

- Minimum password length
- Enforced password history
- Password is valid for
- User is blocked after consecutive login attempts
- Amount of consecutive login failures before blocking the User
- Passwords must meet complexity requirements Require password for Approvals/Rejections when using SAML, LDAP or Basic Authentication
- Username Retype
- Allow alternative passwords to be used for Approval/Rejections and Tasks.
- Block browser autocomplete on User authorization fields

Security Settings

Compares system 'security settings'. The following fields are compared:

- Sharing Viewer Link for Registered Users
- Forward Approval option in Approval Setup for Registered Users
- Allow large Document preview (approval e-mail notifications)
- Allow non-authenticated download of Documents (approval e-mail notifications)
- The link will be valid for
- Allow Project Members with Download permission to e-mail a link for non-authenticated download of a Document
- Require adding a change comment
- Allow non-Administrators to see Archived Projects
- Allow removing Discussions and Discussion Messages
- Allow Document operations on inactive Projects
- Allow changing members of inactive Projects
- Allow non-Administrators to change the Attribute Category of Projects/Documents
- Allow importing from/exporting to JDF on Attributes page
- Allow changing Attributes of inactive Projects
- Allow Forward to
- Sharing Viewer Link for Unregistered Users
- Forward Approval option in Approval Setup for Unregistered Users
- Approval outside the Viewer
- Allow Force Approval by
- Allow Force Rejection by
- Allow Conditional Approval option in Approval setup
- Allow removing Documents with Approval actions
- Allow changing Attributes of approved Documents

Document Types

Compares the following system level document type settings:

- Apply File Extension specific counter for Document Automatic Naming
- Apply Automatic Naming to Documents in Blank Projects
- Apply Default Start Task options to new Documents in Blank Projects

- Apply Default Start Task options to new Versions in Blank Projects
- Apply Default Attribute Categories to Documents in Blank Projects
- E-Mail functionality enabled

For every document type in the system, compares the following fields:

- Enabled
- Prefix
- Suffix
- Counter length
- Scope of the Counter
- Default Attribute Category
- Start Task for new Documents
- Start Task for new Versions

Notifications

Compares the following system level notification settings:

- Send a reminder to the assignee or Approver when a Task or an Approval is overdue
- Send reminders for
- Repeat the Reminder
- Repeat the reminder every
- Notify
- Synchronize with Workflow
- Include in Project History

For every notification event, compares the following fields:

- Notify
- Synchronize with Workflow
- Include in Project History

Menus

Compares the following fields for every Menu in the system:

- Menu Name
- Description
- Configuration

Workspaces

Compares the following fields for every Viewer Workspace in the system:

- Workspace Name
- Configuration

Dashboards

Compares the following fields for every Dashboard in the system:

- Dashboard Name
- Context
- Configuration

My Work Configuration

Compares system 'my work configurations'. The following fields are compared:

- Approvals to Follow Up

- My Approvals
- My Recently Handled Tasks
- My Recently Submitted Approvals
- My Tasks

Customization

Compares the following system level Customizations:

- Colors used in each sections of the page
- Application URL
- Application Logo
- Show the application logo above the menu bar
- Company URL
- Company Logo
- Product Line URL
- Product Line Logo
- Background Image
- Use full screen background image
- Font
- Base Font Size
- Login Welcome Message
- Login Marketing Message
- Home Marketing Message
- Home Welcome Message
- Contact Page
- Show Forgot Password link
- Use Fixed Navigation Bar
- Default Dashboard Theme

Reports

Compares the following fields for every Report in the system:

- Report Name
- Description
- Definition
- Format
- Type

Project Statuses

Compares the following fields for every Project Statuses in the system:

- Name
- Icon URL
- Deleted
- Project Status Type
- Translation Tag
- Color RGB

JavaScript scripts

Compares the following fields for every JavaScript Rules in the system:

- Name

- DescriptionScript
- Scripts defined in CustomFormExtension.js are not compared.

Companies

Compares the following fields for every Company in the system:

- Name
- Company Legal Name
- Menu

Locations

Compares the following fields for every Location in the system:

- Name
- Location Code
- Address1
- Address2
- City
- State/Province
- Zip Code/Postal Code
- Country
- Phone
- Fax

Characteristics

Compares the following fields for every Characteristics in the system:

- Name
- Characteristic Path

Attributes

Compares the following fields for every Attributes in the system:

- Name
- Description
- Unit Type
- Right to Left
- Label
- Value Type
- Restricted Set
- Calculated Expressions
- Versions and Revisions
- Reference Category
- Attribute is also a Task Specification
- Only a Task Specification

Restricted Sets

Compares the following fields for every Restricted Sets in the system:

- Name
- Value
- Unit Type
- Right to Left

Categories

Compares the following fields for every Attribute Categories in the system:

- Name
- Description
- Attribute Category Layout
- Scripts configured in custom/CustomFormExtensions.js are not compared

Lists

Compares the following fields for every List in the system:

- Name
- Description
- Flush Data
- Input Type
- Require password on delete

for every column definition (matching on input column names) compares the following fields:

- Input Column
- List Column
- Unique
- Column Index

List data is not compared.

Task Statuses

Compares the following fields for every Task Status in the system:

Status name

Task Types

Compares the following fields for every Task Type in the system:

- Name
- Description
- Has Workflow
- Estimated duration
- Due Date Link
- Offset
- Dashboard
- Allow changing Task Due Date Link (by Users with Change Task permissions)
- Restrict Task to an Allowed Assignee (a Group or Role)
- Allowed Assignee
- Require password to complete Task
- Automatically delete Task when successfully completed
- Perform full validation of Document Attributes on User Task completion
- Icon
- Task Type Specification
- Synchronize Project Attributes and Task Specifications
- Update empty values
- Assign Roles from Task Specifications
- Finish Task if all steps from checklist are completed
- Only a Task Assignee can check off checklist items

- Checklist Items
- Allow attached Documents
- Show link to Multiple Upload
- Only allow Task to complete if it has one or more attached Documents
- 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 attached Documents Attributes from Task Specifications
- Default Folder for uploaded Documents
- Document Creation
- Document Rendering
- Allow Discussions
- Discussion Context
- Show Discussions of Documents linked to the Task
- Workflow

Saved Searches

Compares the following fields for every Saved Search in the system:

- Search Setup (xml)
- Search Scope
- Enable SmartNames
- Search Results Formatting
- Type

For every saved search visibility setting:

- Company
- Location
- Group

Email Configuration

Compares system 'email configurations'. The following fields are compared:

- E-Mail functionality enabled
- E-Mail debugging output in log
- E-Mail Service Host
- E-Mail Service Port Number
- Outgoing E-Mail Notifications' "FROM" Address
- Use TLSv1.2
- Use Authentication
- E-Mail Service Username
- E-Mail Service Password

Customization to E-mail notification messages is not compared.

Search Crawl Configuration

Compares system 'search crawl configurations'. The following fields are compared:

- E-Mail functionality enabled
- Rebuild Index on Restart
- Include Document Revisions

- Include Workflow Tasks
- Include Any level Document References
- Include all currently referenced Document Versions
- Include Live Text in PDF and AI Documents

External Web Connections

Compares the following fields for every External Web Connection in the system:

- Name
- URL
- Type

Workflow Connections

The following system level settings are compared:

- Name
- JDF Service
- ZIP Folder
- Active Configuration
- Is A Workflow Connection

Asset Management Connections

The following system level settings are compared:

- Name
- URL
- Configuration

Push Through Configurations

Compares the following fields for every External Web Connection in the system:

- Name
- Destination UNC
- File Naming
- Workflow Type
- Active Configuration

QA Tools

Compares the following fields for every QA tool in the system:

- Name
- URL
- Provider
- Report Name Suffix
- Target Folder
- Configuration

Structured Content Configuration

The following system level settings are compared:

- Saved Search for Reusing Documents
- Saved Search for New Documents
- Saved Search for Artwork Templates
- Saved Search for Artwork Templates That Have Been Mapped

- Saved Search for Graphics
- Saved Search for Text Statements
- Saved Search for Segments
- Saved Search for DITA Conrefs
- Root Document Dashboard
- Focused Document Dashboard
- Allow users to resolve comments on documents in Review mode of the Structured Content Editor
- Elevate Permissions for Content Owners performing Inline Edits

Packaging Content Management Configuration

The following system level settings are compared:

- Language Editor Role prefix
- Language Editor Role suffix
- Language Approver Role prefix
- Language Approver Role suffix
- Add Language Role prefix
- Add Language Role suffix
- When Copying a Content Document
- Revision Raise
- Translation Service API Key
- Auto Addition of Languages

File Storage Locations

Compares the following fields for every File Storage Locations in the system:

- Name
- Read Only
- Configuration

File Storage Location Configuration

Compares the following fields for every File Storage Location Configurations in the system:

Storage Location

Approval and Tunnel Clients

Compares the following fields for every Approval and Tunnel Clients in the system:

E-Mail Service Password (value not displayed)

Single Sign-On Settings

Compares the following system level configuration:

Allow Project Managers to change their Users' access to SSO instances.

For every SSO setting, compares the following fields:

- Name
- Priority
- Enabled
- Listed
- Try Next
- Allowed
- Configuration

Groups

Compares the following fields for every Group in the system:

- Name
- Group Visible by
- Group Email
- Group Email Language
- Notify by E-Mail

Roles

Compares the following fields for every Role in the system:

- Name
- Role Visible by
- Viewer Workspace
- Assignee

Named configurations

Broken dependencies are considered as not present and are not compared. Compares the following fields for every Named Configuration in the system:

- Name
- Description

Compares the linked dependencies. In case of projects, also compares whether or not documents are included.

27.1.3. Generating a printable report

The **Print Report** button is available as soon as the comparison is completed. Clicking the button will open a print preview.

The printable report includes a timestamp, information on the user who generated the report (user logged in on the local system) and the local and remote URL of the compared systems.

Any filter settings that were applied to the page will also be applied to the generated printable report.

Generating the print preview may take some time, depending on the amount of content selected.

By default, background graphics are typically not included in the view. To include all background graphics, select the specific printing option in the print preview properties.

27.2. Migrating Self-contained Data



From WebCenter 16 onwards, you do can do self-contained migration of Projects / Templates and this saves the effort of migrating items individually. When you migrate a Template or Project with the setup, the items are exported and imported in the correct order.

It is also possible to migrate individual items to a target system. Read in: [Migrating other Data](#) on page 557.

27.2.1. Exporting Templates or Projects

You can export Projects / Templates along with its Attribute Category, Task Types, Documents, Members ([Groups](#), Roles, Users), Folders, Lists, Characteristics, Permissions and other settings. It is a self-contained export of all the items that are in a Project or Template.

You can choose whether you want to export the Projects with or without its Documents.

1. Go to **Admin > Project Management > Templates / Projects**.
2. Search for the required **Templates** or **Projects**. You can also select from the list.
 -  **Export** to export an XML file without the Documents. For e.g. `ExportedWebCenterProjects.xml`
 -  **Export with Documents** to export a ZIP file with its Documents. For e.g. `WebCenterDownload.zip`



Note: When lists are exported, it is exported in the zip file.

3. Save the XML or ZIP file generated to your computer or a network location.

The below items are included in the Project / Template Export XML / ZIP:

- Project Name, Due Date, Description, Project Status including icons, Project Manager (along with Group)
- Customer, Document template project



Note: The names are exported but the links are established only if they exist in the target system.

- Project Members: Groups and Roles
- Groups, Roles, along with their invitations and permissions: A merged list of all the Project Group and Role members is exported. Read more in [Migrating Groups / Roles](#) on page 557
- Attribute Categories along with Attributes and their values: Reference Categories, their attributes and their values. Restricted sets and lists are also included. Document Reference attribute values (both for Project and/or Document Attributes and/or Task Specifications) is exported along with any additional Document Reference properties.



Note:

During the import, a search is made in the target Project for a Document with the same name as the Document and Project on the system from where the Project was exported. If such a document is found, the value of the Document Reference (including Document Reference properties) will be restored. When a matching document is not found, a warning is displayed in the import feedback page.

Irrespective of the version of the Document on the source, only the value in the latest version of the the Document Reference attribute is updated on the target system.

- A merged list of Project Attribute Category and default [Document Types](#) Categories is exported. Read more in: [Migrating Attribute Categories](#) on page 560

- Tasks (Sequence, Icons, Assignees, Allowed Assignees) and Task Types: See also: [Migrating Task Types](#) on page 562

A merged list of Task Types along with icons of all Project Tasks and Tasks attached to [Document Types](#) is exported.

- Folders and Permissions settings on Folders (for Groups and Roles) and Role Assignments
- [Document Types](#) settings:
 - Autaname settings
 - Task settings
 - Attribute Category
- [Project Creation](#): Creation form settings and Project Autaname settings
- [Document Creation](#) settings
- Document Sources ([Global Saved Searches](#))
- Notifications
- Document templates



Note: The library of templates should exist the target system.

- Document Characteristics
- Approval Setup:
 - Project
 - Folder
 - Document
- Thumbnails of Project, Folders and Documents



Note: The Thumbnails are exported only when you include documents in the export.

- List of Documents and Folders
- Documents if the option **Export with Documents** is selected.
- Document Approval Status



Note: You can export Approval Statuses this for archiving purposes. But you cannot import it to another WebCenter.



Warning: If you have turned on **Add Approval Information to downloaded PDF** turned on, the approval details will be included in export and import.

- Documents added to Bill of Materials

Items not included in the export:

- Documents attached to Tasks
- Workflow Connection
- Users and Permissions
- If the company/location does not exist in the target location, then the company is not created.
- Submitted Document approval statuses
- Project, Task and Document Discussions

27.2.2. Importing Templates / Projects

When you import **Templates** or **Projects**:

- They will get created according to the contents of the import XML/ ZIP file.

- Documents will be added only if they do not exist in the target project. Upload will fail if a document with the same name exists in the target project.
1. Go to **Admin > Project Management > Templates** or **Projects**.
 2. Click **Import from File** on the Template Management page.
 3. Click **Choose File** and then select the XML or ZIP file.
 4. Click **Import**.

When you import self-contained XMLs and ZIP files, you will get an overview of the items in the file. You can choose to import them all or select the items individually:

Following items already exist on the system and will be overwritten!
To prevent this, uncheck the items before the import.

Groups and Roles

- PCM_LEGAL
- PCM_MARKETING
- _REQUESTOR
- PCM_LEGAL_SUPER
- PCM_DESIGNER
- PCM_TECHNICAL
- PCM_TRANSLATION AGENCY
- ADMINS
- PCM_CONTENT MANAGER

Restricted Sets

- PCM Responsible Set
- Languages

Categories

- PCM Artwork Library Update ACat
- PCM Text ACat
- SAH_EMPTY
- PCM Artwork Copy Sheet Acat
- PCM Reference Properties ACat

Task Types

- Simple Task
- PCM Generate and Apply GS1 Flow
- PCM Draft and Approve Master form
- PCM Text Library update Flow
- PCM Create Artwork Flow


Tip:

The documents in the ZIP files will be imported by default.

If you don't want to import the documents, disable **Import the Document(s) in the Project/Template when importing Projects/Templates**.

5. Uncheck the items you do not wish to import and click **Import**.

The referenced objects will be imported first:

- *Attribute Categories including the attributes and restricted sets will be imported. .*
- *Groups / Roles with their settings..*
- *Task Types.*



Caution: When you are importing a Workflow Task Type (during the export of a Project / Template), objects referenced by the Task Types may not be linked properly. If you notice an error, reimport the same Project and the links will be established correctly.

6. Select **Enter Database Credentials** to specify if the WebCenter Database has to create a table or not. If yes, then the **Database Username** and **Password** has to be specified.

After importing these, the Project / Template with its setup will be imported. Check this [list](#) to see what is included in the import.

The items that are not imported are listed below:

- User members and permissions
- Document Reference values
- Company / Location
- Document approval statuses
- Project and Document discussions

27.2.3. Exporting Saved Searches

You can export **Saved Searches** (Project, Task or Document) to in XML format.




Note:

Before migrating a configuration, you need to migrate Users:

- Create Users in the target system
- Optionally remove Users



Note: When you intend to migrate **Saved Searches**, migrate the Projects / Templates first. This will make sure that the search criteria (such as attributes or roles) exist in the target system.

1. Go to **Admin > Search > Saved Searches**. A list of Personal and Global **Saved Searches** is displayed.
2. Select any of the items from Global list and click  **Export**
3. Save the XML file generated (`ExportedSavedSearches.xml`) to your computer or a network location



Note:

- Only **Global Saved Searches** can be exported.

Export of a Saved Search contains:

- Basic properties of each selected Saved Search
- Search Criteria
- Search Visibility Settings
- **Referred Objects**
- Groups, Roles, along with their invitations and permissions:
- Attribute Category used in Search along with their Attributes and values



Note: Document Reference values and the Document sources (Saved Searches) are not included in the export.

- Restricted Set
- Task Specifications specified in Search



Note: The Specification Categories are not imported.

- Task Types along with its settings: See also: [Migrating Task Types](#) on page 562



Note: The Task Status will not get imported

Export of a Saved Search does not contain:

- Company and Location Visibility settings
- Project Status
- Lists



Note: Text Document Search export will not include the Element Type and Language Lists.

27.2.4. Importing Saved Searches

For Importing **Saved Searches**, use the steps below.



Note: You cannot import a Saved Search exported from a later version.

1. **Admin > Search > Saved Searches > Import from File**
2. Click **Choose File** and select the XML file.
3. Click **OK**.
You will see a warning about items that already exist and will be overwritten.
4. Uncheck the appropriate items and click **Import**.

If you encounter issues during the import process (for example, a missing Restricted Set on the target server), you see a warning.

See more details about the import of externally referred search criteria below:

In a **Project Search** the following Search criteria are imported:

- Roles: When a match is not found, an error message is displayed and the import fails.
- Attribute (general) and Attribute Category: When a match is not found, an error message is displayed and the import fails.
- Restricted Set value type: When a match is not found, an error message is displayed and the import fails.
- Document Reference: When a match is not found, you get a warning and a feedback message is displayed.

The **Project Search** criterion entities that do not get imported are:

- Project Status: When a match is not found, you get a warning and a feedback message is displayed.

In a **Document Search** the Search criteria entities that get imported are:

- Search Layout- Show Project Creation Link: When a match is not found, you get a warning and a feedback message is displayed.

In a **Document Search**, the Search criteria entities that do not get imported are:

- Element Type (Configurable Search field): When a match is not found, you get a warning.
- Language (Text Document): When a match is not found, you get a warning.
- Document Type specific metadata: When a match is not found, the import fails with an error message.
- Lists: When a match is not found, you get a warning.

In a **Task Search**, the Search criteria entities that get imported are:

- Task Type: When a match is not found, you get a warning. Import fails if the criteria is used on Task Specification selection page.
- Task Specification: When a match is not found, an error message is displayed and the import fails.
- Search Layout- Show Project Creation Link: When a match is not found, you get a warning and a feedback message is displayed.

In a **Task Search**, the Search criteria entities that do not get imported are:

- Task Status: When a match is not found, you get a warning and a feedback message is displayed.
- Lists: When a match is not found, you get a warning and a feedback message is displayed.



Note: Limitations:

- When you have Document Searches with **Show Project Creation Link** with **Template from Characteristics Path Layout**, the search is imported but the option is not validated.
- **Modified date** related criteria does not consider the Time Zone difference into account.
- Referred Saved Searches (as a document source in a document reference) are not exported.

27.2.5. Importing and Exporting of Lists

In WebCenter 18.0.1, when a Project or a Template is exported, lists in the projects that are part of the Attribute Categories or Task Types are also exported. A zip file containing List configuration and List Documents are created along with the other project components.

WebCenter will now detect whether, if any of the exported objects is dependent on a List or not, and export it in the zip file when the project is exported.

The exported zip file has:

- **ListManager** folder: Contains all the documents needed to reconstruct the List. This folder can have multiple sub-folders exactly as in the source project.
- **XML** file: Contains all the information of the Task Types / Attribute Categories / Project (without documents)



Note: if more than one project is exported with documents, then a folder is created for each project.

On importing of the project, one of the below options may occur.

- **Check whether the list exists:**

WebCenter will check whether the list already exists or not. This is done by using the name of the imported list. If the List doesn't yet exist, we will create a new List otherwise we will update an existing List.

Updating (overwriting) a List:

If the list preexists, WebCenter will check whether the table name used by the list matches the default WebCenter List table name pattern ("WC_LIST...").

If it does, the list is deleted and a new List is created with the specified configuration.



Note: Import of the list may fail, if the lists are preexisting but unable to update to the current list since the table names are not matching in the database.

- **Creating new List:** If the list is not available in the target project, then a new List is created with the configuration found in the zip file.

27.3. Migrating other Data

From WebCenter 16 onwards, you do can do self-contained migration of Projects / Templates and individually migrate items.



Tip: When you migrate a Template or Project with the setup, the items are exported and imported in the correct order. We recommend that you do a [Project or Template](#) migration so that all items are exported in the right order.

27.3.1. Migrating Groups / Roles

You can migrate your groups along with their visibility and download permissions to a target WebCenter.

When importing **Groups**, the system will create Group(s) if it does not exist or update the Group when the Group exists.

Export of Groups contains:

- Basic Information like:
 - Group Name
 - Visibility Type (All Project Managers/Specific Project Managers/Admin)
 - Members
 - Group Task Manager
- Group email including the address and language settings
- Notification settings
- Roles
 - Group is a Role setting
 - Roles, role invitations and assignments

Export of Groups does not contain:

- Role can add another Role



Note: All these will get exported when you do a [self-contained](#) migration.

- To **Export**:
 - a) Go to **Admin > Groups > Groups**. The Groups page appears.
 - b) Search for the required group name(s) or select from the list available and then click **Export Groups** in the **Action Header**.
 - c) Save the XML file generated (ExportedWebCenterGroups.xml) to your computer or a network location.

See a sample below:

```
<group_list>
  <group id="00002_0000000001">
    <deleted>0</deleted>
    <name>EA SPORTS</name>
    <empty_group>0</empty_group>
    <notify_group>1</notify_group>
    <group_email_address>email@test.com</group_email_address>
    <group_email_language>fr</group_email_language>
    <group_vis_type>2</group_vis_type>
    <is_role >0</is_role>
    <user_members>
      <user>
        <name>USER</name>
        <group_manager>0</group_manager>
      </user>
    </user_members>
    <PM_with_visibility>
      <user>
        <name>JT</name>
      </user>
    </PM_with_visibility>
    <download_group_permission_list>
    <download_group_permission_view>
      <group id="00002_0000000011">
        <deleted>0</deleted>
        <name>EA SPORTS</name>
        <group_vis_type>2</group_vis_type>
        <is_role>0</is_role>
      </group>
    <download_format id="00002_0000000001">
      <deleted>0</deleted>
      <name>Native</name>
      <short_name>Native</short_name>
      <doc_type_id>00001_0000000001</doc_type_id>
      <enabled>1</enabled>
    </download_format>
    <download_group_permission id="">
      <deleted>0</deleted>
      <group_id>00002_0000000011</group_id>
      <download_id>00002_0000000001</download_id>
      <granted>0</granted>
    </download_group_permission>
  ...
```

- To **Import**:
 - a) Go to **Admin > Groups > Groups**. The Groups page appears.
 - b) Click **Import from XML** on the Groups page.
 - c) Click **Choose File** and then select the XML file.
 - d) Click **Import**. After the import completes, you can see a basic **Import Group Feedback**.

Groups

Import Group feedback	
Number of Groups Created	1
Number of Groups Modified	0
Number of Groups Not Changed	0
Number of Groups Not Imported	0

[Return](#)
[Download Detailed Report in XML](#)

e) Click the **Download Detailed Report in XML** link to download a detailed report of the import.



Note:

- If there are no visibility settings in the XML, the imported Group(s) will be visible to **All Project Managers**.
- The import will not create Users or Project Managers.
- The download permissions as specified in the Export XML will be granted to the Group(s).

27.3.2. Migrating Restricted Sets

The import of Restricted Sets will overwrite the existing ones with the same name. This is similar to all other import functions.



Note: When you [export](#) Attribute Categories it will contain the Restricted Sets belonging to that Category.

- To **Export**:
 - a) Go to **Admin > Restricted Sets**.
 - b) Select the Restricted Sets to export and go to **Action Header > Export**.
 - c) Save the XML file generated (`exportRestrictedSets.xml`) to your computer or a network location.
The export will contain the following details of the exported Restricted Sets:
 - Name
 - Units


Note:

If the existing Restricted Sets (on the target system) have a different **attribute unit**, the import will not succeed in updating them.

- Values
- To **Import** to the target system:
 - a) Go to **Admin > Attributes > Restricted Sets**.
 - b) Click **Import** on top right.
 - c) Click **Choose File** and then select the XML file from your [export](#).
 - d) Click **Import**. After the import completes, you will see a basic **Import Restricted Sets Feedback**.
 - e) Click the **Download Detailed Report in XML** link to download a detailed report of the import.

27.3.3. Migrating Attribute Categories

The migration of Attribute Categories will create new Attributes and Attribute Categories if they are not existing in the target system.

The **Export / Import of Attribute Category** contains:

- Basic info:
 - Name
 - Description
 - Layout
- Views
- Attributes:
 - List of Attributes
 - Name of the Attribute
 - Attribute Type
 - Visibility settings
 - Attribute Input Option: **Prompted / Calculated / Restricted**
 - Attribute Values
- All Document Reference Attributes with settings:
 - Bill Of Materials options
 - Versions / Revisions settings
 - Reference Category name and the Reference Category attributes



Tip: Export your Document Sources before the export of the Categories.

The **Export / Import of Attribute Category** does not contain:

- **To export Attribute Categories:**
 - a) Go to **Admin > Attributes > Attribute Categories**.
 - b) Select the attribute categories to export and go to **Action Header > Export**.



Warning: If your Attribute Categories were created in another version, it will ask you to re-save the Category. The message will appear as:

The following Attribute Categories cannot be exported because they are outdated. Open each Category and resave.

You also have to re-save the Categories when some Attributes are updated since the last Save.

- c) Save the XML file generated (`exportAttributeCategory.xml`) to your computer or a network location.

See a sample XML below:

```
<category_list>
<category id="00002_0000011548">
<deleted>0</deleted>
<name>Griet Category</name>
<description></description>
<category_XML>XML blob describing the layout of the attribute category for the
different views</category_XML>
<!--Mapping between the attribute category and the attribute -->
<attribute_category_list>
<attribute_category id="00002_0000011549">
<deleted>0</deleted>
<attr_id>00002_0000000302</attr_id>
<category_id>00002_0000011548</category_id>
<display_order>1</display_order>
</attribute_category>
...
</attribute_category_list>

<!-- List of attributes in the selected category -->
<attribute_list>
<attribute id="00002_0000000302">
<deleted>0</deleted>
<name>GrietAtt1</name>
<description></description>
<attribute_unit_id>00001_0000000001</attribute_unit_id>
<restricted_set_id></restricted_set_id>
<restricted_set_name></restricted_set_name>
<default_expression></default_expression>
<type>12</type>
<istask>0</istask>
<isdoc>1</isdoc>
<isproject>1</isproject>
</attribute>
...
</attribute_list>
</category>

<!-- List of the restricted sets used by the selected categories -->
<restricted_set_list>
<restricted_set id="00002_0000000001">
<deleted>0</deleted>
<name>Countries Imported</name>
<attribute_unit_id>00001_0000000001</attribute_unit_id>
<allow_manual>0</allow_manual>
<restricted_set_value_list>
<restricted_set_value id="00002_0000000004">
<deleted>0</deleted>
<restricted_set_id>00002_0000000001</restricted_set_id>
<value>Belgium</value>
</restricted_set_value>
...
</restricted_set_value_list>
</restricted_set>
</restricted_set_list>
</category_list>
```

- **To Import an Attribute Category:**
 - a) Go to **Admin > Attributes > Attribute Categories > Import**.
 - b) Browse to the XML file that you saved during [export](#) and click **Import**.


Caution:

- When importing Attribute Categories, existing Categories with the same name are overwritten. A warning message is displayed on the Import page.
- A warning message is displayed about the items that already exist.

- c) Uncheck the items that you do not want to import and click **Import**.
- d) You are redirected to **Import Dependencies** screen where all the imported content is shown. You have the option to overwrite the existing content or uncheck the content which you do not wish to import.
- e) Select **Enter Database Credentials** to specify if the WebCenter Database has to create a table or not. If yes, then the **Database User** name and **Password** have to be specified. Click **OK** for one of the options.
- f) When the import is finished, WebCenter shows the list of the content that is either updated or newly created with warnings.

27.3.4. Migrating Task Types

You can migrate your Task Types with its settings.

When Importing Task Types:

- the Task Types will be created with the settings mentioned in the XML file when they do not exist in the target system. Dependencies to the task type including lists and categories are also imported.

If the document reference attributes of the imported categories/specifications have a reference category, the reference category is also imported.

- If the imported Task Types do exist, they will be updated with the settings from import XML.
- To export **Task Types**:
 - a) Go to the **Task Types > Types** page. Select the Task Type(s) to export and click **Export**.
 - b) Save the XML file generated to your computer or a network location.

Export / Import of Task Types contain:

- Basic Settings
- Task Document's settings
- Discussions with Settings
- Checklist items with Settings
- Views
- Specifications:
 - List and Order
 - Names
 - Type
 - Grid Layout
 - Visibility settings
 - Input Option: **Prompted / Calculated / Restricted**

- Values
- Document Reference Specifications:
 - Bill Of Materials options
 - Versions / Revisions settings
 - Reference Category name and the Reference Category attributes



Tip: Export your Document Sources before the export of the Categories.

- Workflow
- Task Status List with the icons (18.0.1 release onwards)
- Document Upload Settings
- To Import:
 - a) On the **Task Types > Types > Import from XML**
 - b) Click **Choose File** and then select the XML file that you saved during the export.
 - c) Click **Import**.
 - d) You are redirected to **Import Dependencies** screen where all the imported content is shown. You have the option to overwrite the existing content or uncheck the content which you do not wish to import.

Import Dependencies

Following items already exist on the system and will be overwritten!
To prevent this, uncheck the items before the Import.

Lists

- PCM_Size
- PCM_Seasonal
- PCM_Output

Categories

- PCM Reference Properties ACat

Following items will be created in the system
Uncheck the items that you do not want to import.

Lists

- PCM_Flavour
- PCM_Container

Task Types

- PASH Copy ATTR Values --

- e) Select **Enter Database Credentials** to specify if the WebCenter Database has to create a table or not. If yes, then the **Database User** name and **Password** have to be specified. Click **OK** for one of the options.
- f) When the import is finished, WebCenter shows the list of the content that is either updated or newly created with warnings.

27.3.5. Migrating Workflows

You can export a Workflow from a Task Type to an XML file and migrate it to another Task Type either on the same system or a target system.

- To export:
 - a) On your Task Type's **Workflow** tab, click **Export Workflow**.
 - b) Save the XML file generated to your computer or a network location.
- To import:
 - a) On your Task Type's **Workflow** tab, click **Import Workflow**.

- b) Browse to the XML file that you saved and click **OK**.
- c) A note of caution asks you if you are sure that you want to overwrite the current Workflow. Click **OK**.



Note: You will get the following message:

Not all the items in the Workflow are available on this WebCenter when the Task Types linked in the workflow are missing.